



Welcome to Meeting Assistant!

We are super thrilled to have you with us!

[1. Introduction](#)

[2. Application overview](#)

[3. Creating a meeting](#)

[3.1. Create a new event](#)

[4. Start your meeting!](#)

[4.1. Preparation](#)

[4.2. Meeting](#)

[4.2.1 Assigning Tasks](#)

[4.3. Meeting Report](#)

[5. Agenda Editor](#)

[5.1 Agenda Details](#)

[5.2. Agenda Items Timeline](#)

[5.3. Agenda Item](#)

[5.4. Questions](#)

[5.5. Clone Agenda](#)

[6. Send the Agenda for the upcoming meeting](#)

[7. Manage meetings and notes easier in Salesforce](#)

[7.1. Meetings related to Leads, Contacts, Accounts, or Opportunities](#)

[7.2. All Meetings](#)

[8. Known issues / bugs](#)

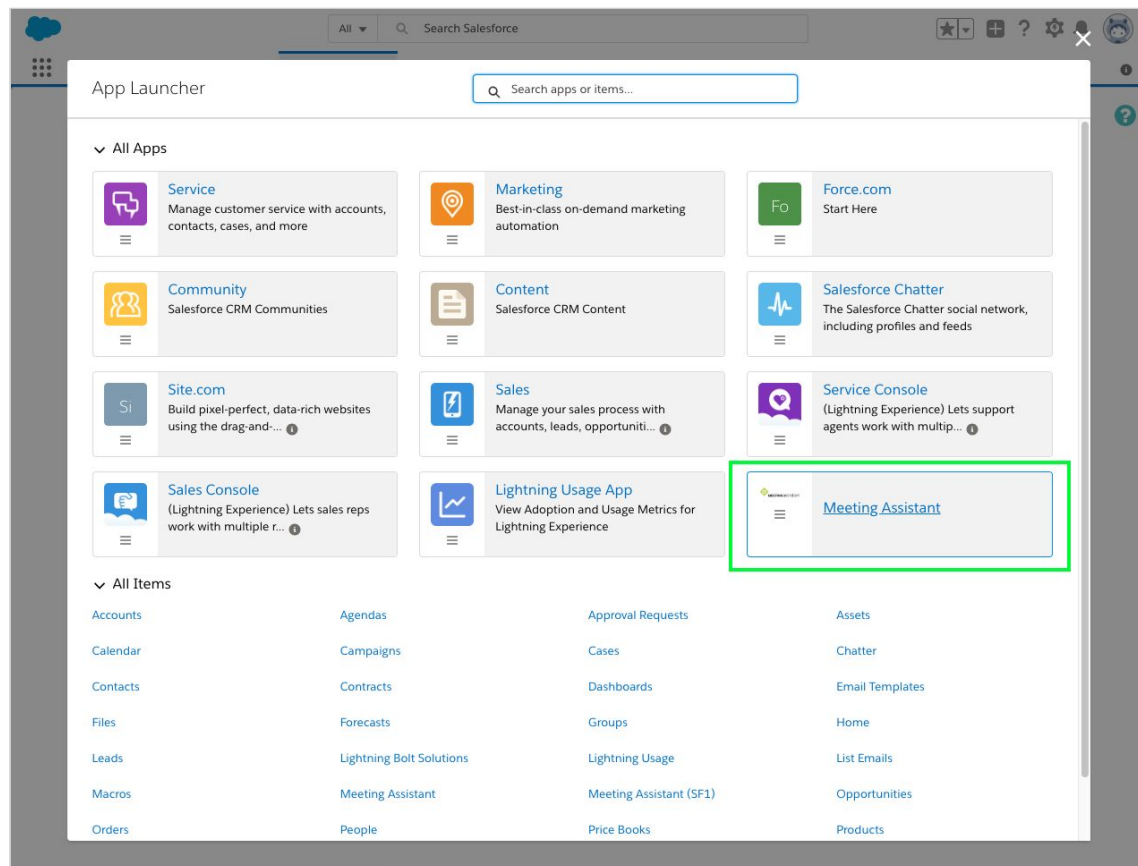
1. Introduction

Meeting Assistant optimizes and streamlines your meeting activities with customers by providing you with a sophisticated agenda builder tool and a smart note-taking platform right in Salesforce. Focus on high-value actions to increase your productivity, mobility, and make your work day a lot easier.

From the management perspective, Meeting Assistant app helps managers build up structured meeting templates for their sales and account teams in everyday meetings with customers and partners. Managing sales team performance is now easier and faster than ever.

