

## VM3COP27.08 - IntraStats Telephone Logging System

**Related documents:** VM3COP20.72 The Systems  
VM3COP20.081 Adding Amending Contact Records in the CRM

All calls need to be logged in order to keep accurate records of who called and when, calls recorded via IntraStats will appear on the contact record.

1. Login to IntraStats as per VM3COP20.72
2. Click on 'Take Telephone Call' which could be located in either of these places depending on your settings.



3. Click the 'Take New Call' link.



4. This page will be displayed:

A screenshot of the 'Take New Call' form in IntraStats. The form is titled 'CALL ID #2826 - Taken by Katie Evans On Thursday 19th of October 2017 10:39:50 AM'. It includes a 'CONTACT not Linked to Contact Management' warning. The form has several tabs: 'Generic', 'Vamed', 'Vandagraph', 'VST', 'Human Med', and 'Vamed Properties'. The 'Generic' tab is selected. The form contains fields for 'Company', 'Contact', 'Telephone', and 'Email'. There is a 'Notes' section with a text area. At the bottom, there is a 'Current User' dropdown set to 'Katie Evans' and a 'Deadline' field. A 'Search' button is also present.

5. 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 fields, 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 large notes field.

**Note:** If this bar is **GREEN**, advanced information searches are possible. The bar will be **RED** if a contact has not been linked and you will have limited search options.

**Note:** If you enter a contact name that is not in the database without adding a company, you will not get the option to link the call; it is recommended that you enter a company name first.

## Main Buttons

Select the name of the company called as displayed on the telephone, i.e. Viamed, Vandagraph, VST, Humanmed, or Viamed Properties.

## To Advise Colleague of Outstanding Call

If the caller needs to speak to another member of staff and they are not available, link the contact as described on page 1 and make notes in the notes field regarding the reason for their call.

From the 'Current User' drop down menu, 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.

CALL ID #2826 - Taken by Katie Evans On Thursday 19th of October 2017 10:39:50 AM

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

**Ongoing Query / I'm Done for now** Turn to Orders20056 Create Issue Type: Call Complete/Close off Telephone Call

Customer Complaint Company: Hickleys Ltd Taunton Contact: Vanessa Westwood Telephone: Email: Notes: would like to discuss a new oxygen sensor

Current User: Katie Evans

Information Search: Jonathan Connor, Katie Evans, Linda Sheering, Martina Austermann, Matthias Borgert, Michael Green, Michael Lamb, Philip Crossley, Robert Bonser, Robert Connor, Roland Hauer, Ryan Swaine, Sarah Walton, Sophie Lines, Steve Hardaker, Steve Nixon, Tom Liddle, Training, Xhibition, Zoey Teal

CONTACT LINKED: Vanessa Westwood, Hickleys Ltd Taunton, vwestwood@hickleys.com, Castle Street, Taunton, Somerset, TA1 4AU ( Normal UPS Rates. ), UK United Kingdom, Main Tel: 01823 328530, Opera: 10020233, Type: Automotive Company Distributor UK, Mail Department, Responsibility: Key Buyer

Show all Calls - Show all UN-linked Calls

**Note:** This system does NOT transfer the call through to a colleague; this must still be done using the regular phone system.

## Ongoing Query

'Ongoing Query / I'm Done for now' will complete the Call but leave it ACTIVE in your call log active list.

CALL ID #2826 - Taken by Katie Evans On Thursday 19th of October 2017 10:39:50 AM

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

**Ongoing Query / I'm Done for now** Turn to Orders20056 Create Issue Type: Call Complete/Close off Telephone Call

**Note:** You will have an indication of Active Calls you have assigned to you in your main IntraStats information bar.

Katie Evans: **1 Calls** 1 Issues 12 Unread | Imported 18 Oct 15:01:52 | Out of Office: EH Future

If you see an open call in the information bar, click on it. A list of your outstanding calls will be displayed. Click on the call to open it.

My Outstanding Calls						
Call ID	Host	Name	Contact	Tel	Current User	Last User Time
Call #2829	M	Vanessa Westwood	Hickleys Ltd Taunton		Katie Evans	Katie Evans 19 Oct 11:40:22 AM

Any information relating to the call will be noted here, return the call and update the notes. If no further action is needed, close the call by clicking the 'Complete/Close off Telephone Call' button as per page 4. If you need to call them again, click the 'Ongoing Query / I'm Done for now' button as per page 2.

## Turn to Order

Clicking 'Turn to Order' will take you to the IntraStats 'Telephone Order' page; any notes you have typed will be transferred to the order page. Complete telephone order as per VM3COP27.29.

