

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

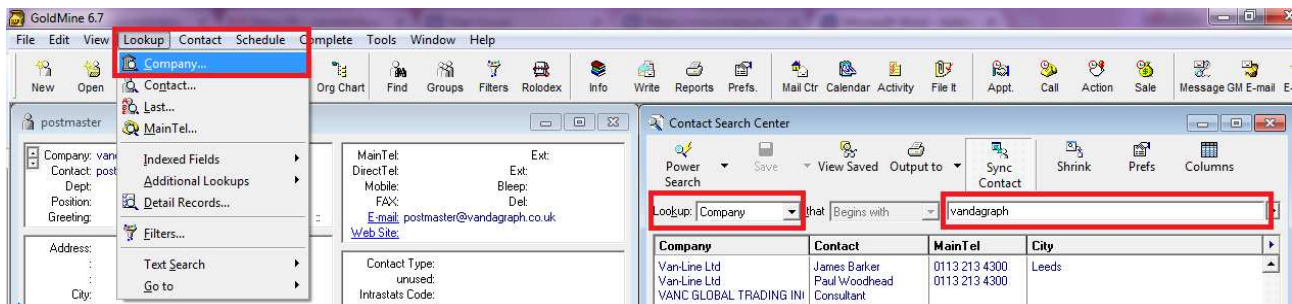


GoldMine

Login to GoldMine as per VM3COP20.72

Search for company

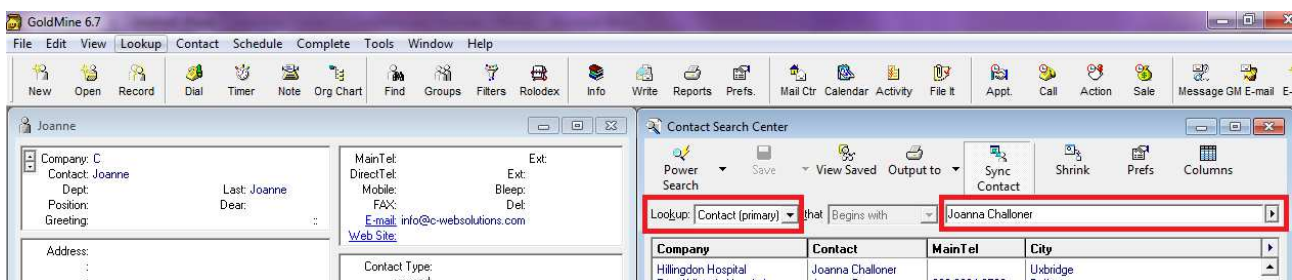
First, click 'LookUp' and click on 'Company'. Type the hospital/company name in the search field.



