



# Meeting Notes accelerator

for

Microsoft Dynamics 365 for Customer Engagement

## USER GUIDE



Version Control	Prepared By:	Reviewed by:	Change
1.1. 25/6/2018	Ana Rodríguez		Initial version
03/09/2019	Emma Bush		AppSource version

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This user document is valid for the CEM Meeting Notes Accelerator *version 1.0* based on Dynamics 365 CEM.

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## CONTENTS

1. Introduction.....	4
1.2 Application description .....	4
1.3 Goal of application.....	4
1.4 Application process flow .....	5
1.5 Application pack content.....	5
2. Setup & Installation guide .....	6
2.1 System requirements.....	6
2.2 Installation .....	6
2.3 Upgrading to a new version.....	7
3. Security configuration .....	8
4. Features and functions for Users (ABRIDGED) .....	9
4.2 Main functionality.....	9
4.3 Send by email .....	10
4.4 Print the Meeting Note summary.....	10
4.5 Working from your mobile phone.....	10
4.6 Working from your Outlook.....	11

## 1. INTRODUCTION

### 1.2 Application description

Meeting Notes is an Accelerator (Extension) designed for Microsoft Dynamics 365 CEM.

Meeting Notes are the place to find, store and search for organized and structured notes of all the relevant interactions with your clients.

The next step of an important meeting, or an important call, is to create a Meeting Note, to summarize what happened with the client. I do not need to create a Meeting Note for all the interactions with a customer, just for the most relevant ones.

### 1.3 Goal of application

Why choose the Meeting Notes solution?

- > To share information across the organization
- > Avoid loss of information. For example, if a sales manager leaves the company, the important meetings they had with the client normally are not stored anywhere
- > Standardize processes: these small improvements allow the company to professionalize their sales processes even more
- > Promote the adoption of your D365 sales solution. There are people in all organizations who are not used to working with new technologies, the Meeting Notes accelerator will be an easy entry to start working on your sales solution: start by introducing the client meeting summary feature

The Meeting Note can be used to reflect the first interaction with the client within the commercial activity process: if a user interacts with a client (in the form of an e-mail, phone call or meeting) that can lead to a business opportunity, it should be recorded as a Meeting Note.

In order to be able to store all the relevant information, the Meeting Note contains several fields to identify when it happened and who was involved.

There are fields to capture a brief summary, what was the proposed solution and what are the next actions to be taken.

## 1.4 Application process flow

Although you can work with Meeting Notes throughout the sales process, Meeting Notes can also be used like a previous stage of starting to work with a lead.



## 1.5 Application pack content

The Meeting Notes package should contain the following files:

- > Meeting Notes managed solution file: meeting\_notes\_1\_0\_0\_0.zip (where x.x.x.x represents solution version)
- > User Guide : *This document*

## 2. SETUP & INSTALLATION GUIDE

### 2.1 System requirements

Meeting Notes accelerator has to be installed on Dynamics 365 CEM.

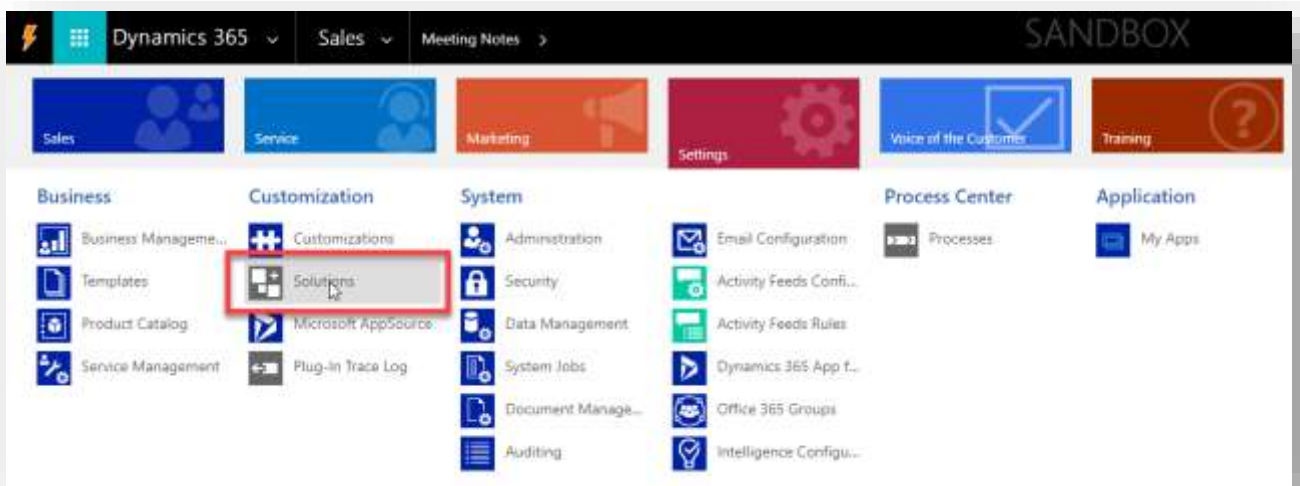
To be able to use this functionality your Dynamics 365 CEM license must be up to date. If necessary, contact your reseller for more information about your license.

