



SMART MEETING MINUTES

Smart Meeting Minutes

USER GUIDE

ATTENTION CRM CONSULTING KFT.

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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: Salesforce standard activity task for colleagues.

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

LIGHTNING VERSION

OPEN APPLICATION

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

The screenshot shows the Salesforce interface for an event titled "Needs analysis meeting". The top navigation bar includes "Sales", "Home", "Chatter", "Opportunities", "Leads", "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Calendar", and "More". The event details section includes fields for "Location" (San Francisco - Salesforce tower, Golden gate meeting room), "Start" (03/09/2018 09:00), and "End" (03/09/2018 10:30). Below this, there are tabs for "DETAILS" and "RELATED". The "DETAILS" tab is active, showing fields for "Assigned To" (David Turi), "Subject" (Needs analysis meeting), "Name" (Marc Benioff), and "Related To" (Salesforce). There is also a section for "System Information" showing "Created By" (David Turi, 29/06/2018 14:56) and "Last Modified By" (David Turi, 29/06/2018 14:56). A red box highlights the "Meeting Minutes" tab in the top right corner.

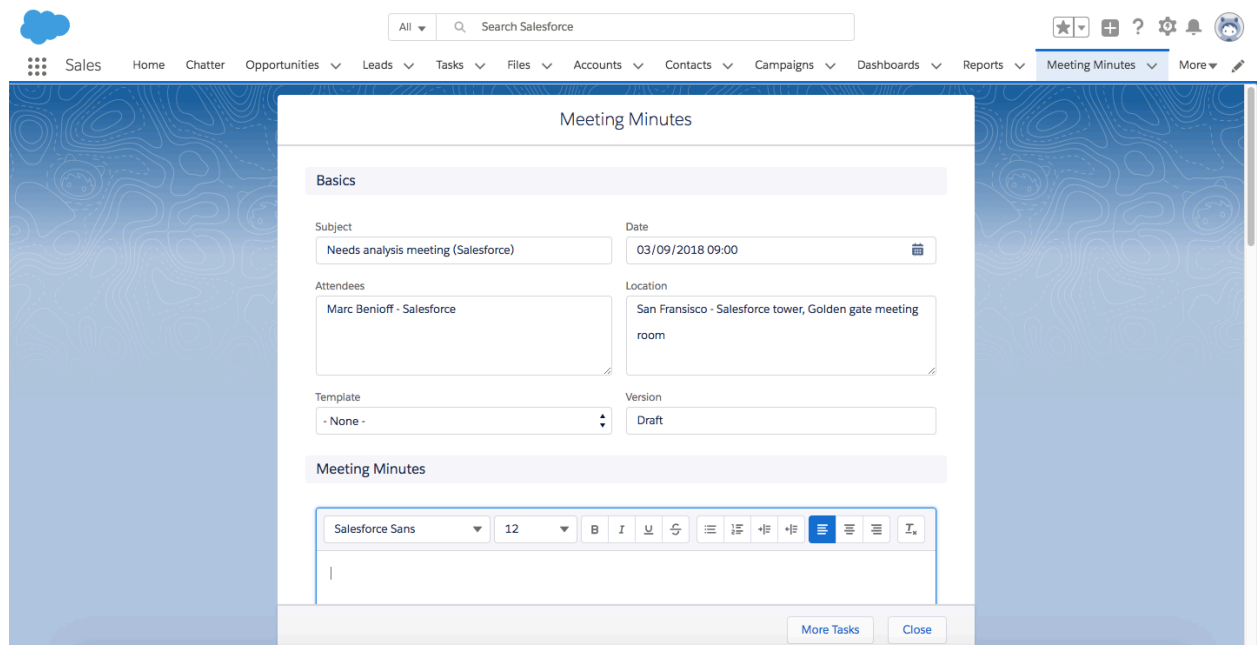
The next screen is the edit layout of the Meeting minutes, where you supplement the basic information of your meeting, take notes, and allocate tasks. Always enter as many information as you have.

