

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



Login to GoldMine as per VM3COP20.72

Search for company

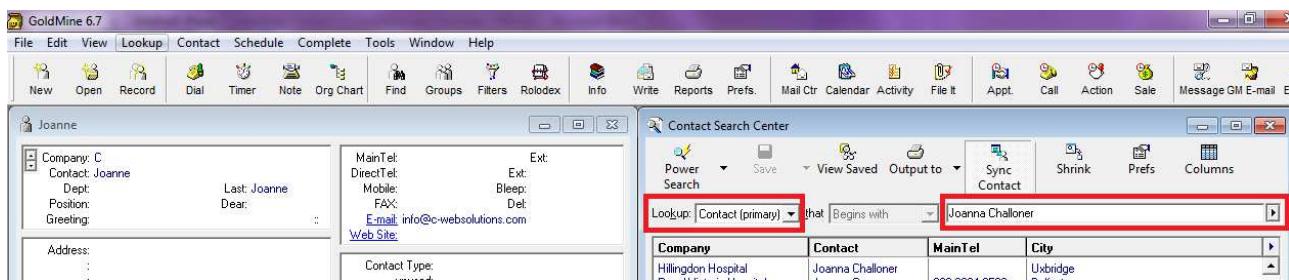
First, click 'LookUp' and click on 'Company'. Type the hospital/company name in the search field.



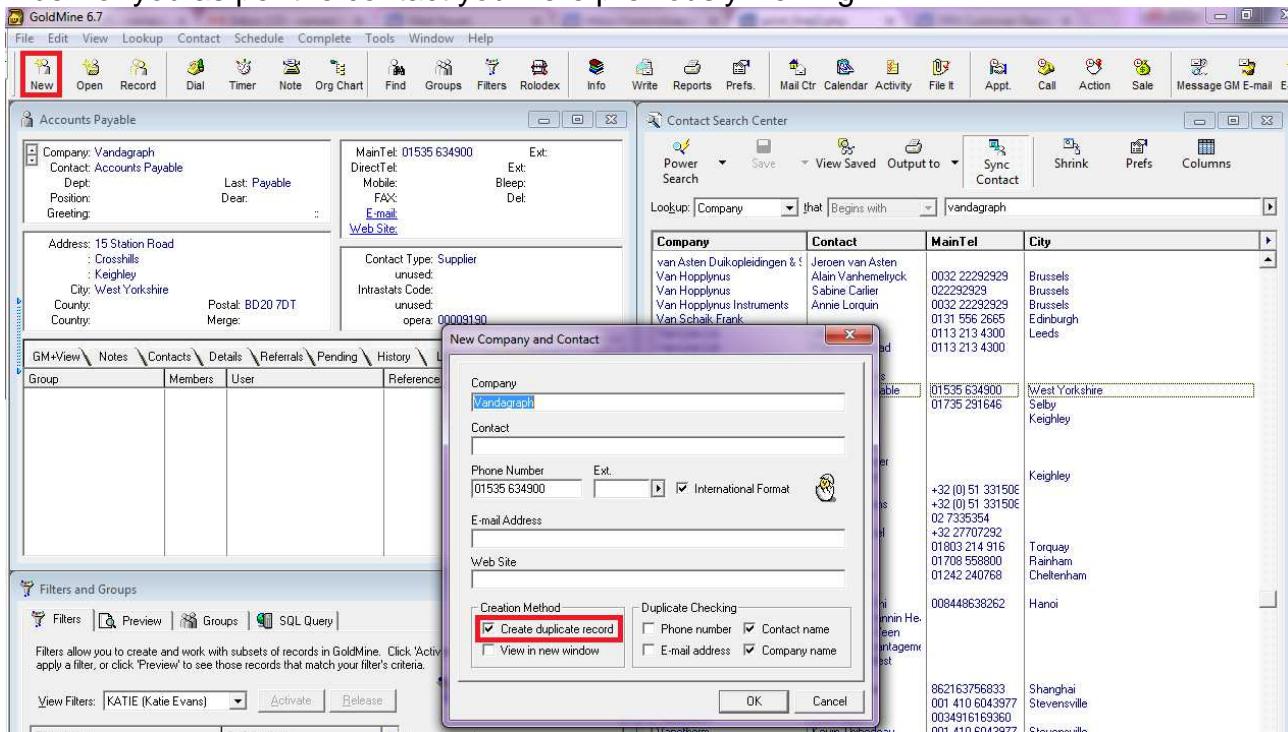
If the company is listed but contact is not, search for Contact

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.

