SMART
MEETING
MINUTES

Smart Meeting Minutes

USER GUIDE

ATTENTION CRM CONSULTING KFT.

CONTENT

INTRODUCTION

Notes and agreed tasks on client meetings are still often recorded in notebooks or in private documents. As a result, sharing the information and related tasks with clients and colleagues is time consuming or incomplete and often hard to find.

We developed a simple app, which is built in salesforce and helps sales people to take notes in a familiar document editor screen and share the information easy by sending pdf or word meeting minutes and by auto creating related tasks. Sales methodologies can be supported by meeting minutes templates created by managers. This helps sales people to not to forget discussing specific topics by meeting types. Enforcing sales teams to use meeting minutes results in an easy to search database of everything clients said.

The application is available in Lightning and Classic version. In the Salesforce mobile app the 'edit' mode is currently not supported, only the 'view' mode is available.

Templates: The pre-build templates are helping you not to forget discussing specific topics by meeting types. As a result, searching in these notes will be easier.

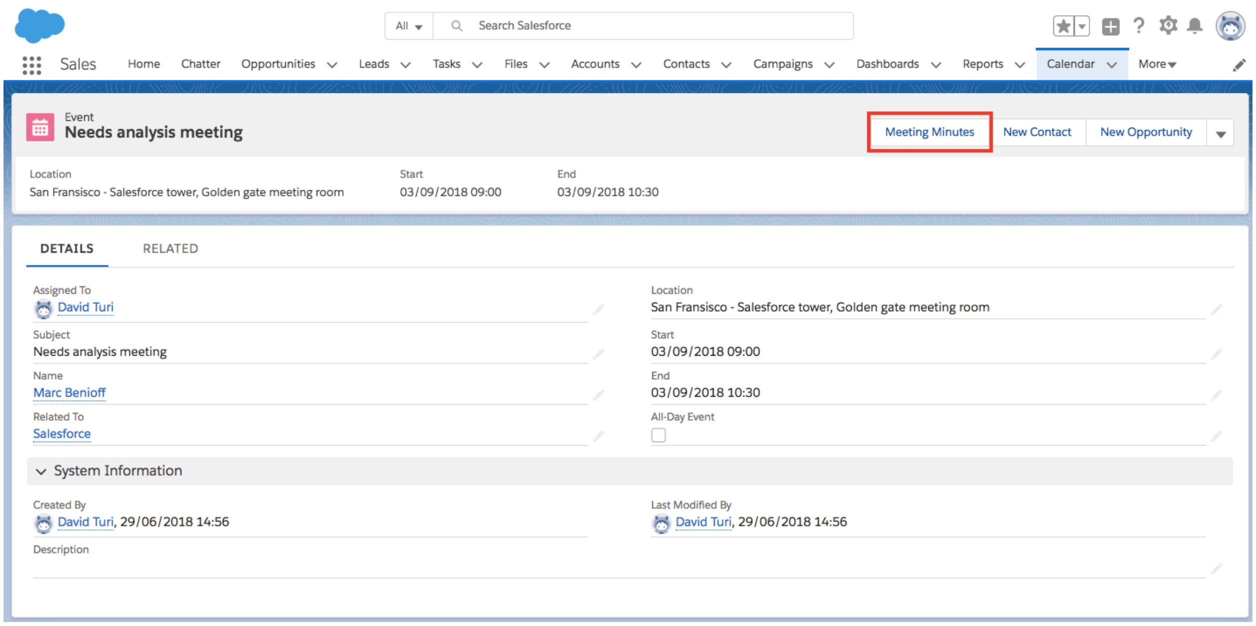
Internal task: Salesfore standard activity task for collegues.

External task: Task for the other party, for example prospects, partners.

LIGHTNING VERSION

OPEN APPLICATION

- select an event record in your Saleforce organization
- click on the 'Meeting Minutes' button on the upper left corner



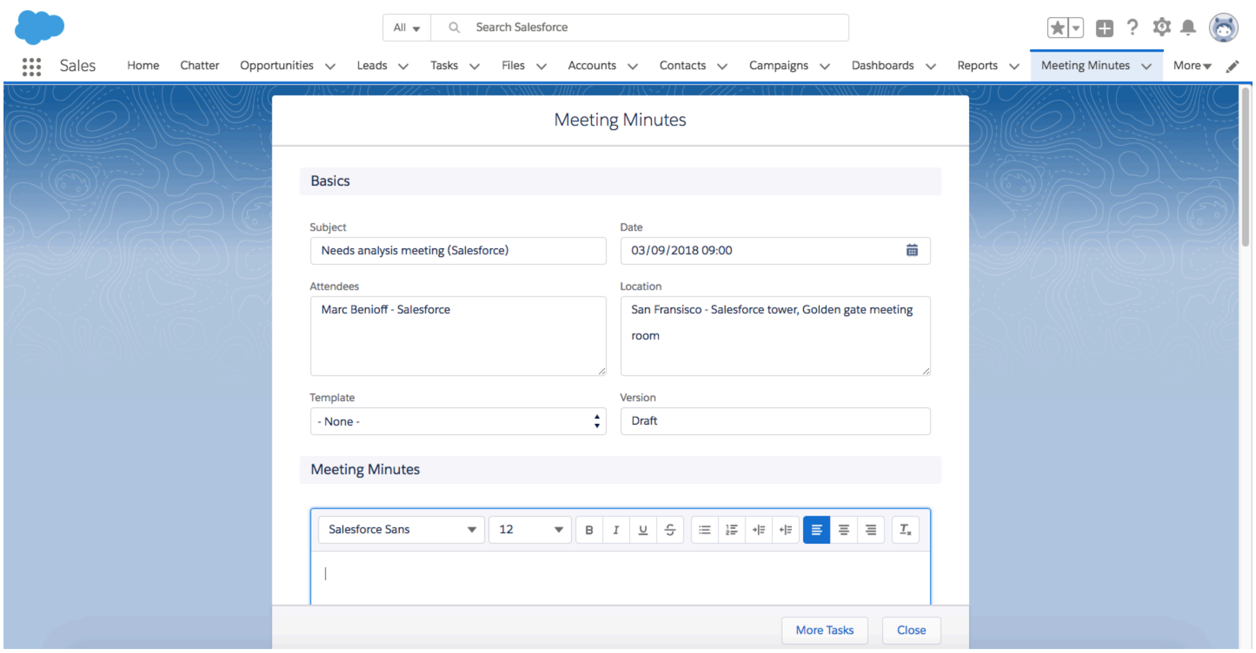
The next screen is the edit layout of the Meeting minutes, where you supplement the basic information of your meeting, take notes, and allocate tasks. Always enter as many information as you have.

