

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"**

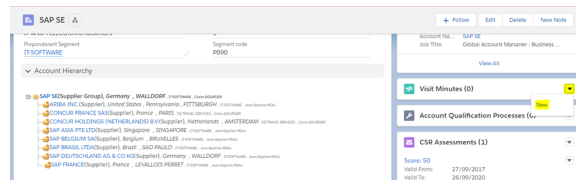
2- In View Menus => Select **"My Accounts"**

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

ACCOUNT N°	ACCOUNT	CITY	COUNTRY	S.	RESPONDE	NATURE	PARENT AC	SOLVAY AC	EXTER.	EXT.
16	Additional Supp...	TAP PORTUGAL	Urtica	Portugal	P106	GETRAVEL SER...	Ba-Regulac...	Claire BOURSIER	T&E	
17	Supplier	STRATOSYS	CHICAGO	United States	P109	GE-MANAGING...	Ba-Regulac...	OTWATER	Devnet-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	WALLDOOP	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"**



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: [Field]

Owner: Claire BOURSIER

* Account: SAP SE

Visit Content

* Meeting Date: [Calendar icon]

* Meeting Location: [Text field]

* Short description: [Text field]

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

Grouping Field: [Field]

Other Topics Discussed: [Text field]

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

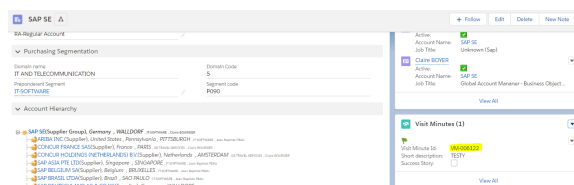
8- Click "**Save**"

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.](#)