2. Application overview

Start by selecting Meeting Assistant from the App Launcher:



Application includes the following three tabs:

- Meeting Assistant: The main view of the application
- Meeting Assistant (SF1): for usage in Salesforce mobile app
- Agendas: All agenda templates you created for your team

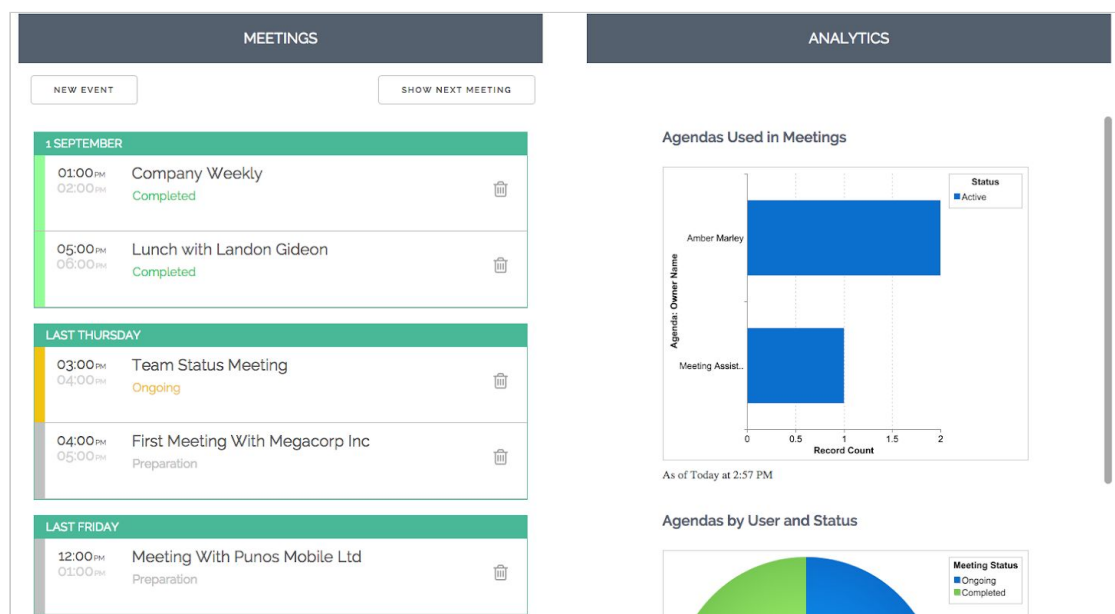
Every screen in the application shows a question mark button in the top right corner of the screen. By clicking that you can open a tutorial which will present you all the functionalities related to the active page. This tutorial is also opened for you when you open the page for the first time.

2.1 Meeting Assistant Home

To start Meeting Assistant, choose Meeting Assistant from the App Launcher (Lightning) or go to the Meeting Assistant tab (Classic). You are first taken to the Meeting Assistant Home page.

The main item on this page is the meeting list. The list contains all meetings owned by you. Additionally, the list contains meetings, where you are an attendee or a meeting resource, after the meeting has been completed. On the right hand side, you can see a couple of meeting-related reports (these are disabled in Salesforce Lightning).

By default, the list contains 50 past meetings and 10 future meetings. Each time you scroll the list to either end of the current selection, a new set of 50 meetings is added to the list.



3. Creating a meeting

After installing Meeting Assistant, it will automatically create a corresponding meeting for every Salesforce Event you create. You can create new Events also from the Meeting Assistant home view.

3.1. Create a new event

1. Go to the **Meeting Assistant** meeting list view.
2. Click the **New Event** button.
3. Fill in the details of your event.
4. Add files or attachments to the event. These will be displayed in a list during the meeting.
5. Click **Save**.
6. You will be forwarded back to the Meeting Assistant Home tab. Meeting Assistant created a meeting automatically based on your event and it is displayed in the **Meetings** list.

In Lightning:

Create Event

Calendar Details

* Assigned To: Kien Pham

* Subject: Beta 13 Meeting

Name: John Bond

Related To: Edge Communications

Agenda: Sales Meeting for Medium Size Companies

Location:

* Start: Date: 15.6.2017, Time: 20:00

* End: Date: 15.6.2017, Time: 21:00

All-Day Event: ☐

Meeting Link:

Description Information

Description:

Cancel Save & New Save

In Classic:

Calendar Event

Beta 13 Meeting

Edit Layout | Help for this Page

Attachments (0)

Event Detail

Assigned To: Kien Pham

Subject: Beta 13 Meeting

Name: John Bond

Phone: (312) 596-1000

Email: bond_john@grandhotels.com

Location:

Start: 15.6.2017 15:00 Check Availability

End: 15.6.2017 16:00

All-Day Event: ☐

Related To: Edge Emergency Generator

Meeting Assistant

Agenda: Sales Meeting for Medium Size Companies

Meeting Link: https://punosenv-dev-ed.my.salesforce.com/a0B58...