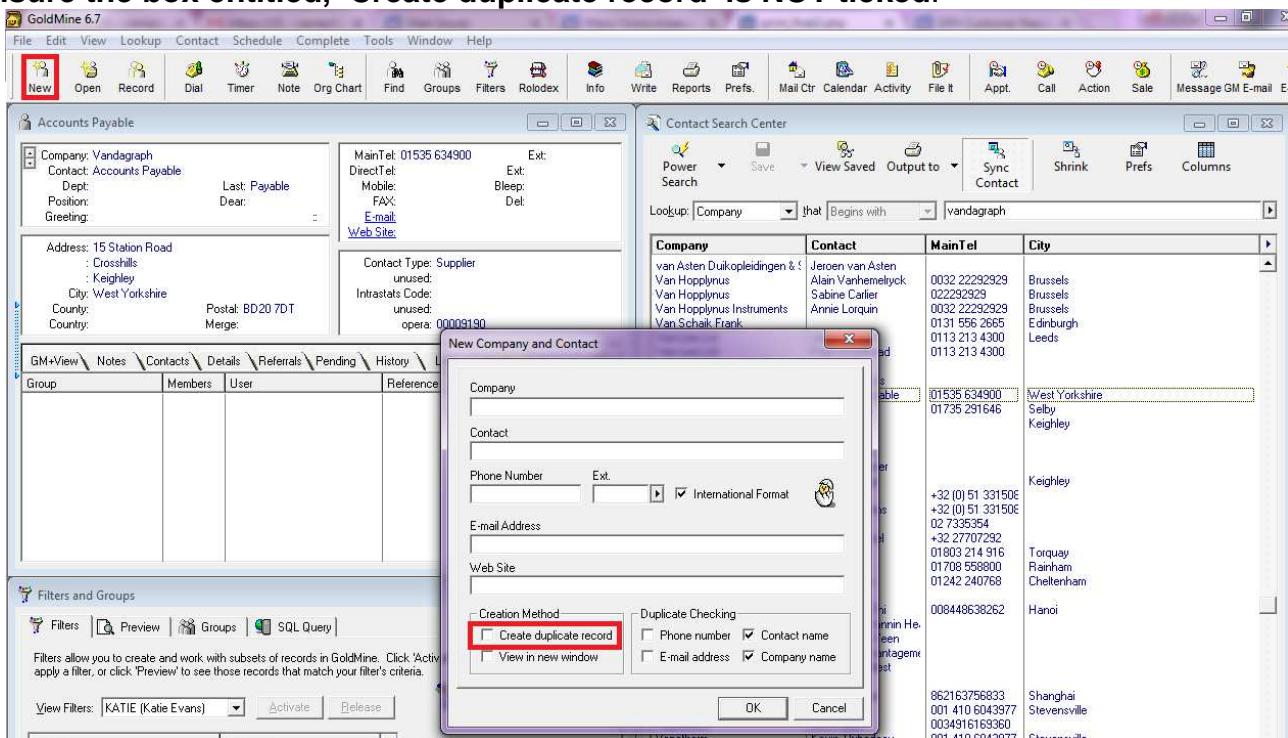


If the contact cannot be found in GoldMine, search for the company again. Click on a record of the correct company, then click 'New' and a new window will appear. Ensure the box entitled, '**Create duplicate record**' is ticked, this will fill in the address, website and main telephone/fax number for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



If the Company is not listed

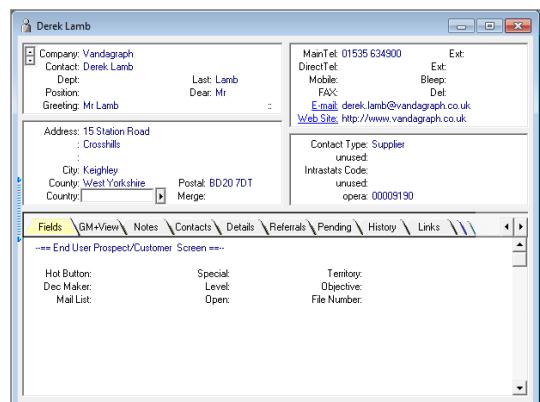
If the company has not been added as a contact, click 'New' and a new window will appear. Ensure the box entitled, '**Create duplicate record**' is NOT ticked.



