


## 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:

1. CALL ID #4399 - Taken by Catrin Hird On Tuesday 12th of July 2022 02:23:18 PM

2. ☒ Generic ☐ Viamed ☐ Vandagraph ☐ VST ☐ Human Med ☐ Viamed Properties

3.

4.

5.

6.

Company:  Contact:

Telephone:  Email:

Notes:

Current User: Catrin Hird Deadline:

Information Search:

Working from top left downwards please complete the information:

- Using the tick boxes, select which Viamed Group company the call/email is for.
- 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.

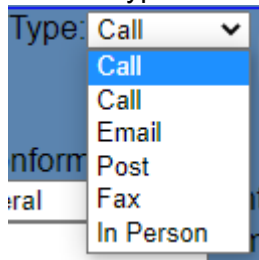
Searching Company Name			
Company	Contact	Opera	Tel
Airedale General Hospital	Joe Bloggs	00002360	<input type="button" value="ADD Joe Bloggs to CRM"/>
1 Airedale General Hospital	Adele Brown	00002360	<input type="button" value="Link to CRM 26117"/>
1 Airedale General Hospital	Alia Majid	00002360	<input type="button" value="Link to CRM 29207"/>

This will link the call to that contact record...

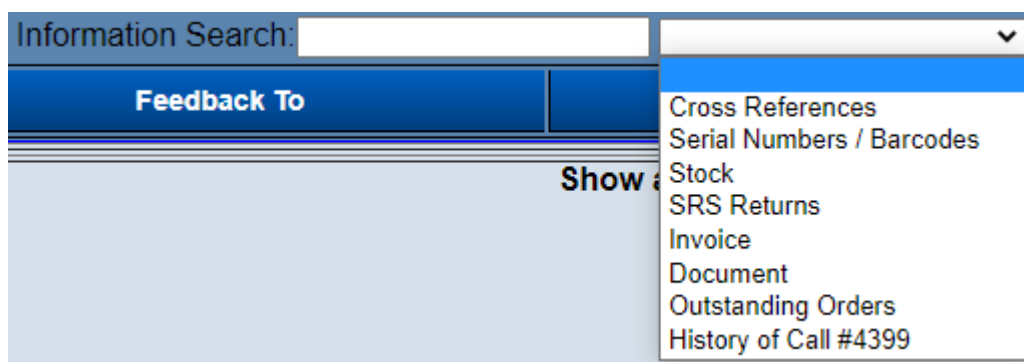
**CONTACT LINKED CID826**

Joe Bloggs  
Airedale General Hospital  
Finance Dept AGH 4793  
Skipton Road  
Steeton  
Keighley  
West Yorkshire  
BD20 6TD ( Normal UPS Rates. )  
UK  
Main Tel: 01535 652511  
Opera: 00002360  
Type: NHS Hospital End User  
Mail Department:   
Responsibility:

- Any contact information which is not included, please add to the relevant box i.e. telephone number/email address.
- Select "Type" from the dropdown menu...



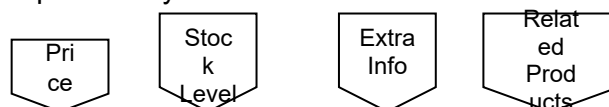
- To retrieve information from the system, use the "Information Search" text box and drop down. This is very similar to the menu found on the top right of all Intrastats pages.



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:



0110017 Oxygen sensor R-17MED Prices Stocks Info Related Hide

**We would like Customer Feed back on**  
 Test Question to Ask the customer for FEEDback on a product  
 Answer  Submit Answer

0110017:  
**0110017 MEMO:**  
 Last Sales Date No Sales Over year since last sale - Check Pricing

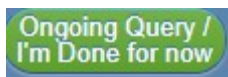
Only give out DISTRIBUTOR prices to confirmed distributors

Key	Viamed	VST	Vandagraph
0110017 Oxygen sensor R-17MED (Tick a checkbox if price / qty given out on the phone or <input type="checkbox"/> if no prices listed)			
<input checked="" type="checkbox"/> 0001 VIAMED <i>Free Carriage (Check N IRE)</i>	<span>Pricelists</span> <span>(History)</span>	GBP End User 0001	1 = £ 42.00 2 = £ 40.00 3 = £ 38.00 11 = £ 36.00
<input checked="" type="checkbox"/> 0002 VIAMED	<span>Pricelists</span> <span>(History)</span>	GBP Distributor 0002	1 = £ 34.00
<input checked="" type="checkbox"/> 0003 VIAMED		Euro End User 0003	1 = € 56.00 2 = € 50.40 3 = € 47.60 11 = € 44.80
<input checked="" type="checkbox"/> 0004 VIAMED		Euro Distributor 0004	1 = € 32.00
<input checked="" type="checkbox"/> 0005 VIAMED		USD End User 0005	1 = \$ 63.50 2 = \$ 57.15 3 = \$ 53.98 11 = \$ 50.80
<input checked="" type="checkbox"/> 0006 VIAMED	<span>(History)</span>	USD Distributor 0006	1 = \$ 34.50

ContractID	Description	Price	Expires	Show Accounts
5	NHS Wales - Fixed Pricing Agreement - PA4762 - EXPIRED	£ 46.2	30 Aug 2019	
10		90.00	01 Jul 2019	

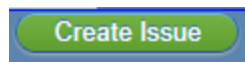
Note: When providing pricing, please make sure you click the white square box to the right of the price you have provided. This is then logged in the system to allow marketing/sales to determine if mailings are working or if we have an increase in enquiries for certain products at different times of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

- 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."
- 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:

**1 Calls**




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.

