

VM3COP27.37 – Office - Searching for Distributors

Related documents: VM3COP20.72 The Systems
VM3COP20.081 Adding Amending Contact Records in the CRM
VM3COP02.1 Organisation Who`s Who

Distributor or manufacturer searches are often requested via the 'Office Jobs' list, see VM3COP03.04. There will be a country and/or a product requested. E.g., 'Medical Distributor Search – Latvia' or, 'Manufacturer Search – V1000'.

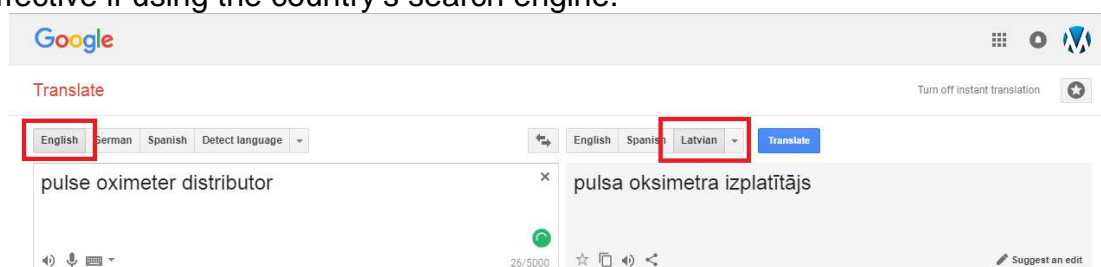
Searching

Potential distributors can be found using several methods.

1. Use a search engine, e.g. www.google.co.uk

Searches could include, 'medical distributors Latvia', or an item in our product range 'pulse oximeters Latvia' or, 'capnograph retailers Latvia'

2. Use the relevant country's search engine and perform similar searches, e.g. Google in Latvia is www.google.lv
3. Use a translation service such as: <https://translate.google.co.uk> and translate searches in to the local language for the country being searched for. E.g. the most used language in Latvia is Latvian, use Google Translate to search for our product range; this is especially effective if using the country's search engine.



Copy and paste the translated text in to www.google.lv



When you find a company who appear to be a suitable potential distributor, they need to be entered in to IntraStats.

Logging in the System

Log into IntraStats as per VM3COP20.72

From the 'Sales' tab in IntraStats, click on, 'Potential Distributors Stage 1.1'



There are three drop-down menus.

- 'Country' – use the drop down menu to select the relevant country
- 'Marketing ID' – use the drop down menu to select the relevant ID, if you cannot find a relevant ID, ask the Marketing Department to advise you which one to use.
- 'Potential Distributor Type' – Use the drop down menu to select the type of distributor, e.g. medical, automotive, veterinary etc

A screenshot of the 'Potential Distributors' form in the IntraStats application. The form is titled 'Potential Distributors' and has a subtitle 'Please Add Details'. It contains four input fields: 'Country' (set to 'LA Latvia'), 'Marketing ID' (set to 'Latvia Medical Distributors'), 'Potential Distributor Type' (set to 'Medical'), and 'Base Web Address' (empty). A 'Go' button is located at the bottom right of the form. The entire form area is highlighted with a red border.

In the, 'Base Web Address' field you need to add the web address of the potential distributors you have located. Only the base web address is needed.

Remove the http:// or https:// and remove everything after the domain.

E.g. if the web address looks like this:

<http://www.viamed.co.uk/uk/?uid=&sessionid=&g=&i=&i=2&page=catagory&cat=353&subcat=454>

Only **www.viamed.co.uk** needs to be entered.

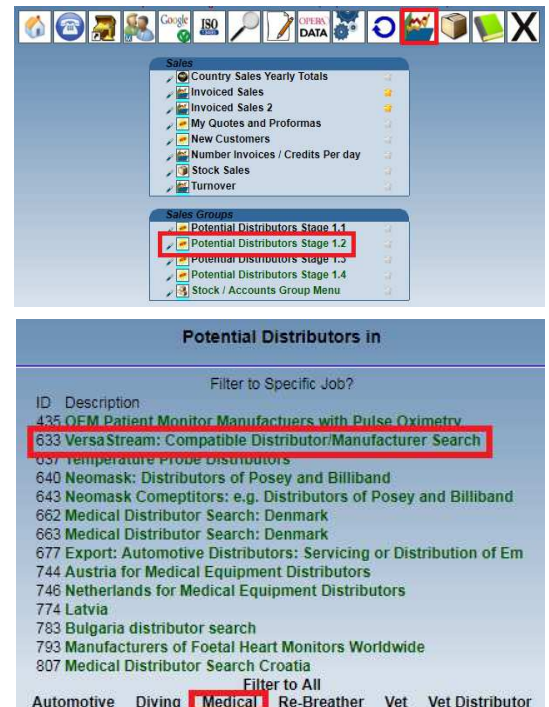
Then click the 'Go' button and proceed to find another potential distributor.