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.

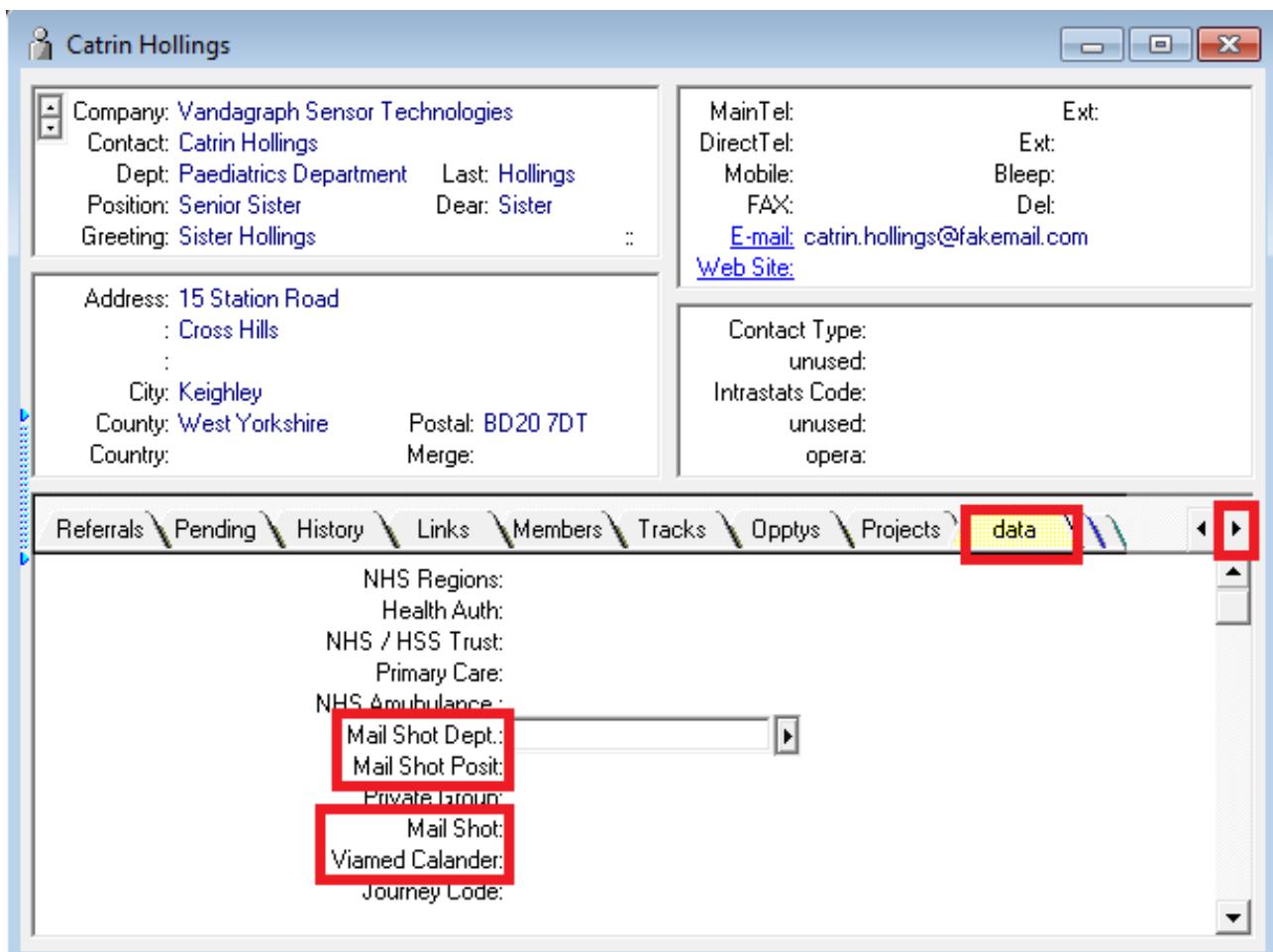
- Telephone – 'MainTel' must only be the main company/hospital number, if a department or direct dial is known, please include this in the 'DirectTel' field.
- Fax numbers - be careful when copying records, the fax number needs to be checked and only entered if it is known to be the departments fax number.
- 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'.