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.



The image shows the Salesforce Meeting Minutes form. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu lists: Sales, Home, Chatter, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Meeting Minutes (selected), and More. The form is titled "Meeting Minutes" and is divided into two main sections: "Basics" and "Meeting Minutes".

Basics Section:

- Subject:** Needs analysis meeting (Salesforce)
- Date:** 03/09/2018 09:00
- Attendees:** Marc Benioff - Salesforce
- Location:** San Francisco - Salesforce tower, Golden gate meeting room
- Template:** - None -
- Version:** Draft

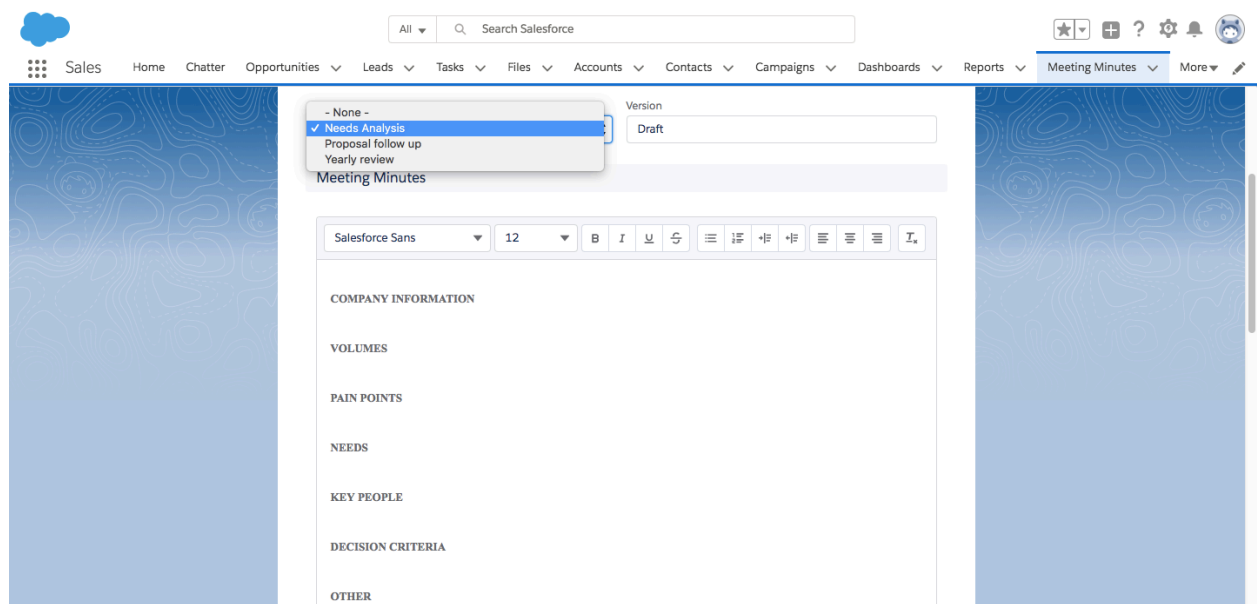
Meeting Minutes Section:

This section contains a rich text editor with a toolbar. The toolbar includes options for font face (Salesforce Sans), font size (12), bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, link, unlink, and text color. The text area below the toolbar is currently empty.

At the bottom right of the form, there are two buttons: "More Tasks" and "Close".

TAKE NOTES

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



This image shows the same Salesforce Meeting Minutes form, but with the "Template" dropdown menu open. The dropdown list shows the following options:

- None -
- ✓ Needs Analysis (selected)
- Proposal follow up
- Yearly review

The "Meeting Minutes" section below the dropdown is now populated with a structured template. It includes a rich text editor with the same toolbar as before. The text area contains the following sections:

- COMPANY INFORMATION
- VOLUMES
- PAIN POINTS
- NEEDS
- KEY PEOPLE
- DECISION CRITERIA
- OTHER

The "Version" field remains set to "Draft".

