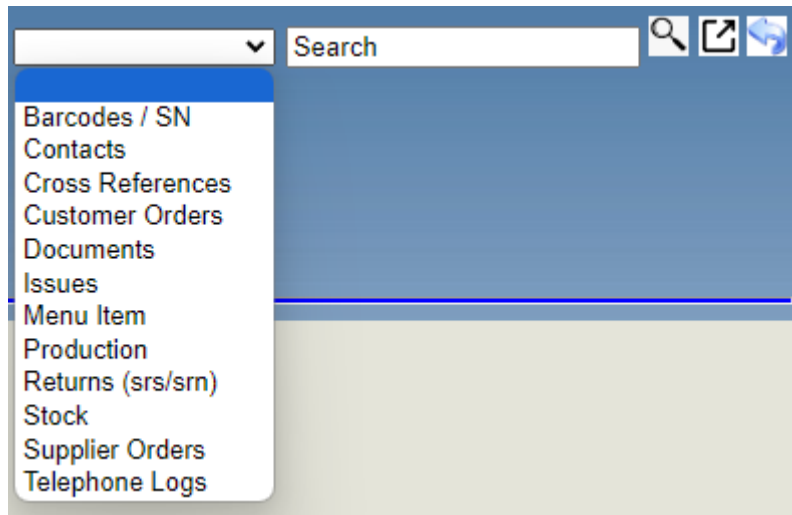


VM3COP20.94 Logging Information Requests and Sales Projects

All enquiries are required to be logged within the Intrastats system.

How to create a new Information Request or Sales Project

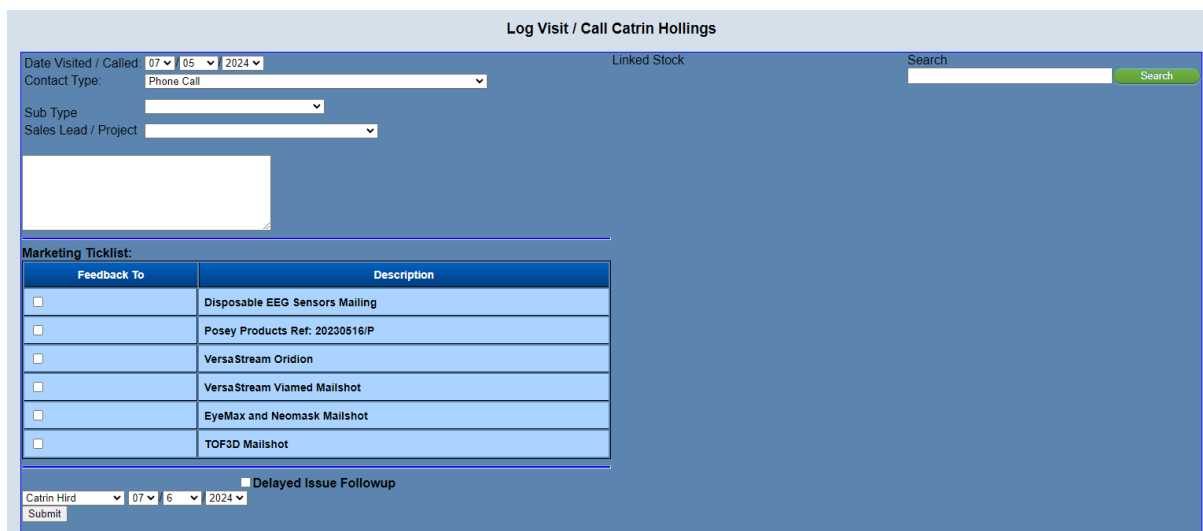
1. Search for the customer's account in Intrastats.



The screenshot shows a search interface with a dropdown menu open. The dropdown menu lists the following options: Barcodes / SN, Contacts, Cross References, Customer Orders, Documents, Issues, Menu Item, Production, Returns (srs/srn), Stock, Supplier Orders, and Telephone Logs. The search bar contains the text "Search" and has icons for search, print, and refresh.

