

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"

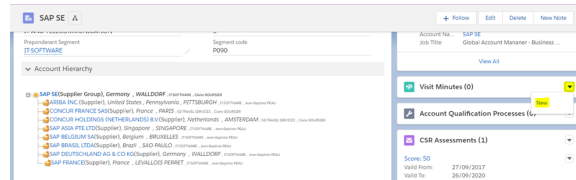
2- In View Menus => Select "My Accounts"

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

ACCOUNT NO.	ACCOUNT NAME	CITY	COUNTRY	S.	PARPROVIDE	NATURE	PARENT AC.	SOLVAY AC.	EXTER.	EXTE.
16	Additional Supp. TAP PORTUGAL	Uster	Portugal	P106	GETRAVEL SER.	Ba-Regular Acc.	CAIRE BOURSIER		T&E	
17	Supplier STRATTECO	CHICAGO	United States	P059	GETRANGOME.	Ba-Regular Acc.	STRATEGG	Qentor-REAL	2133399	
18	Supplier STRALUIS SA	PARIS	France	P206	GETRANNO S.	Ba-Regular Acc.	CAIRE BOURSIER	10212252	1021322	
19	Additional Supp. SINGAPORE AI	SINGAPORE CITY	Singapore	P106	GETRAVEL SER.	Ba-Regular Acc.	CAIRE BOURSIER		T&E	
20	Supplier SHANGHAI CT.	SHANGHAI	China	P106	GETRAVEL SER.	Ba-Regular Acc.	SHANGHAI CTR.	4004290		
21	Supplier Group SHANGHAI CT.	NON SPECIFIC	Non Specified C.	P106	GETRAVEL SER.	Ba-Regular Acc.	CAIRE BOURSIER	PA004290		
22	Supplier Group SAP SE	WALLDORF	Germany	P090	IT/SOFTWARE	Ba-Regular Acc.	CAIRE BOURSIER	21626695		

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: [] 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, ICT, HSE, Innovation, Other

Other Topics Discussed: []

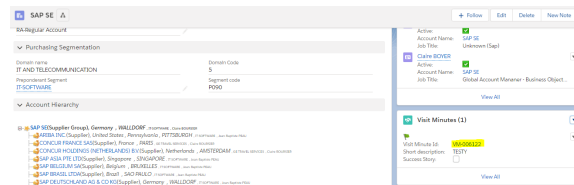
7- In the "Additional Internal Notes" field, write your notes to be shared internally (Solvay Only)

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.

Workflow history

This view shows the 5 most recent entries. The complete workflow log is available from the 'Document Activity' menu item.

From Sept 08,
2016 to Sept
05, 2018

Actor





Type

Activity

Version

Yoann Petit-ext , Vincent VERDELLET-
EXT , Isabelle Auboeuf and Fereol
Nyounai Boumtje

Edit

multiple updates from  Yoann Petit-ext ,  Vincent
VERDELLET-EXT ,  Isabelle Auboeuf and  Fereol
Nyounai Boumtje

Sept 06, 2016



Fereol Nyounai Boumtje

Edit

created the page at 2:53 pm
