VM3.COP20.56 Call Log

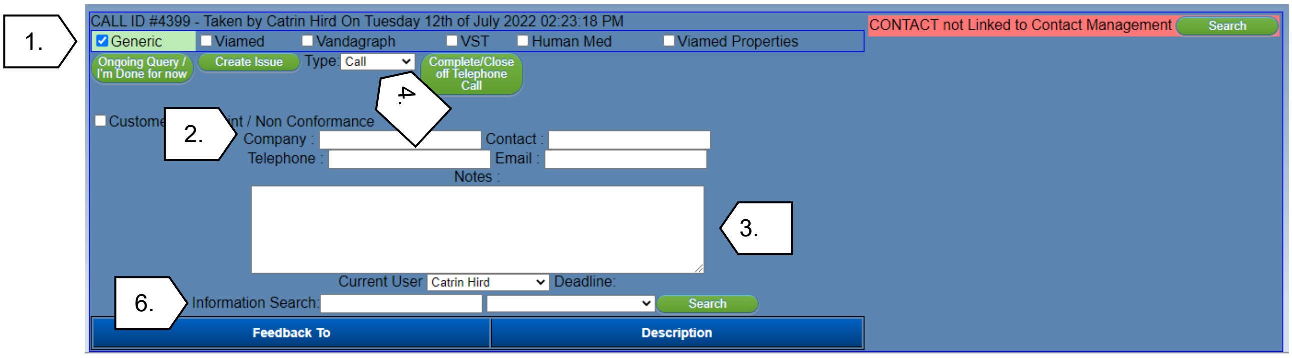
When you receive a call or email which requires you to provide information or answer a query, these must be logged using the Call Log feature in Intrastats.

The icon looks like this 

and may be either in the main buttons at the top of the screen or in the extra small icons to the left of your name in the top banner of Intrastats.

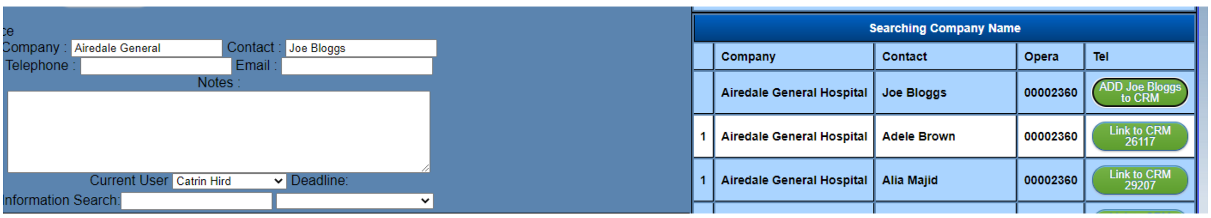
Alternatively, find the contact is the CRM from the top right menu. Open the accounts page and click the telephone next to the contact.

Once in the call log screen please click "Take New Call" which will open this screen:

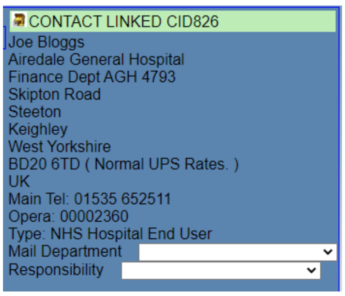


Working from top left downwards please complete the information:

1. Using the tick boxes, select which Viamed Group company the call/email is for.
2. Search for the company, this will bring up a list of contacts assigned to that company/hospital on the right hand side.
   Either click "Link to CRM…" against the contact name you are talking to/emailing or type of the name of the caller/recipient in the "Contact" box and add a new contact by clicking the button saying "ADD **** ****** to CRM".
   Please make sure this is typed in Title Case, for example Joe Bloggs, not capitals.

