

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

Table of content

- [Step-By-Step](#)
- [Related articles](#)
- [Need help?](#)
 - [How to ask for assistance?](#)

Step-By-Step

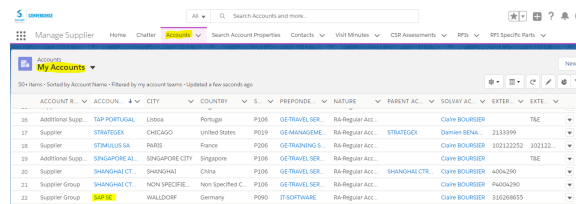
STEP 1

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

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

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

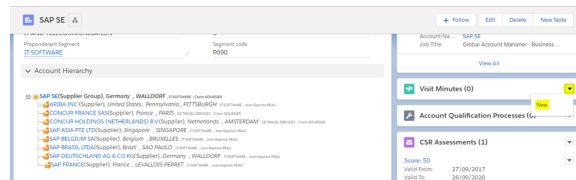
3- In ListViews => Click on **"an Account"** e.g. SAP SE



ACCOUNT N.	ACCOUNT	CITY	COUNTRY	S.	P.	NATURE	PARENT AC.	SOLVAY AC.	EXTER.	EXT.
16	Additional Supp...	TAP PORTUGAL	Utrera	Portugal	P106	GETRAVEL SER...	Ba-Regulac...	Claire BOURSIER	T&E	
17	Supplier	STRATISD	CHICAGO	United States	P109	GE-MANAGING...	Ba-Regulac...	OTWATER	Devon-RENA...	2113399
18	Supplier	STRALUS SA	PARIS	France	P106	GE-TRAINING S...	Ba-Regulac...	Claire BOURSIER	10112252	102132
19	Additional Supp...	SINGAPORE AL	SINGAPORE CITY	Singapore	P106	GETRAVEL SER...	Ba-Regulac...	Claire BOURSIER	T&E	
20	Supplier	SHANGHAI CT	SHANGHAI	China	P106	GETRAVEL SER...	Ba-Regulac...	SHANGHAI CTR	Claire BOURSIER	A004290
21	Supplier Group	SHANGHAI CT	NON SPECIFIC	Non Specified C...	P106	GETRAVEL SER...	Ba-Regulac...	Claire BOURSIER	P4004290	
22	Supplier Group	WALLDORF	Germany	POBO	P106	IT/SOFTWARE	Ba-Regulac...	Claire BOURSIER	210268055	

STEP 2

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



Information	Visit Content
Visit Minute Id Owner: Claire BOURSIER * Account: SAP SE	* Meeting Date * Meeting Location * Short description * Topics Discussed: Business & market update, Commercial, Costs & cash savings opportunities, CST, HSE, Innovation, Other

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 CST HSE Innovation Other	Other Topics Discussed

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

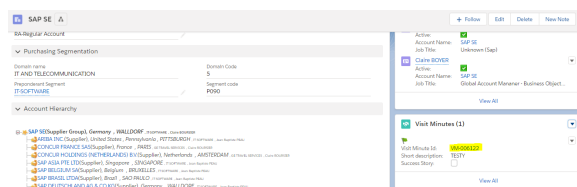
8- Click "**Save**"

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.](#)