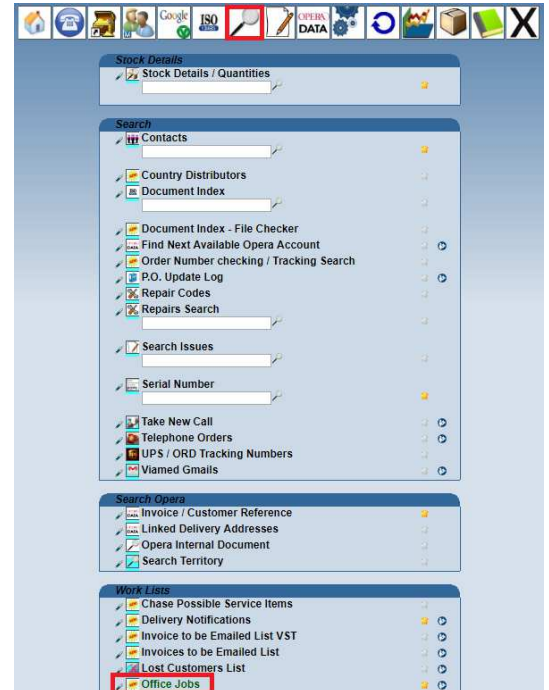# VM3COP10.03 – Office - Chasing Lost Customers

Log into IntraStats as per VM3COP20.72

From the 'lookup' tab, click on the 'Office Jobs' link.

When a lost customer task appears on the 'Office Jobs' list, look at the job issue for the details. Within the issue it should state a part number and department along with information regarding which leaflet to send and whether or not to include a price list; if any information is missing, consult with the marketing department. If unsure on how to use the, 'Office Jobs' list, see VM3COP20.40.

From IntraStats, click on the 'Lookup' tab and enter the part number in to the 'Stock Details / Quantities' field.

When the stock line appears, click on the 'X' button and then click on the 'Lost Customers' button.
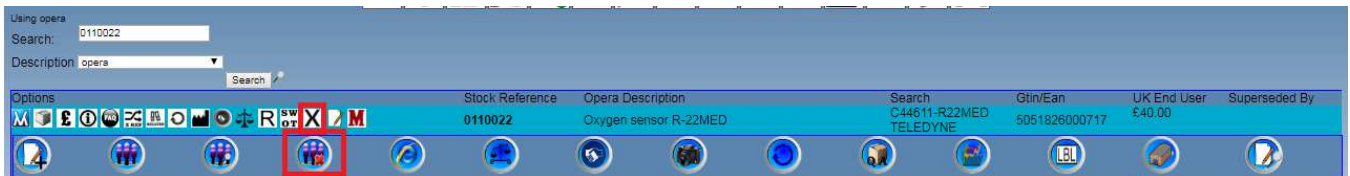
A list will appear containing all of the customers who have ever bought the product. If the line is red, do not contact them as the hospital/company may have closed, or it may be a duplicate account. If the customer has purchased the product in the current year, the line will be white; do not contact them as they are still purchasing the product.

Lines will be green if we have already contacted them about this product or a product in the same range; if the product you are working on is a single use product and they have been contacted in the last 6 months, do not contact them again, if it is not a single use product and they have been contacted in the last 12 months, do not contact them again. To find the last date they were contacted, check the 'Last Chased' column.

Any blue lines need to be contacted.

Locate the first appropriate line and click on the account number on the left.

Account	Name	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Last Chased	Status
00000020	Grampian University Hospitals					10	12			10				6					16/03/17	Sent Leaflet and Prices
00000069	Leeds Beckett University											1	1						25/08/15	Sent Leaflet and Prices
00000078	NHS Gloucestershire CCG												2						24/08/15	Sent Leaflet and Prices
00000126	Antrim Area Hospital									41	93	1							26/05/17	Duplicate Account
00000127	Causeway Hospital											3	-1						26/05/17	Sent Leaflet and Prices
00000130	Heatherwood Hospital							10											02/06/17	Sent Leaflet and Prices
00000149	Northumbria Specialist Emerg															6				
00000150	William Harvey Hospital			1															17/03/17	Sent Leaflet and Prices
00000160	Ashington Hospital	2								2									24/08/15	Hospital Closed
00000161	Wansbeck General Hospital						1			21	45	20	22	15	16				23/03/17	Sent Leaflet and Prices
00000170	Tameside General Hospital			3						3									23/03/17	Sent Leaflet and Prices
00000200	Stoke Mandeville Hospital	3						1		6	12								23/03/17	Sent Leaflet and Prices
00000235	Ysbyty Gwynedd		1																23/03/17	Sent Leaflet and Prices
00000261	Siemens Medical Solutions			8						15	3		11	2	8	4			03/07/17	Duplicate Account
00000264	Siemens Healthcare						1												12/08/15	Duplicate Account
00000310	Furness General Hospital						4												27/03/17	Sent Leaflet and Prices
00000330	North Hampshire Hospl NHS Trst	4																	24/08/15	Do Not Contact
00000333	Basingstoke & North Hampshire						1		1	5	9								27/03/17	Sent Leaflet and Prices
00000350	Royal United Hospitals Bath				1							3	1		2	1			27/03/17	Sent Leaflet and Prices
00000395	Royal Victoria Hospital	0																	24/08/15	Do Not Contact
00000470	Birmingham Women s Hospital	1			2	10	12		4			15		8					27/03/17	Sent Leaflet and Prices
00000480	City Hospital		2			4	6		2	3		10	8				5		27/03/17	Sent Leaflet and Prices
00000501	Birmingham Women s Hospital											12							20/06/16	Sent Leaflet

