A1811 - Sending Visit Minutes

Overview

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

Table of content

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

Step-By-Step

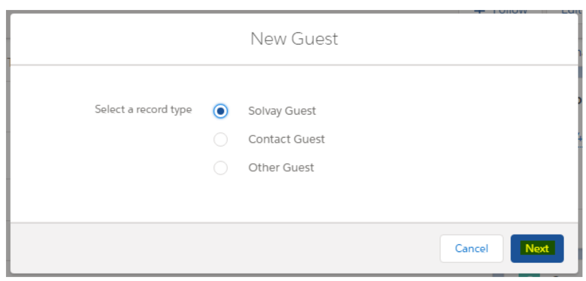
How Add the Guests ?

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

STEP 1

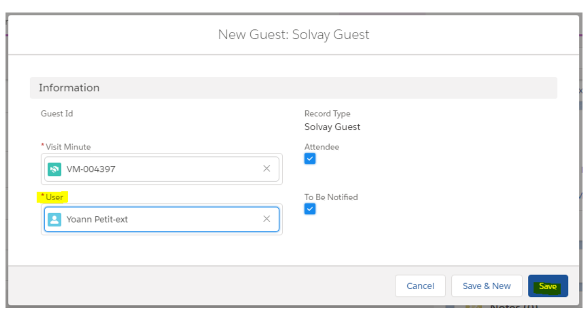
From your Visit Minute, go to the "**Guests** " related list and click in the button "**New**"

1- In view menu **Record Type of new record**, select "**Contact Guest"** or **"Oth er Gues"t** or **"Solvay Guest"**



2- Click on "**Next**"
3 – Fill User **name** you can use the search help by pressing the "Enter" key

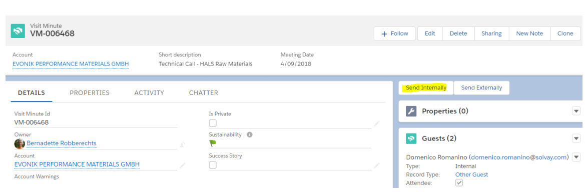
4 – Click on **Save** " if you add only one guest ", if you add more Guests Click on "**Save & New**"
N.B. : ticking the checkbox "To Be Notified" will allow to automatically populate the "To:" field with the guest email when sending your Visit Minutes



STEP 2

Visit Minute Detail

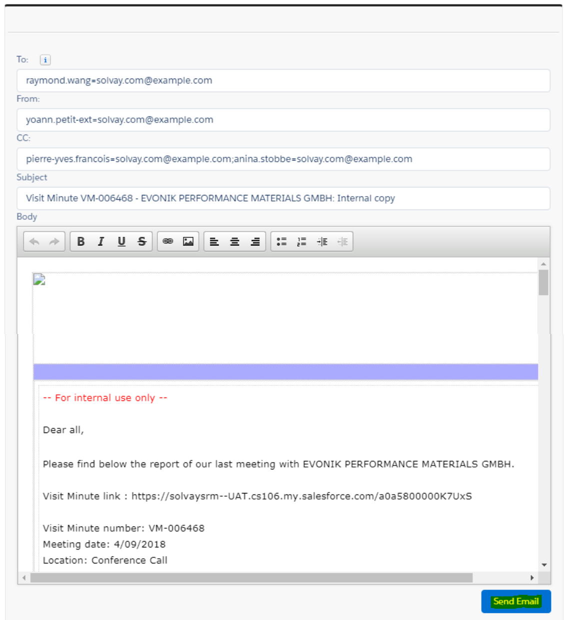
Click on **"Send Internally"**, a preview of the email is generated with all Visit Minutes fields, including internal notes



STEP 3

Check that relevant Solvay email adresses 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)

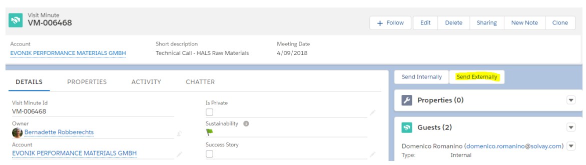
By default, the **Account Solvay team** members are in the "CC:" field and all **Solvay guests** are in the "To:" one



STEP 4

Visit Minute Detail

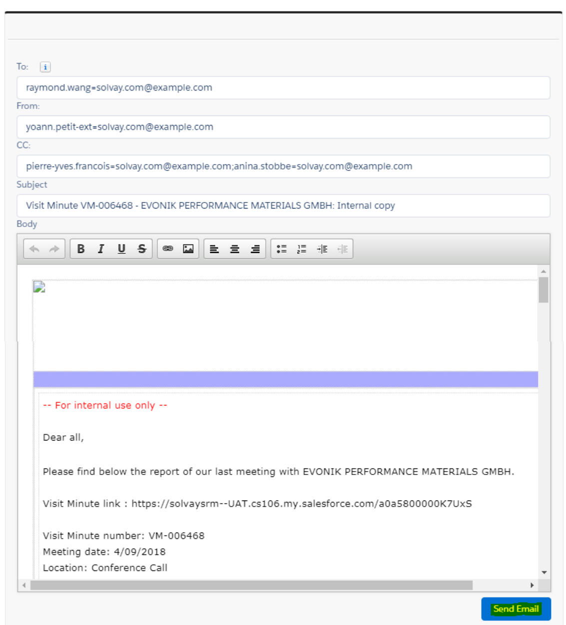
Click on "**Send Externally",** a preview of the email is generated with all Visit Minutes fields, excluding internal notes



STEP 5

Check that relevant Solvay email adresses 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.