

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



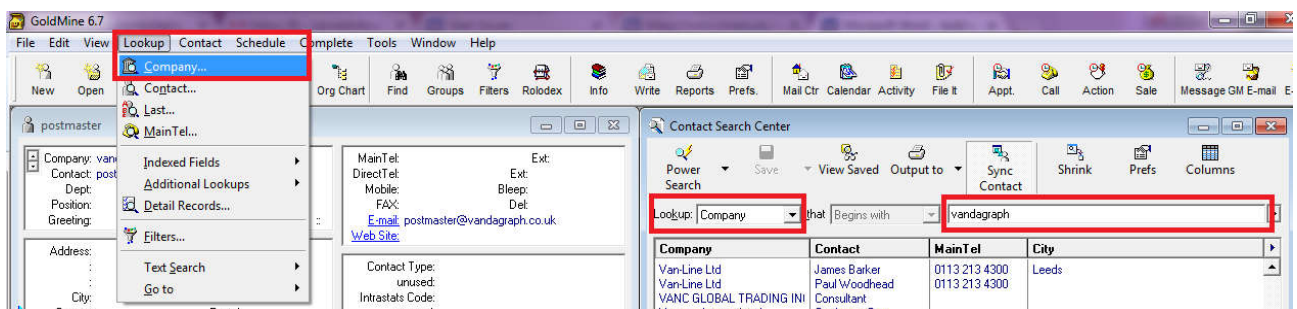
GoldMine

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

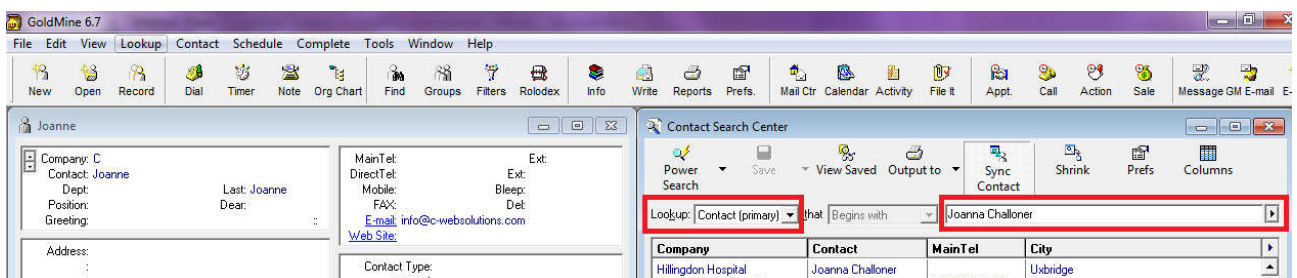
First, click 'LookUp' and click on 'Company'. Type the hospital/company name in the search field.