Locating the correct contact

Send a letter to one person in procurement/supplies and one person from the relevant department. Ensure the most relevant contact is used for the department; this can be someone who we have had direct contact before or the person named on the most recent order.

To do this, locate the product you are working on in the list and click on the number in the column for the most recent year they purchased.

Should show all stock customer whom Bought the product previously, but have not purchased in 2018
instructions
Tick boxes that you wish to Flag as Chased up with Customer, Select Customer Name you have chased up from the Pull down List, Enter Notes, Enter Status Field, Enter

	Stock	Description	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
☐	0021013	Sensor wraps box of 12.											30	15	20	10			
☐	0021014	Sensor wraps case of 48 boxes.														1	1	1
☐	0110015	Oxygen sensor R-15																	2
☐	0110016	Oxygen sensor R-17MEDV														1			
☐	0110017	Oxygen sensor R-17MED											4			1			
☐	0110021	Oxygen sensor R-22MEDV															1		
☑	0110022	Oxygen sensor R-22MED														12			
☐	0110047	Oxygen sensor R-47V														3			

This will open a list of invoices containing that product ordered in that year. If there are more than one invoice listed, check the date column and find the most recent. Then click on the invoice number next to it. This will open the invoice screen that contains the details specific to that invoice.

Account	Name	Date	Reference	Quantity	Value	Unit Value	Currency	Foreign Unit Value
00003800	Newcastle Hospitals NHS	2012-04-02	IN120720	1	£40.00			
00003800	Newcastle Hospitals NHS	2012-05-24	IN121476	1	£40.00			
00003800	Newcastle Hospitals NHS	2012-06-06	IN121648	1	£40.00			
00003800	Newcastle Hospitals NHS	2012-09-18	IN123164	2	£72.00			
			Totals	5	£192.00			

Click on the PDF icon to open the invoice.

Delivery Address			Invoice Address
00003800	IN123164 📄 18/09/2012		I0003800
Royal Victoria Infirmary			Newcastle Hospitals NHS
Electronics & Medical Eng Dept	Order		Foundation Trust
Queen Victoria Road	👥		Accounts Payable
Newcastle Upon Tyne	()		Regent Point, Regent Farm Road
	Log Error on Order or Invoice		Gosforth, Newcastle upon Tyne
NE1 4LP			NE3 3HD
	Customer Reference		0191 282 4069
	W/56022		

Locate the name of the customer in the bottom left of the invoice. Disregard the name in capital letters as this is the name of the colleague who processed the order.

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Invoice Address	Delivery Address		
Newcastle Upon Tyne Hospitals	Royal Victoria Infirmary	Delivery No.	DEL60061
Accounts Payable	Electronics & Medical Eng Dept	Invoice No.	IN123164
Finance Department	Queen Victoria Road	Delivery Date	18/09/12
Freeman Hospital, Freeman Rd	Newcastle Upon Tyne	Tax Point	18/09/12
Newcastle upon Tyne		Customer Ref.	W/56022
NE7 7DN	NE1 4LP	Account	00003800

PRODUCT CODE	DESCRIPTION	QUANTITY	UNIT PRICE	DISC.%	Total £	VAT
0110015	Oxygen sensor, R-15 S/N 857482 857488	2	36.00		72.00	1
0110023	Oxygen sensor, R-23V S/N V08506-07	2	36.00		72.00	1
0110022	Oxygen sensor, R-22MED S/N 926877-78	2	36.00		72.00	1
PPRD	Delivery - Royal Mail 1st Class Recorded Tracking number:AU249952458GB	1				1

Geoff McDonough
0191 282 1802
LAURAC

Weee registration number: WEE/DD1952ZQ
Vat Registration number : GB 287 3895 93
Terms: Nett 30 days from date of Invoice.
Terms and conditions: www.viamed.co.uk/terms.htm
Credit transfers to : Barclays Bank PLC, High Street, Skipton, N Yorks.
For credit of:
VIAMED Ltd, £ A/C No. 00906662 Bank Sort Code 20-78-42.
BIC/Swift Code: BARCGB22   IBAN: GB93BARC20784200906662

Claims: Please claim non delivery within 7 days of invoice,
shortages or damages within 3 days of receipt.
Claims after these times cannot be entertained
Title to goods does not pass until payment in full
has been received.