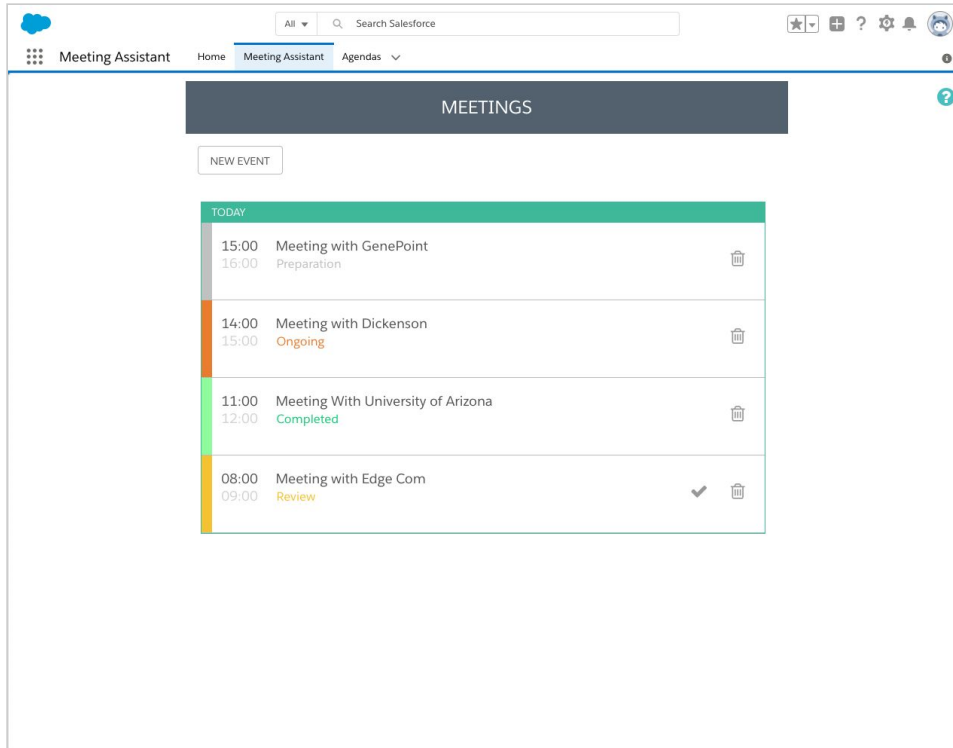
Meeting Notes

Reminder

Reminder: ☐

4. Start your meeting!

You will go to the meeting view by selecting a meeting from the list in the Meeting Assistant tab.



The meeting list displays, e.g., the meeting start time, subject and meeting status. The trashcan icon can be used to delete meetings. The checkmark icon sets the meeting status as Completed.

Once you start your meeting, you will enter the meeting flow which consists of three parts:

1. **Preparation**
Prepare your meeting by selecting an agenda and creating necessary adjustments for the meeting.
2. **Meeting**
The actual meeting.
3. **Report**
Outcome of the meeting.

During a meeting lifecycle, a meeting will have one of four possible statuses:

1. **Preparation**
Meeting is being prepared. It has not yet started.
2. **Ongoing**
Meeting has started. (Please note that you can reset a meeting consequently reverting the status back to "Preparation".)

3. Review

Meeting is finished. Meeting data can still be edited.

4. Completed

Meeting is finalized. Meeting data can not be edited. Only a Meeting Assistant administrator can switch the meeting back to have a “Review” status.

4.1. Preparation

The screenshot shows the Salesforce Meeting Assistant interface. On the left, a vertical timeline indicates the meeting status is 'Preparation'. The main area is titled 'MEETING WITH DICKENSON' and contains the following details:

- Event Information:**
 - Subject: Meeting with Dickenson
 - Event Start Time: 14/11/2018 15:00
 - Event End Time: 14/11/2018 16:00
 - Attendees: Charlie Brown, Andy Young
- Meeting Details:**
 - Meeting duration (in minutes): 60
 - Agenda: Sales Meeting for Medium Size
- Agenda Items:**
 - 1. Introduction**
 - Linked to Contact: Andy Young
 - Questions:
 - Is your email still the same?
 - Is your title still valid?
 - 2. Check customer details**
 - Questions:
 - Company size?
 - Revenue
 - What is the target market for current fiscal year?
 - 3. Introduce solution**
 - Linked to Opportunity: (field is empty)

On the right sidebar, there is a section for 'Agenda details' with a description, a list of 'Previous meetings with' (Andy Young, 1 meeting), a 'Sharing' button, and a 'USER LIST' button. The 'Meeting Status' is confirmed as 'Preparation'.