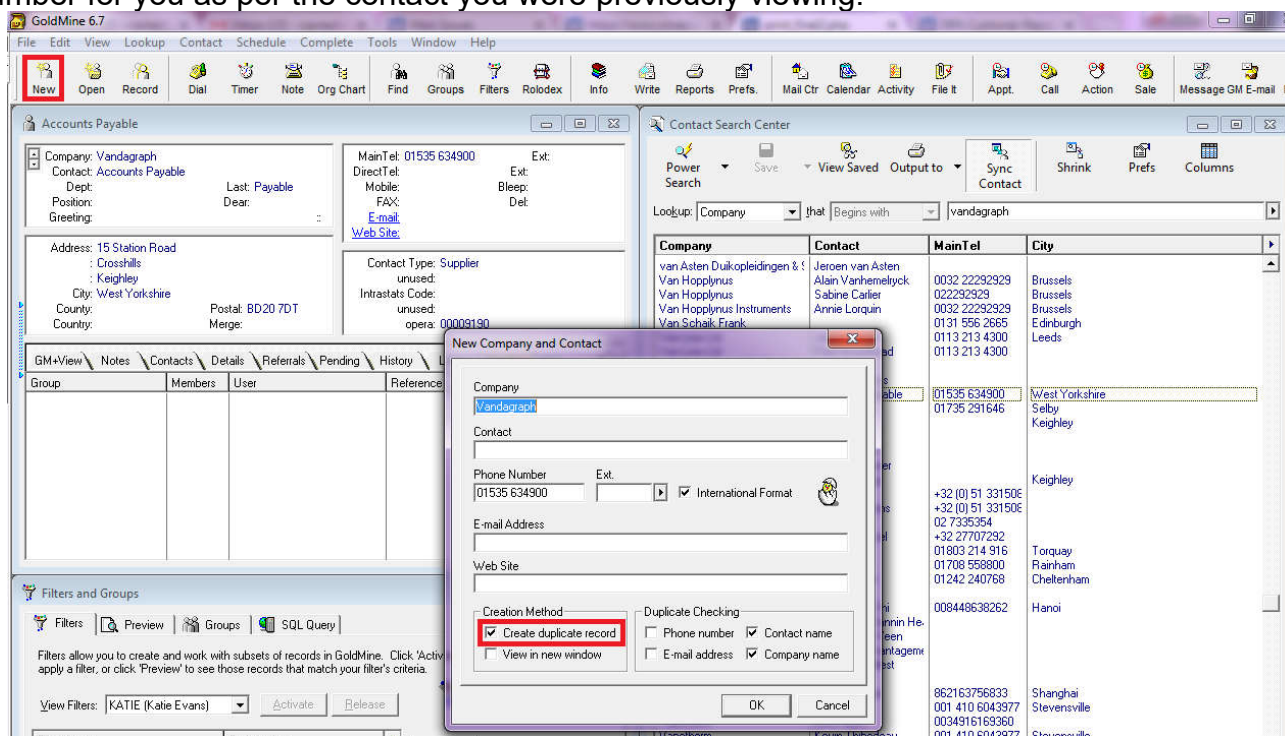
If the company is listed but contact is not, search for Contact

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'.

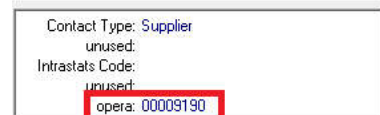
- 'Contact': First name and surname – if only the surname is available please only include this. This section should not include any titles (i.e. Mr, Mrs, Sister, Dr). E.g. Joe Bloggs.
- 'Dear': The contact's title, i.e. Mr, Mrs, Ms, Sister, Dr. Do not use Miss, use Ms instead. E.g. Mr.
- 'Position': 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

Catrin Hollings

Company: Vandagraph Sensor Technologies
 Contact: Catrin Hollings
 Dept: SCBU Last: Hollings
 Position: Senior Sister Dear: Sister
 Greeting: Sister Hollings

Address: 15 Station Road
 : Cross Hills
 :
 City: Keighley
 County: West Yorkshire Postal: BD20 7DT
 Country: Merge:

MainTel: 01535 634900 Ext:
 DirectTel: Ext:
 Mobile: Bleep:
 FAX: 01535 635582 Del:
 E-mail: catrin.hollings@fakemail.com
 Web Site: http://www.vandagraphst.com/

Contact Type: unused:
 Intrastats Code: unused:
 opera: 00009191

Summary \ **Fields** \ GM+View \ Notes \ Contacts \ Details \ Referrals \ Pending \ History

--- End User Prospect/Customer Screen ---

Hot Button: Special: Territory:
 Dec Maker: Level: Objective:
 Mail List: Open: File Number:

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'.

Catrin Hollings

Company: Vandagraph Sensor Technologies
 Contact: Catrin Hollings
 Dept: Paediatrics Department Last: Hollings
 Position: Senior Sister Dear: Sister
 Greeting: Sister Hollings

Address: 15 Station Road
 : Cross Hills
 :
 City: Keighley
 County: West Yorkshire Postal: BD20 7DT
 Country: Merge:

MainTel: Ext:
 DirectTel: Ext:
 Mobile: Bleep:
 FAX: Del:
 E-mail: catrin.hollings@fakemail.com
 Web Site:

Contact Type: unused:
 Intrastats Code: unused:
 opera:

Referrals \ Pending \ History \ Links \ Members \ Tracks \ Opptys \ Projects \ **data**

