



SMART MEETING MINUTES

Smart Meeting Minutes

System Administrator 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.

INSTALLATION GUIDE

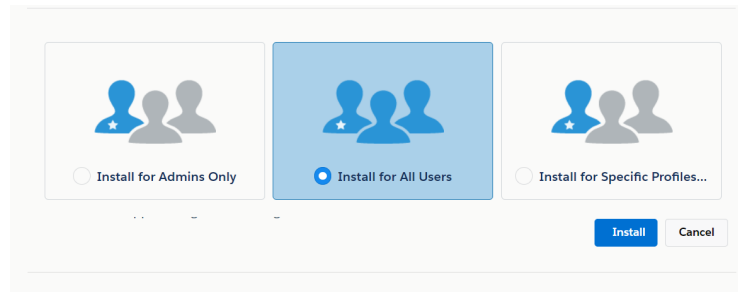
PRE-INSTALLATION

Before installing the Smart Meeting Minutes, please verify the following pre-conditions:

- Your Production or Sandbox organization's license is **Professional or Enterprise or Unlimited or Force.com or Developer or Essentials**
- Your Salesforce Service Cloud (preferred) or Sales Cloud license is **Professional or Enterprise or Unlimited or Force.com or Developer or Essentials**
- Setup mydomain in your Salesforce organization required if you use Salesforce Lightning

INSTALLATION

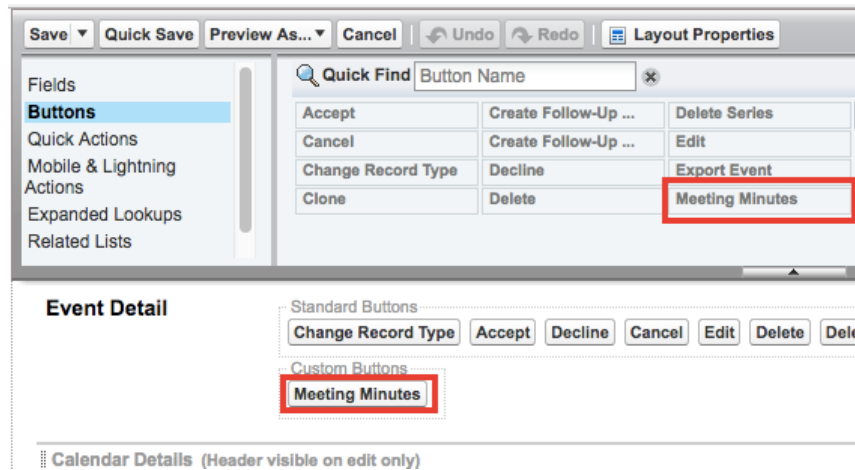
- On the Smart Meeting Minutes application on AppExchange, click **Get It Now**.
- Click Install



- The system starts the installation process.
- Follow the onscreen setup instructions.
- When completed, click **Done**.
- The installed application will show up on your system.

POST-INSTALLATION CONFIGURATION – CLASSIC

- Add Meeting Minutes button to your event page layout (Setup/Activites/Event Page Layout)

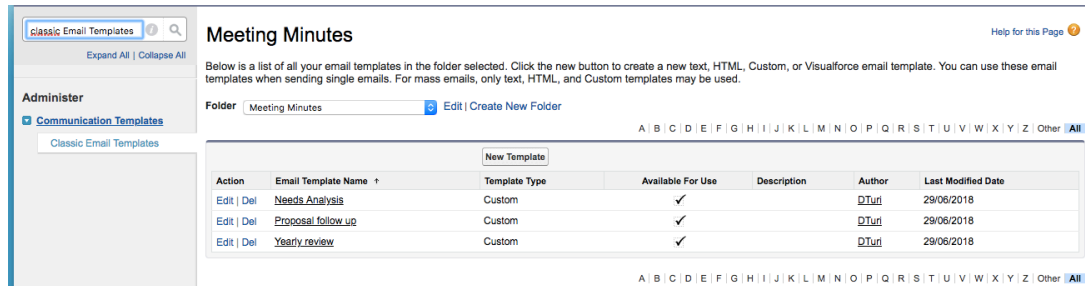


- Enable Profile Access for Apex classes (Setup/Develop/Apex classes/Security)
 - MeetingMinutes
 - MeetingMinutesPDF
- Enable Profile Access for Visualforce Pages (Setup/Develop/Visualforce Pages/Security)
 - MeetingMinutes
 - MeetingMinutesCreate
 - MeetingMinutesCreateWord
 - MeetingMinutesDownloadWord
 - MeetingMinutesCreatePDF
 - MeetingMinutesView
 - MeetingMinutesRelatedTasks
 - MeetingMinutesSendWord
 - MeetingMinutesSendPdf
 - myEvent
 - MeetingMinutesEdit
- Enable Custom Object Permissions (Setup/Profiles/Custom Object Permissions/'Meeting Minutes' and 'Meeting Minutes External Activities')

Custom Object Permissions													
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Meeting Minutes	☒	☒	☒	☒	☐	☐	Meeting Minutes External Activities	☒	☒	☒	☐	☐	

