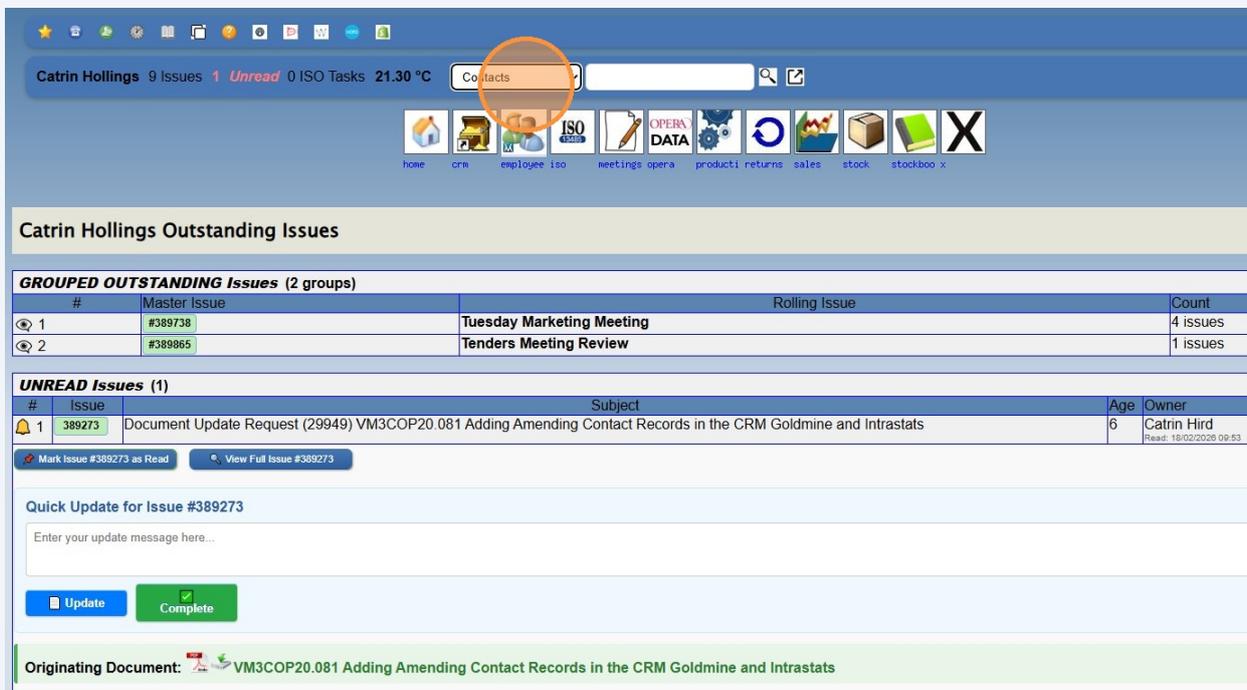# VM3COP20.081 How to Add and Merge Contacts and Companies in Intrastats CRM

1 Navigate to Intrastats

2 Select the "Contacts" option from the dropdown.

3 Enter the name or company you wish to search

Catrin Hollings 9 Issues 1 *Unread* 0 ISO Tasks 21.30 °C   Contacts

Catrin Hollings Outstanding Issues

GROUPED OUTSTANDING Issues (2 groups)

#	Master Issue	Rolling Issue	Count
👁 1	#389738	Tuesday Marketing Meeting	4 issues
👁 2	#389865	Tenders Meeting Review	1 issues

UNREAD Issues (1)

#	Issue	Subject	Age	Owner
🔔 1	389273	Document Update Request (29949) VM3COP20.081 Adding Amending Contact Records in the CRM Goldmine and Intrastats	6	Catrin Hird Read: 18/02/2026 09:53

🔄 Mark Issue #389273 as Read   🔍 View Full Issue #389273

Quick Update for Issue #389273

Enter your update message here...

📄 Update   ☑ Complete

Originating Document: 📄 VM3COP20.081 Adding Amending Contact Records in the CRM Goldmine and Intrastats

4 Either click the magnifying glass or press ENTER to search.

9 Issues 1 *Unread* 0 ISO Tasks 21.30 °C   Contacts   Vandagraph

s Outstanding Issues

STANDING Issues (2 groups)

Master Issue	Rolling Issue	Count
#389738	Tuesday Marketing Meeting	4 issues
#389865	Tenders Meeting Review	1 issues

(1)

Subject	Age	Owner	With
cument Update Request (29949) VM3COP20.081 Adding Amending Contact Records in the CRM Goldmine and Intrastats	6	Catrin Hird Read: 18/02/2026 09:53	Catrin Hird Act: 18/02/2026 09:53

Read   🔍 View Full Issue #389273

Issue #389273

essage here...

