VM3COP20.081 – Office - Adding or Amending Contacts in GoldMine and IntraStats CRM
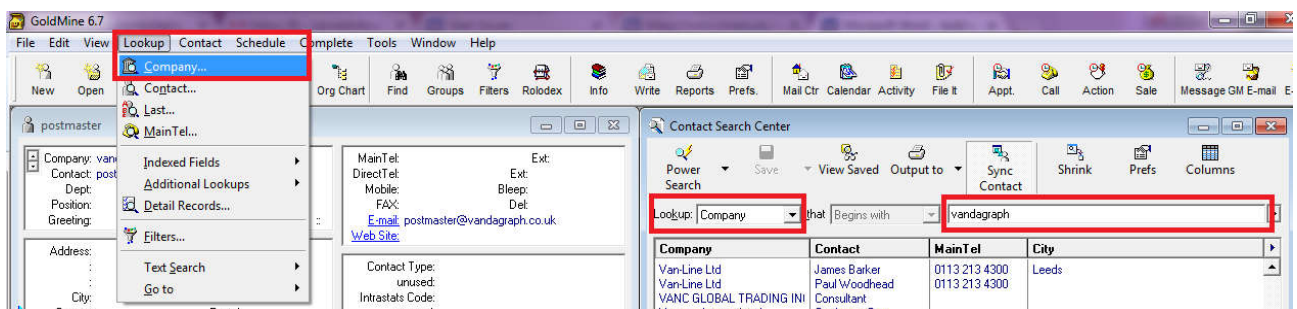
GoldMine

As per COP VM3COP27.08 Call log – which states "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."

Login to GoldMine.

Search for company

First, click 'LookUp' and click on 'Company'. Type the hospital/company name in the search field.

If the company is listed but contact is not, search for Contact

If the company has already been added as a contact but the person you require is not in the list, amend the 'Lookup' field to '**Contact (Primary)**' and enter their name in the search field.