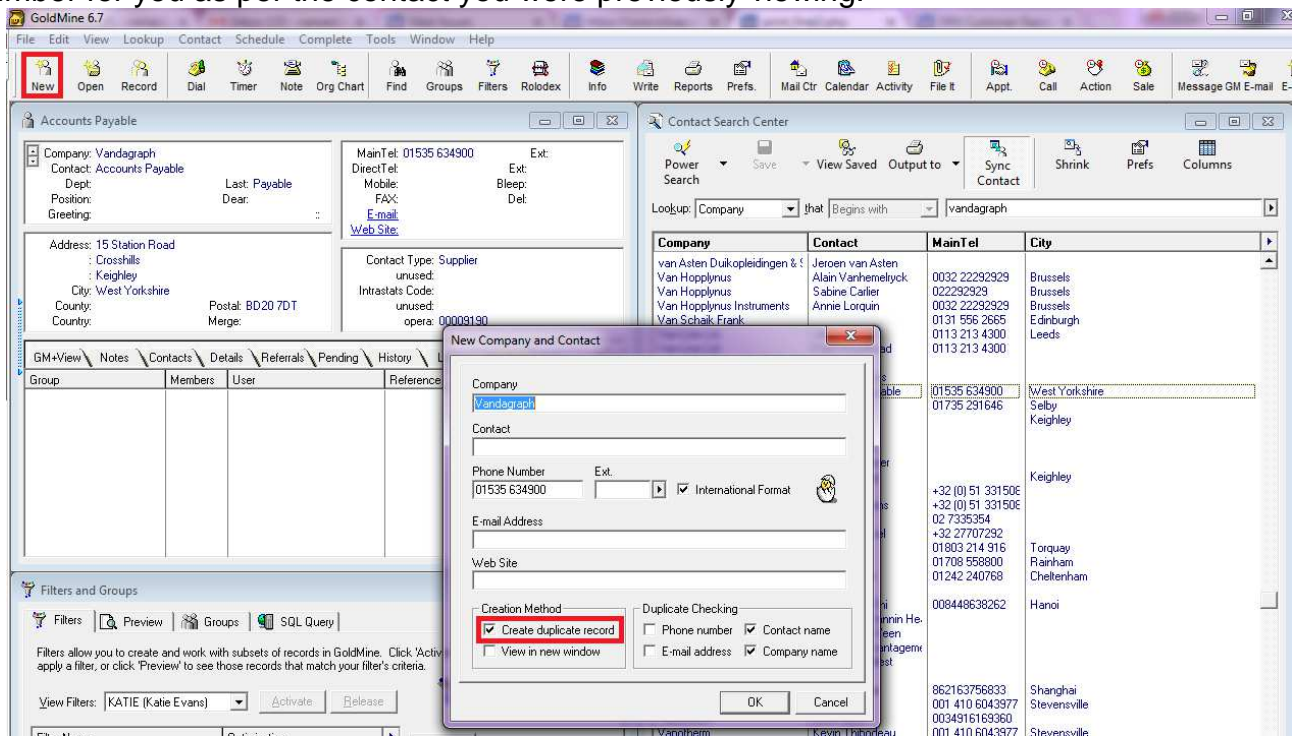
If the company is listed but contact is not, search for Contact

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.