☑ Complete

ment: 📄 VM3COP20.081 Adding Amending Contact Records in the CRM Goldmine and Intrastats

5 **If the company is already listed**, click the company or contact you're searching for.

☐	Vandagraph	CID21791 / CID21791	Contacts #1	Adam Wedgbury	Swansea	SA6 5BZ	0794 333 0117	Vandagraph Retail		Proforma
☐	Vandagraph	CID28109 / CID28109	Contacts #1	Exhibition Contacts. - Vandagraph						
☐	Vandagraph	CID33115 / CID33115	Contacts #1	Karel Kohout	Redhill	RH1 1QE	0789 455 0667	Vandagraph Retail		Proforma
☐	Vandagraph	CID25885 / CID25885	Contacts #1	Martin Mayorga	Ottobrunn	85521	1515 609 0956	Vandagraph Retail		Proforma
☐	Vandagraph	CID17100 / CID17100	Contacts #1	Paul Brown	Wiltshire	SP3 6DF		Vandagraph Retail		Proforma
☐	VST	CID13059 / VST014	Contacts #2	Vandagraph	Nr Keighley	BD20 7DT			Credit	
☐	Viamed	CID3656 / 00009190	Contacts #7	Vandagraph Ltd	Keighley	BD20 7DT	0153 563 4900	Company Supplier Customer	Credit Credit C	
☐	Vandagraph	CID28093 / CID28093	Contacts #0	Vandagraph Ltd						
☐	Viamed	CID5914 / 00009191	Contacts #2	Vandagraph Sensor Tec VST	Cross Hills	BD20 7DT	0153 563 4900		Extr Sea	
☐	VST	CID28096 / CID28096	Contacts #0	Vandagraph Sensor Tec VST						
☐	Vandagraph	CID15899 / CID15899	Contacts #3	Vandagraph Sensor Technologies	Keighley	BD20 7DT		Vandagraph Trade	Extr Sea	

Request Merge Companys

Searching Contact Names

6 **If the company is listed but the contact is not**, click "Add New Contact" button.

home   crm   employee iso   meetings opera   producti returns   sales   stock   stockboo x

HOST Vandagraph's Contact Record For:

Vandagraph Ltd
CID**28093** Opera **CID28093** Type: **Vandagraph Ltd** , , ,
Tel   Log Call   Add Issue

Home   Details   Memos   Sales   Stock Refs
Returns   Service   Distributors   Documents   Issues   Regulatory

General account to store vandagraph documents and links,
NO purchase orders or Sales orders please

Add New Contact   Merge Contacts   Hidden/Removed Contacts

CONTACTS

ID	Contact	Sales Order	Purchase Order	Contact Actions	Department	Position	Direct Phone	Email	Unsubscribe Mailing Lists	Head

Bulk Edit View   Standard View

Customer Orders   Link Orders

Display Ordered It

7 Type in the name of the contact to this field.

HOST Vandagraph's Contact Record For:

Vandagraph Ltd

CID**28093** Opera **CID28093** Type:
Vandagraph Ltd , , ,
Tel [Log Call]   [Add Issue]
[Home] [Details] [Memos] [Sales] [Stock Refs]
[Returns] [Service] [Distributors] [Documents] [Issues] [Regulatory]

General account to store vandagraph documents and links,
NO purchase orders or Sales orders please

Add New Contact to
Contact [   ] Derek Lamb
[Add Contact]

---

8 Click "Add Contact"

HOST Vandagraph's Contact Record For:

Vandagraph Ltd

CID**28093** Opera **CID28093** Type:
Vandagraph Ltd , , ,
Tel [Log Call]   [Add Issue]
[Home] [Details] [Memos] [Sales] [Stock Refs]
[Returns] [Service] [Distributors] [Documents] [Issues] [Regulatory]

General account to store vandagraph documents and links,
NO purchase orders or Sales orders please

Add New Contact to
Contact [Ryan Swaine   ] Derek Lamb
[Add Contact]

9 Fill in all details which are available, information can be found on email signatures and purchase orders.

Greyed out text to the right of the text box provides an example of what to include and in what format.