- 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 blue) 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.

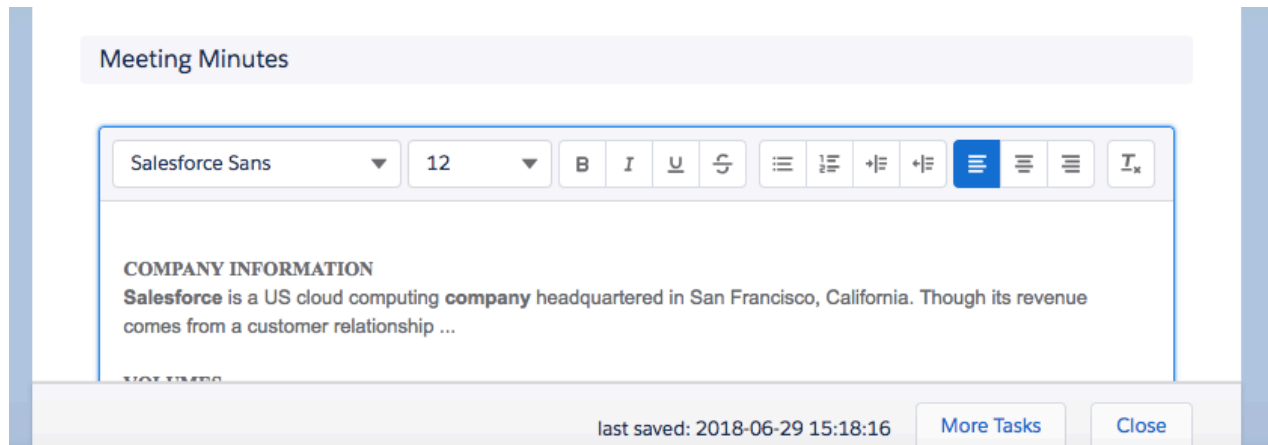
The screenshot shows the Salesforce interface for creating tasks and internal comments. At the top, there is a search bar and a navigation menu with options like 'portunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', and 'Repo'. Below the navigation menu, there is a 'Tasks' section with a table. The table has three columns: 'salesforce action subject', 'assigned to', and 'due date'. The first two rows of the table are highlighted in yellow, and the next two rows are highlighted in blue. Below the 'Tasks' section, there is an 'Internal Comments' section with a text area and a rich text editor toolbar. At the bottom of the interface, there is a status bar showing 'last saved: 2018-06-29 15:18:16' and a 'More Tasks' button highlighted in red.

- scroll down on the page and add related tasks
- add internal (marked as yellow) task
- add external (marked as blue) 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.