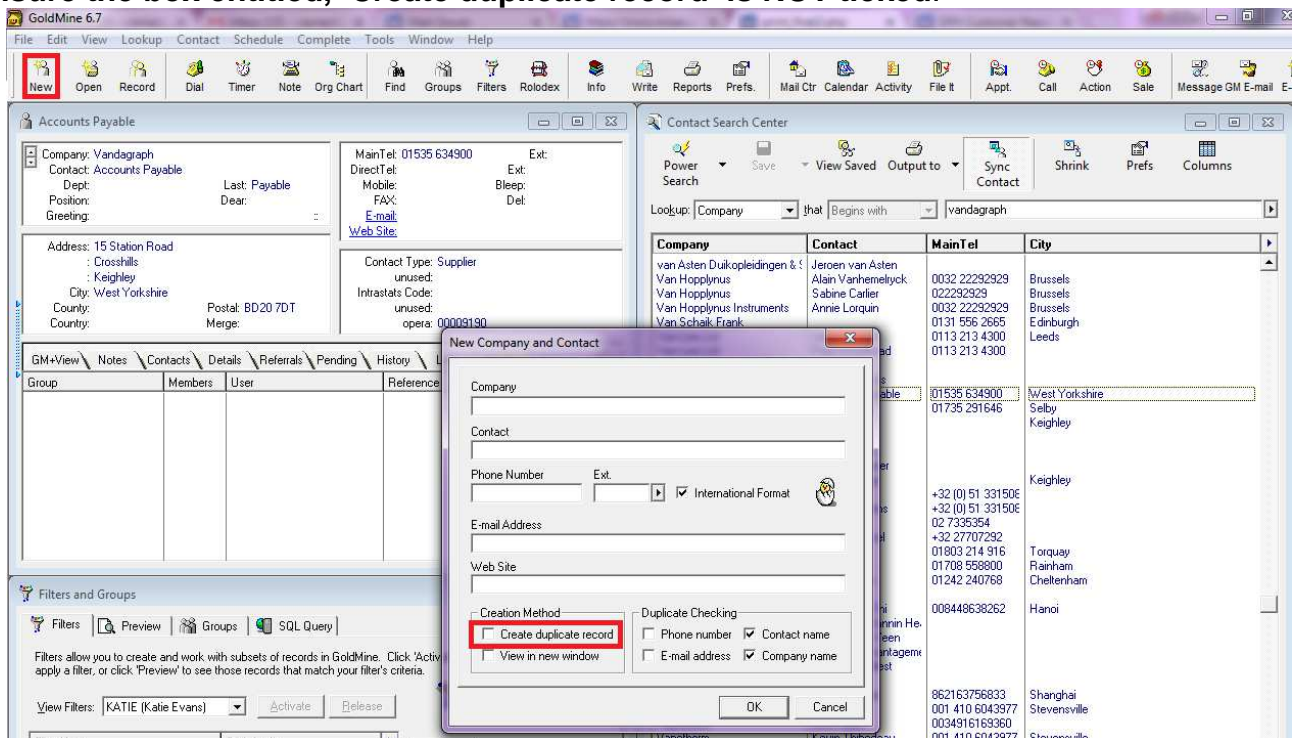


If the contact cannot be found in GoldMine, search for the company again. Click on a record of the correct company, then click 'New' and a new window will appear. Ensure the box entitled, **'Create duplicate record'** is ticked, this will fill in the address, website and main telephone/fax number for 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 contact record, fill in all known information.

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'.

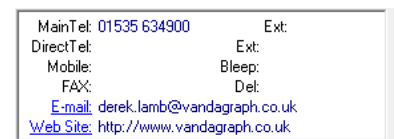
- 'Contact': First name and surname – if only the surname is available please only include this. This section should not include any titles (i.e. Mr, Mrs, Sister, Dr). E.g. Joe Bloggs.
- 'Dear': The contact's title, i.e. Mr, Mrs, Ms, Sister, Dr. Do not use Miss, use Ms instead. E.g. Mr.
- 'Position':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



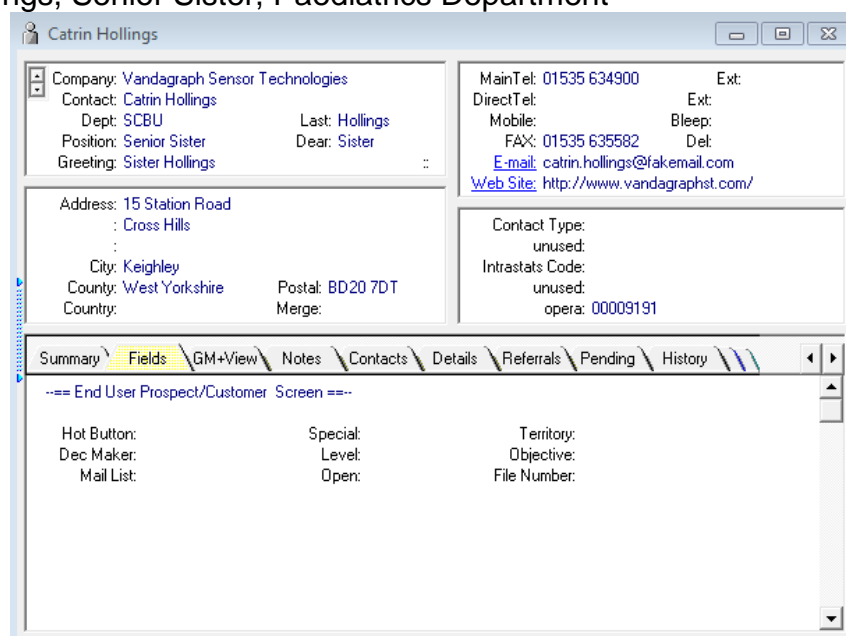
Include as much additional information as possible; some information can be gained from looking at email footers and orders.

- 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'.