Please remember to not have any spaces in telephone numbers.

10 Once all details have been added, click "Update"

11   Company Not Listed: Add Company

Click "Add New Company Hospital" button.

12 Fill in all relevant information.

Greyed out text to the right of the text box provides an example of what to include and in what format.

Please remember to not have any spaces in telephone numbers.

Once complete click "Update"

13 Amending Contact Details

When you receive additional information regarding a contact you can add this information to their record. To do so, click this the pen icon image next to the relevant contact name.

General account to store vandagraph documents and links, NO purchase orders or Sales orders please

Add New Contact   Merge Contacts   Hidden/Removed Contacts

CONTACTS

ID	Contact	Sales Order	Purchase Order	Contact Actions	Department	Position	Direct Phone	Email	Unsubscribe Mailing Lists
36390	Ryan Swaine	No Pricelist		✏️ 🖨 ⌄ SOR ↻ 🔧 🕐				ryan.swaine@vandagraph.co.uk ☐

Bulk Edit View   Standard View

Customer Orders   Link Orders

Display Ordered It

Supplier Orders

Issue Logs

Get Logs

14 This will open up the contact details page, update as necessary.

General account to store vandagraph documents and links, NO purchase orders or Sales orders please

Update Contact Details

Added on 24 Feb 2026

Contact	Ryan Swaine	Derek Lamb
Title	Mr Swaine	Mr Lamb
Position		Manager
Department		Information Systems
Mailing Department		
Primary Email +	ryan.swaine@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		
Notes		
Contact Methods	☐ Email ☐ Mailshot ☐ Phone	
Global Responsibility		
Hide Contact	☐	

Addition Address (If Applicable)
Addition Address Type	Use Main Address	
Address 1		15 Station Road
Address 2		Crosshills

15   Once complete, click the "Update" button.

Hide Contact	■ : [▼]	

Addition Address (If Applicable)

Addition Address Type	[Use Main Address ▼]	
Address 1		15 Station Road
Address 2		Crosshills
Address 3		Keighley
City		Bradford
County		West Yorkshire
Postcode		BD20 7DT

Auto Paperwork/Defaults

		Head of Department:	
ISO Standards	■	☐ Accounts
Account Statements	■	☐ CEO MD
Allow Purchase Orders	■	☐ Enviromental Officer
Allow Sales Orders	■	☐ Ethics Officer
Send Pricing Updates	■	☐ Marketing
Email Delivery Notifications	■	☐ Purchases
Email Invoices	■	☐ Regulatory affairs
Email Invoices Via Goldmine	■	☐ Returns
Send Remits to (Purchasing)	■	☐ Sales
Email Price Changes	■	☐ Service

In Mailing Groups

ADD to Mailing Group

☐	[Extra]	Maquet Potential Customers
☐	[Extra]	Maquet 66 40 044 suppliers/distributors
☐	[Extra]	Enquiry from Viamed-EU
☐	[Extra]	EBME Expo 2024

[UPDATE]

Record Updates
Updated on 24 Feb 2026 Catrin Hird

16   Merging Company Records

When searching for a company name and if 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).

Click the checkboxes next to the relevant companies.

17   Click "Request Merge Companys"

☐ Vandagraph	CID25885 / CID25885	Contacts #1	Martin Mayorga	Ottobrunn	85521	1515 609 0956	Vandagraph Retail	Proforma
☐ Vandagraph	CID17100 / CID17100	Contacts #1	Paul Brown	Wiltshire	SP3 6DF		Vandagraph Retail	Proforma
☐ VST	CID13059 / VST014	Contacts #2	Vandagraph	Nr Keighley	BD20 7DT			Credit
☐ Viamed	CID3656 / 00009190	Contacts #7	Vandagraph Ltd	Keighley	BD20 7DT	0153 563 4900	Company Supplier Customer	Credit Credit C
☐ Vandagraph	CID28093 / CID28093	Contacts #1	Vandagraph Ltd					
☐ Viamed	CID5914 / 00009191	Contacts #2	Vandagraph Sensor Tec VST	Cross Hills	BD20 7DT	0153 563 4900		Extr Sea
☐ VST	CID28096 / CID28096	Contacts #0	Vandagraph Sensor Tec VST					
☐ Vandagraph	CID15899 / CID15899	Contacts #3	Vandagraph Sensor Technologies	Keighley	BD20 7DT		Vandagraph Trade	Extr Sea