BASIC INFORMATION

Fields in the 'Basic' section are refer to the event information. Our suggestion is to add all these data on the Event layout.

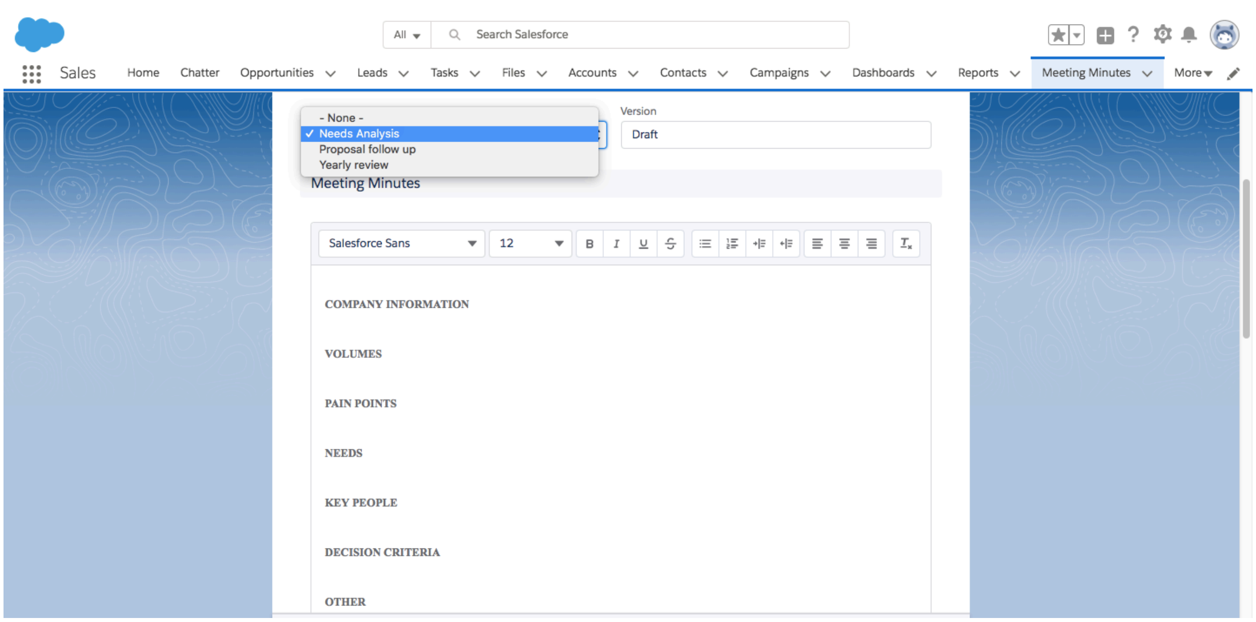
List of fields in this section:

- Subject: Event subject with the selected Account.
- Date: Event date.
- Attendees: Selected Contact on the Event. Add more attendees in the field.
- Location: Event Location field.
- Template: You can choose one or more from the prebuilt meeting templates.
- Version: Mark your memo after working on it. Let your colleagues know the status of your note. Values: Draft, Final.



TAKE NOTES

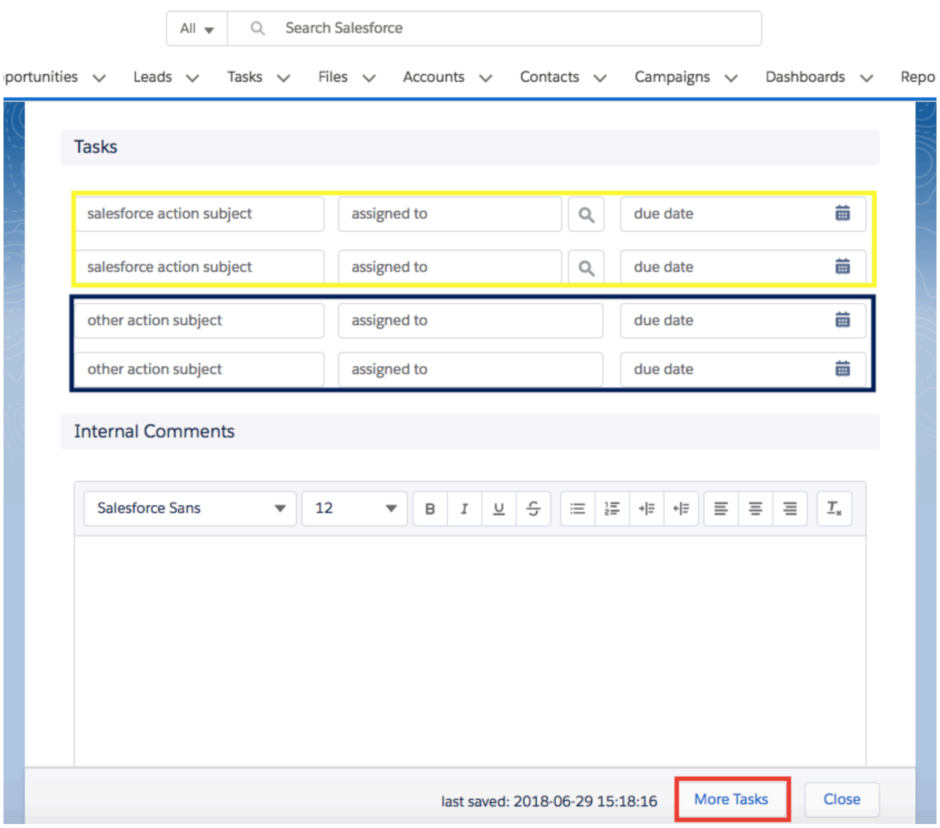
In this section you can take notes in the selected template on your meeting or on your conference call. Choose