OFFLINE USE

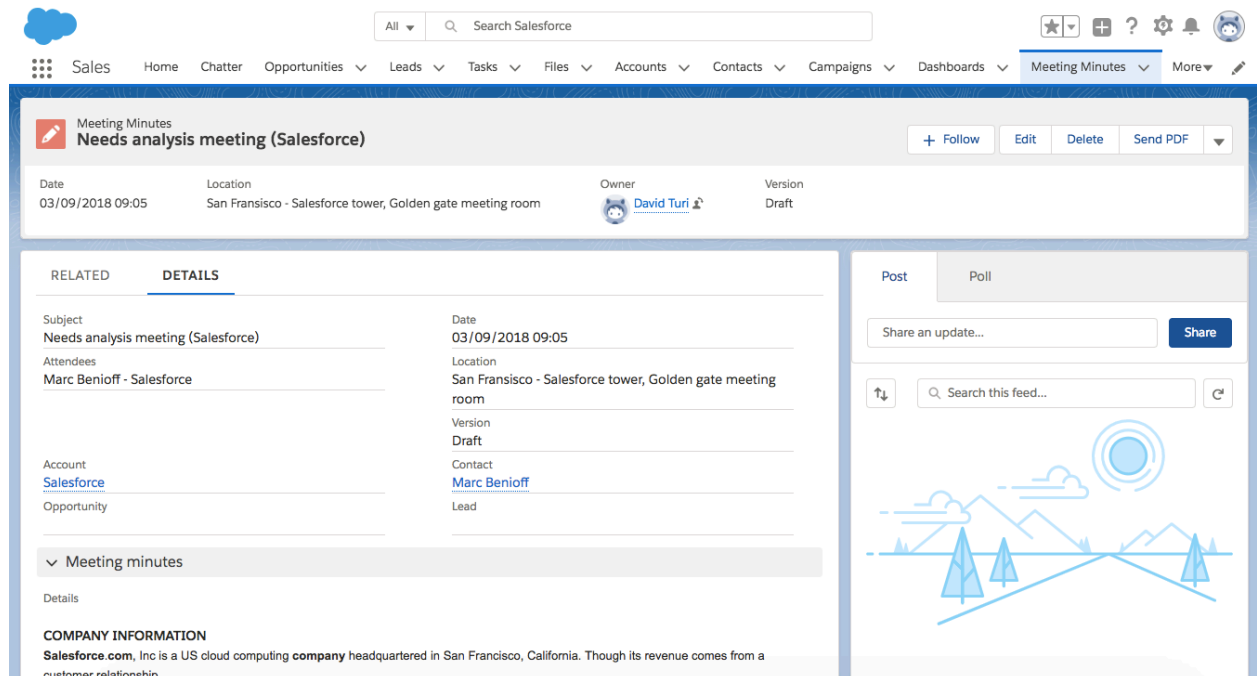
If your device goes offline, you have the following message on your screen: 'You are currently offline'. You can continue your work, just please pay attention to find Internet access before you hit the 'Close' button. If you quit the application in offline mode, your notes will be lost.

The screenshot shows the Smart Meeting Minutes app interface. At the top, a header bar displays the meeting title 'Needs analysis meeting (Salesforce)' and the date '03/09/2018 09:05'. A dark grey modal box with a close button (X) is overlaid on the screen, displaying the message 'You are currently offline.' Below the modal, the 'Attendees' section lists 'Marc Benioff - Salesforce'. The 'Location' section shows 'San Francisco - Salesforce tower, Golden gate meeting room'. The 'Template' dropdown is set to 'Needs Analysis', and the 'Version' dropdown is set to 'Draft'. Below these fields is a section titled 'Meeting Minutes' which contains a rich text editor. The editor has a toolbar with options like 'Select an Option', 'Select all', bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, outdent, and text color. The text area contains the following content: **COMPANY INFORMATION**
Salesforce.com, Inc is a US cloud computing **company** headquartered in San Francisco, California. Though its revenue comes from a customer relationship ...
VOLUMES

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.

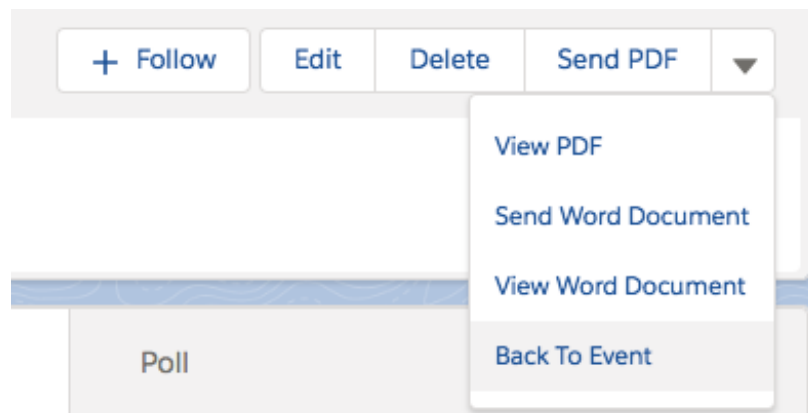
- view all the recorded information
- check internal and external tasks on the right section of the page
- go back to edit mode with the 'Edit' button
- navigate to the calendar event with the 'Back To Event' button
- handle PDF and Word docs