- Here you will see an overview of the meeting about to take place.
- You can see the targeted duration for meeting but you can also change it to something else if you have changes in your schedule. The targeted time will affect targeted times for specific agenda items later in the meeting.
- You can select an agenda for the meeting. Once agenda is selected, its agenda items and questions are displayed on screen.
 - In case an agenda item is **related to a Salesforce object**, a selection field will be displayed, and you can select a record from there. This will then be attached to this agenda item. You have to type something in the field in order to show the list from which to select.

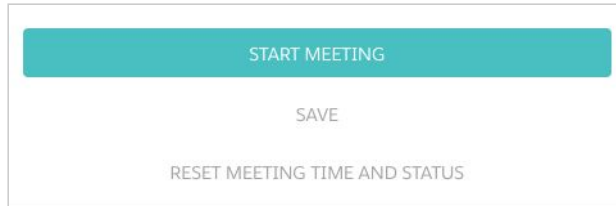
This close-up shows the '3. Introduce solution' agenda item. It features a 'Linked to Opportunity:' label above a selection field containing the text 'Dickenson Mobile Generators'. Below this, under the heading 'Questions', there are two bullet points: 'What is the amount of this opportunity?' and 'When customer makes decision, close date?'.

Relating a particular agenda item to an object in Salesforce can be done when generating a new agenda in the **Agenda Editor**

- Green dot means the question is public and gray means it is private



- Clicking on **Start Meeting** will take you to the Meeting View.



- Clicking on **Edit Event** will take you back to the corresponding Event. There you can make modifications to the event in question.



- On the right side, you can see previous meetings that you have had with attendees.

Agenda details

Description

Please update agenda for selected companies

Previous meetings with:

Andy Young ^

1 meetings.

First meeting with Dicke nson plc

SHOW ALL

Sharing

USER LIST

Meeting Status

Preparation

- You can also add resources by clicking the USER LIST -button. If added as a **Resource**, that user will be your assistant and can access the meeting notes. You can effortlessly assign tasks to that user.

USER SHARING

NAME	STATUS	+/-
Charlie Brown	Owner	
Andy Young	Invited	
David Smith	Resource	REMOVE

Search User

DONE

- Below the USER LIST button, you can see the current meeting status. Currently that is *Preparation*.

4.2. Meeting

The screenshot displays the Meeting Assistant application interface. On the left, a vertical timeline shows the meeting agenda with five items: Preparation (00:00 / 12:00), 1. Introduction (00:00 / 12:00), 2. Check customer details (00:00 / 12:00), 3. Introduce solution (00:00 / 12:00), 4. Next steps (00:00 / 12:00), and 5. Further measures (00:00 / 12:00). A timer at the top left shows 00:11.26. The main area displays the details for the selected item, '1. INTRODUCTION'. It includes a question 'Is your email still the same?' with a text input field containing 'a_young@dickenson.com'. Below this is a 'Related to field Email' section with a character limit of 80. Another question 'Is your title still valid?' has a text input field containing 'SVP, Operations'. Below this is a 'Related to field Title' section with a character limit of 128. A link to agenda item's presentation material is provided: <https://www.meetingassistantapp.com>. There are buttons for 'NOTES', 'Public Meeting Note', 'Private Meeting Note', 'TASKS', 'ACCEPT', and 'SKIP'. On the right, a 'Details' sidebar shows the meeting name 'Meeting with Dickenson', the related contact 'Contact Andy Young', instructions to shake hands and give a contact card, meeting materials link, and the current meeting status 'Ongoing'.

- Here you will see the agenda items you want to go through in the meeting.
- If you have selected an agenda with **Meeting Timer** enabled, you will see the timer on the left hand side, above the timeline. Meeting timer will show you both the time left for the current agenda item as well as the time left for whole meeting. You can edit the time by clicking the timer. You can also pause the timer using the button underneath it and continue the meeting later.
- You can select answers for the questions. In case you have selected a related record or your agenda contains lookup questions for the meeting agenda item, you will see also previous values being fetched from the corresponding fields.
- You can write meeting notes for each agenda item by clicking the **Notes** button. There you can also enter internal notes for your own reference. Internal meeting notes do not appear on the public meeting report for your client.
- You can assign tasks to people involved with the meeting by clicking the **Tasks** button.
- On the right side, you can see records that are related to the current agenda item as well as the presentation material.
- You will click **Accept** when you approve the item and **Skip** if you just want to skip that item.

- Every time you enter a new meeting agenda item, you are automatically taken to the beginning of the active question list. (Please note this does not work on iOS.)
- Once you have gone through the items and clicked either **Accept** or **Skip** on the last one, the meeting will be closed and your meeting notes and answers will be saved. The other way to close a meeting is to click DONE.
- During a meeting, the **Status** is *Ongoing*. When a meeting has been closed, the status will change to *Review*.