- Choose your preferred template from the Basic section. The selected template inserted into the body. In Lightning you can choose more templates. The selected always goes under the previous template.
- Takes notes in the text field.
- Format your text with the function on the top.

CREATE TASKS AND ADD INTERNAL COMMENTS

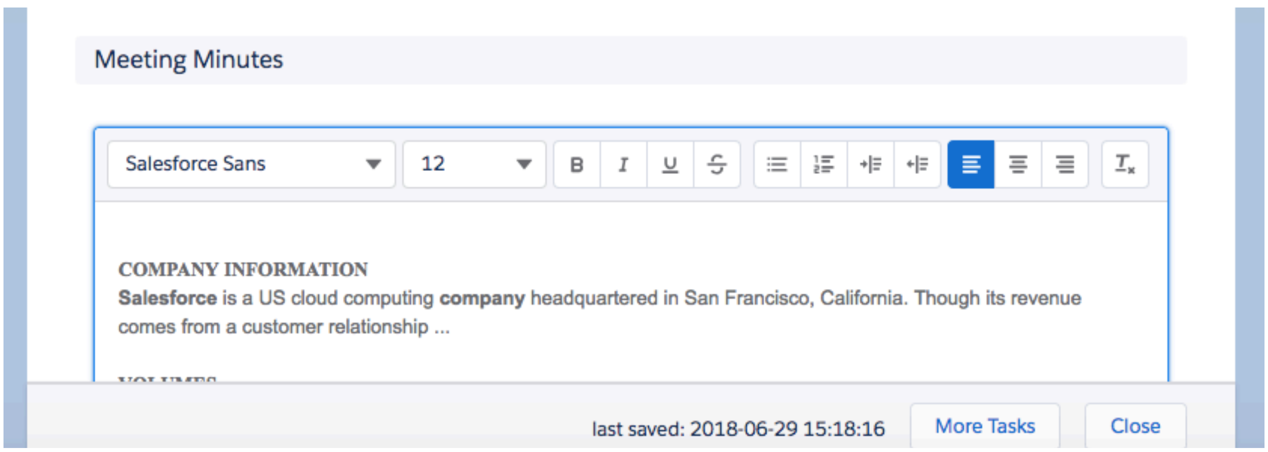
You can easily add internal (marked as yellow) and external (marked as bule) task to your Meeting Minutes. Internal task creates a standard Activity record in the system, external task will be shown as a custom object record in the related list.
In the first column enter the subject of the task. In the middle choose an internal or an external user. In the last column you can give a deadline to your task.
If you filled out some of the task rows, you can press ‘More Tasks’ button to add more new unfilled tasks.
In the Internal comment section you can add internal comments to your Meeting Minutes. These texts are not the part of the generated documents, only your colleagues access them.



- scroll down on the page and add related tasks
- add internal (marked as yellow) task
- add external (marked as bule) task
- add more tasks to your Meeting Minutes marked as red)
- take comments for internal usage

SAVE AND CLOSE

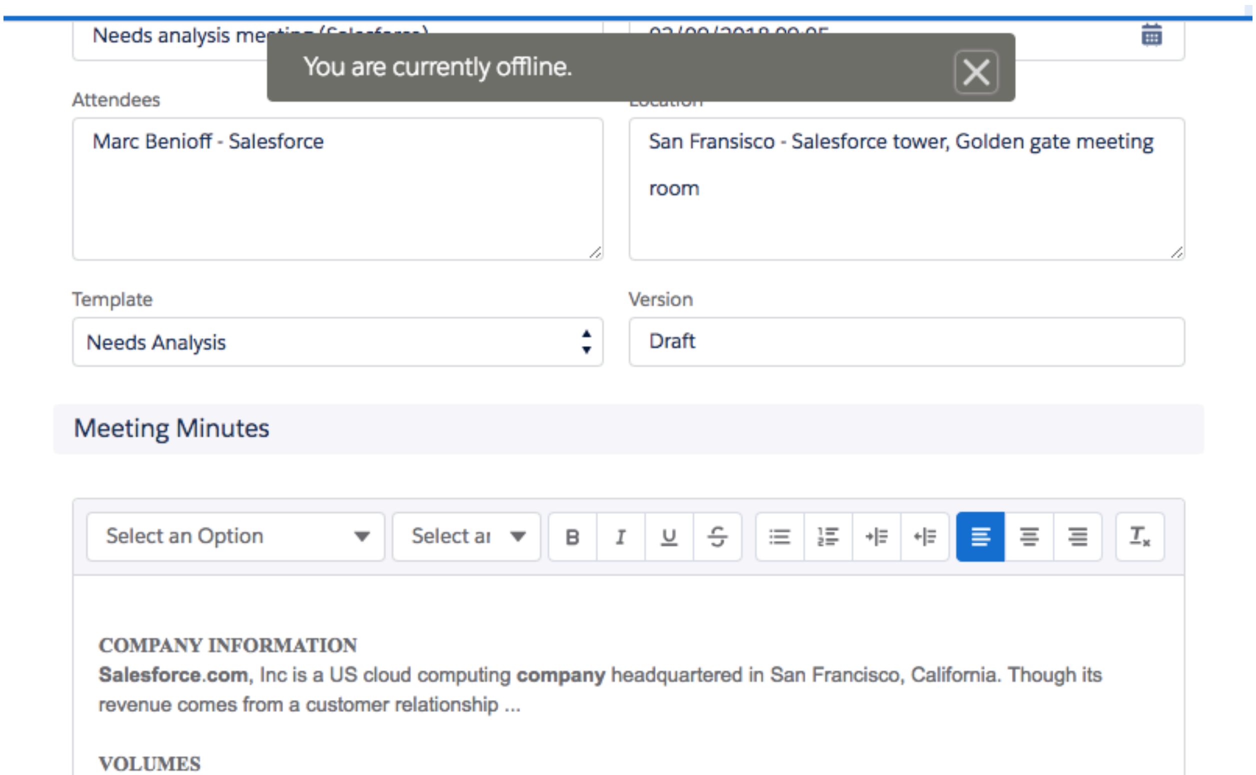
On the bottom of the screen of the application you can see the last saving date. Your inputs are autosaved in every minute. If the message in the bottom is the following: Autosave failed, please check the mandatory fields on your page.
With the 'Close' button you can save and quit from the edit layout.