PDF AND WORD DOCUMENTS

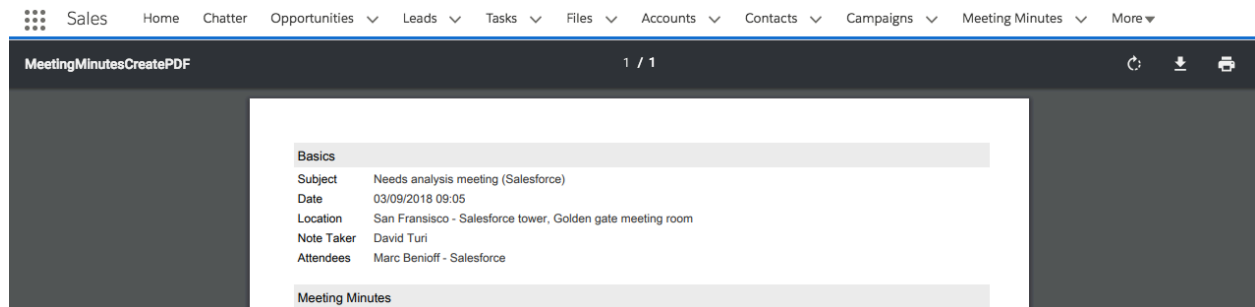
To access these functions, use the following buttons on the upper right corner:

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

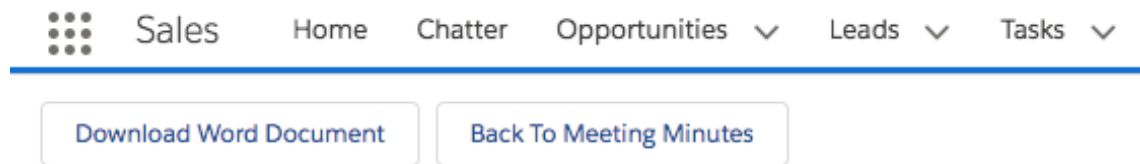


VIEW PDF AND WORD DOCUMENT

'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.

A screenshot of an email composition form. The 'From' field is 'Turi David'. The 'To' field contains 'marc.benioff@salesforce.example.com'. The 'CC' and 'BCC' fields both contain the placeholder text 'Please use comma, semicolon or linebreak as separator'. The 'Subject' field contains 'Meeting Minutes - Needs analysis meeting (Salesforce)'. The 'Body' field is empty. In the top right corner, there are 'Send' and 'Cancel' buttons.

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

CLASSIC VERSION

OPEN APPLICATION AND CHOOSE TEMPLATE

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

Calendar Event Needs analysis meeting [Edit Layout](#) | [Help for this Page](#) ?

Click to add topics: ?

« Back to List: Email Templates

Attachments [0]

Event Detail

Assigned To: [David Turi](#) Location: San Francisco - Salesforce tower, Golden gate meeting room

Subject: Needs analysis meeting Start: 03/09/2018 09:00 [Check Availability](#)

Name: [Marc Benioff](#) End: 03/09/2018 10:30

Phone: All-Day Event: ☐

Email: marc.benioff@salesforce.example.com

Related To: [Salesforce](#)

▼ System Information

Created By: [David Turi](#), 29/06/2018 14:56 Last Modified By: [David Turi](#), 29/06/2018 15:10

Description

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

Meeting Minutes Needs analysis meeting (Salesforce)

Choose template

Create [Preview templates](#)

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.