When you have found all you can, use VM3COP03.04 to link an issue from the correct stage of the job advising that this stage has been completed and send to the person who requested the search, i.e. the International Sales Manager or Commercial Director.

Filtering Potential Distributors

Note: This is only to be completed by the person who requested the search.

When the issue is received requesting that the results are filtered, from IntraStats, click on the 'Sales' tab and then click on 'Potential Distributors Stage 1.2'.



There is the option to filter the results linked to a specific job or product area, click on the job name or product area to display the results of the search.

Working from the top, click on the website and it will open in your browser.

Company	Country	Web Site	Status	Notes	Note	Type	Added by	Added on	Job#
SI Singapore	USA U.S.A.	www.starmedical.com				Medical	Katie Evans	14 Dec 2016	633
UR Uruguay	USA U.S.A.	adinet.com.uy				Medical	Katie Evans	14 Dec 2016	633

When you have determined if the company is suitable for the task, you can update the status.

If the company is not suitable, select 'Do Not Contact' from the drop down menu and a note in the, 'Notes' field to state a reason as to why they are unsuitable. The company will be removed from the list when the page is refreshed.

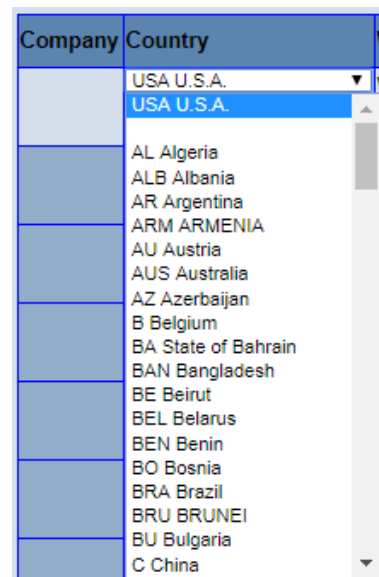
Company	Country	Web Site	Status	Notes
	USA U.S.A.	www.ccpi-inc.com		
	USA U.S.A.	www.heraeus.com		

If you would like the office to proceed to the next stage and contact the company, select 'Move to next stage'.

Company	Country	Web Site	Status
SI Singapore	USA U.S.A.	www.starmedical.com	
UR Uruguay	USA U.S.A.	adinet.com.uy	

Country Amend

If the company has been entered in to the system against the wrong country, this can be amended by clicking the drop-down menu in the 'Country' column. Select the correct country and the company will be linked to it.



When you have worked through the list, ensure that you return the issue to the person who sent it, advising them that the selected companies are ready to be contacted. If you would like to see the letter, or use your own letter, please attach this to the issue.

Writing to Potential Distributors

When the issue is returned confirming that the list has been filtered and the selected companies can be contacted, from IntraStats, click on the 'Sales' tab and then click on 'Potential Distributors Stage 1.3'.



A list will be displayed showing the companies that are to be contacted.