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**

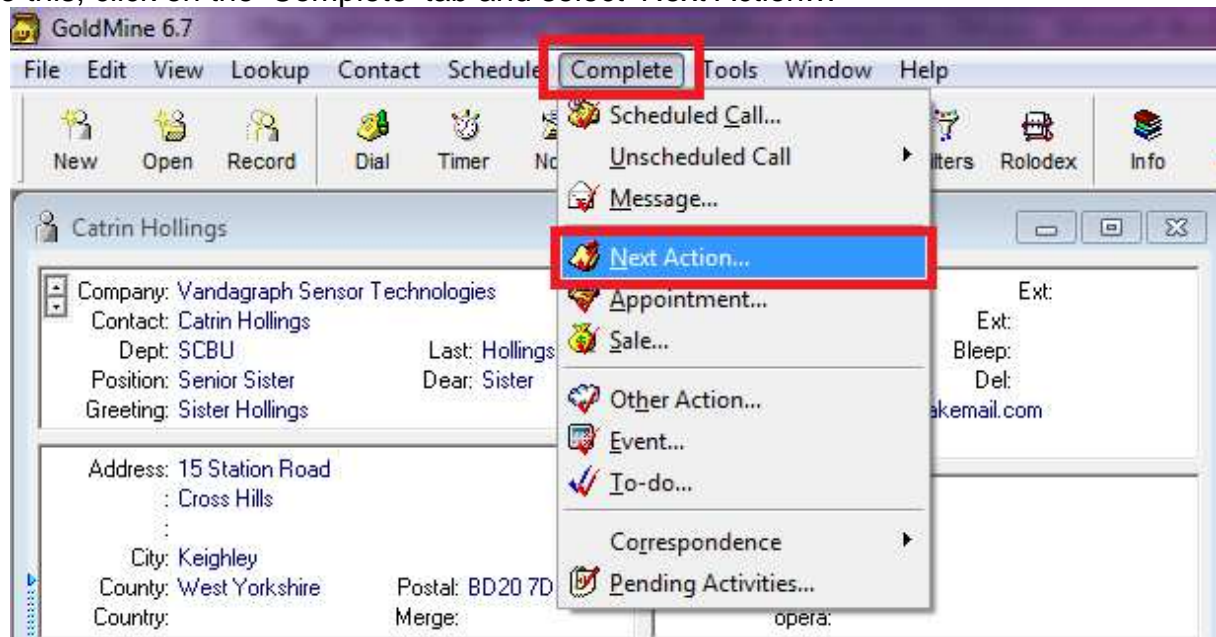
NHS Regions:
Health Auth:
NHS / HSS Trust:
Primary Care:
NHS Amulance :
Mail Shot Dept.:
Mail Shot Posit:
Private Group:
Mail Shot:
Viamed Calander:
Journey Code:

Ensure that the following headings are completed correctly:

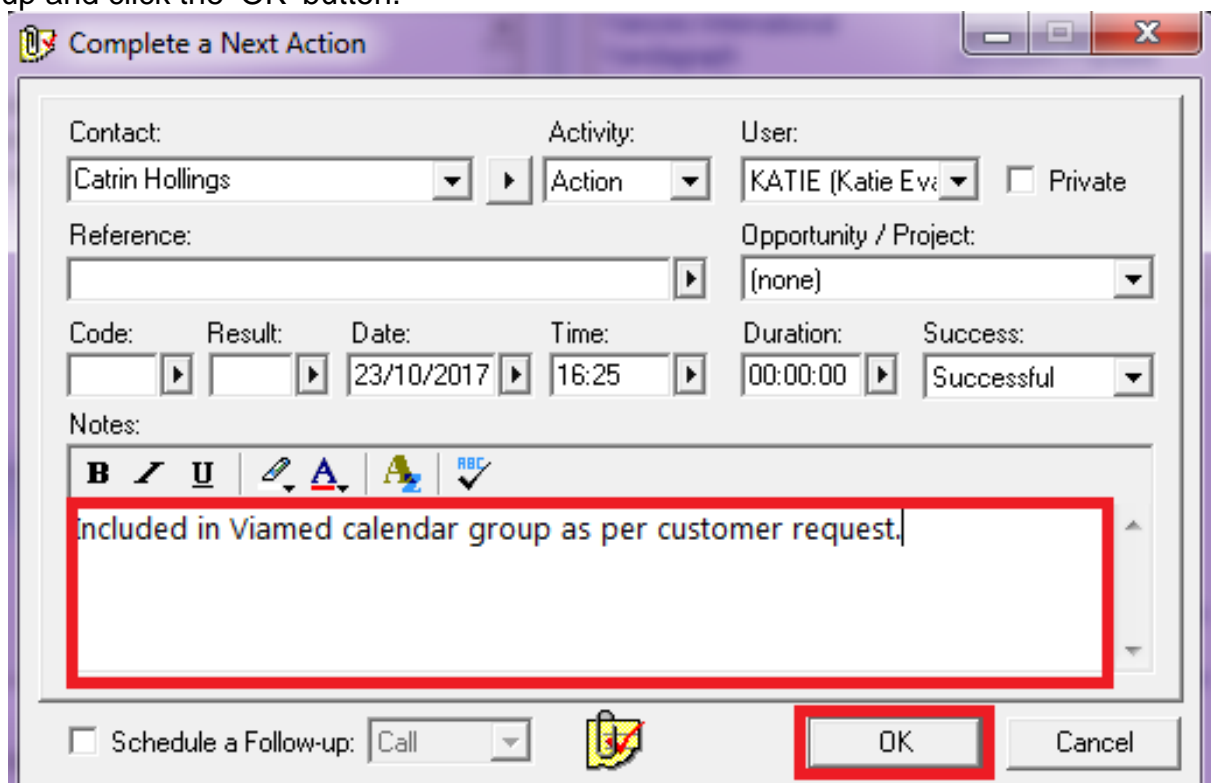
- 'Mail Shot Dept'
- 'Mail Shot Position'
- 'Mail Shot' – this is most important when a customer specifically asks not to be included in mailings.
- 'Viamed Calendar' - If there is no one else in their department and you believe a Viamed calendar would be beneficial to the customer/department please 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 dialog box will open, make a note that you have included them in the Viamed calendar group and click the 'OK' button.





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.

The screenshot shows the GoldMine 6.7 interface. On the left, the 'Catrin Hollings' contact record is displayed with fields for Company (Vandagraph Sensor Technologies), Dept (SCBU), Address (15 Station Road, Keighley), and various contact details. On the right, the 'Contact Search Center' is open, showing a list of contacts. The 'Lookup' dropdown is set to 'Company', and the search criteria is 'Vandagraph Sensor Technologies'. The search results list several contacts, with 'Vandagraph Sensor Technologies' and 'Catrin Hollings' highlighted.

IntraStats

Login to Intrastats as per VM3COP20.72

Search for company

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

The screenshot shows the IntraStats interface. At the top, there is a toolbar with various icons. Below the toolbar, the 'Stock Details' section is visible. In the 'Search' section, the 'Contacts' field is highlighted with a red box, and the text 'Vandagraph' is entered into it.

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.

The screenshot shows a table of companies in the IntraStats interface. The table has columns for Hospital / Organisation Names, Contacts, and other details. The row for 'VANDAGRAPH' is highlighted with a red box.

Hospital / Organisation Names	Contacts	Other Details
VANDAGRAPH	Contacts #1	Mentor Diver Training
00009190	Contacts #6	Vandagraph