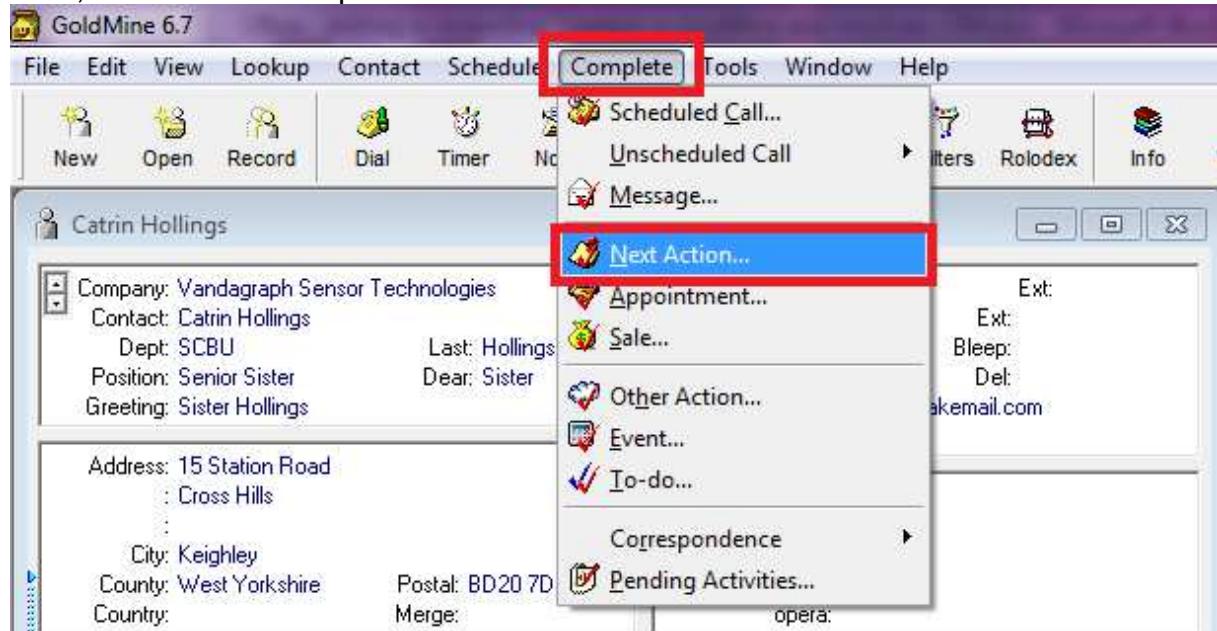


Ensure that the following headings are completed correctly:

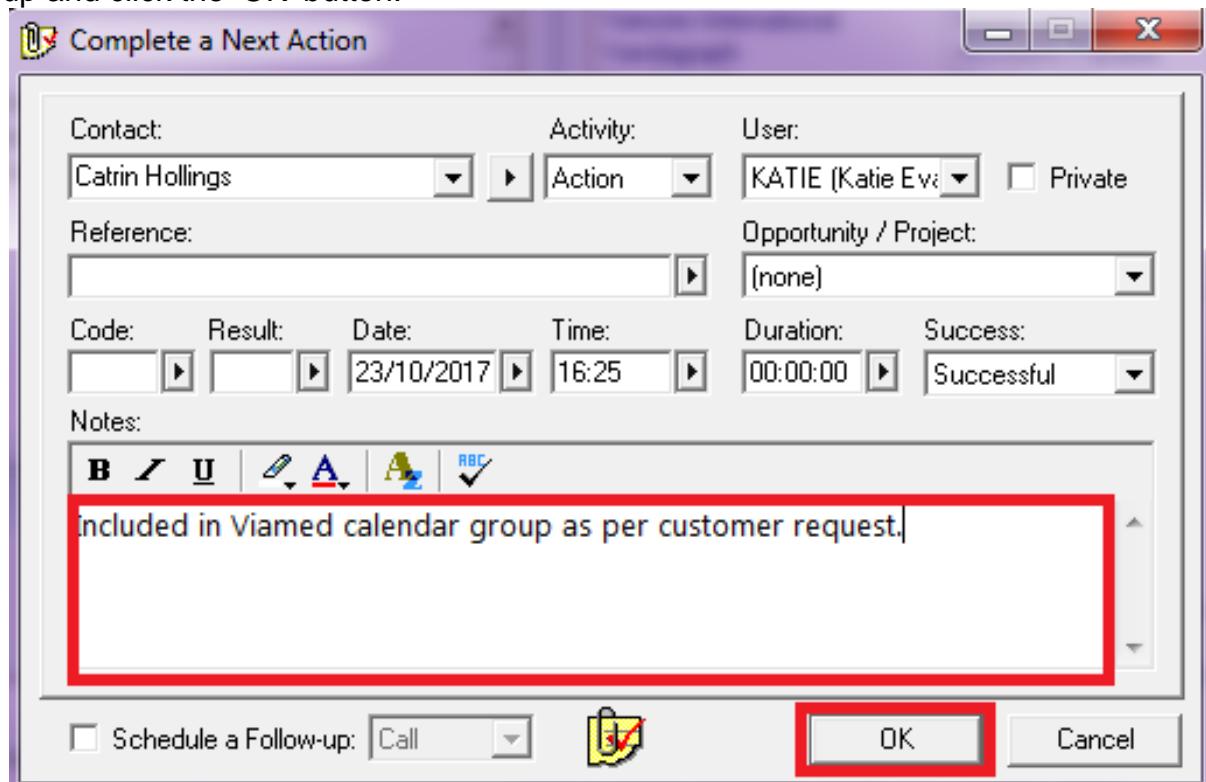
- 'Mail Shot Dept'
- 'Mail Shot Position'
- 'Mail Shot' – this is most important when a customer specifically asks not to be included in mailings.
- 'Viamed Calendar' - If there is no one else in their department and you believe a Viamed calendar would be beneficial to the customer/department please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

IntraStats

Login to IntraStats as per VM3COP20.72

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					
	Contact #1	Contact #2	Address	City	Postcode
<input checked="" type="checkbox"/> VANDAGRAPH	Mentor Diver Training			London	0163 177 0693
<input checked="" type="checkbox"/> ALTITUDE	The Altitude Centre				Customer Distributor
<input checked="" type="checkbox"/> 00009190	Vandagraph				Customer
					Extra Search

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

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

Merge Contacts

Contact	Department	Position	Direct Phone	Email	Y	?
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.

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

Add New Contact to Vandagraph Ltd

Send Issue to Office: Emily Hanson Derek Lamb

Contact: Derek Lamb Mr Lamb

Title: Mr Lamb Senior Buyer

Position: Senior Buyer Procurement & Supplies

Department: Procurement & Supplies Supplies Department

Mailing Department: Supplies Department Email Mailshot Phone

Global Responsibility: Key Buyer

Email: derek.lamb@vandagraph.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 635682

First Contact:

Responsible for ISO:

Account Statements:

Send Pricing Updates:

Email Invoices:

Email Single Invoice Per Email if applicable:

Email Invoices Via Goldmine:

Purchase Orders:

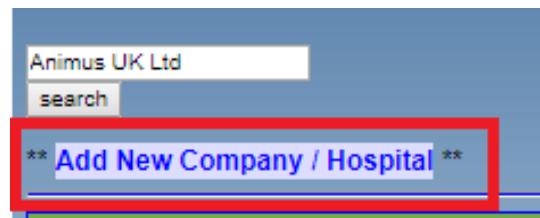
Send Remits:

Email Price Changes:

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.

Opera Account	needac	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		To locate on GMaps
Google Identifier		
Type	Ambulance End User	
Credit Account Type		
Email Only Invoices	Unknown	
Email Order Confirmations Basic		
Email Order Confirmations Full		
VAT Exempt		
Host Company	Unknown	
First Contact Code		first contact code
<input type="button" value="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		
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	<input type="checkbox"/>
Send Update to Viamed	Emily Hanson
Contact	Jean Lamb
Title	Mrs Lamb
Position	
Department	
Mailing Department	
Primary Email + 1	jean.lamb@vandagraph.co.uk
Direct Phone	
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	

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 Companys' button.

