

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

STEP 4

Visit Minute Detail

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

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

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.