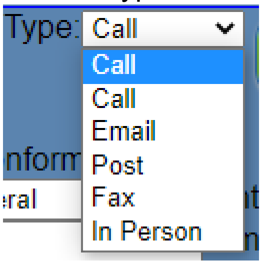


This will link the call to that contact record…

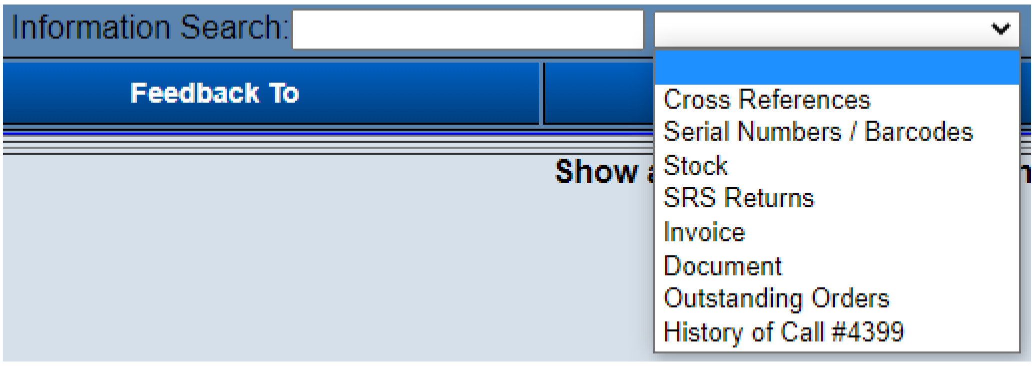


3. Any contact information which is not included, please add to the relevant box i.e. telephone number/email address.

4. Select “Type” from the dropdown menu…

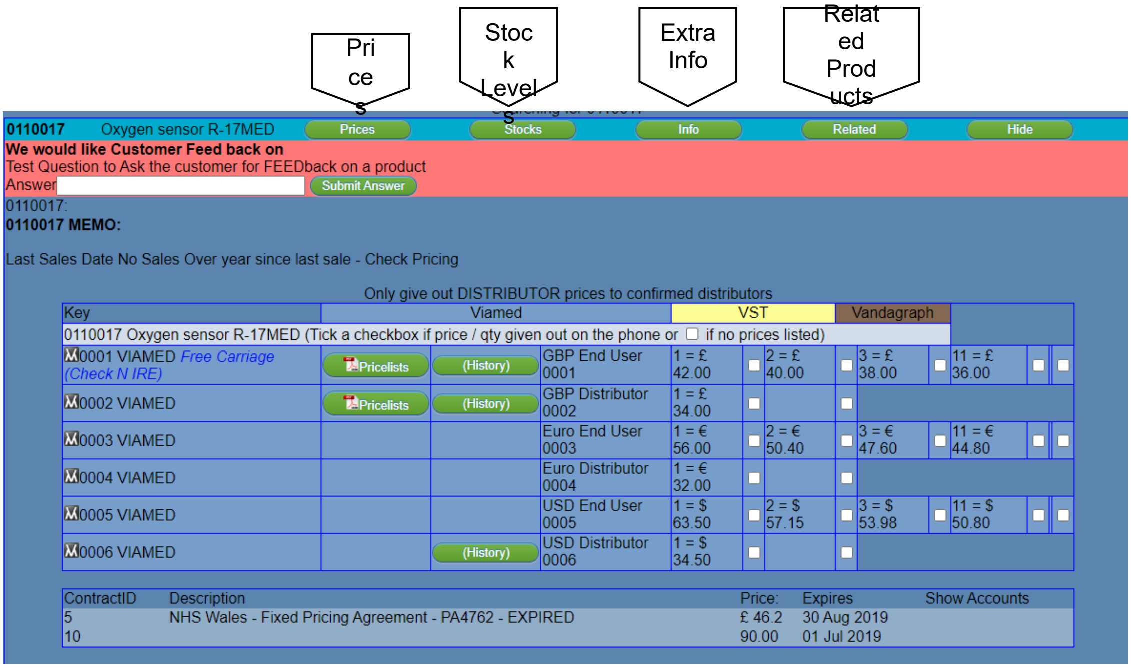


5. To retrieve information from the system, use the “Information Search” text box and drop down. This is very similar to the menu found on the top right of all Intrastats pages.



For example, a customer has called asking for a price of the R-17MED 0110017…

This will bring up any stock memos assigned to that part number. Using the green buttons on the part number/description line you can retrieve different information:



Note: When providing pricing, please make sure you click the white square box to the right of the price you have provided. This is then logged in the system to allow marketing/sales to determine if mailings are working or if we have an increase in enquiries for certain products at different times of year.