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

CID 3656

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

Company Options

Merge Contacts

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	<input type="checkbox"/>	Derek Lamb
Title	<input type="checkbox"/>	Mr Lamb
Position	<input type="checkbox"/>	Senior Buyer
Department	<input type="checkbox"/>	Procurement & Supplies
Mailing Department	<input type="checkbox"/>	Supplies Department
Contact Methods	<input checked="" type="checkbox"/>	Email
Global Responsibility	<input checked="" type="checkbox"/>	Mailshot
Email	<input checked="" type="checkbox"/>	Phone
Direct Phone	<input type="checkbox"/>	Key Buyer
Mobile Phone	<input type="checkbox"/>	derek.lamb@vandagraph.co.uk
Alt Direct Dial	<input type="checkbox"/>	derek@vlamed.co.uk
Extension	<input type="checkbox"/>	01535 643542
Alt Extension	<input type="checkbox"/>	0770 12345
Bleep	<input type="checkbox"/>	0770 12345
Fax	<input type="checkbox"/>	0770 12345
First Contact	<input type="checkbox"/>	0770 12345
Responsible for ISO	<input type="checkbox"/>	0770 12345
Account Statements	<input type="checkbox"/>	0770 12345
Send Pricing Updates	<input checked="" type="checkbox"/>	0770 12345
Email Invoices	<input type="checkbox"/>	0770 12345
Email Single Invoice Per Email if applicable	<input type="checkbox"/>	01535 635582
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.

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.

Animus UK Ltd
search

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

Opera Account
Company/Hospital
Address 1
Address 2
Address 3
City
County
Postcode
Country
Hosp/Company Phone
Company Registration Number
Vat Number
Web Site
Google Identifier
Type
Credit Account Type
Email Only Invoices
Email Order Confirmations Basic
Email Order Confirmations Full
VAT Exempt
Host Company
First Contact Code

Opera Account
VIAMED
15 Station Road
Crosshills
Keighley
Bradford
West Yorkshire
BD20 7DT
United Kingdom
+44 1535 634542
Ambulance End User
To locate on GMaps
Unknown
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.

Send Issue to Office
Send Update to Viamed
Contact
Title
Position
Department
Mailing Department
Primary Email + 1
Direct Phone
Mobile Phone
Alt Direct Dial
Extension
Alt Extension
Bleep
Fax
First Contact
Notes
Contact Methods
Global Responsibility
Hide Contact

Emily Hanson
Jean Lamb
Mrs Lamb
jean.lamb@vandagraph.co.uk
Email Mailshot Phone

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 checked="" 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.

Hospital / Organisation Names		
<input type="checkbox"/>	VANDAGRAPH	Contacts #1 Mentor Diver Training
<input type="checkbox"/>	ALTITUD1	Contacts #1 The Altitude Centre
<input type="checkbox"/>	00009190	Contacts #1 Vandagraph Customer
<input checked="" type="checkbox"/>	00009190	Contacts #4 Vandagraph Ltd
<input type="checkbox"/>	10009190	Contacts #2 vandagraph Ltd
<input type="checkbox"/>	10009191	Contacts # Vandagraph Sensor Tec VST
<input type="checkbox"/>	00009191	Contacts #2 Vandagraph Sensor Tec VST
<input type="checkbox"/>	...	Contacts #1 Vandagraph Stock
<input type="checkbox"/>	00009190	Contacts #8 Viamed Ltd
<input type="checkbox"/>	...	Contacts # www.vandagraph.co.uk
Request Merge Companies		
Searching Contact Names		

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'.

CID 9447

Viamed Ltd.

Add Contact

15 Station Road
Cross Hills
Keighley
north yorks
BD20 7DT
United Kingdom
Opera: 0009192
Type: Company Supplier

Company Options

Merge Contacts

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

History - Switch to Condensed

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.

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	
Merge Selected Contacts				

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

Contact Name	Jonathan Connor ▼
Title	▼
Position	▼
Department	▼
Mailing Department	▼
Email Address	▼
Direct Number	01535 634542 ▼
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"/>
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	Emily Hanson ▼	
Contact	Jonathan Connor	
Title		
Position		
Department		
Mailing Department	▼	
Primary Email +		
Direct Phone	01535 634542	
Mobile Phone		
Alt Direct Dial		
Extension		
Alt Extension		
Bleep		
Fax		
First Contact		
Notes		
Contact Methods	<input type="checkbox"/> Email <input type="checkbox"/> Mailshot <input type="checkbox"/> Phone	
Global Responsibility	▼	
Hide Contact	<input type="checkbox"/> : ▼	
		<i>Example</i> 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	▼
Non Product Responsibility	
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	