SMART MEETING MINUTES

OFFLINE USE

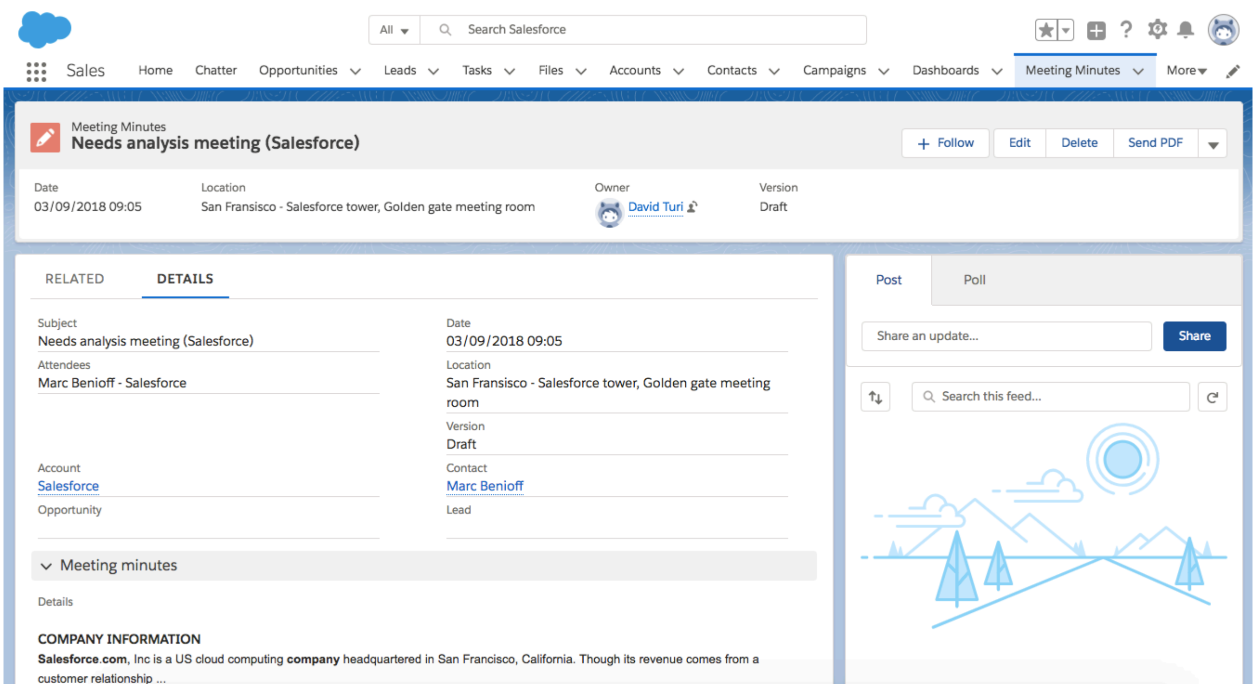
If your device goes offline, you have the following message on your screen: ‘You are currently offline’. You can continue your work, just please pay attention to find Internet access before you hit the ‘Close’ button. If you quit the application in offline mode, your notes will be lost.



VIEW PAGE

You can navigate to Smart Meeting Minutes view page with two different ways: Close your Meeting Minutes after you opened it from the specific event or from the Meeting Minutes Tab.

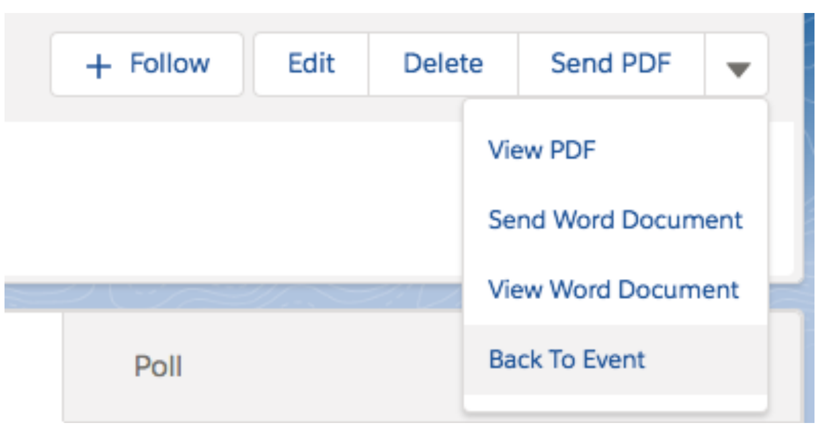
- view all the recorded information
- check internal and external tasks on the right section of the page
- go back to edit mode with the ‘Edit’ button
- navigate to the calendar event with the ‘Back To Event’ button
- handle PDF and Word docs