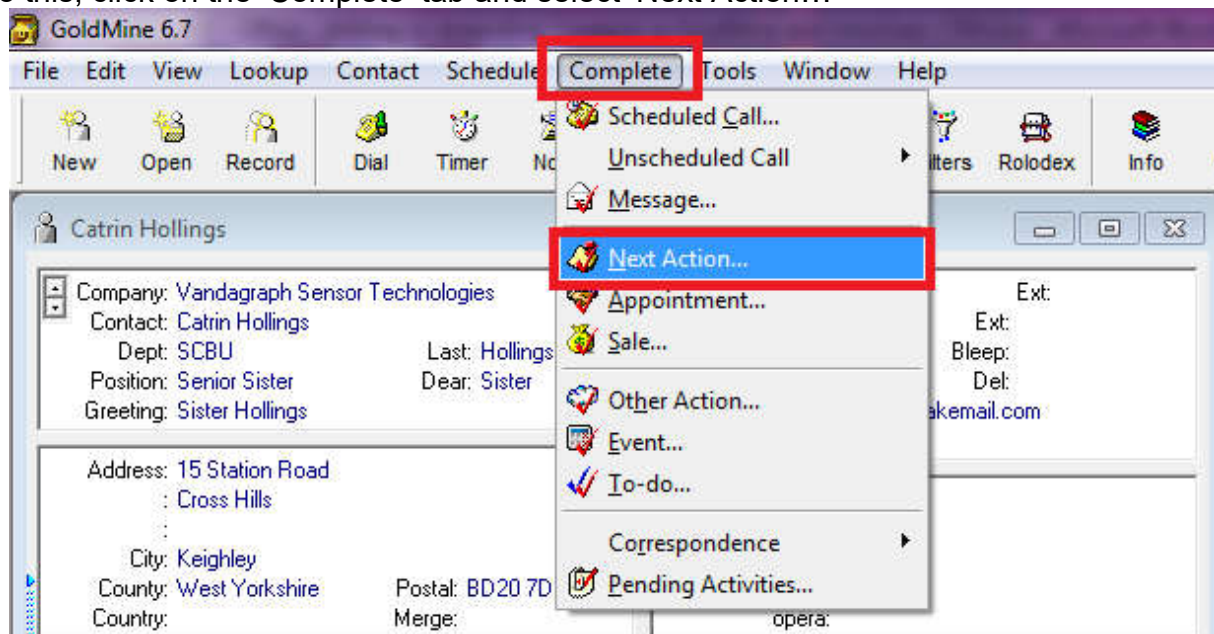
NHS Regions:
 Health Auth:
 NHS / HSS Trust:
 Primary Care:
 NHS Ambulance:
 Mail Shot Dept.:
 Mail Shot Posit:
 Private Group:
 Mail Shot:
 Viamed Calander:
 Journey Code:

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.

Complete a Next Action

Contact: Catrin Hollings Activity: Action User: KATIE (Katie Evans) ☐ Private

Reference: Opportunity / Project: (none)

Code: Result: Date: 23/10/2017 Time: 16:25 Duration: 00:00:00 Success: Successful

Notes:

B **I** **U** included in Viamed calendar group as per customer request.

☐ Schedule a Follow-up: Call

OK Cancel



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.

GoldMine 6.7

File Edit View Lookup Contact Schedule Complete Tools Window Help

New Open Record Dial Timer Note Org Chart Find Groups Filters Rolodex Info Write Reports Prefs. Mail Ctr Calendar Activity File It Appt. Call Action Sale Message GM E-mail E

Catrin Hollings

Company: Vandagraph Sensor Technologies

Dept: SCBU Last: Hollings

Position: Senior Sister Dear: Sister

Greeting: Sister Hollings

Address: 15 Station Road
: Cross Hills

City: Keighley

County: West Yorkshire Postal: BD20 7DT

Country:

MainTel: Ext:

DirectTel: Ext:

Mobile: Bleep:

FAX: Del:

E-mail: catrin.hollings@fakemail.com

Web Site:

Contact Type: unused:

Intrastats Code: unused:

opera:

Referrals Pending History Links Members Tracks Opptys Projects data

NHS Regions:

Health Auth:

NHS / HSS Trust:

Primary Care:

NHS Ambulance:

Mail Shot Dept:

Mail Shot Post:

Private Group:

Mail Shot:

Viamed Calendar:

Journey Code:

Contact Search Center

Power Search Save View Saved Output to Sync Contact Shrink Prefs Columns

Lookup: Company that Begins with Vandagraph Sensor Technologies

Company	Contact	MainTel	City
van Asten Duikopleidingen & S	Jeroen van Asten	0032 22292929	Brussels
Van Hopplynus	Alain Vanhemelyck	022292929	Brussels
Van Hopplynus	Sabine Carlier	0032 22292929	Brussels
Van Hopplynus Instruments	Annie Lorquin	0131 556 2655	Edinburgh
Van Schalk Frank	James Barker	0113 213 4300	Leeds
Van Line Ltd	Paul Woodhead	0113 213 4300	
VANC GLOBAL TRADING INI	Consultant		
Vancres International	Guniz van Cres	01535 634900	West Yorkshire
Vandagraph	Accounts Payable	01535 634900	Keighley
Vandagraph	Derek Lamb	01735 291646	Selby
Vandagraph	James Lamb		Keighley
Vandagraph	Jean Lamb		
Vandagraph	postmaster		
Vandagraph	Ryan Swaine		
Vandagraph	Chris Meddler		
Vandagraph Sensor Technol	Catrin Hollings	+32 (0) 51 331506	Keighley
Vanderabeele nv IVE Impo	Danny Simoens	+32 (0) 51 331506	
Vandermeulen		02 7336354	
Vanderveken Sa	Laurent Dassel	+32 27707292	
Vanehill Specialist Care Home		01803 214 916	Torquay

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.

Hospital / Organisation Names							
VANDAGRAPH	Contacts #1	Mentor Diver Training					
ALTITUDE	Contacts #4	The Altitude Centre	London	EC2V 5AF	0163 177 0693	Customer Distributor	Extra Search
00009190	Contacts #6	Vandagraph				Customer	

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

CID 3656

Vandagraph Ltd.

15 Station Road
CrossHills
Keighley
West Yorkshire
BD20 7DT
United Kingdom
www.vandagraph.co.uk
Tel: 01535 634900
Opera: 00009190
Type: Company Distributor
Invoice Address/Account : 10009190
Account Type : Credit Credit Credit

Add Contact

Company Options

Contact	Department	Position	Direct Phone	Email			
No Name					Y		?
Jean Lamb					Y		?
John Lamb				john.lamb@vandagraph.co.uk	Y	Y	
Ryan					Y		?

History - Switch to Condensed

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.

Vandagraph Ltd. **Add Contact**

15 Station Road
 CrossHills
 Keighley
 West Yorkshire
 BD20 7DT
 United Kingdom
www.vandagraph.co.uk
 Tel: 01535 634900
 Opera: 00009190
 Type: Company Distributor
 Invoice Address/Account : **10009190**
 Account Type : Credit Credit Credit

Add New Contact to Vandagraph Ltd

Send Issue to Office	<input type="checkbox"/> Emily Hanson	
Contact	Derek Lamb	Derek Lamb
Title	Mr Lamb	Mr Lamb
Position	Senior Buyer	Manager
Department	Procurement & Supplies	Information Systems
Mailing Department	Supplies Department	
Contact Methods	<input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Mailshot <input checked="" type="checkbox"/> Phone	
Global Responsibility	Key Buyer	
Email	derek.lamb@vandagraph.co.uk	derek@viamed.co.uk
Direct Phone		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	<input type="checkbox"/>	
Responsible for ISO	<input type="checkbox"/>	
Account Statements	<input type="checkbox"/>	
Send Pricing Updates	<input checked="" type="checkbox"/>	
Email Invoices	<input type="checkbox"/>	
Email Single Invoice Per EMail if applicable	<input type="checkbox"/>	
Email Invoices Via Goldmine	<input type="checkbox"/>	
Purchase Orders	<input type="checkbox"/>	
Send Remits	<input type="checkbox"/>	
Email Price Changes	<input type="checkbox"/>	
Add Contact		

Company not listed: add company

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

Animus UK Ltd

**** Add New Company / Hospital ****

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.

Opera Account	needed	Opera Account	
Company/Hospital		VIAMED	
Address 1		15 Station Road	
Address 2		Crosshills	
Address 3		Keighley	
City		Bradford	
County		West Yorkshire	
Postcode		BD20 7DT	
Country		United Kingdom	
Hosp/Company Phone		+44 1535 634542	
Company Registration Number			
Vat Number			
Web Site			
Google Identifier			To locate on GMaps
Type	Ambulance End User		
Credit Account Type	Unknown		
Email Only Invoices	<input type="checkbox"/>		
Email Order Confirmations Basic	<input type="checkbox"/>		
Email Order Confirmations Full	<input type="checkbox"/>		
VAT Exempt	<input type="checkbox"/>		
Host Company	Unknown		
First Contact Code			first contact code
ADD			

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.