If you still cannot find them, you can try searching by last name, email address or any other details you may have by changing the '**Lookup**' field and entering the detail in the search field. This is completed to prevent duplicate entries.
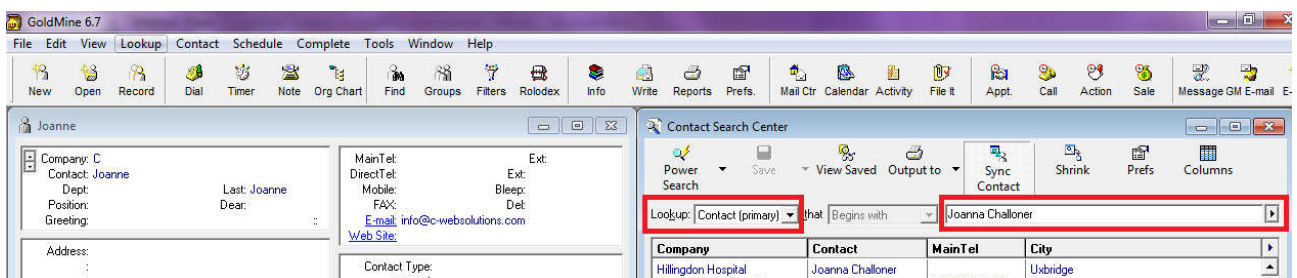
If the contact cannot be found in GoldMine, search for the company again. Click on a record of the correct company, then click 'New' and a new window will appear. Ensure the box entitled, '**Create duplicate record**' is ticked, this will fill in the address, website and main telephone/fax number for you as per the contact you were previously viewing.
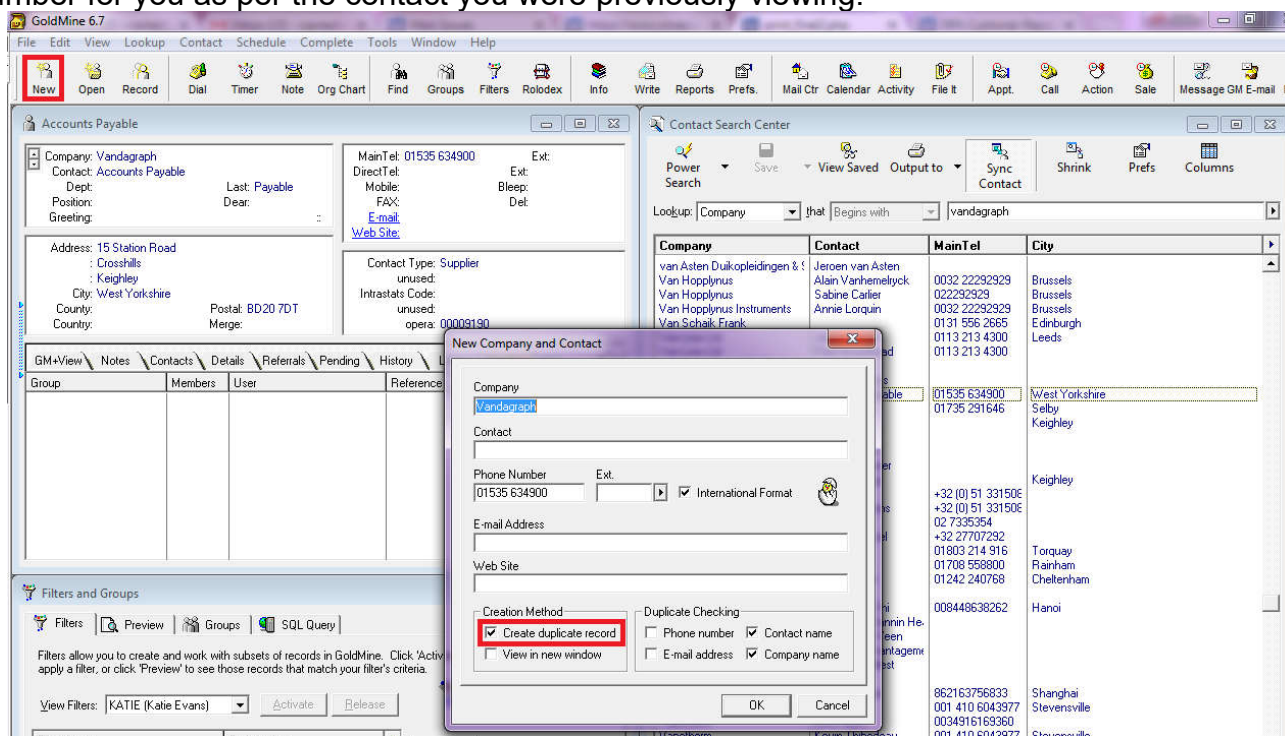
If the Company is not listed

If the company has not been added as a contact, click 'New' and a new window will appear. **Ensure the box entitled, 'Create duplicate record' is NOT ticked**.

Enter all known information in this window. When complete, click 'OK'. This will add the contact to the list.

From the new information.   contact record, fill in all known

Minimum Information required
Try not to leave blank fields, the following fields must be filled in for the system to work efficiently: 'Contact', 'Department', 'Dear', and 'Greeting'.

- 'Contact': First name and surname – if only the surname is available please only

  include this. This section should not include any titles (i.e. Mr, Mrs, Sister, Dr). E.g. Joe Bloggs.

- 'Dear': The contact's title, i.e. Mr, Mrs, Ms, Sister, Dr. Do not use Miss, use Ms instead. E.g. Mr.

- 'Position': If the position is Sister or Matron and the 'Dear' field is the same, please do not include a position as this will cause duplications when creating mailings – this does not apply if the position is Senior Sister. E.g. Senior Technician.

- 'Greeting': This should be identical to the Dear field plus the surname of the contact, no first names should be included – initials are allowed but only if title is not known. E.g. Mr Bloggs.