Request Merge Company

Searching Contact Names

Host	Account	Contact Name	Department	Position	Company	Town	PostCode	
	CID21791 / CID21791	Adam Wedgbury			Adam Wedgbury	Swansea	SA6 5BZ	07943 330
	CID16941 / CID16941	Darren Weller			Darren Weller	Surrey	KT24 6LZ	078915822
	00009190 / CID3656	Jean Lamb			Vandagraph Ltd	Keighley	BD20 7DT	015356349
	CID15899 / CID15899	Jean Lamb			Vandagraph Sensor Technologies	Keighley	BD20 7DT	
	00009191 / CID5914	Jean Lamb			Vandagraph Sensor Tec VST	Cross Hills	BD20 7DT	015356349
	CID33115 / CID33115	Karel Kohout			Karel Kohout	Redhill	RH1 1QE	078945506

18   Merging Contacts within Company

When there is more than one contact with the same details within the same company record, they can be merged.

Click "Merge Contacts"

19   Click the checkboxes of the relevant contacts.

HOST Ⓜ Viamed's Contact Record For:

eBay Sale

CID**4224** Opera **00006666** Type:**Customer End User UK**
eBay Sale , , , UK
Tel   Ebay (0008)   Log Call   Add Issue
Not Set Credit Limit 0.00GBP

Home   Details   Memos   Sales   Stock Refs
Returns   Service   Distributors   Documents   Issues   Regulatory

Username Medesales
Password v1942med!

Select Contacts to Merge

	Contact	Department	Position	Direct Phone	Email		
☐	Ebay Sale						
☐	Sir Or Madam				catrin.hollings@viamed.co.uk		

Merge Selected Contacts

---

20   Click "Merge Selected Contacts"

HOST Ⓜ Viamed's Contact Record For:

eBay Sale

CID**4224** Opera **00006666** Type:**Customer End User UK**
eBay Sale , , , UK
Tel   Ebay (0008)   Log Call   Add Issue
Not Set Credit Limit 0.00GBP

Home   Details   Memos   Sales   Stock Refs
Returns   Service   Distributors   Documents   Issues   Regulatory

Username Medesales
Password v1942med!

Select Contacts to Merge

	Contact	Department	Position	Direct Phone	Email			
☑	Ebay Sale							
☑	Sir Or Madam				catrin.hollings@viamed.co.uk			

Merge Selected Contacts

21 From the information shown, include the correct details for each field.

22 Click "Next"

23 Review all information which has been merged and click "Update" when all correct.

Auto Paperwork/Defaults		Head of Department:	
ISO Standards	☐	☐ Accounts	
Account Statements	☐	☐ CEO MD	
Allow Purchase Orders	☐	☐ Enviromental Officer	
Allow Sales Orders	☐	☐ Ethics Officer	
Send Pricing Updates	☐	☐ Marketing	
Email Delivery Notifications	☐	☐ Purchases	
Email Invoices	☐	☐ Regulatory affairs	
Email Invoices Via Goldmine	☐	☐ Returns	
Send Remits to (Purchasing)	☐	☐ Sales	
Email Price Changes	☐	☐ Service	

In Mailing Groups

ADD to Mailing Group

☐ Extra Calendar Medical
☐ Extra EBME (UK)
☐ Extra Calendar Medical WIP
☐ Extra V1000 (Inform of Production)
☐ Extra Medica 2021 (Post-Contact)
☐ Extra Arab Health 2023 Post-Contact
☐ Extra Maquet Potential Customers
☐ Extra Maquet 66 40 044 suppliers/distributors
☐ Extra Enquiry from Viamed-EU
☐ Extra ICU Critical Care
☐ Extra Maternity Labour Delivery
☐ Extra SCBU (UK)
☐ Extra Paediatrics Intensive Care (UK)
☐ Extra EBME Expo 2024
☐ Extra Medica 2024
☐ Extra EBME Expo 2025
☐ Extra Medica 2025
☐ Extra NEW Vet Capnograph
☐ Extra WHX 2026

UPDATE