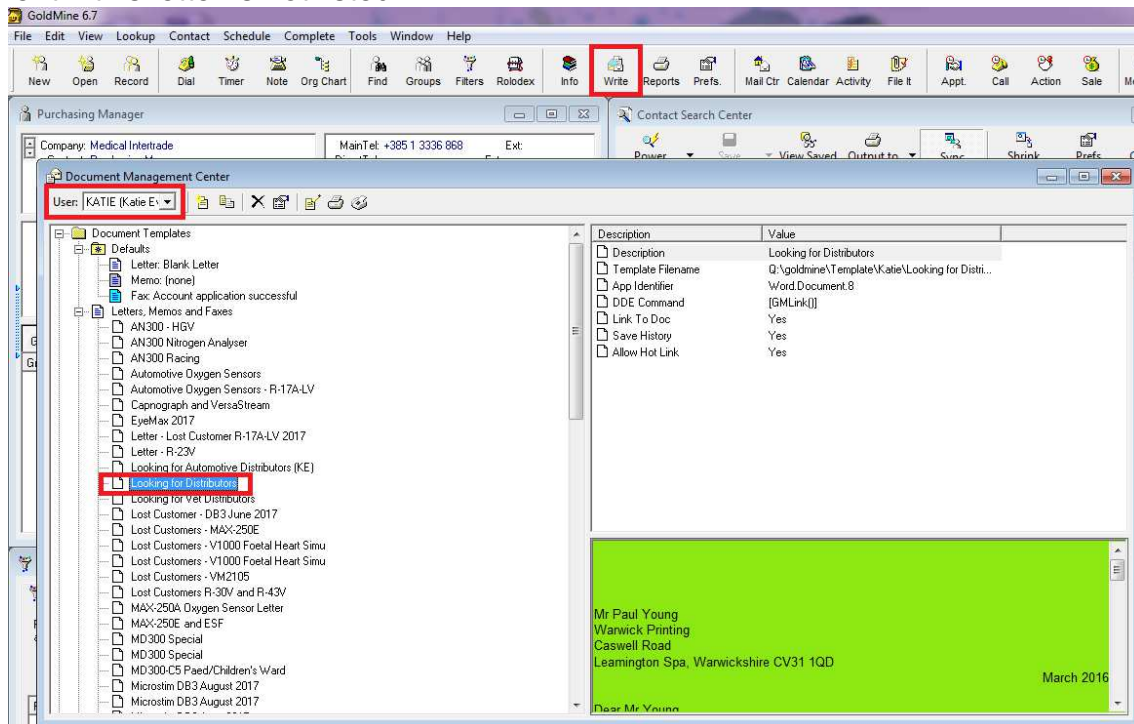
Stage 1.3 Initial TO contact list					
CRM	WebSite	User	Country	Status	
	www.medical-intertrade.hr	Sarah Walton	CRO Croatia	Done	Medical Distributor Search Croatia #807

Visit the website displayed in the second column and find the contact details. Collect as many details as possible including: mailing address, email addresses, telephone number, fax number, and a contact name, where possible. Enter these into both CRM's as per VM3COP20.081. A contact record is automatically created in IntraStats for companies on this list, click on the 'CRM' icon next to the company to be directed to the contact page

Stage 1.3 Initial TO contact list					
CRM	WebSite	User	Country	Status	
	www.medical-intertrade.hr	Sarah Walton	CRO Croatia	Done	Medical Distributor Search Croatia #807

Log into GoldMine as per VM3COP20.72

From GoldMine, locate the company and click 'Write'. Ensure you are working from your username and locate the letter named 'Looking for Distributors'. Consult with the marketing department if this letter is not listed.



The letter will open in your word processing application (Microsoft Word, LibreOffice Writer or OpenOffice Writer)

When it opens, read the letter very carefully and ensure the details are correct. There may be a different country or product mentioned here that is not relevant to the letter you are sending. If in doubt, consult the marketing department.

When your letter is complete, print it to a colour printer on letter headed paper. Place in a C5 envelope with a Product portfolio and frank the letter as per VM3COP29.04.

Schedule an Issue

Schedule an issue for two weeks from the date of posting the letter to remind yourself to follow up the initial contact.

To schedule an issue, from IntraStats, click on the 'Meetings' tab then click 'Add View Scheduled/Rolling Issues'.



Click 'Add new Future / Recurring Issue'.

Add New Future / Recurring Issue

Type 'Office' in the search field and a list of issue types will be displayed. Click 'Office followups'.

Meeting Name	Agenda Name
VIAMED General Issue	General Office Procedures (2)
Office Meeting	Agenda
Office Meeting	Office followups
Office Meeting	Office Health safety (1)
Office Meeting	Office Health safety
Office Meeting	Office Procedures
Office Meeting	Office requirements (3)
Office Meeting	Office Training

Write an appropriate subject in the 'Subject' field and fill in the 'Notes' field with the companies that you need to contact. Amend the start date to 2 weeks from the date the letter was sent. Ensure the issue is set to yourself and click, 'Add Issue'.

You will receive the issue on the set date. If no correspondence/contact was received from the companies you sent the letter to, send them an email to follow this up.

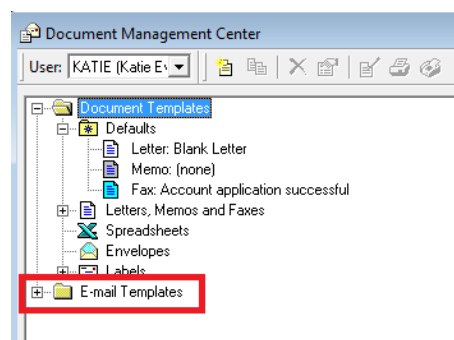
From GoldMine, navigate to the company as per VM3COP20.081 and select the contact, if available.