CALL ID #2826 - Taken by Katie Evans On Thursday 19th of October 2017 10:39:50 AM

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

Ongoing Query / I'm Done for now **Turn to Orders20056** Create Issue Type: Call Complete/Close off Telephone Call

Customer Complaint

Company: Hickleys Ltd Taunton Contact: Vanessa Westwood Telephone: Email:

Notes: would like to order 3 x 0110132

Current User: Katie Evans Deadline:

Information Search: Description

CONTACT LINKED

Vanessa Westwood  
Hickleys Ltd Taunton  
vwestwood@hickleys.com  
Castle Street  
Tangier  
Taunton  
Somerset  
TA1 4AU ( Normal UPS Rates. )  
UK United Kingdom  
Main Tel: 01823 328530  
Opera: I0020233  
Type: Automotive Company Distributor UK  
Mail Department  
Responsibility: Key Buyer

Viamed From Call Log #2826 Contact ID20056

Contact

- Telephone Order
- Quotation
- Customer advised of Carriage charges

Name: Vanessa Westwood Department: Email: S00020233.Vanessa.Westwood@fakemail Direct Tel:

Invoice Address: I0020233  
Hickleys Ltd Taunton  
Castle Street  
Tangier  
Taunton  
Somerset  
TA1 4AU  
Telephone Number: 01823 328530

Invoice Address: No opera account

Delivery Address: 00020233  
Hickleys Ltd Taunton  
Castle Street  
Tangier  
Taunton  
Somerset  
TA1 4AU  
Telephone Number: 01823 328532

Purchase Method  
Order Number: 19/10/17/VW  
Use Visa slip for Credit Cards

UPDATE

Order Notes:  
would like to order 3 x 0110132

## Complete/Close off Telephone Call

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

CALL ID #2826 - Taken by Katie Evans On Thursday 19th of October 2017 10:39:50 AM

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

Ongoing Query / I'm Done for now Turn to Orders20056 Create Issue Type: Call **Complete/Close off Telephone Call**

Customer Complaint

Company: Hickleys Ltd Taunton Contact: Vanessa Westwood Telephone: Email:

Notes: would like to discuss an oxygen sensor

Current User: Katie Evans Deadline:

Information Search: Description

CONTACT LINKED

Vanessa Westwood  
Hickleys Ltd Taunton  
vwestwood@hickleys.com  
Castle Street  
Tangier  
Taunton  
Somerset  
TA1 4AU ( Normal UPS Rates. )  
UK United Kingdom  
Main Tel: 01823 328530  
Opera: I0020233  
Type: Automotive Company Distributor UK  
Mail Department  
Responsibility: Key Buyer

## Create Issue

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

CALL ID #2827 - Taken by Katie Evans On Thursday 19th of October 2017 11:04:12 AM

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

Ongoing Query / I'm Done for now **Create Issue** Type: Call Complete/Close off Telephone Call

The call number will be displayed in the 'Subject' field and the notes typed in the 'Notes' field will be displayed in the body of the issue.

Add further details to the 'Subject' field, e.g. 'Call Log #3827 - Customer Complaint - Airedale Hospital'

Use the drop down menu to select the colleague that you are directing the issue to. See Doc ID: 22272 for more information on how to send issues.

Creating this issue does not close the call.

To go back to your call, click on 'Take Telephone Call' which could be located in either of these places depending on your settings.



Click on the outstanding call.

Take New Call							
Call ID	Host	Name	Contact	Tel	Current User	Last User	Time
Call #2827	M	Derek Lamb	Viamed Limited	01535 643542	Katie Evans	Katie Evans	19 Oct 11:10:55 AM

If the caller does not need to be called back then close the call as per page 4. If they do require a call back, direct the call as per page 2.



## 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.

Feedback To	Description
MD000 Feedbacks Email Mailing	
MD000 Service Mailing - Sent to Feedback Group	
Automotive Catalogue Mailing	
CD Screen Catcher Minicode Monitor	
CD Check CD Monitor	

## Advanced Search Features

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

In the drop down menu you can select different options to search customer specific information such as 'SRS Returns', 'Invoice', 'Outstanding Orders' etc.

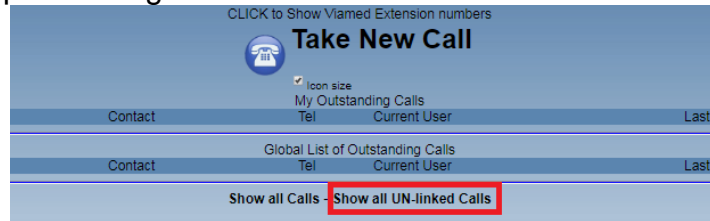
Information Search:  ▼

- Cross References
- Serial Numbers / Barcodes
- Stock
- SRS Returns
- Invoice
- Document
- Outstanding Orders
- History of Call #2828

## Linking Calls

A rolling issue is received once per week stating that unlinked calls need to be linked to the correct contact, where possible.

Beneath the 'Take New Call' link is a 'Show all UN-linked Calls' page which lists calls that have not been linked but require linking to the CRM.



