

A504 - Make an Internal Visit private - confidential

Overview

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Convergence allows you to make your Internal Visits private. By doing so, you are the only one who can access it. You can also share it with specific people only .

Step-By-Step

STEP 1

When creating an Internal Visit, tick the **"Private"** checkbox in the Information section

The screenshot shows the 'Edit IV-000092' form. The 'Internal Visit Id' is IV-000092. The 'Owner' is Marc Steyaert. The 'Addressable Spend' is 123. The 'Currency' is EUR. The 'Private' checkbox is checked, indicated by a yellow highlight.

For an already existing Internal Visit, open it and :

- 1- Tick box **"Private"**
- 2- Click on the **"Save"** button

The screenshot shows the details page for Internal Visit IV-000092. The 'Private' checkbox is checked, indicated by a yellow highlight.

STEP 2

Your Internal Visit is now private, visible only by the **Owner**.

In order to share it with other user click on the **"Sharing"** button

The screenshot shows the details page for Internal Visit IV-000092. The 'Sharing' button is highlighted in yellow. The 'Guests' list is visible, showing two users: Jean-Pierre and Marie-Ange.

STEP 3

Type the name of the person you want to share your Internal Visit with in the "User Name" field and select it

Sharing

User Name * Access Level

Read Edit

ACTION	USER	TYPE	ACCESS
	Solvay	Rule	Read
	Marc Steyaert	Owner	All

Cancel

STEP 4

1- Choose a "Read" Access Level if you want your colleagues to only display your Visit Minutes, or "Edit" one if you want them to be able to edit it

2- Press the "Create new sharing" button

Sharing

User Name * Access Level

Read Edit

Create new sharing