

VM3COP27.08 Intrastats Telephone Logging System

Click on 'Take Telephone Call' which could be located in either of these places.



Then click the 'Take New Call' link.

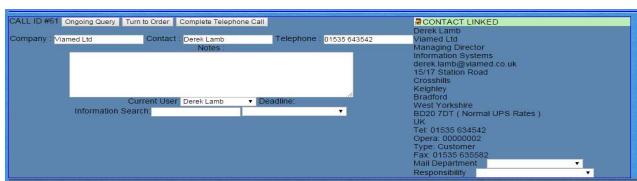


This page will be displayed:



Start by entering the Company and/or Contact name, as you do so a list will appear on the right. The more information you include in the company and contact details, the more the list will decrease in size, only showing known company and contact details relevant to your search.

If the contact details are not included in the CRM database you will receive the following **RED** bar stating "Contact Not linked to CRM database". You can utilise the buttons 'ADD to CRM' or 'Link to CRM' to link your call to the database.



'Add...to CRM' will add a new contact to an existing organisation, 'Link to CRM' will link the listed Contact to the current telephone call. The **GREEN** bar at the top right-hand side saying, CONTACT LINKED shows when a contact is selected and linked correctly.

Enter any notes in the notes field.

CALL ID #1271 - Taken by Katie Evans On Wednesday 22nd of June 2016 03:45:30 PM

☒ Generic ☐ Viamed ☐ Vandagraph ☐ VST ☐ Human Med ☐ Viamed Properties

Ongoing Query / I'm Done for now Type:

To Advise Staff Member of Outstanding Call

[illegible]

From the 'Current User' list, select the name of the member of staff they need to speak with and click the 'Ongoing Query / I'm Done for now' button. If the contact is not listed/linked to the call, ensure to type their name and contact telephone number into the notes field as the information will not be kept if not linked to the CRM database.

N.B. This system does NOT transfer the call through to the member of staff – this must still be done using the regular phone system.

'Ongoing Query / I'm Done for now' will complete the Call but leave it ACTIVE in the call log active list. NOTE: You will have an indication of Active Calls you have assigned to you in your main Intrastats information bar.

CALL ID #1286 - Taken by Katie Evans On Monday 27th of June 2016 12:25:52 PM
☒ Go to ☐ Viewed ☐ Mandagraph ☐ VST ☐ Human Med ☐ Mailed Properties
 Ongoing Query / I'm Done for now Turn to Order Create Issue Type: Call Complete/Close off Telephone Call
 Done by: _____ Company: _____ Contact: _____

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Turn to Order

Clicking 'Turn to Order' will take you to the existing Intrastats 'Telephone Order' page; any notes you have typed will be transferred to the order page.

CALL ID #1291 - Taken by Katie Evans On Monday 27th of June 2016 02:57:24 PM

Generic Viamed Vandagraph VST Human Med Viamed Properties

Ongoing Query / I'm Done for now Turn to Order Create Issue Type Call Complete/Close off Telephone Call

Company: Viamed Ltd Contact: Katie Evans Telephone: Email:

Notes: 1 x: 0000000

Current User: Katie Evans Deadline:

Information Search:

CONTACT LINKED

Katie Evans
Viamed Ltd
15/17 Station Road
Crosshills
Keighley
Bradford
West Yorkshire
BD20 7DT (Normal UPS Rates.)
UK
www.viamed.co.uk
Main Tel: 01535 634542
Opera: 00000002
Type: Customer

Viamed
Contact
Telephone Order
Quotation
Customer advised of Carriage charges
Name: Katie Evans Department: Email: 00000002.Katie.Evans@fakemail.com Direct Tel:
Invoice Address: 10000002
Viamed Limited
15 Station Road
Crosshills
Nr Keighley
West Yorkshire
BD20 7DT
Telephone Number:
Delivery Address: 00000002
Viamed Ltd (UK)
15 Station Road
Crosshills
Nr Keighley
West Yorkshire
BD20 7DT
Telephone Number:
Purchase Method
Order Number
Use Visa slip for Credit Cards