4.2.1 Assigning Tasks

You can also create and assign tasks when taking notes.

- **Subject:** This will be the title of task
- **Assigned to:** If you have invited other Salesforce Users to the event, you can select to whom this task will be assigned
- **Name:** You can choose multiple Contacts or one Lead
- **Related object:** Choose objects related to the meeting
- **Due Date:** You can set the due date for the task
- **Comments:** You can add a comment for the task
- **Add to public meeting notes:** You can choose to display the task in external meeting notes
- **Create task with more options:** Enables you to jump straight into the standard Salesforce task creation functionality. Please note that currently these tasks will be saved only to Salesforce. They are not visible in the meeting view or the meeting report PDF.

The screenshot shows the 'ASSIGN TASK' modal in Salesforce. It contains the following fields and options:

- Subject:** A text input field containing 'Send Example Materials'.
- Assigned to:** A multi-select field showing 'Charlie Brown' and 'David Smith'.
- Name:** A multi-select field showing 'Andy Young - Contact'.
- Related object:** A multi-select field showing 'Dickenson Mobile Generators - Opportunity' and 'Meeting with Dickenson - Meeting'.
- Due Date:** A date picker field showing 'Wednesday 21 November 2018'.
- Create task with more options:** A link that is currently inactive.
- Add to public meeting notes:** A checkbox that is checked.
- Comments:** A text area for adding comments.
- Buttons:** 'SAVE' and 'CLOSE' buttons at the bottom.

NOTE: When a meeting is deleted, all tasks created during the meeting are deleted alongside the meeting, if you are using Lightning. None of the tasks are deleted, if you are on the Salesforce Classic side.

4.3. Meeting Report

The screenshot displays the 'Meeting Assistant' interface. On the left, a vertical timeline shows the meeting stages: Preparation, 1. Introduction, 2. Check customer details, 3. Introduce solution, 4. Next steps, 5. Further measures, and Meeting report. The main panel shows the 'MEETING WITH DICKENSON' report, including meeting start/end times, agenda, attendees, resources, and a list of completed tasks with related questions. On the right, there are 'Actions' (Download PDF, PRIVATE, PUBLIC), 'Sharing' (USER LIST), and 'Meeting Status' (Review) options.

- Here you'll see the report of your meeting.
- You can download meeting notes as PDF files by using the buttons on the right.
 - **PRIVATE** will give you a PDF file with all questions and answers, including both external and internal meeting notes.
 - **PUBLIC** will give you a PDF file with questions, which have been marked as safe to include to customer meeting notes. (See Agenda Editor) Also, it will not include internal meeting notes.
- You can still edit the agenda items by tapping on EDIT MEETING NOTES. It will take you back to the Meeting view. Choosing DONE takes you to the home view. SET STATUS TO COMPLETED will finalize the meeting and prevent all future modifications.

A modal dialog box with a teal background. It contains three buttons: a large teal button labeled 'DONE', a smaller grey button labeled 'EDIT MEETING NOTES', and a smaller grey button labeled 'SET STATUS TO COMPLETED'.

- You can also click on the '✓' icon to set your meeting status to completed straight from your Meeting List.

08:00	Meeting with Edge Com	✓	🗑️
09:00	Review		

- You can edit sharing of the completed Meeting object to Salesforce users with **USER LIST** -button.

Sharing

USER LIST

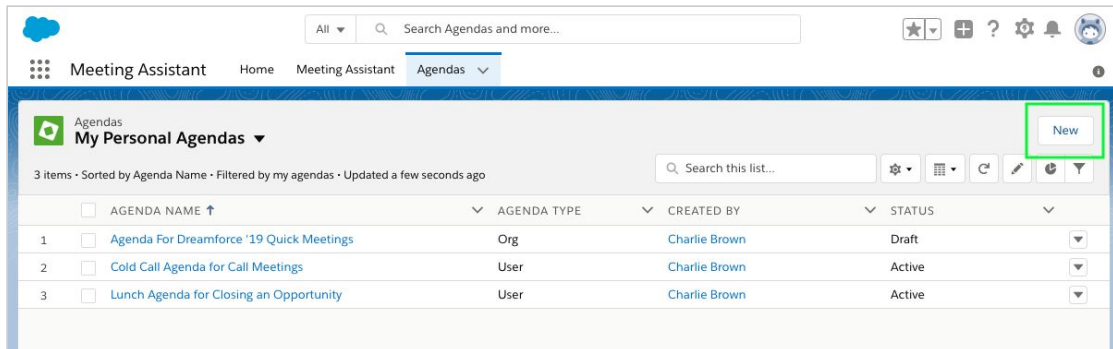
- You can also edit the Start and End times of the meeting. (If, for example you are adding notes after your actual meeting). This is not the actual time the meeting took place, but rather the time you would like to be displayed for example in notes.