PDF AND WORD DOCUMENTS

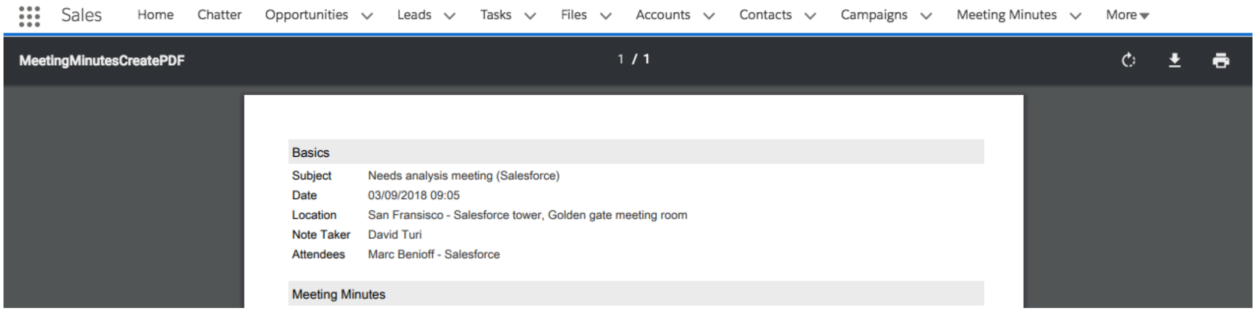
To access these functions, use the following buttons on the upper right corner:

- Send PDF
- View PDF
- Send Word document
- View Word document

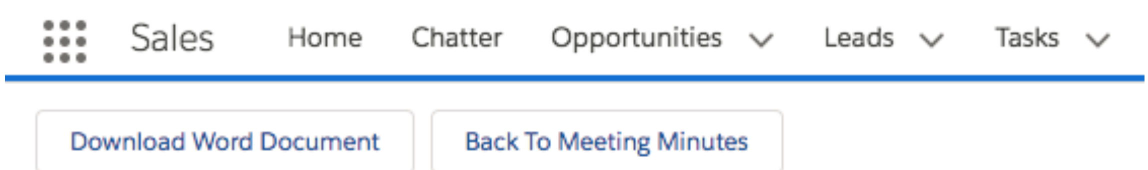


VIEW PDF AND WORD DOCUMENT

'View PDF' button opens your generated PDF file. From the PDF view page, you can easily download, or print the document.

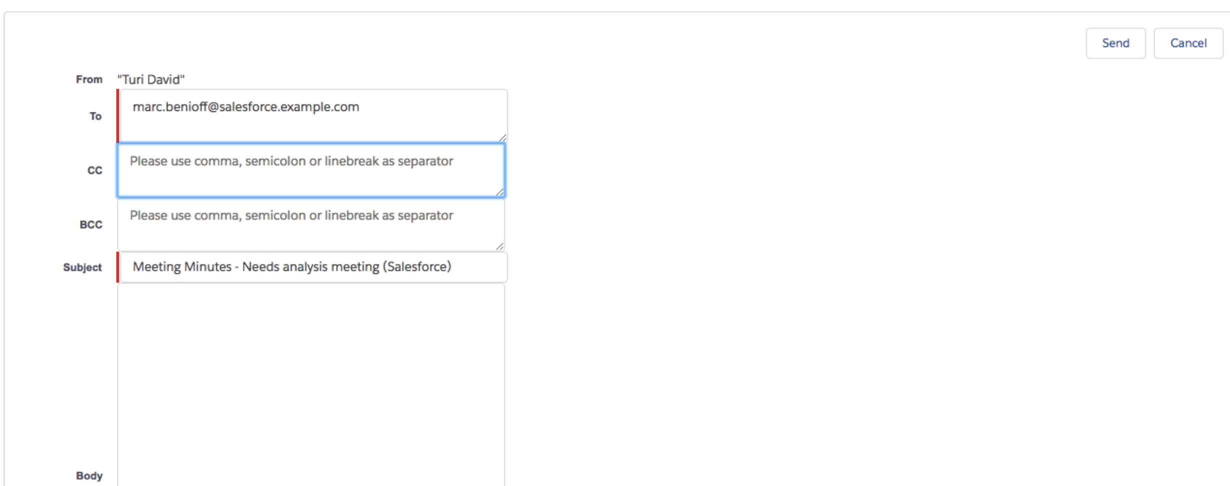


After clicking 'View Word Document' button you have the option to download it and navigate back to the Meeting minutes



SEND DOCUMENTS

'Send PDF' and 'Send Word Documents' buttons open the email sending page.