If no contact is available, ensure the 'Greeting' field states 'Sir or Madam'.

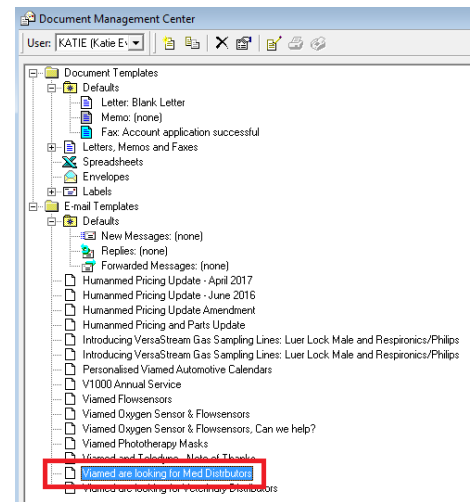
Click on the 'Write' button.



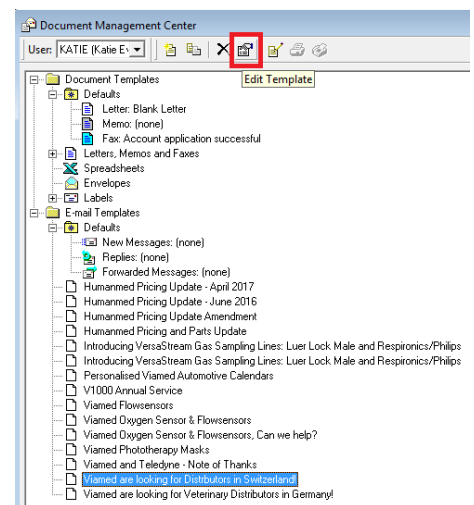
When the 'Document Management Center' opens, click on the + icon next to 'E-mail Templates'. This will open a list of email templates.



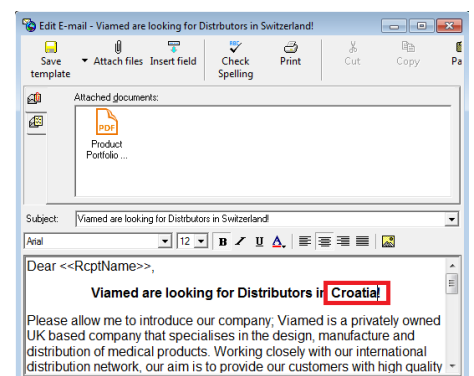
Locate the template named 'Viamed are looking for Distributors in ***'



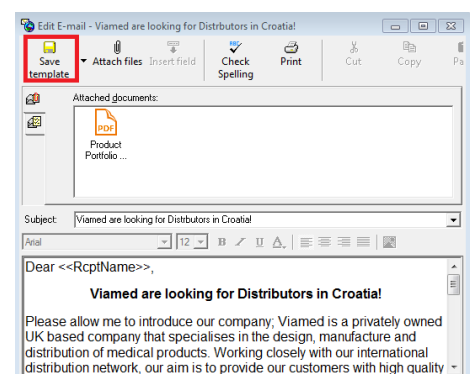
Click on the 'Edit Template' button.



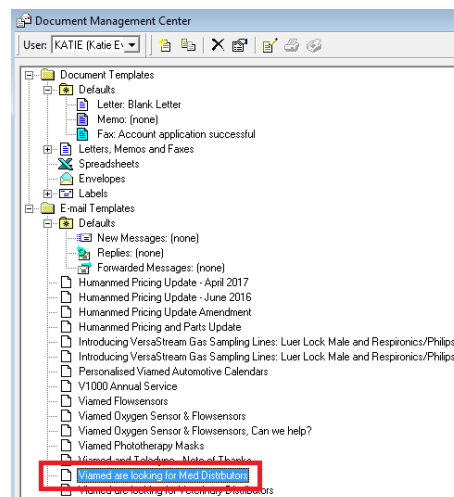
Edit the country, where applicable and make sure that the template contains all the information you have been asked to send. Check the subject line to ensure the correct country is named, where applicable.