2. Find the relevant contact, if requires adding see VM3COP20.081.

3. Click  Log Activity and the following screen will show.



The screenshot shows the "Log Visit / Call Catrin Hollings" form. The form includes the following fields and sections:

- Date Visited / Called: 07 / 05 / 2024
- Contact Type: Phone Call
- Sub Type: [Dropdown]
- Sales Lead / Project: [Dropdown]
- Marketing Ticklist:

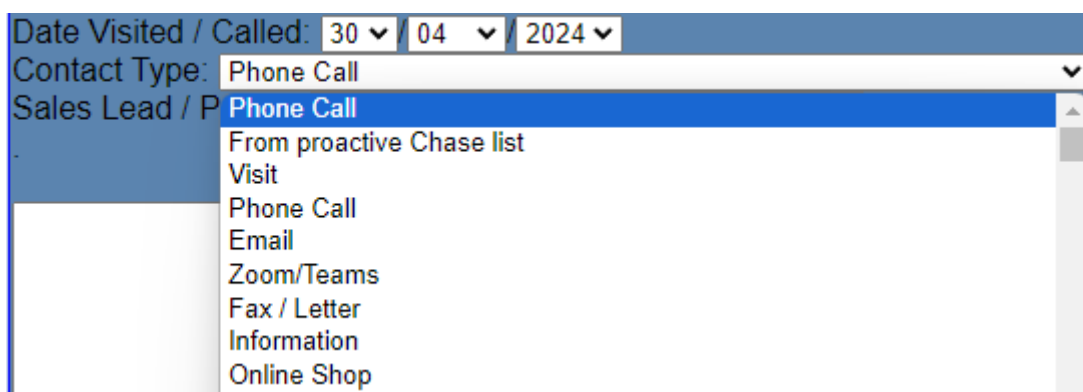
Feedback To	Description
☐	Disposable EEG Sensors Mailing
☐	Posey Products Ref: 20230516/P
☐	VersaStream Oridion
☐	VersaStream Viamed Mailshot
☐	EyeMax and Neomask Mailshot
☐	TOF3D Mailshot

☐ Delayed Issue Followup

Catrin Hird 07 / 6 / 2024

Submit

4. Review the information which has been preselected to check it is correct, if not please amend.



The screenshot shows the "Log Visit / Call Catrin Hollings" form with the "Sales Lead / Project" dropdown menu open. The dropdown menu lists the following options: From proactive Chase list, Visit, Phone Call, Email, Zoom/Teams, Fax / Letter, Information, and Online Shop.

5. Select from the “Sales Lead / Project” drop down.

Information Request

This option should be selected when a new enquiry is received which is for consumable items such as oxygen sensors, eye masks, samplings within the current quantity discount structure.

Sales Projects

This option is for high value orders over £1000 and also for products such as monitors and equipment. This option should also be selected if the order is out of the ordinary for the customer i.e. they used to order single units and now want to purchase 50. All new distributor enquiries should also be under this option.

This option should also be selected when an enquiry has already been logged but it is felt that the questions and quantities required are larger than can be processed/answered by the main office.

Should you be unsure which option to select, please check with a Sales or Technical Manager.

6. Add a Description for the lead in the following format:

Company/Hospital: Product

7. Add a short description including quantities and any time frames which have been discussed.

8. Tick any relevant “Marketing Ticklist”.

9. Tick the “Delayed issue followup” tick box and amend date to 1 week from initial enquiry.

10. Using the Search box to the right, search and link relevant stock by click the associated tick box.

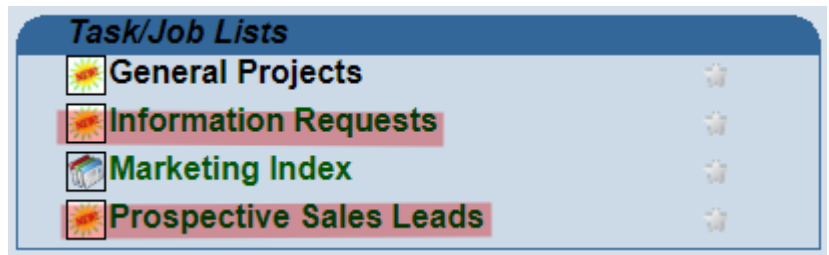
A search box with a blue header bar containing the word "Search" in white. Below the header is a white text input field. To the right of the input field is a green button with the word "Search" in white.