MEETING WITH DICKENSON	
	EDIT EVENT
Meeting Start Time	14/11/2018 14:51 
Meeting End Time	14/11/2018 15:02
Agenda	Sales Meeting for Medium Size Companies
Attendees	Charlie Brown Andy Young
Resources	David Smith

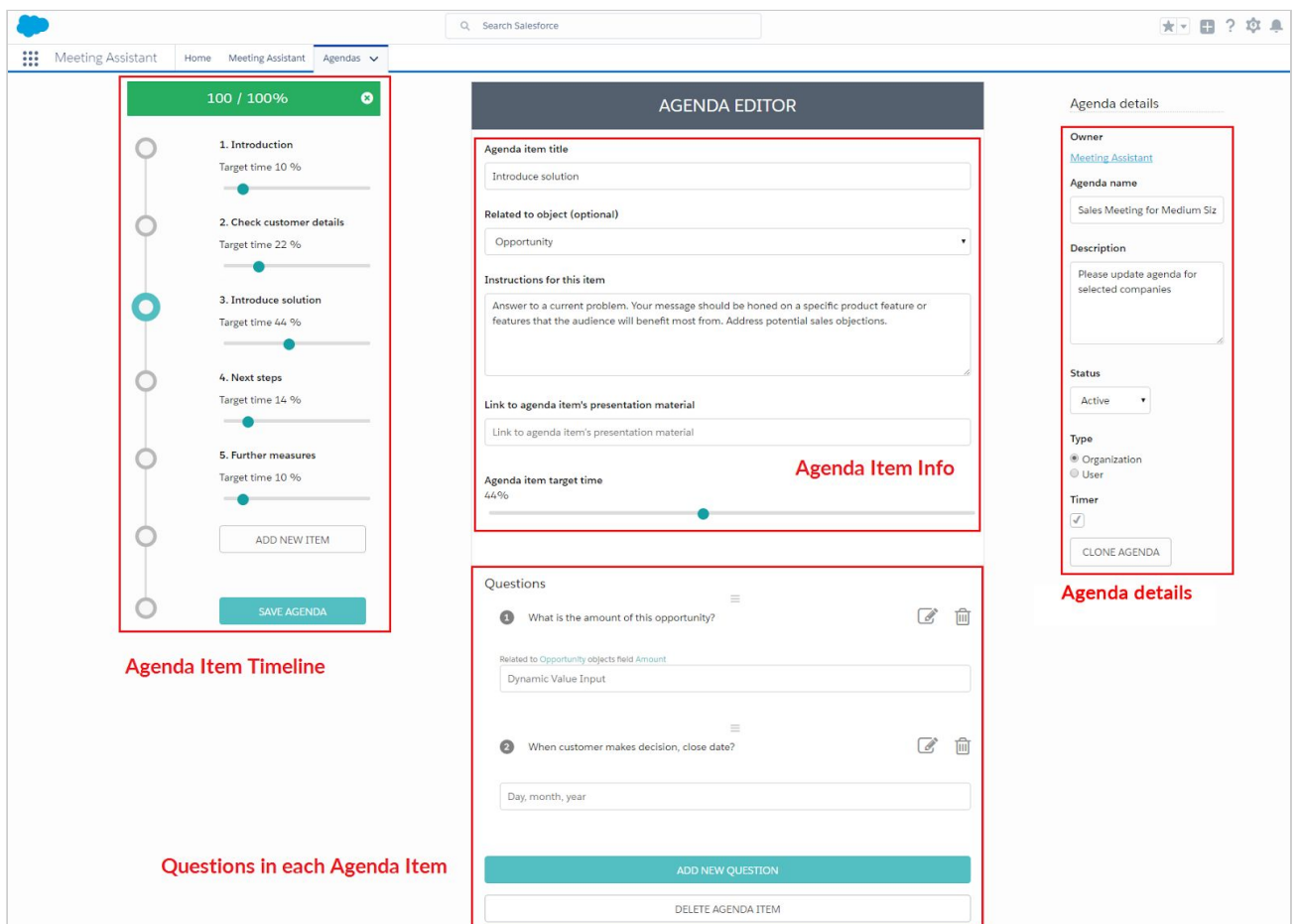
- You can add new users as resources and remove other resources. If you want to modify the Attendees of the event, that can be done via EDIT EVENT.

5. Agenda Editor

You can edit meeting agendas with the Agenda Editor. From the **Agendas** tab, you can open an existing agenda to edit or you can create a new one by choosing **New**.



Agenda editing consists of three parts: Agenda details, editing agenda items and editing questions for agenda items.