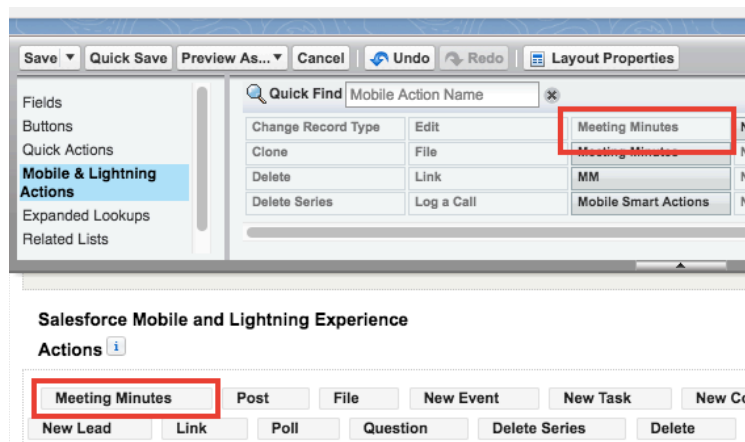
- Add Meeting Minutes Templates (Setup/Classic Email Templates/'Meeting Minutes' Folder)
 - Click on the 'New Template' button

- Choose 'Custom (without using Letterhead)' template
- Add the basic information
- Add the HTML body
- Save your new template



POST-INSTALLATION CONFIGURATION – LIGHTNING VERSION

- Add Meeting Minutes action to your event page layout (Setup/Object Manager/Event/Page Layout)



- Enable Profile Access for Apex classes (Setup/Develop/Apex classes/Security)
 - MeetingMinutes
 - MeetingMinutesPDF
- Enable Profile Access for Visualforce Pages (Setup/Develop/Visualforce Pages/Security)
 - MeetingMinutes
 - MeetingMinutesCreate
 - MeetingMinutesCreateWord
 - MeetingMinutesDownloadWord
 - MeetingMinutesCreatePDF
 - MeetingMinutesView
 - MeetingMinutesRelatedTasks

- MeetingMinutesSendWord
- MeetingMinutesSendPdf
- myEvent
- MeetingMinutesEdit

- Enable Custom Object Permissions (Setup/Profiles/Custom Object Permissions/'Meeting Minutes' and 'Meeting Minutes External Activities')

Custom Object Permissions									
Basic Access					Data Administration				
Read	Create	Edit	Delete		View All	Modify All			
					1	1			
Meeting Minutes					Meeting Minutes External Activities				
☒	☒	☒	☒		☐	☐			

- Add Meeting Minutes Templates (Setup/Classic Email Templates/'Meeting Minutes' Folder)
 - Click on the 'New Template' button
 - Choose 'Custom (without using Letterhead)' template
 - Add the basic information
 - Add the HTML body
 - Save your new template

Setup Home Object Manager

Q classic email templates

Email

Classic Email Templates

Didn't find what you're looking for? Try using Global Search.

SETUP Classic Email Templates

Meeting Minutes

Classic Email Template Availability [Expand]

Folder: Meeting Minutes Edit Create New Folder

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Needs Analysis	Custom	✓		D.Turi	29/06/2018
Edit Del	Proposal follow up	Custom	✓		D.Turi	29/06/2018
Edit Del	Yearly review	Custom	✓		D.Turi	29/06/2018

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

- Setup Compact Layout for the Meeting Minutes view page layout (Setup/Objects/Event/Compact Layout)
 - Make a clone from the System default compact layout
 - Add a Label name for example: Meeting Minutes
 - Select the compact layout fields. Our recommendation is in the screenshot below.
 - Click Save

Meeting Minutes

Compact layouts are used in the mobile app and some Chatter feed items to display a record's key fields at a glance. You can but the number of fields that display may vary based on the device's screen, which record page is being viewed, and the perm

Compact Layout Edit

SaveCancel

Enter Compact Layout Information

Label

Meeting Minutes

Name

Meeting_minutes

Select Compact Layout Fields

Available Fields

Account

Contact

Created By

Event ID

Last Modified By

Lead

Opportunity

Subject

Test Date field

Add

Remove

Selected Fields

Subject

Date

Location

Owner

Version

Top

Up

Down

Bottom

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

SaveCancel

MANAGE SMART MEETING MINUTES LICENSES

You can activate licenses for certain users by setting it in Manage License option:

1. Search for and click on "Installed packages" in Setup

Setup

Home

Object Manager

install

Apps

Installed Packages

Didn't find what you're looking for?

Try using Global Search.

SETUP

Installed Packages

Help for this Page

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Visit AppExchange »

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Edit Quotas	Salesforce.com	2.5	EdiQuotas	Free	N/A	N/A	N/A	2018.10.17.13:36		1	1	0	Passed
Manage Licenses	Smart Meeting Minutes	Smart Meeting Minutes Package Org	1.6	AttentionMM	Active	7	7	Does not Expire	2018.12.04.13:43	✓	0	1	2	Passed

2. Click on "Manage Licenses" option on first cell of Smart Meeting Minutes app

The screenshot shows the Salesforce Package Manager interface. On the left, there's a sidebar with a search bar containing 'install', a 'Setup' button, and a 'Package Manager' section. The main area displays the 'Smart Meeting Minutes' package details. Below the details, there's a table of 'Licensed Users' with columns for Action, Full Name, Role, Active, and Profile. A red box highlights the 'Add Users' button in the 'Licensed Users' section.

Package Name	Smart Meeting Minutes	Publisher	Smart Meeting Minutes Package Org
Status	Active	Allowed Licenses	7
Expiration Date	Does not Expire	Used Licenses	7

Licensed Users

Action	Full Name	Role	Active	Profile
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SUPPORTED BROWSERS

Smart Meeting Minutes application is supported on the following browsers:

- Supported Browsers for Salesforce Classic:
https://help.salesforce.com/articleView?id=getstart_browser_aloha.htm&type=5
- Supported Browsers for Lightning Experience:
https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5

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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