- When inputting the 'Postcode', the 'City' and 'County' fields should automatically be inserted – please check this information is correct and amend as appropriate.

Note: *Counties should not be truncated, for example West Yorks should be West Yorkshire. If the Postcode has not been inputted into Goldmine previously a pop up box will appear – please complete the 'City' field accurately as this will be used in the future when the same postcode is used.*

Include as much additional information as possible; some information can be gained from looking at email footers and orders.

- Telephone – 'MainTel' must only be the main company/hospital number, if a department or direct dial is known, please include this in the 'DirectTel' field.

- Fax numbers - be careful when copying records, the fax number needs to be checked and only entered if it is known to be the departments fax number.

- Opera account numbers – When copying records please check you are using the correct account number, some hospitals can have a multiple accounts.
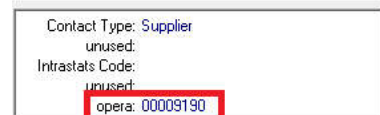
Example data below - this has been correctly inputted in to a GoldMine record.

Sister Catrin Hollings, Senior Sister, Paediatrics Department

Data tab

When creating a new record please check the 'Data' tab. To access the 'Data' tab, scroll right through the tab menu and click on 'Data'.

Ensure that the following headings are completed correctly:

- ‘Mail Shot Dept’
- ‘Mail Shot Position’
- ‘Mail Shot’ – this is most important when a customer specifically asks not to be included in mailings.
- ‘Viamed Calendar’ - If there is no one else in their department and you believe a Viamed calendar would be beneficial to the customer/department please enter ‘Y’ or ‘Yes’.

If you have opted to send the contact a Viamed calendar, it must be noted as an action, which will appear in the ‘History’ tab.

To do this, click on the ‘Complete’ tab and select ‘Next Action…’
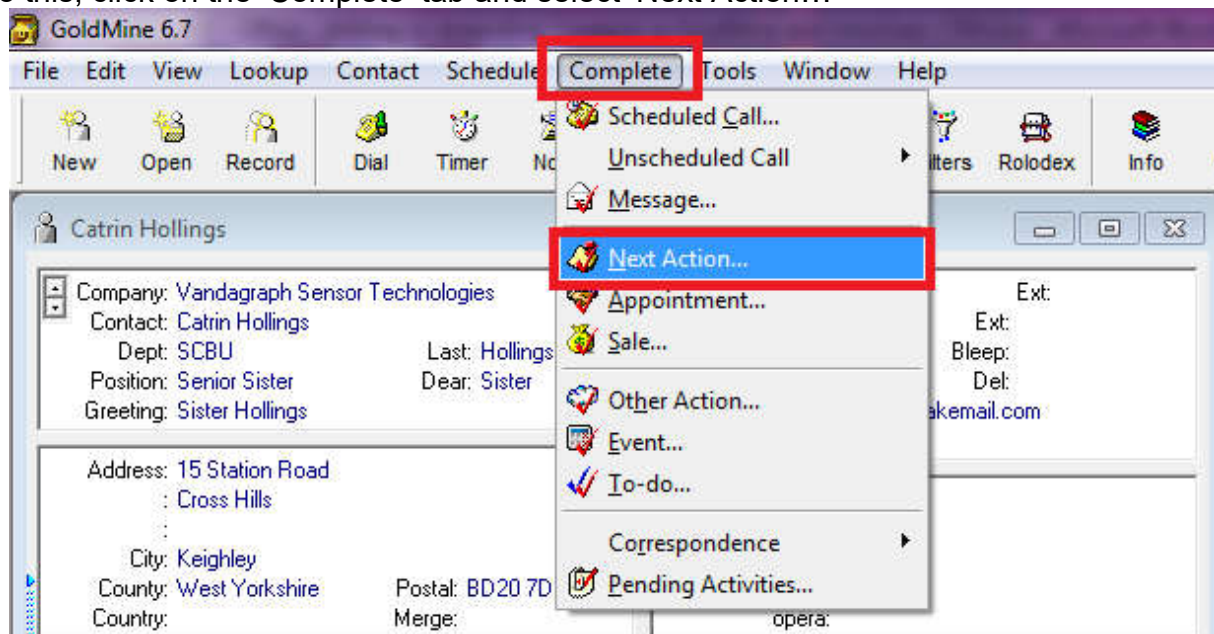
A dialogue box will open, make a note that you have included them in the Viamed calendar group and click the ‘OK’ button.