Contact	Department	Position	Direct Phone	Email		
No Name					Y	?
Jean Lamb					Y	?
John Lamb				john.lamb@vandagraph.co.uk	Y	Y
Ryan					Y	?

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 1 accounts.

<input checked="" type="checkbox"/>	00009190	Contacts #4	Vandagraph Ltd
<input type="checkbox"/>	10009190	Contacts #2	Vandagraph Ltd

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 Companies' 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'.

The screenshot shows a company record for 'Viamed Ltd.' with address details. Below the company information is a 'Merge Contacts' button. A table lists contacts for merging:

Contact	Department	Position	Direct Phone	Email	Y	?
Derek Lamb				derek.lamb@viamed.co.uk		
Jonathan Conner			0153 563 4542		Y	?
Jonathan Connor			0153 563 4542		Y	?

Below the table is a 'Historv - Switch to Condensed' link.

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.

The screenshot shows the same contact list as above, but with checkboxes on the left. The 'Jonathan Conner' and 'Jonathan Connor' rows are selected. A 'Merge Selected Contacts' button is at the bottom.

Contact	Department	Position	Direct Phone	Email
<input type="checkbox"/> Derek Lamb				derek.lamb@viamed.co.uk
<input checked="" type="checkbox"/> Jonathan Conner			0153 563 4542	
<input checked="" type="checkbox"/> Jonathan Connor			0153 563 4542	

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

The screenshot shows a form titled 'Merge Selected' with various fields and drop-down menus. The 'Contact Name' field is set to 'Jonathan Connor'. The 'Direct Number' field is set to '01535 634642'. A 'Next' button is at the bottom right.

Contact Name	Jonathan Connor ▼
Title	▼
Position	▼
Department	▼
Mailing Department	▼
Email Address	▼
Direct Number	01535 634642 ▼
Fax Number	▼
Notes	▼
Contact Allowed by Email	<input type="checkbox"/>
Contact Allowed by Phone	<input type="checkbox"/>
Contact Allowed by Post	<input type="checkbox"/>
Send Account Statements	<input type="checkbox"/>
Responsible for ISO Standardds	<input type="checkbox"/>
Send Pricing Updates	<input type="checkbox"/>
Email Invoices	<input type="checkbox"/>
<input type="button" value="Next"/>	

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

Send Issue to Office	<input type="checkbox"/>		
Send Update to Viamed	<input type="checkbox"/>	Emily Hanson	
Contact	<input type="checkbox"/>	Jonathan Connor	
Title	<input type="checkbox"/>		
Position	<input type="checkbox"/>		
Department	<input type="checkbox"/>		
Mailing Department	<input type="checkbox"/>		
Primary Email +	<input type="checkbox"/>		
Direct Phone	<input type="checkbox"/>	01535 634542	
Mobile Phone	<input type="checkbox"/>		
Alt Direct Dial	<input type="checkbox"/>		
Extension	<input type="checkbox"/>		
Alt Extension	<input type="checkbox"/>		
Bleep	<input type="checkbox"/>		
Fax	<input type="checkbox"/>		
First Contact	<input type="checkbox"/>		
Notes	<input type="checkbox"/>		
Contact Methods	<input type="checkbox"/>	<input type="checkbox"/> Email <input type="checkbox"/> Mailshot <input type="checkbox"/> Phone	
Global Responsibility	<input type="checkbox"/>		
Hide Contact	<input type="checkbox"/>		

Example

Derek Lamb

Mr Lamb

Manager

Information Systems

derek@viamed.co.uk

01535 643542

0770 12345

0770 12345

0770 12345

0770 12345

0770 12345

01535 635582

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

Emergency Services Pulse Oximetry	<input type="checkbox"/>
Non Product Responsibility	<input type="checkbox"/>
ISO Standards	<input type="checkbox"/>
Account Statements	<input type="checkbox"/>
Purchase Orders	<input type="checkbox"/>
Send Pricing Updates	<input type="checkbox"/>
Email Invoices	<input type="checkbox"/>
Email Invoices Via Goldmine	<input type="checkbox"/>
Send Remits to	<input type="checkbox"/>
Email Price Changes	<input type="checkbox"/>
Submit	