The product is also available for earlier versions. If you would like the package for other CRM version, the Consultant should contact the Sales Solution Specialist from the Innovation and Business Solution division at Prodware.

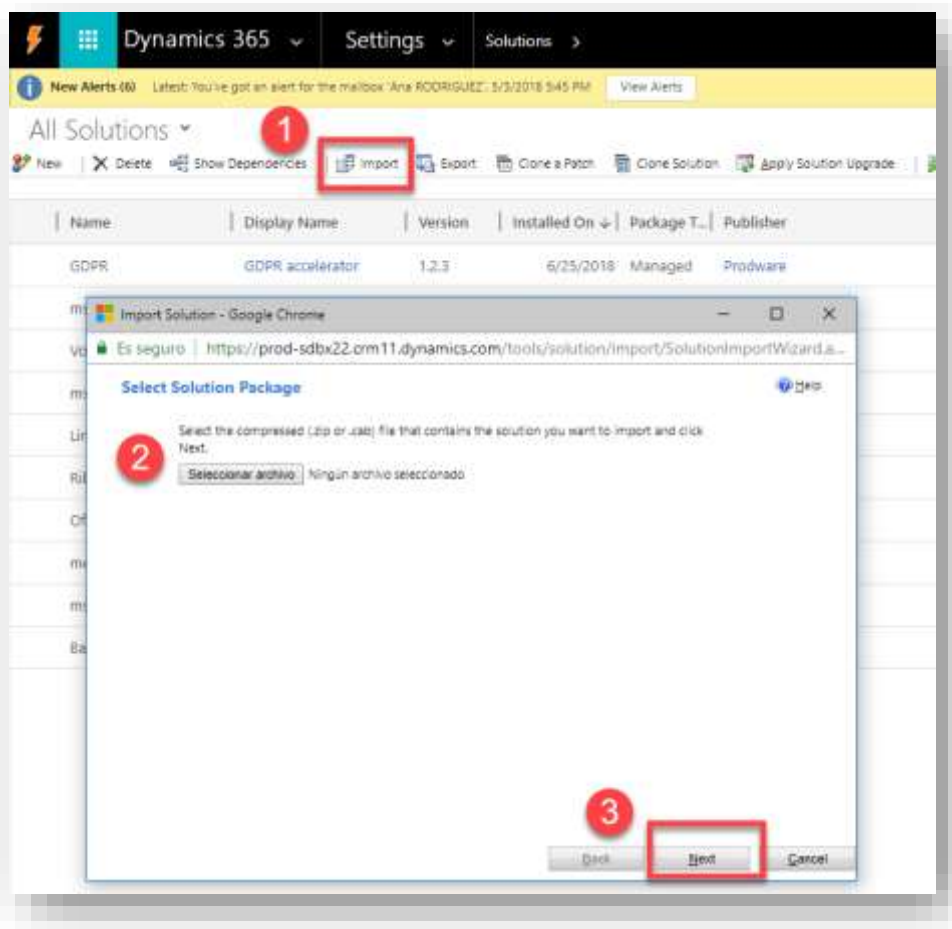
### 2.2 Installation

Important: Before any installation and/or modification, you must create a backup of your solution to restore it if you encounter issues with your set-up.

1. Go to Configuration → [Solutions](#):

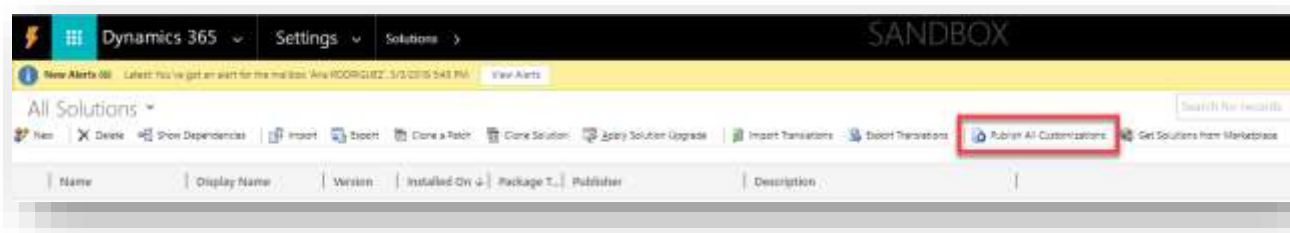


2. Click on "Import", select the meeting\_notes\_1\_0\_0\_0.zip file and click on "Next", and then "Next":



The solution will be uploaded to the CEM environment.

3. Once the solution is uploaded, click on “Publish All Customizations”.



## 2.3 Upgrading to a new version

Important: Before any installation and/or modification, you must create a backup of your solution to restore it if you encounter issues with your set-up.

When upgrading from a previous version, the actions are the same as for first installation, please refer to chapter 2.2.

All your previous data will be saved and no further action is needed.