5.1 Agenda Details

- You can give an agenda **name** and **description** here. Presentation material link will be then displayed in the meeting view.
- Also you can modify the visibility with the **Status** and **Type** fields. Any other status than Active means that this agenda can not be used in meetings. Type defines whether the agenda is visible organization-wide or shown only for this user. You can choose to use the meeting timer by selecting via the **Timer**-checkbox at the bottom.
- **Timer** works in the way that you will have a visible “Time left” indicator in your meeting. You set the meeting times in this agenda editor by dividing time between agenda items in your agenda. So let’s say you have an agenda where you have two items, both take 50% time of the meeting. Now, if you hold a meeting where you use that agenda, and the meeting takes 1 hour, then both agenda items will have 30 minutes each. You can divide the time for agenda items using 2% intervals.

Agenda details

Owner

[Meeting Assistant](#)

Agenda name

Sales Meeting for Medium Siz

Description

Please update agenda for selected companies

Status

Active

Type

☒ Organization

☐ User

Timer

☒

CLONE AGENDA

Agenda Info

5.2. Agenda Items Timeline

- **Timeline Items** You can select any item and edit its properties. You can also assign the target time percentages from the slider if you have enabled the timer for this agenda. Items can be re-ordered simply by dragging-and-dropping.
- **Add New Item** creates a new agenda item for this agenda.
- **Save Agenda** saves the details, items and the current state of the agenda and closes the view.
- **Meeting timer percentage** shows you the current status of the agenda item target times. You have to have either 0 or 100% in order to continue. You can reset the assigned target times using the button on the right side of the percentage.



5.3. Agenda Item

- Here you'll edit the agenda item title, instructions and presentation material link. Also you can select to relate this agenda item to a certain Salesforce object type by selecting it from Related object -list. You can relate it to almost any custom object, only system objects are excluded from the list.
- You can add, edit and remove questions from here. Also you can delete this agenda item from the bottom button. Re-ordering questions can be done with pressing and holding item and moving it up or down.
- The input type is displayed for the question as a preview of how it will look during the meeting to better understand the purpose of each type.

The screenshot shows the 'AGENDA EDITOR' form. It has several sections: 'Agenda item title' with a text input containing 'Introduce solution'; 'Related to object (optional)' with a dropdown menu showing 'Opportunity'; 'Instructions for this item' with a text area containing 'Answer to a current problem. Your message should be honed on a specific product feature or features that the audience will benefit most from. Address potential sales objections.'; 'Link to agenda item's presentation material' with a text input containing 'Link to agenda item's presentation material'; and 'Agenda item target time' with a slider set to 44%. A red box highlights the 'Agenda Item Info' section, which includes the title, related object, instructions, and target time.

5.4. Questions

- Questions are agenda item-specific data entry fields. In practice a question consists of two things: a question, i.e., topic and the answer.
- The answer can be of almost any type supported by Salesforce:
 - Text
 - Rich Text
 - Number
 - Date
 - Checkbox
 - Multi Select
 - Currency
 - Picklist
 - Slider
 - Percent

The screenshot shows a 'Questions' interface with a list of three questions. Each question has a number, a topic, and an input field. The first question is '1 Company size?' with a 'Number Input' field. The second is '2 Revenue' with a 'Currency Input' field. The third is '3 What is the target market for current fiscal year?' with a 'Text Input' field. Each question has edit and delete icons. At the bottom, there are two buttons: 'ADD NEW QUESTION' (teal) and 'DELETE AGENDA ITEM' (light gray).

Complex types, such as dates are accessed using appropriate pickers.

- Answer values can be stored in Meeting Assistant or in Salesforce. In the latter scenario, the question is data-bound to a corresponding field in Salesforce. Changes in value are automatically reflected on the other side. This answer type is called <Field from ...> which means that the field is linked with an existing, related record. Please note that, the agenda item must be related to a Salesforce object (e.g., Lead, Contact, Opportunity, etc.).
- When you select the <Field from ...> option, an extra selection list called Field will be displayed and you can select the a field from the object.

AGENDA EDITOR

Agenda item title

Further measures

Related object

Opportunity

--

Account

Ad Group

Badge

Case

Contact

Google Campaign

Keyword

Lead

Opportunity

Order

Price Book

Product

Search Phrase

SFGA Version

Social Post

Text Ad

5.5. Clone Agenda

- From version 3.10 onwards, you have been able to make a copy of an existing agenda. This allows you to quickly make several agendas with variations like different questions or target times.
- You will find the button for cloning agenda on the right side of the editor. By clicking 'Clone Agenda' a popup will appear that allows you to give a name to your new copy. You can clone the agenda by clicking 'Save'. You will be taken to the cloned agenda after cloning has been successful. From there on you can continue editing the agenda as described earlier in this section.

