

A501 - New Internal Visit

Overview

Internal Visits is a Convergence page to record every meeting that took place between Solvay colleagues involved in the purchasing process.

In this page we will see how to create an Internal Visit and how to manage it.

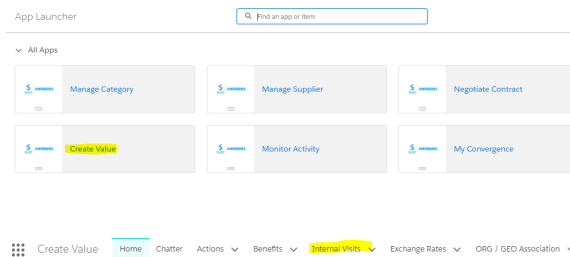
Step-by-step

Table of content

- [Step-by-step](#)
- [Add Properties to your Internal Visit](#)

STEP 1

Open the app "Create Value"

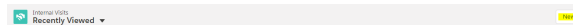


STEP 2

Go to the tab "Internal Visits"

STEP 3

Click on the "New" button



STEP 4

Fill in section "Information" .

Topics : choose the topic picklist the of the meeting by selecting it ; if several, chose multiple topics by maintaining the "Ctrl" key

Note that if you choose the topic "Other", you will have to fill-in the "Other topics" field

Other Topics: field is mandatory if you chose "Other" in the "Topics" field

Addressable Spend: Fill-in the field with the amount of Spend covered by the discussed topics

Currency: choose in the picklist the currency related to the amount of Addressable Spend

Private: tick the checkbox in order to make your Internal Visit confidential ; only certain appointed users can access the Internal Visit. We will see further this point in [this chapter](#)

Scope: this is the field where you precise the agenda of your meeting

The screenshot shows the 'New Internal Visit' form. The 'Information' section is highlighted. It contains fields for 'Internal Visit Id', 'Owner' (Yoann Petit-ext), 'Addressable Spend', 'Currency' (set to 'None'), and 'Private' (checkbox). There is also a 'Topics' picklist with options: 'Brainstorming Collaborative', 'Brainstorming-Commercial', 'Contract', and 'Excellence Centre'. Below the picklist is an 'Other Topics' text area. At the bottom, there is a 'Scope' section with a rich text editor toolbar.

STEP 5

Fill in the Internal Event section in order to plan the meeting and synchronize calendars. Fields in red are mandatory

Short Description : write the title of the meeting that will appear in the calendar

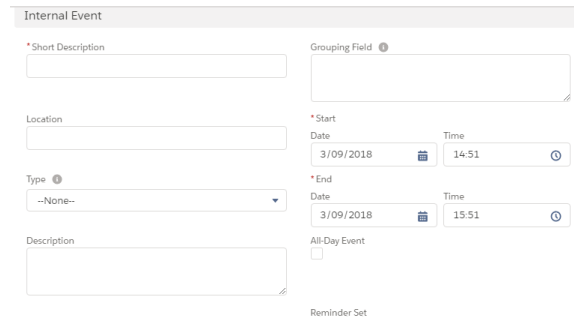
Location : type in the place where the meeting will take place

Type : choose in the picklist the type of meeting

Description : you can log in a longer description of the meeting ; not mandatory

Grouping field: the content of this field is searchable through the global Search Engine ; it also helps you to make a relation between different Convergence objects (i.e. : Actions/Benefits, Visit Minutes, etc. ...)

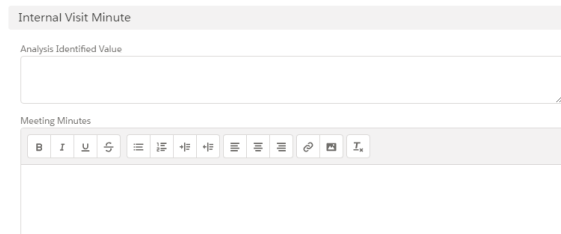
End/Start: indicate here the time slot during which the meeting will occur



The screenshot shows the 'Internal Event' form. It includes fields for 'Short Description' (mandatory), 'Location', 'Type' (a dropdown menu currently showing '--None--'), and 'Description'. There is also a 'Grouping Field' with a help icon. The 'Start' and 'End' sections each have 'Date' and 'Time' pickers, with the 'All-Day Event' checkbox below the 'End' section. A 'Reminder Set' checkbox is at the bottom right.

STEP 6

The section Internal Visit Minute is where you will log the exchange you had with your colleagues during the meeting



The screenshot shows the 'Internal Visit Minute' form. It has a text area for 'Analysis Identified Value' and a 'Meeting Minutes' section. The 'Meeting Minutes' section includes a rich text editor toolbar with icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and other formatting options, followed by a large text area for notes.

STEP 7

Do not forget to save your Internal Visit by clicking on the **“Save”** button.



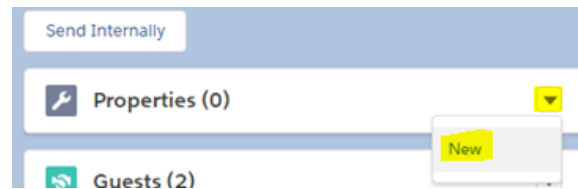
Add Properties to your Internal Visit

By adding properties to your Internal Visit, you allow every Convergence user to retrieve what is going on for a zone, a domain or a segment. Do not hesitate to create them !

Here is how to proceed :

STEP 1

Access your Internal Visit and to the related list "**Properties**", to the right of the screen, and click on the "**New**" button



STEP 2

You are then redirected to the screen where you create the Internal Visit properties.

Each contract property is defined for a given Internal Visit on 3 axis (the Master Keys) :

1. **Geographical Axis** : which zone, country or site ?
2. **Organisational Axis** : which GBU or business line ?
3. **GPS Axis** : which segment, material group or sub-material group ?

Do not forget to save your contract property by clicking on the "**Save**" button.

A screenshot of a form titled 'Information' and 'Related to... (Only one can be selected at a time)'. The 'Information' section contains three search fields: '* ORG axis' with a search icon, '* GEO axis' with a search icon, and '* GPS axis' with a search icon. The 'Related to...' section contains four search fields: 'Qualification Process' with a search icon, 'Contact' with a search icon, 'Visit Minute' with a search icon, and 'Internal Visit' with a search icon. The 'Internal Visit' field is selected and shows the value 'IV-000092' with a close button.