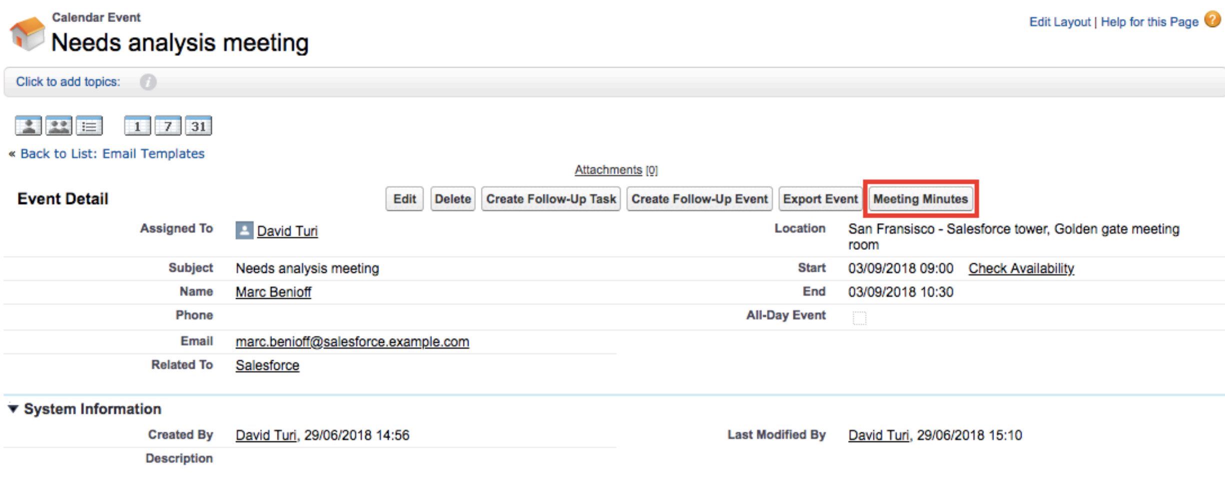


The attachment, and addressee information is automatically added to the email. Fill out the Body section than cklick to 'Send' button.

CLASSIC VERSION

OPEN APPLICATION AND CHOOSE TEMPLATE

- select an event record in your Saleforce organization
- click on the 'Meeting Minutes' button on the upper left corner
- choose one template from the listing



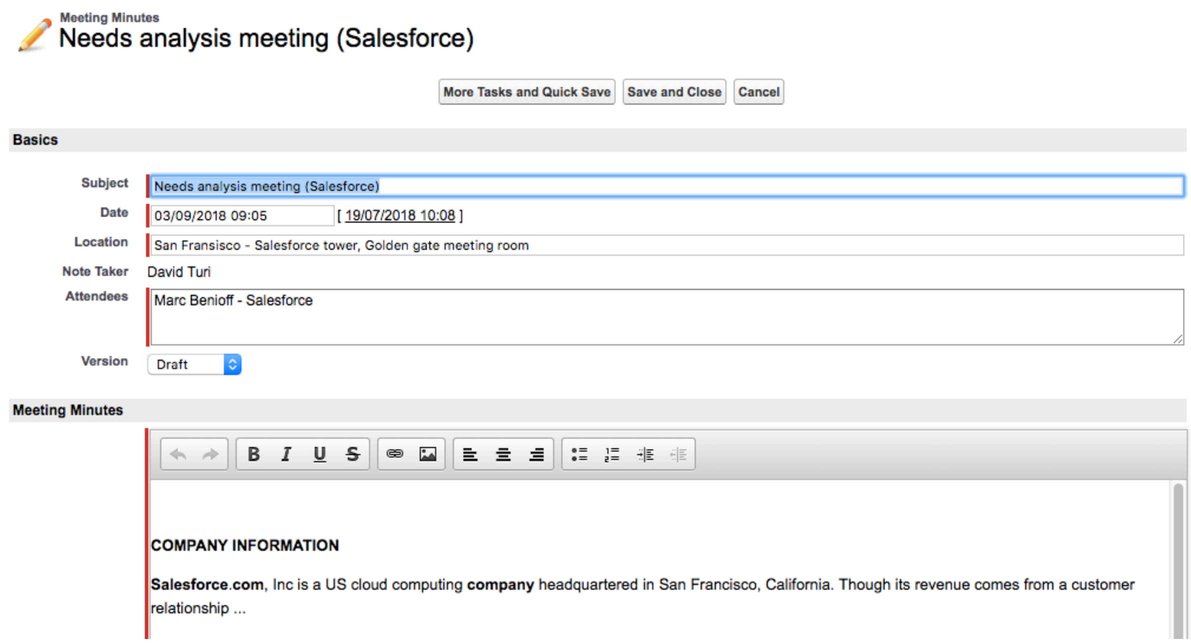
You can preview all the Meeting minutes template just click on 'Preview templates' link.

The next screen is the edit layout of the Meeting minutes, where you supplement the basic information of your meeting, take notes, and allocate tasks. Always enter as many information as you have.

BASIC INFORMATION

Fields in the 'Basic' section:

- Subject: Event subject with the selected Account.
- Date: Event date.
- Location: Event Location field.
- Note taker: User
- Attendees: Selected Contact on the Event. Add more attendees in the field.
- Version: Mark your memo after working on it.



TAKE NOTES

- takes notes in the text field
- format your text with the function on the top

in this section you can take notes on your meeting or on your conference call. The pre-build templates are helping you not to forget discussing specific topics by meeting types. As a result, searching in these notes will be easier.