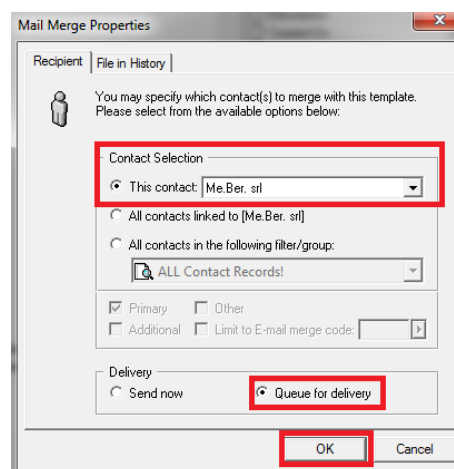
When you are happy with the template, click the 'Save template' button.



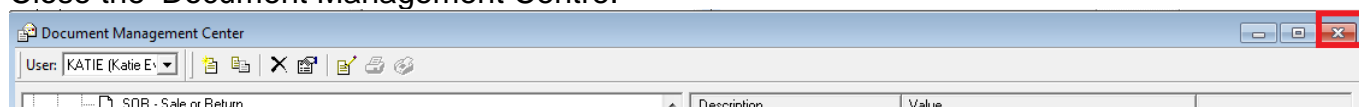
Double-click on the template.



When the 'Mail Merge Properties' dialog opens, ensure that you have selected 'This contact:' and that the desired contact is selected. Also ensure that you have selected 'Queue for delivery', and then click 'OK'.



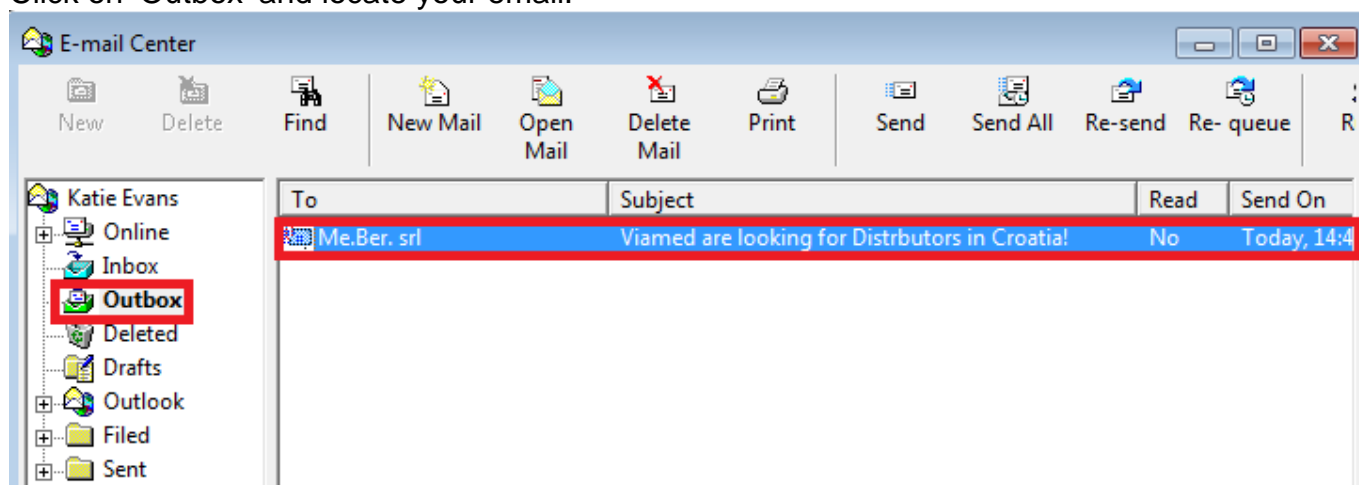
Close the 'Document Management Centre'.



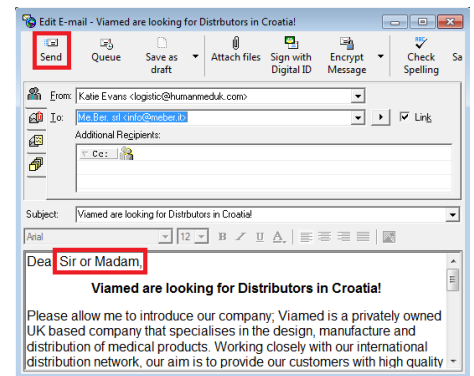
Click on the 'Mail Ctr' icon.



Click on 'Outbox' and locate your email.



Double-click on your email to open it. Check that the recipients name has appeared correctly. Amendments can be made here by editing the text. If everything is correct, click the 'Send' button.



From the 'Office Jobs' list, create a linked issue to inform the person who requested the search of the outcome. See VM3COP03.04 if you are unsure on how to complete this.