The screenshot displays the 'Meeting Minutes' application interface. At the top, there is a title bar with a pencil icon and the text 'Meeting Minutes'. Below this is a header section titled 'Needs analysis meeting (Salesforce)'. To the right of the header are three buttons: 'More Tasks and Quick Save', 'Save and Close', and 'Cancel'. The main content area is divided into two sections. The first section, titled 'Basics', contains several fields: 'Subject' (Needs analysis meeting (Salesforce)), 'Date' (03/09/2018 09:05 [19/07/2018 10:08]), 'Location' (San Fransisco - Salesforce tower, Golden gate meeting room), 'Note Taker' (David Turi), 'Attendees' (Marc Benioff - Salesforce), and 'Version' (Draft). The second section, titled 'Meeting Minutes', contains a text editor with a toolbar at the top. The toolbar includes buttons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, decrease indent, increase indent, and a search icon. The text editor area contains the following text: 'COMPANY INFORMATION' followed by 'Salesforce.com, Inc is a US cloud computing company headquartered in San Francisco, California. Though its revenue comes from a customer relationship ...'.

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

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

Create New Actions

salesforce action subject	assigned to	due date	[19/07/2018]
salesforce action subject	assigned to	due date	[19/07/2018]
other action subject	assigned to	due date	[19/07/2018]
other action subject	assigned to	due date	[19/07/2018]

Internal Comments

←

→

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More Tasks and Quick Save

Save and Close

Cancel

SAVE AND CLOSE

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

 Meeting Minutes
Needs analysis meeting (Salesforce)

[More Tasks and Quick Save](#) [Save and Close](#) [Cancel](#)

Basics

Subject	Needs analysis meeting (Salesforce)
Date	03/09/2018 09:05 [19/07/2018 10:08]
Location	San Francisco - Salesforce tower, Golden gate meeting room

OFFLINE USE

This function is not available in 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

 Meeting Minutes
Needs analysis meeting (Salesforce)

[Edit](#) [Delete](#) [Back to the Event](#) [Related Actions](#) [View PDF](#) [Send PDF](#) [View Word](#) [Send Word](#)

Basics

Subject	Needs analysis meeting (Salesforce)
Date	03/09/2018 09:05
Location	San Francisco - Salesforce tower, Golden gate meeting room
Note Taker	David Turi
Attendees	Marc Benioff - Salesforce
Version	Draft

Meeting Minutes

COMPANY INFORMATION

Salesforce.com, Inc is a US cloud computing **company** headquartered in San Francisco, California. Though its revenue comes from a customer relationship ...

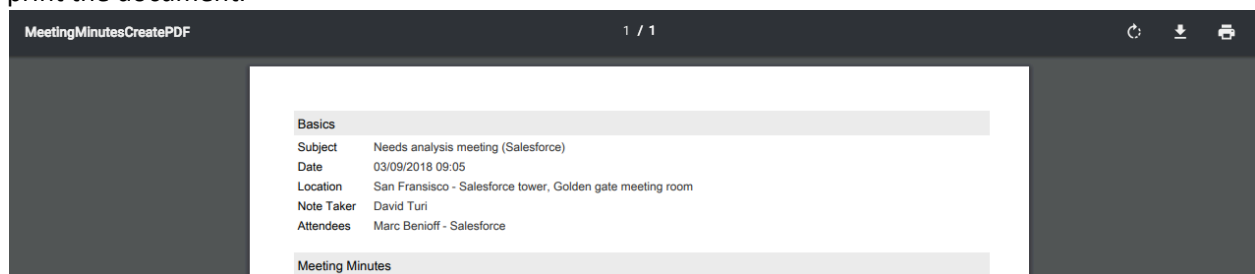
PDF AND WORD DOCUMENTS

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 starting.

SEND DOCUMENTS

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

Send Cancel

From "Turi David"

To marc.benioff@salesforce.example.com

CC Please use comma, semicolon or linebreak as separator

BCC Please use comma, semicolon or linebreak as separator

Subject Meeting Minutes - Needs analysis meeting (Salesforce)

Body

Send Cancel

The attachment, and addressee information is automatically added to the email. Fill out the Body section than click 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

TAX number: 23350849-2-42

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