CREATE TASKS AND ADD INTERNAL COMMENTS

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- add internal (marked as yellow) task
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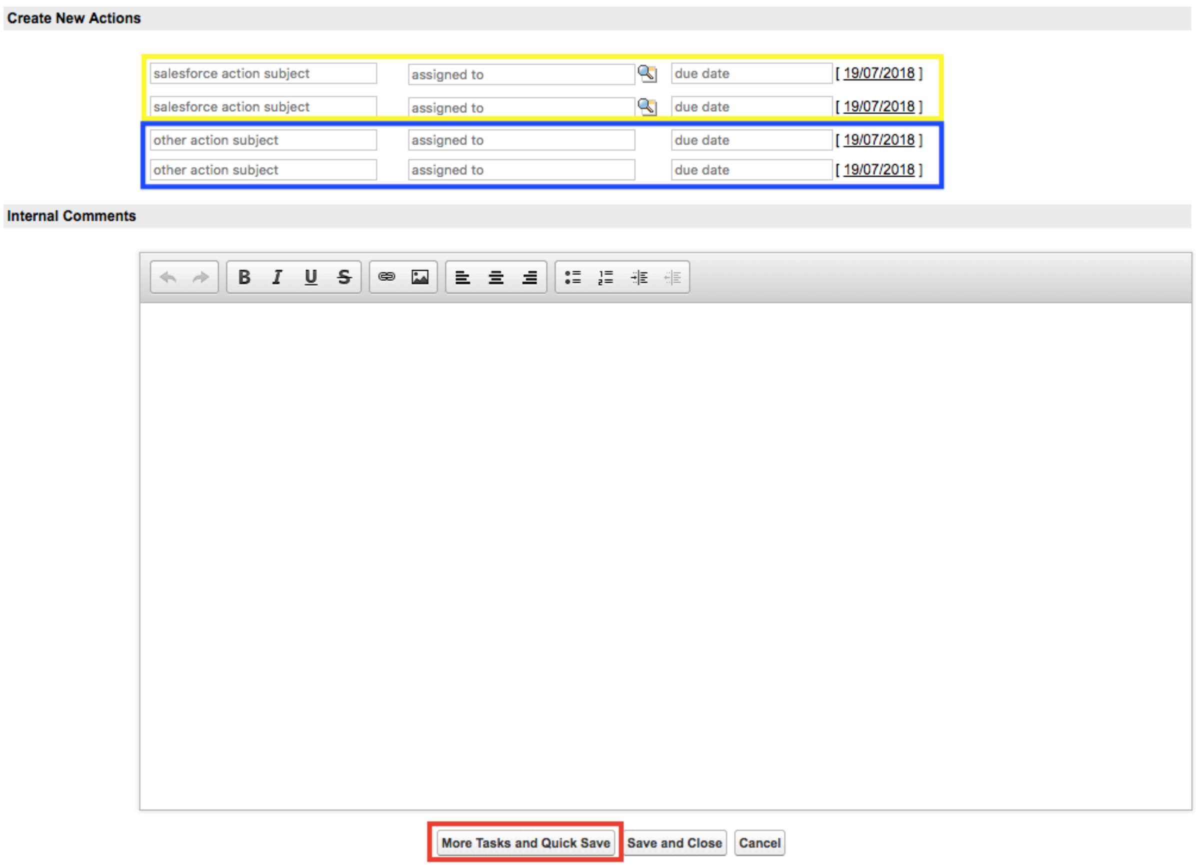
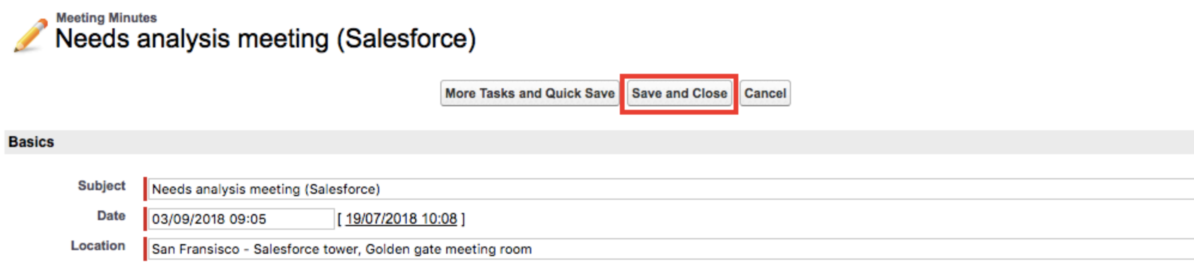


SAVE AND CLOSE

To save and close your Meeting Minutes click on the 'Save and Close' button.

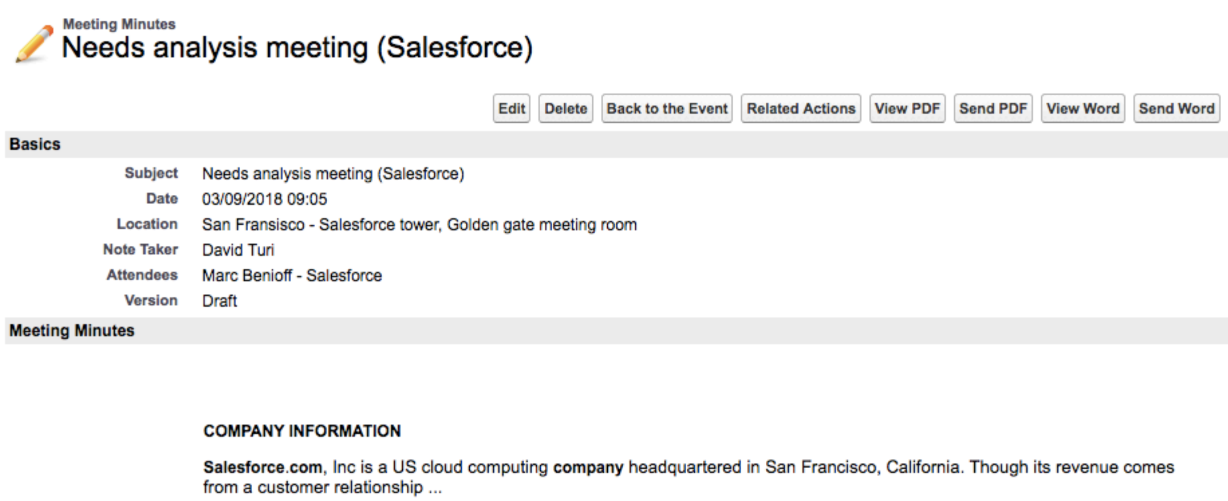


OFFLINE USE

This function is not available is classic version

VIEW PAGE

- view all the recorded information
- check internal and external tasks by clicking on the 'Related Actions button'
- go back to edit mode with the 'Edit' button
- navigate to the calendar event with the 'Back To Event' button
- handle PDF and Word docs