Hospital / Organisation Names		
VANDAGRAPH	Contacts #1	Mentor Diver Training
ALTITUD1	Contacts #1	The Altitude Centre
	Contacts #1	Vandagraph Customer
<input checked="" type="checkbox"/> 00009190	Contacts #4	Vandagraph Ltd
10009190	Contacts #2	Vandagraph Ltd
10009191	Contacts #	Vandagraph Sensor Tec VST
00009191	Contacts #2	Vandagraph Sensor Tec VST
...	Contacts #1	Vandagraph Stock
00009190	Contacts #8	Viamed Ltd
...	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'.

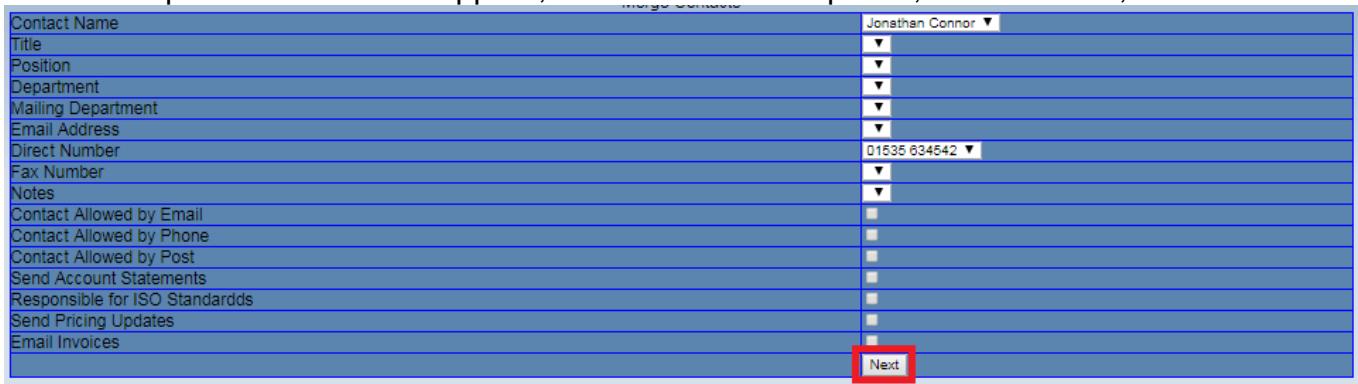
CID 9447		Viamed Ltd.		Add Contact	
15 Station Road					
Keighley					
North Yorks					
BD20 7DT					
United Kingdom					
Opéra: 0009192					
Type: Company Supplier					
Company Options					
Merge Contacts					
Contact	Department	Position	Direct Phone	Email	
Derek Lamb				derek.lamb@viamed.co.uk	
Jonathan Conner			0153 563 4542		
Jonathan Connor			0153 563 4542		
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	