Status

Active

Type

☒ Organization

☐ User

Timer

☒

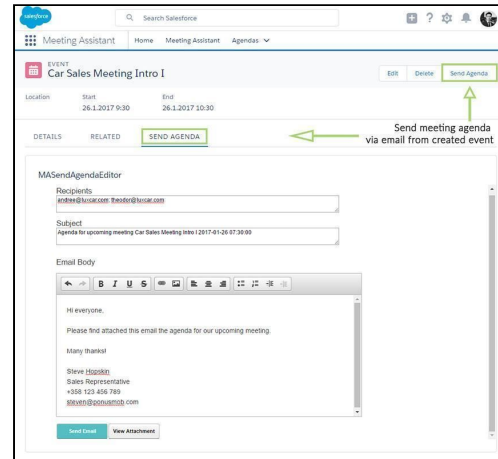
CLONE AGENDA

6. Send the Agenda for the upcoming meeting

From version 3.9.1 onwards, users can send the meeting agenda for the upcoming meeting via the Salesforce email system. You can do that by clicking the **“Send Agenda”** -button on the event page on Salesforce Classic or opening the **“Send**

Agenda” -tab in Salesforce Lightning. Now you have following fields and options available:

- **Participants:** Email addresses of all invitees will show up in Recipients box. You can also add more addresses to the field by separating them with a semicolon.
- **Subject:** The subject for the email to be sent.
- **Body:** The message will be sent with the email that is also editable. Please refer to the Installation instructions for more information about the default text in the email body.



The email that is going to be sent will also include the agenda in a styled pdf format as an attachment. You can preview the attachment by clicking the **View Attachment** -button.

7. Manage meetings and notes easier in Salesforce

7.1. Meetings related to Leads, Contacts, Accounts, or Opportunities

Meeting Assistant offers a better way to manage your meetings and notes in Salesforce from version 3.9.1 onwards. Completed meetings will be shown as a new section “**Meetings**” related to Salesforce records (Leads, Contacts, Accounts, Opportunities).

The screenshot shows the Meeting Assistant interface for the account 'Dickenson plc'. The top navigation bar includes 'Meeting Assistant', 'Home', 'Meeting Assistant', 'Agendas', and tabs for 'Dickenson Mobile Generators' and 'Dickenson plc'. The account details section shows 'Dickenson plc' with options to 'Follow', 'Edit', 'Delete', and 'View Account Hierarchy'. Below this, account information is displayed: Type (Customer - Channel), Phone ((785) 241-6200), Website (dickenson-consulting.com), Account Owner (admin Ma320beta3testorg), Account Site, and Industry (Consulting). The 'Related' section on the left lists 'Contacts (1)' (Andy Young, SVP, Operations), 'Opportunities (1)' (Dickenson Mobile Generators, Proposal/Price Quote, £15,000.00), 'Cases (0)', and 'Notes & Attachments (0)'. The right sidebar has tabs for 'Activity', 'Chatter', and 'Meetings'. The 'Meetings' tab is active and highlighted with a green box, showing 'Previous Meetings' with two items: 'Meeting with Dickens...' and 'First meeting with Dic...'. Both items have a green icon, indicating they are completed.

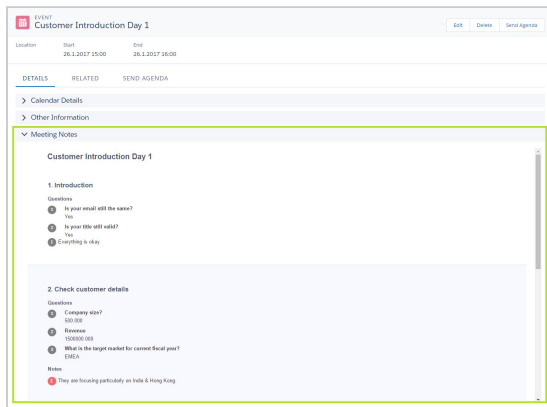
Meetings marked with a **green icon** have been reviewed and marked as completed. Meeting marked with a **yellow color** are in the review stage, but you can still see the meeting minutes.

By clicking on each meeting item, it directs user to **Meeting Review** in Meeting Assistant.

7.2. All Meetings

Another way to view Meeting Notes is to check it from **Events** and **Calendar**.

Meeting Assistant creates a new section called “**Meeting Notes**” in **Event Page Layout** which helps users quickly view meeting notes after the meeting is finished.



8. Known issues / bugs

- Meeting Assistant may not work as expected, if used inside Lightning Application & Console Navigation
- Meeting Assistant may not work as expected with Safari, if Prevent cross-site tracking-feature is active