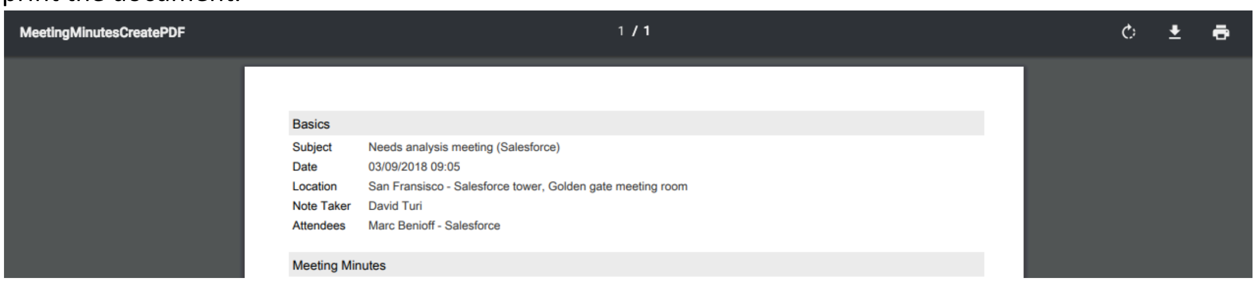
PDF AND WORD DOCUMENTS

To access these functions, use the following buttons on the upper right corner:

- Send PDF
- View PDF
- Send Word document
- View Word document

VIEW PDF AND WORD DOCUMENT

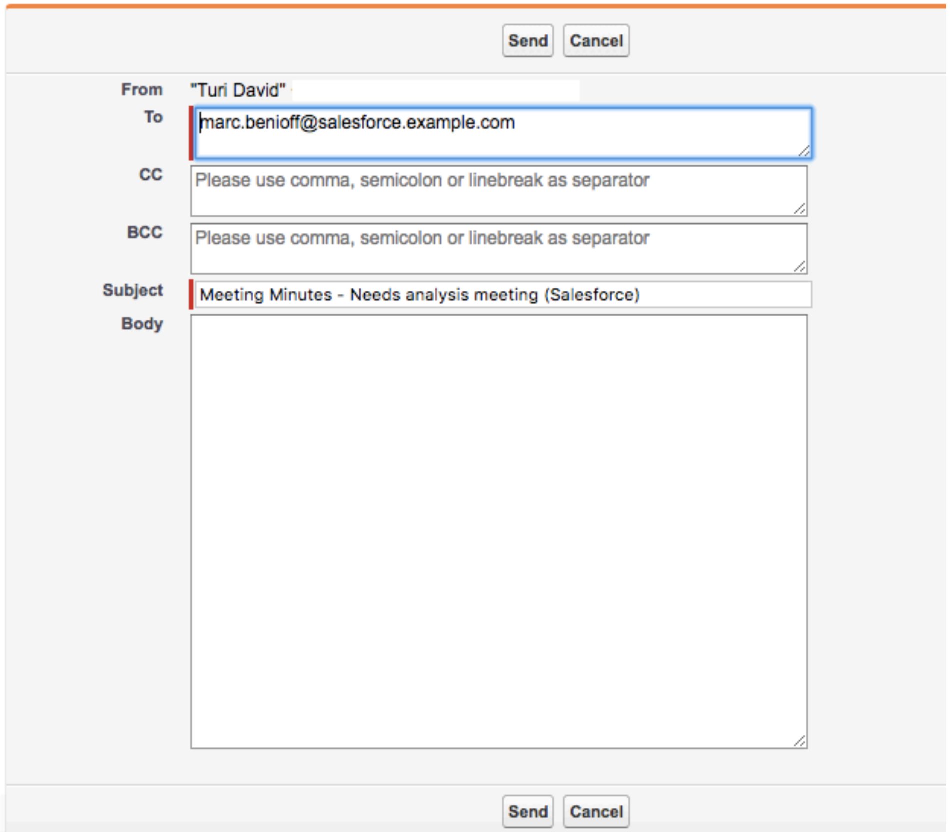
'View PDF' button opens your generated PDF file. From the PDF view page, you can easily download, or print the document.



After clicking 'View Word Document' button the download process is staring.

SEND DOCUMENTS

'Send PDF' and 'Send Word Documents' buttons open the email sending page.



The attachment, and addressee information is automatically added to the email. Fill out the Body section than cklick to 'Send' button.

MEETING MINUTES TEMPLATES

Optionally you can create simple templates to ensure topics to be discussed by meeting type. With the application you have 3 default templates:

- Needs Analysis
- Proposal follow up
- Yearly review

To add more template, connect with your Salesforce System Administrator.

ABOUT ATTENTION CRM CONSULTING

For more information visit our website.

We help our clients to acquire new customers and to increase the benefits of the cooperation with the existing customer base in both – business to business and business to consumer environments. We apply the newest technology and solutions to serve the core business aims of sales, marketing and service.

We do business consulting, software implementation of the leading software (Salesforce.com, Adobe, Microsoft, Oracle etc. – please see details here), after go live consulting and marketing business process outsourcing (please see details here).

Our customers include companies large and small from many industries and locations (please see details here).

Attention in numbers.

- 100 clients
- 150 projects
- 35 consultants
- End users in 15 countries
- Since 2011
- One office
- Official company name: Attention CRM Consulting Ltd.

Company registration number: 01-09-961453
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