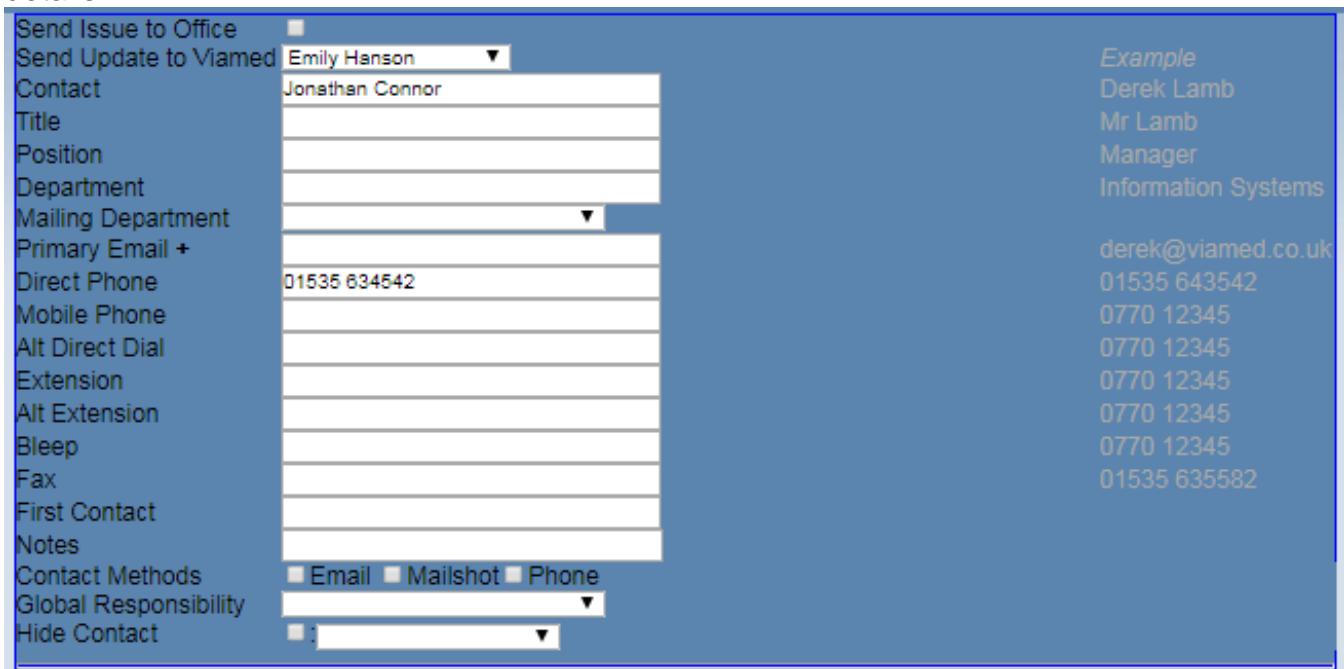
Merge Selected Contacts

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



A screenshot of a contact form with a blue header and a red 'Next' button at the bottom right. The form includes fields for Contact Name (Jonathan Connor), Title, Position, Department, Mailing Department, Email Address, Direct Number (01535 634542), Fax Number, Notes, Contact Allowed by Email, Contact Allowed by Phone, Contact Allowed by Post, Send Account Statements, Responsible for ISO Standardds, Send Pricing Updates, and Email Invoices. The 'Next' button is highlighted with a red box.

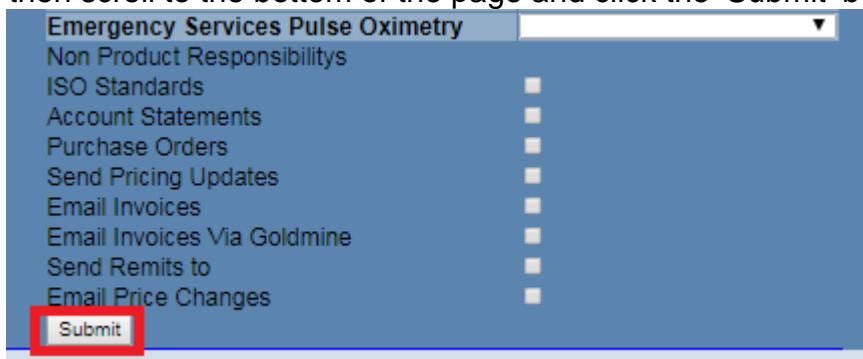
You will then be directed to the 'Edit Contact' page where you can enter any further known details.



A screenshot of the 'Edit Contact' page. On the left, there is a list of contact details: Send Issue to Office (checkbox), Send Update to Viamed (dropdown menu showing 'Emily Hanson'), Contact (dropdown menu showing 'Jonathan Connor'), Title, Position, Department, Mailing Department, Primary Email (checkbox), Direct Phone (01535 634542), Mobile Phone, Alt Direct Dial, Extension, Alt Extension, Bleep, Fax, First Contact, Notes, Contact Methods (checkboxes for Email, Mailshot, Phone), Global Responsibility (dropdown menu), and Hide Contact. On the right, there is a 'Example' section with sample data corresponding to the dropdown menus.

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.



A screenshot of a dropdown menu with a blue header and a red 'Submit' button at the bottom. The menu includes options: Emergency Services Pulse Oximetry, Non Product Responsibilities, ISO Standards, Account Statements, Purchase Orders, Send Pricing Updates, Email Invoices, Email Invoices Via Goldmine, Send Remits to, and Email Price Changes. The 'Submit' button is highlighted with a red box.