Goods Total	216.00
VAT	43.20
Invoice Total	259.20

15 Station Road, Cross Hills, Keighley
West Yorkshire, BD20 7DT, UK
Telephone : +44 (0) 1535 634542
Fax : +44 (0) 1535 635582
Email : info@viamed.co.uk

Writing the Letter

Log into GoldMine as per VM3COP20.72. From Goldmine, look up the company/contact; if unsure on how to do this, see VM3COP20.081.

When the contact has been located, click the 'Write' button from the toolbar at the top. Ensure you are working from your own username and find the correct letter template; this should be named with the correct product. If you do not have a letter template for the product, consult with the marketing department.
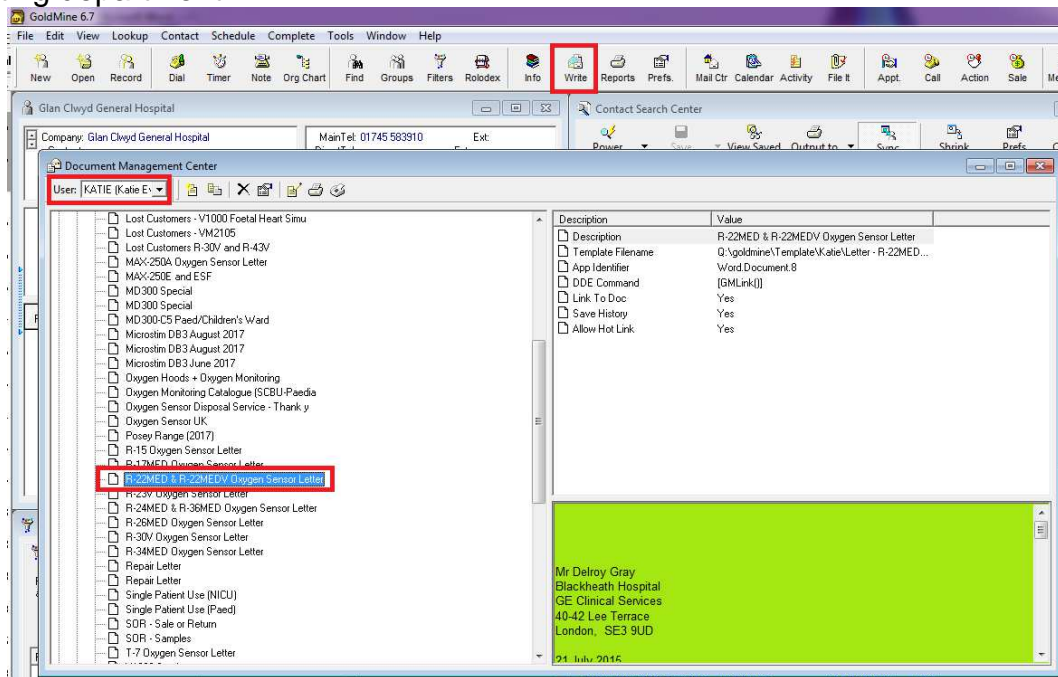
Double click on the letter to open it; the letter will then open in Microsoft Word, Libre Writer or OpenOffice Writer dependant on which program is installed on your computer.

GoldMine will fill out the address, date and greeting automatically; ensure these are correct.

Before	After
Department Manager Purchasing Glan Clwyd General Hospital Bodelwyddan Rhyl, Clwyd LL18 5UJ 03 October 2017 Dear Sir or Madam,	Department Manager Purchasing Department Glan Clwyd General Hospital Bodelwyddan Rhyl, Clwyd LL18 5UJ 03 October 2017 Dear Sir or Madam,

When the letter is complete, print to a colour printer on letter headed paper. Locate the leaflet as per the information received in the issue and where appropriate, print price lists from L Drive. If there is not a price list for the specific product, find the price list for the product range. E.g. there are no individual price lists for oxygen sensors, send the price list for the full oxygen sensor range. Alternatively, if asked to send a leaflet containing a number of products, use the corresponding price list.

See VM3COP20.73 for guidance on how to find price lists.

