

A1810 - New Visit Minute

Overview

Visit Minute is a Convergence page to record every meeting that took place between a Solvay Buyer and an external party.

Following topics will be in the page:

1. Meeting Date
2. Meeting Location
3. Short description
4. Topics Discussed

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Step-By-Step

STEP 1

Account Owner you can Create **"Visit Minute"**

1- In Tabs => Click on **"Accounts"**

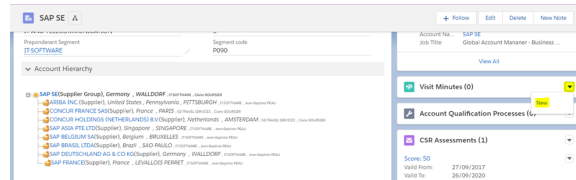
2- In View Menus => Select **"My Accounts"**

3- In ListViews => Click on **"an Account"** e.g. SAP SE

ACCOUNT NO.	ACCOUNT NAME	CITY	COUNTRY	S.	PARPROVIDE	NATURE	PARENT AC.	SOLVAY AC.	EXTER.	EXTL.
16	Additional Supp. TAP PORTUGAL	Uster	Portugal	P106	GETRAVEL SER.	Ba-Regular Acc.	CAIRE BOURSIER		T&E	
17	Supplier STRATTECO	CHICAGO	United States	P059	GETRANGOME.	Ba-Regular Acc.	STRATEGG	Qentor-RENA.	2133399	
18	Supplier STRALUIS SA	PARIS	France	P206	GETRANNO S.	Ba-Regular Acc.	CAIRE BOURSIER	10212252	1021322	
19	Additional Supp. SINGAPORE AI	SINGAPORE CITY	Singapore	P106	GETRAVEL SER.	Ba-Regular Acc.	CAIRE BOURSIER		T&E	
20	Supplier SHANGHAI CT.	SHANGHAI	China	P106	GETRAVEL SER.	Ba-Regular Acc.	SHANGHAI CTR.		A004290	
21	Supplier Group SHANGHAI CT.	NON SPECIFIE	Non Specified C.	P106	GETRAVEL SER.	Ba-Regular Acc.	CAIRE BOURSIER		PA004290	
22	Supplier Group SAP SE	WALLDORF	Germany	P000	IT/SOFTWARE	Ba-Regular Acc.	CAIRE BOURSIER		21626895	

STEP 2

Go to the **"Visit Minutes"** related list to the right of your screen and click in the button **"New"**



STEP 3

1- Verify that the name of your supplier is the right one on the field **"Account"**

2- Click on the **"Meeting Date"** field and choose the date of the day you met our supplier

3- Click on the **"Meeting Location"** field and write the location of the meeting

4- Click on the **"Short Description"** field and write a description for the Visit Minute

5- In the topic discussed fields, select the right ones. If several, select them maintaining the "Ctrl" key

6- In the **"Meeting Minute"** field, write your notes to be shared with all.

Information

Visit Minute Id: [] Is Private:

Owner: Claire BOURSIER Success Story:

*Account: SAP SE

Visit Content

*Meeting Date: []

*Meeting Location: []

*Short description: [] Grouping Field: []

*Topics Discussed: Business & market update, Commercial, Costs & cash savings opportunities, ICT, HSE, Innovation, Other

Other Topics Discussed: []

7- In the "Additional Internal Notes" field, write your notes to be shared internally (Solvay Only)

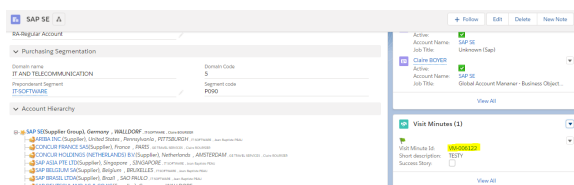
8- Click "Save"

The Visit Minute is created, you are directed to the Visit Minute Detail page, and you can see the content.



STEP 4

Back to the Account page, go and see the "Visit Minutes" related list. The Visit Minute you just created is visible



Related articles

- [A1711 - New other document](#)

Need help?

How to ask for assistance?

Dear *SalesForce Convergence* user,

For any question or issue regarding Convergence, please :

- create a request in **Service One** with the following information:
 - I want to update data in Convergence [Maintain data ownership in CONVERGENCE](#)
 - I want to mass upload procurement data [Maintain procurement data in CONVERGENCE](#)
 - Process : Data & Analysis
 - PTP-Subprocess: Purchasing Tools Support
 - PTP-Category: Convergence

For account creation, please refer to [here](#).

Thank you very much,

Convergence Team.