A list will be displayed of all calls that have not been linked correctly.

Link Unlinked Calls						
Link	Call ID	Host	Name	Contact	Tel	Opera
<a href="#">Link</a>	#2798	11 Oct 2017	John Radcliffe			
<a href="#">Link</a>	#2797	11 Oct 2017	John	Wika	07973 414276	
<a href="#">Link</a>	#2796	10 Oct 2017				
<a href="#">Link</a>	#2792	10 Oct 2017				
<a href="#">Link</a>	#2791	10 Oct 2017	Guernsey	Hazel	01481 725241 Ext 4484	
<a href="#">Link</a>	#2787	09 Oct 2017				
<a href="#">Link</a>	#2785	06 Oct 2017				
<a href="#">Link</a>	#2781	05 Oct 2017	Russells Hall Hospital (Siemens)	Tala Awkati		00000262
<a href="#">Link</a>	#2778	04 Oct 2017	Pendle Signs	Garry		
<a href="#">Link</a>	#2773	03 Oct 2017				
<a href="#">Link</a>	#2770	29 Sep 2017	Nottingham	Peter McCann	Bleep 1287	00003930
<a href="#">Link</a>	#2768	28 Sep 2017	C	John	01422 292201	
<a href="#">Link</a>	#2765	28 Sep 2017		Robert Bonser	07526815479	
<a href="#">Link</a>	#2764	27 Sep 2017				
<a href="#">Link</a>	#2762	28 Sep 2017	Harley Street	Adnan	0207 034 8395	
<a href="#">Link</a>	#2758	25 Sep 2017				
<a href="#">Link</a>	#2756	25 Sep 2017		Neil Ju		00001288
<a href="#">Link</a>	#2755	25 Sep 2017	Paul Brackley	Paul Brackley	07719939185	00013093
<a href="#">Link</a>	#2754	25 Sep 2017				
<a href="#">Link</a>	#2753	25 Sep 2017		Martin- Germany	49173677 4446/ 49 43123 771823	

To link a call, click the 'Link' button on the left.

<a href="#">Link</a>	#2753	25 Sep 2017		Martin- Germany	49173677 4446/ 49 43123 771823	
<a href="#">Link</a>	#2752	26 Sep 2017	Harley Street Clinic, The	Catrinel Todirascu	02074863653	00003007
<a href="#">Link</a>	#2751	25 Sep 2017				

A 'Company' and 'Contact' field will appear. Type any known information in to the boxes and click the 'Search' button. The system will search on company and contact matches, if you find the correct person click the 'Link To Call' button on the right which links the call to the correct CRM record.

[Link](#)

#2752

26 Sep 2017

Harley Street Clinic, The

Catrinel Todirascu

02074863653

00003007

Search CRM Details

Company/ harley street

Contact/ catrinel

Search

Search Results

Company and Contact Search

id	cid	Contact	Address	
19929	2128	Catrinel Todirascu	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>

Company Search

id	cid	Contact	Address	
7059	2128	Keith Overton	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
10039	2128	John Strauss	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
10040	2128	Muneeb Shamin	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
11481	2128	Sebastian Ball	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
14925	2128	Richie Iglesias	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
17292	2128	Kurt Hope	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
18495	2128	Roy Shepherd	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
18496	2128	Paakow Enchill	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
19929	2128	Catrinel Todirascu	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>
	7836		HSS01 Harley Street Skin 48 Harley Street London W1G 9PU	<a href="#">Link To Call</a>
16216	7836	Sharon McDonald	HSS01 Harley Street Skin 48 Harley Street London W1G 9PU	<a href="#">Link To Call</a>
16217	7836	Natalie Kavanagh	HSS01 Harley Street Skin 48 Harley Street London W1G 9PU	<a href="#">Link To Call</a>
17330	7836	Paula	HSS01 Harley Street Skin 48 Harley Street London W1G 9PU	<a href="#">Link To Call</a>
19311	7836	Supplies	HSS01 Harley Street Skin 48 Harley Street London W1G 9PU	<a href="#">Link To Call</a>
19517	7836	Davina Saunders	HSS01 Harley Street Skin 48 Harley Street London W1G 9PU	<a href="#">Link To Call</a>
	9955		HM10294 Harley Street Reigate 16 Bell Street Reigate Surrey RH2 7BG	<a href="#">Link To Call</a>
19317	9955	Davina Saunders	HM10294 Harley Street Reigate 16 Bell Street Reigate Surrey RH2 7BG	<a href="#">Link To Call</a>

Contact Search

id	cid	Contact	Address	
19929	2128	Catrinel Todirascu	00003007 Harley Street Clinic, The 35 Weymouth Street London W1G 8BJ	<a href="#">Link To Call</a>

If a match cannot be found, leave it in the list. The calls are already closed and remain listed for reference.