Completing the mailing

Collate the letter, leaflet and price list, where appropriate, and insert into an appropriately sized envelope. Use C5 envelopes where possible, but due to the size of some leaflets, C4 may be required.

The correspondence must now be logged in IntraStats. Tick the boxes of the products that you have included in your letter, or are included in the leaflet.

Going to Show **0110022** for **00000580** [No Information ▼]

Should show all stock customer whom Bought the product previously, but have not purchased in 2018

instructions
Tick boxes that you wish to Flag as Chased up with Customer, Select Customer Name you have chased up from the Pull down List, Enter Notes, Enter Status Field, Enter followup action required and Time delay for Follow UP

	Stock	Description	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Last Chased	Status	Contact
☐	0012101	Finger Pulse Oximeter Viamed VM 2101.															3			31/07/17	Sent Leaflet and Prices	Procurement
☐	0018700	SpO2 finger sensor P870RA.										10										
☐	0021013	Sensor wraps box of 12.								3	4	6		12	5					10/04/17	Sent Leaflet and Prices	Catalogue Buyer
☑	0110015	Oxygen sensor R-15	14	1	1	12		2			2	4		2	3	5	4	2	2	14/08/15	Sent Leaflet and Prices	Sue Lewis
☑	0110017	Oxygen sensor R-17MED	1	1	2	2	1	1	4	2	3	4	5	3	1	4	4	4	4	20/06/16	Sent Leaflet	Carla Roberts
☑	0110022	Oxygen sensor R-22MED													3					20/06/16	Sent Leaflet	Carla Roberts
☑	0110023	Oxygen sensor R-23V						2	2		2	4	2	2		3	3			20/06/16	Sent Leaflet	Carla Roberts
☑	0110024	Oxygen sensor R-24MED	1		2		2		2	4	4			2	3	3	3			14/08/15	Sent Leaflet and Prices	Sue Lewis
☑	0110030	Oxygen sensor R-30MED						4	0											20/06/16	Sent Leaflet	Carla Roberts
☑	0110049	Oxygen sensor R-49V														1	3			14/08/15	Sent Leaflet and Prices	Sue Lewis
☑	0110410	Oxygen sensor MAX-10							4											20/06/16	Sent Leaflet	Carla Roberts
☑	0110525	Oxygen sensor KE-25 (std. with flange).	1	1		2	2	1	2											20/06/16	Sent Leaflet	Carla Roberts
☐	0111235	Oxygen monitor with alarms - MX300-l.							4			1		1	3							
☐	0120100	'T' adapter. 22mm I.D. - 22mm O.D.						8	8	10	4	40	6			20	40					
☐	0121182	'V' mount pole clamp - large													1			1				
☐	0121201	'V' mount pole clamp.					1	1	1					1								
☐	0121210	Back panel for AX300 & MX300															1					
☐	0121211	Battery door for AX300 & MX300							3		3											
☐	0121212	Battery door lock for AX300 & MX300							5	3			3									
☐	0121213	Mounting plate for AX300 & MX300							2				1									
☐	0121217	MX300 Case Upgrade Kit Rev.1 to Rev.2																2				
☐	0131200	Oxygen Sensor Cable Black.					1		1	2												
☐	0131201	Oxygen Sensor Cable Black.							2		6											

From the drop down menu beneath, select the contact name – if this is not included you must add them to the contact management, click the 'Add a New Contact' button and proceed as per VM3COP20.081.

From the second drop down menu, select 'Sent Leaflet' or 'Sent Leaflet and Prices' as appropriate. Add any additional notes where necessary, to the box below.

Tick the box of the leaflet that has been sent; the easiest way to find the correct box is to use Ctrl+F on your keyboard and type the name of the product. E.g. 0021013 on its own is MID355, but with EyeMax included, it is MID380.

If you are unsure of the MID, navigate to the 'lookup' tab on IntraStats and click on the 'Stock Details/ Quantities' field. Scan the barcode on the reverse of the leaflet with a barcode scanner.

The MID number will be displayed in the 'Stock Reference' column.

Note: *Whichever mailing you select will stay ticked for the rest of the mailings you complete and will still have a tick against the last one you sent; make sure that there aren't any incorrect leaflets/catalogues ticked.*

When complete, click the 'Submit' button at the bottom of the page.

This will take you back to the original lost customers list and the line will now reflect that your mailing has been sent.

Account	Name	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Last Chased	Status
00000020	Grampian University Hospitals					10	12			10				6					16/03/17	Sent Leaflet and Prices
00000069	Leeds Beckett University														1	1			19/12/17	Sent Leaflet and Prices
00000078	NHS Gloucestershire CCG															2			24/08/15	Sent Leaflet and Prices