UPDATE
Order Notes:
1 x: 0000000

Complete/Close off Telephone Call

CALL ID #1286 - Taken by Katie Evans On Monday 27th of June 2016 12:25:52 PM

Generic Viamed Vandagraph VST Human Med Viamed Properties

Ongoing Query / I'm Done for now Turn to Order Create Issue Type Call Complete/Close off Telephone Call

Company: Contact: Telephone: Email:

Clicking 'Complete Telephone Call' will close the call screen and complete the call from the active call list.

Create Issue

CALL ID #1286 - Taken by Katie Evans On Monday 27th of June 2016 12:25:52 PM

Generic Viamed Vandagraph VST Human Med Viamed Properties

Ongoing Query / I'm Done for now Turn to Order Create Issue Type Call Complete/Close off Telephone Call

Company: Contact: Telephone: Email:

Clicking 'Create Issue' will generate a new issue from which you can send to the relevant team member. This may be done for serious

issues, to inform directors of positive or negative feedback, or if the caller requests a product we currently do not stock.

Marketing Feedback

This page is also used for obtaining marketing feedback. If a customer calls or emails in response to a mail shot/e-mail shot then it must be logged here. This is done by selecting whether the contact was a call or an email from the drop-down menu, and clicking the relevant box next to the mailshot they are responding to. Ensure contact information is also recorded.

CALL ID #1271 - Taken by Katie Evans On Wednesday 22nd of June 2016 03:45:30 PM

Generic Viamed Vandagraph VST Human Med Viamed Properties

Ongoing Query / I'm Done for now Turn to Order Create Issue Type Call Complete/Close off Telephone Call

Company: Contact: Telephone: Email:

Notes:

Current User: Katie Evans Deadline:

Information Search:

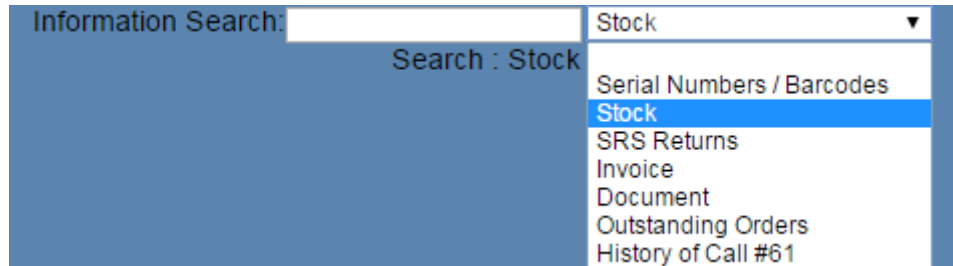
Feedback To	Description
<input type="checkbox"/>	MD300 Paediatrics Email Mailing
<input type="checkbox"/>	MD300 Series Mailing - Sent to Paediatrics Group
<input type="checkbox"/>	Automotive Catalogue Mailing
<input type="checkbox"/>	CO Screen Carbon Monoxide Monitor
<input type="checkbox"/>	CO Check CO Monitor

Show all Calls - Show all UN-linked Calls

Advanced Search Features

If during the call you have linked to the CRM (Green bar 'CONTACT LINKED'), you can use the Information search.

In the pull down menu you can select to search customer specific information such as 'Repairs', 'Invoices ', 'Outstanding Orders', 'SRS Returns' etc.



The screenshot shows a web interface with a blue header bar. On the left, the text "Information Search:" is followed by a text input field. To the right of the input field, the text "Search : Stock" is displayed. A dropdown menu is open, showing a list of search categories. The categories are: "Serial Numbers / Barcodes", "Stock" (which is highlighted in blue), "SRS Returns", "Invoice", "Document", "Outstanding Orders", and "History of Call #61".

Search Category
Serial Numbers / Barcodes
Stock
SRS Returns
Invoice
Document
Outstanding Orders
History of Call #61