- Should you need to revisit calls, click the "Call Log" icon  and it will open your "Call Log" screen.

CLICK to Show Varned Extension numbers							
Take New Call							
My Outstanding Calls							
Call ID	Host	Name	Contact	Tel	Current User	Last User	Time
My Recent Calls							
Call #4399	U	Joe Bloggs	Airedale General Hospital		Catrin Hird	Catrin Hird	12 Jul 02 46:42 PM
Call #4398	U	Catrin Hollings	Viamed Ltd		Catrin Hird	Catrin Hird	12 Jul 02 46:59 PM
Call #4378	U	Catrin Hollings	Viamed Ltd		Catrin Hird	Catrin Hird	06 Jul 03 13:33 PM
Call #4349	V	Anthony Smith	VMS / Nammu-Tech	07827518191	Steve Nixon	Catrin Hird	14 Jun 09 55:02 AM
Call #4348	U	Betty Layton	Dive Centre Ltd		Michael Lamb	Catrin Hird	08 Jun 03 01:51 PM
Call #4332	U	Sean	Nuffield Health Leicester Hospital		Catrin Hird	Catrin Hird	10 May 11 00:14 AM
Call #4311	U	Richard Liddle	Walsall Manor Hospital NHS Trust		Catrin Hird	Catrin Hird	20 Apr 09 57:41 AM
Call #4310	U	Colin Fairhurst	Seaways Diving		Michael Lamb	Catrin Hird	20 Apr 09 49:58 AM
Call #4309	U	Colin Fairhurst	Seaways Diving		Catrin Hird	Catrin Hird	19 Apr 04 01:09 PM
Call #4308	U	Glenn Friedman	Cryptofix Ltd		Zoe Teal	Catrin Hird	19 Apr 01 03:30 PM
Call #4307	U	Nicky	East Surrey Hospital	01737768511 ext 6602	Catrin Hird	Catrin Hird	19 Apr 11 58:33 AM
Call #4290	U	Mukesh Rana	Manchester Royal Infirmary		Steve Hardaker	Catrin Hird	09 Apr 08 54:10 AM
Call #4287	U	Chris Holmes	Scuba Workshop UK		Ryan Swaine	Catrin Hird	05 Apr 08 48:14 AM
Call #4229	U	Geoff Shearn	Aqualogistics		Michael Lamb	Catrin Hird	22 Feb 10 28:18 AM
Call #4223	U	Andrea Beasley	St Hugh's Hospital	01472251100 x3317	Catrin Hird	Catrin Hird	15 Feb 09 06:32 AM
Call #4218	U	Catrin Hollings	ZZZ TEST		Catrin Hird	Catrin Hird	09 Feb 10 11:03 AM
Call #4138	U	Jeff Errington	DiveLine Medical Ltd		Gail Bell	Catrin Hird	19 Oct 10 27:54 AM
Call #4114	U	Steven Thurston	JFD Limited		Sarah Walton	Catrin Hird	21 Sep 03 05:29 PM
Call #4096	U	Steve	Discover Diving		Ryan Swaine	Ryan Swaine	03 Sep 11 06:59 AM
Call #4082	U	Unknown	BMI South Cheshire Private Hospital	07956818861	Steve Hardaker	Steve Hardaker	28 Jul 04 50:52 PM
Call #4038	U	John Timperley	C and R Testing Ltd		Catrin Hird	Catrin Hird	07 Jul 10 55:38 AM
Call #4023	U	Ammon Dolev	Amironic		Catrin Hird	Catrin Hird	23 Jun 02 48:06 PM
Call #4009	U	Ammon Dolev	Amironic	0097239047744	Catrin Hird	Catrin Hird	07 Jun 07 40:28 AM
Call #4008	U	Ammon Dolev	Amironic		Catrin Hird	Catrin Hird	07 Jun 07 38:59 AM
Call #4001	U	Tim Hazell	Watford General Hospital		Catrin Hird	Catrin Hird	01 Jun 02 20:24 PM
Global List of Outstanding Calls							
Call ID	Host	Name	Contact	Tel	Current User	Last User	Time
Call #4400	U	Thomas Grant	Bournemouth Nuffield Hospital		Steve Hardaker	Steve Hardaker	12 Jul 02 43:00 PM 2022

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:



**Log Visit / Call Ebay Sale**

Submit

Date Visited / Called: 22 07 2022

Contact Type: Email

**Marketing Ticklist:**

Feedback To	Description
<input type="checkbox"/>	V1000 Servicing Ref: 20180723/499
<input type="checkbox"/>	BlenderBuddy 2 Ref: 20191113/0191235/544
<input type="checkbox"/>	Notice of Discontinuation: VersaStream Resp/Philips Compatible Ref: 20191113/0191207/0191204/532
<input type="checkbox"/>	MaxBlend Lite Ref: 20191217/0191236/543
<input type="checkbox"/>	Supplier Pricing Questionnaire
<input type="checkbox"/>	V1000 Mailing Ref: 1490000/20190806/315P

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