![icon] GoldMine – Amend Contact

To amend a contact, look up the contact as per page 1, click on the correct contact, then click on the fields and enter the correct/new details.

IntraStats

Login to Intrastats.

Search for company

From the 'Lookup' tab, type the company name in the 'Contacts' field.

If the company is already listed

If the company is already listed, click on the company name. If the company has not been added already, see page 9.

If the contact name is not in the green/blue list, click the 'Add Contact Name' button.

Complete all known fields.

Example - This contact is a buyer for the company, a 'Mailing Department' has been added and the 'Send Pricing Updates' box has been ticked. Only add a 'Direct Phone' number if it is different to the main company number as seen in the company details at the top. Be as thorough as possible; when completed, click the 'Add Contact' button.

Company not listed: add company

If the company wasn't listed when you searched for them, click the 'Add new Company / Hospital' button.

Complete all of the fields, if any details are not known check any paperwork or their website. The 'Opera Account' field is vital for linking to orders; enter the Opera 0 account number. Every field here is important, be as thorough as possible. When completed, click, 'ADD' and proceed to enter the contacts as per page 8.

IntraStats – Amend Contact

When new information is discovered about a contact, the contact records needs to be updated. Search for the company name as per page 7 and locate the contact name on the list. Click on their name.

From the 'Contact Options' list, click on the 'Edit Details' button.

Enter any new information and click the, 'Submit' button at the very bottom of the page.

Merging company records

When searching for a company name as per page 7 and you notice that there are duplicate records, you can request that they are merged. E.g. when more than one record has the same account number and company name or when there is a separate account listed with a website (this usually occurs due to an error when inputting contact details following a distributor search).

Note: *Do not request the merging of contact records for 0 and I accounts.*

To request a merge, tick the boxes next to all of the company records that are definitely the same customer, then click them 'Request Merge Companys' button.

Merging contacts within a company record

When there is more than one contact with the same details within the same company record, they can be merged.

From the company record, click 'Merge Contacts'.

A list will be displayed containing all the contacts within the company record. Tick the boxes on the left of the contacts to be merged. Click the 'Merge Selected Contacts' button at the bottom of the page.

A list of drop-down menus will appear, select the correct options, then click the, 'Next' button.

You will then be directed to the 'Edit Contact' page where you can enter any further known details.

		Example
Send Issue to Office	☐	
Send Update to Viamed	Emily Hanson ▼	
Contact	Jonathan Connor	Derek Lamb
Title		Mr Lamb
Position		Manager
Department		Information Systems
Mailing Department	▼	
Primary Email +		derek@viamed.co.uk
Direct Phone	01535 634542	01535 643542
Mobile Phone		0770 12345
Alt Direct Dial		0770 12345
Extension		0770 12345
Alt Extension		0770 12345
Bleep		0770 12345
Fax		01535 635582
First Contact		
Notes		
Contact Methods	☐ Email ☐ Mailshot ☐ Phone	
Global Responsibility	▼	
Hide Contact	☐ ▼	

Enter the details, then scroll to the bottom of the page and click the 'Submit' button.

Emergency Services Pulse Oximetry	▼
Non Product Responsibilitys	
ISO Standards	☐
Account Statements	☐
Purchase Orders	☐
Send Pricing Updates	☐
Email Invoices	☐
Email Invoices Via Goldmine	☐
Send Remits to	☐
Email Price Changes	☐
Submit	