6. Once you have provided this information to the customer, please add notes in the notes box. Do not copy and paste emails but give a shorten overview.
   For example, “Provided 1, 2, 3-10 and 11+ pricing for R-17MED 0110017 and attached copy of Oxygen Monitoring Catalogue and GBP End User Price List to email.”

7. Once all information has been provided or once you have done all you can, then you have a choice of what to then do with the call/email log…

Click this when you want to keep the call in your call log as you still have something you need to do. This will close the screen but keep it as an “Outstanding Call”
If you would like to send it to another staff member you will need to change the “Current User” dropdown which is underneath the “Notes” text box then click this button. It will then show in their active calls and highlight in red at the top of their screen, like this:

Should a customer be placing a telephone order, use this button. This will convert this to an issue and allow you to add to your open issues. You will then be able to print to PDF and use as your evidence when adding a new sales order.

This button should only be clicked when the call/email is complete and nothing else is required to be done.

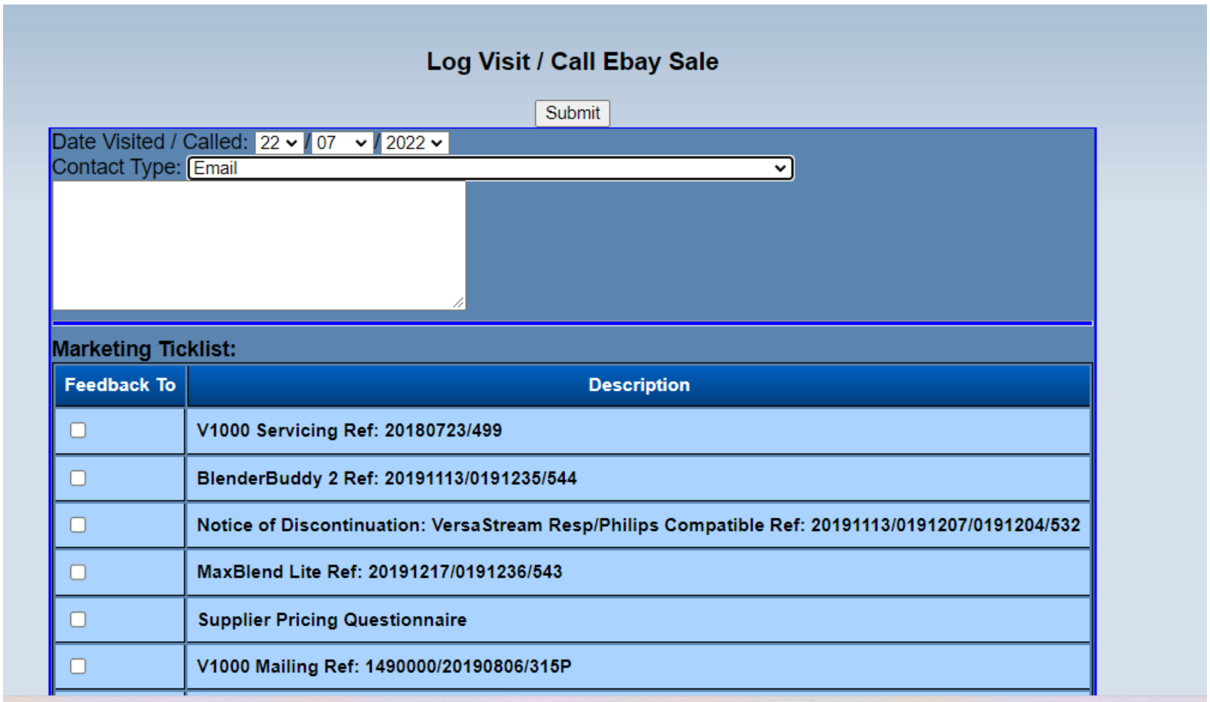
For example, you have received a call asking for pricing, you have provided this over the phone, added information to the notes section and ticked the relevant prices you have provided. Clicking this button will close the call, remove from your active calls and log it again the relevant linked CRM contact.

8. Should you need to revisit calls, click the “Call Log” icon  and it will open your “Call Log” screen.

This shows your “Outstanding Calls”, “Recent Calls” and “Global List of Outstanding Calls”

Email Log

Alternatively, Search the CRM, find the company and contact then click  then log the email using the following screen:



Please do not copy and paste full emails, just include a brief synopsis of the request and the response.