


A1811 - Sending Visit Minutes

Overview

In this section, you can send the Visit Minutes to the supplier, to your Manager or Colleagues

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 Guests and Solvay Account team members are by default in copy of the e-mail

Step-By-Step

How Add the Guests ?

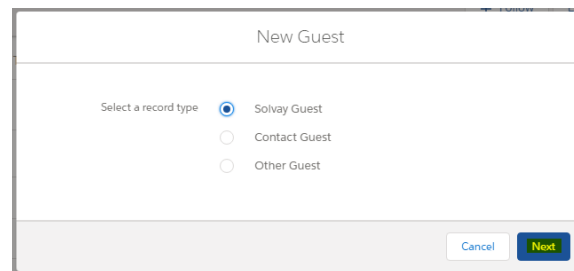
- **Solvay Guest** = Solvay user with Convergence license
- **Contact Guest** = Account related contact
- **Other Guest** = Solvay staff with no Convergence license

STEP 1

From your Visit Minute, go to the "**Guests**" related list and click in the button "**New**"



1- In view menu **Record Type of new record**, select "**Contact Guest**" or "**Other Guest**" or "**Solvay Guest**"

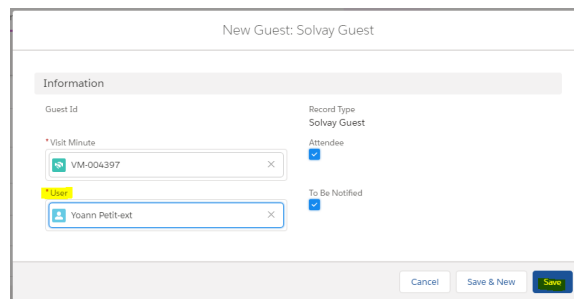


2- Click on "**Next**"

3 – Fill User **name** you can use the search help by pressing the "Enter" key

4 – Click on **Save** if you add only one guest ", if you add more Guests Click on "**Save & New**"

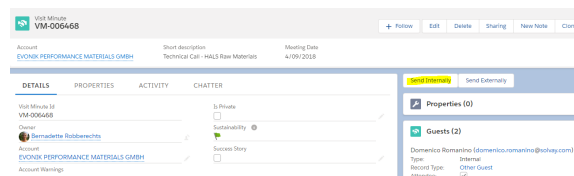
N.B. : ticking the checkbox "To Be Notified" will allow to automatically populate the "To:" field with the guest email when sending your Visit Minutes



STEP 2

Visit Minute Detail

Click on "**Send Internally**", a preview of the email is generated with all Visit Minutes fields, including internal notes



STEP 3

Check that relevant Solvay email addresses are in copy and then click on "**Send Email**"

You can add an Additional to Recipients (Click in the magnifier at the right of the Additional to)



By default, the **Account Solvay team** members are in the "CC:" field and all **Solvay guests** are in the "To:" one

To:

From:

CC:

Subject

Body

B I U S [Rich Text Editor Icons]

-- For internal use only --

Dear all,

Please find below the report of our last meeting with EVONIK PERFORMANCE MATERIALS GMBH.

Visit Minute link : <https://solvayrm--UAT.cs106.my.salesforce.com/a0a580000K7UxS>

Visit Minute number: VM-006468
Meeting date: 4/09/2018
Location: Conference Call

Send Email

STEP 4

Visit Minute Detail

Click on "**Send Externally**", a preview of the email is generated with all Visit Minutes fields, excluding internal notes

Visit Minute VM-006468

Account: EVONIK PERFORMANCE MATERIALS GMBH | Short description: TECHNICAL C&I - H&LS Raw Materials | Meeting Date: 4/09/2018

DETAILS | PROPERTIES | ACTIVITY | CHAT

Visit Minute ID: VM-006468 | Owner: Bernadette Robberechts | Account: EVONIK PERFORMANCE MATERIALS GMBH

3 Private | Satisfiability: [icon] | Service Story: [icon]

Send Internally | **Send Externally**

Properties (0)

Guests (2): Domenico Romano (domenico.romano@solvay.com) | Type: Internal

STEP 5

Check that relevant Solvay email addresses are in copy and then click on "**Send Email**"



By default, the **Account Solvay team** members are in the "CC:" field and all **Solvay guests** are in the "To:" one

To:

From:

CC:

Subject

Body

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Location: Conference Call

Send Email

Related articles

Need help?

- [A18 - Visit Minutes](#)

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.