11. Click “Submit” button

Review Information Request or Sales Project

There are 2 options to review the above.

Option 1.



This option will show you a full list of Information Requests and Sales Leads for all users.

Option 2. Search for the company/hospital using the top right search box and scroll down to below the list of contact names. This will show you a full list of Active Sales/Project linked to that Company/Hospital.

Click the Details **** under Lead ID and this will open the task.

Lead ID	Start Date	Type	Description	Brief Notes	Company	Contact	Source
Details 1344	29 Apr 2024	Information requests	Medical Support Solutions: Sampling Lines 5	MVM149760 raised	Medical Support Solutions Limited	Angela De Weerd	Shopify Viamed Website

Linking Enquiry Source and Contact

When you are in the active Information Request or Sales Project you need to make sure the top section is completed correctly. This allows for the enquiries to show on the supplier CRM records as well as the customers.

This is automatically filled when request generated from CRM

Customer Account CID	24363	Vivisol
Customer Contact ID	31408	Niall Barron
Supplier Account CID	4614	Maxtec Inc
Supplier Contact ID	31408	Niall Barron
Source Account CID	4614	Maxtec Inc
Source Contact ID	0	

This will automatically be filled with the customer details. Please amend to the relevant supplier if known.

When an enquiry is received from a supplier for us to contact the end user, or if it is received through our website these fields need to be filled.

Frequently used Company CIDs

Account

Maxtec 4614
Viamed Shopify 15361
Teledyne 3988

Contact

KB Back in Stock App 33285

Updating the Information Requests

A structured list of tasks required to be completed will automatically added to the task.

- **Information Sent**

Insert date to brief notes and tick when completed.

- **Confirmed Information Received**

A delayed issue should have been added when the original enquiry was logged, **one week after the original enquiry was responded to**. When this issue is received you can add this issue number to the Issue against this line and complete the line when done.



- **Confirmed Information Received Attempt 2**

Should a reply not be received, please email the customer **three weeks after the original enquiry was responded to**.

- **Confirmed Information Received Attempt 3**

Should a reply not be received, please email the customer **five weeks after the original enquiry was responded to**.

- **Confirmed Information Received Attempt 4**

Should a reply not be received, please email the customer **two months after the original enquiry was responded to**.

- **Customer Requested Sale or Return**

Should a Sale or Return be requested by the customer, please add the main Issue ID, when available.

SOR	Type Loan	Issue ID
 SOR967	Service Loan	# 324829 New Updates

- **Pass to Manager to Convert to Sales Projects:**

Ryan Swaine for International Sales and Steve Hardaker for UK

If you feel that the enquiry is becoming too complicated and/or is above £\$€ 1000 value then a request to pass to a manager can be completed. To do this click the new issue icon against this line, this will refresh the page and create a related issue.



Click this issue number, this will open the issue for you to complete and send to the relevant manager.

- **Customer Purchased**

- **Customer Declined**

- **Customer Purchased Follow-up**

Once a customer has ordered the product, please chase **two weeks** after the dispatch date to check all received.

- **Complete Job to be Signed off**

Once all tasks have been completed, please complete the job.

Updating the Sales Projects / Leads

A structured list of tasks required to be completed will automatically added to the task.

- **Sent product information and pricing**

- **Send pricing schedule or quotation**

- **PAQ**

If this is required, please contact Marketing or Technical Support for assistance.

- **SOR Terms and Conditions Sent**

See VM3COP20.13 regarding the SOR procedure.

- **SOR Signed Terms Received**

- **SOR Sent to Customers**

- **SOR Decision Made/Closed**

- **SOR Feedback**

- **Follow up Progress**

- **Purchase Order Received**

- **Verify Goods Received**