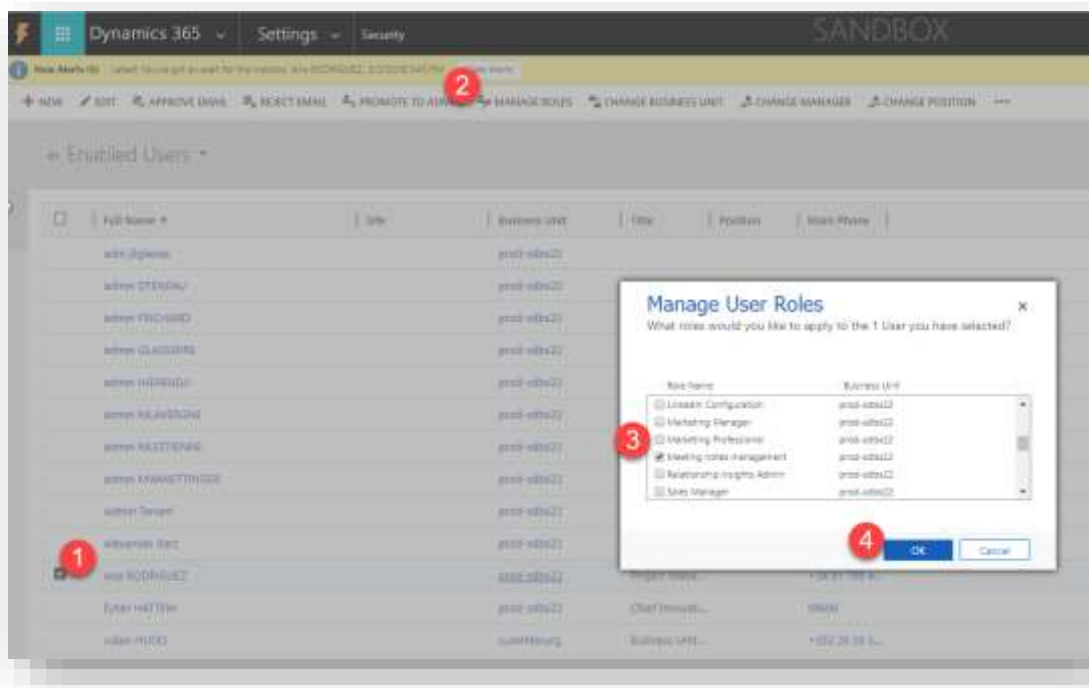
### 3. SECURITY CONFIGURATION

There is one specific role to manage Meeting Notes: Meeting Notes management. To allow users to work with Meeting Notes, you should assign them this specific role.

1. Go to Settings → Security.



2. Select the user/users who are going to manage Meeting Notes, click in “Manage roles” and then select “Meeting Note management” role. The selected users will have the Meeting Notes accelerator available.



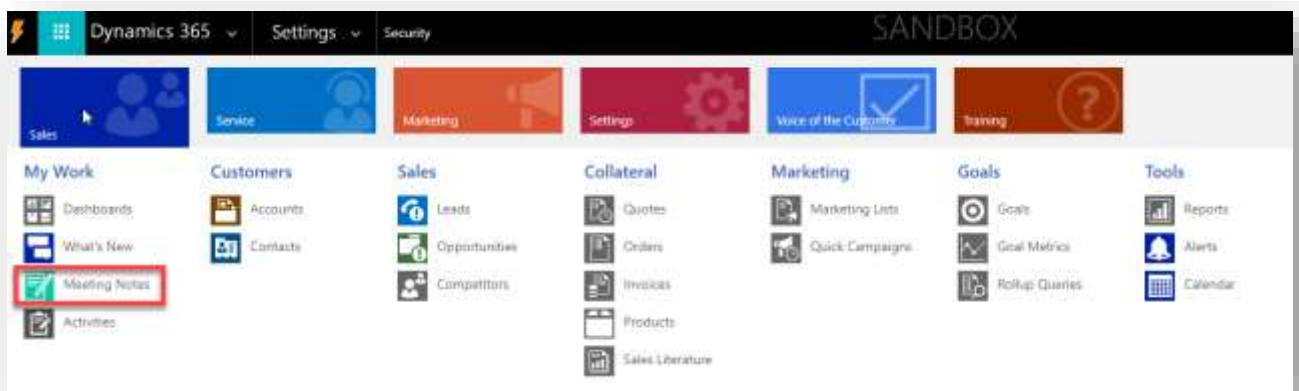


## 4. FEATURES AND FUNCTIONS FOR USERS (ABRIDGED)

### 4.2 Main functionality

We have many ways to access the Meeting Notes: by browser, Outlook, mobile ... **Only** users with the Meeting Note role, can work with Meeting Notes.

In a browser, you can find Meeting Notes from the menu, in Sales.



You can see all the Meeting Notes in the system, with the main information: meeting date, account met, subject, location, etc.

Meeting Date	Account Met	Subject	Location	Business Unit (Sharing Unit)	Owner	Discussion Notes
11/22/19	Orionstar company	Discussion about new opportunities	Orionstar company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
11/22/19	Apia company	New opportunity affected	Apia company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
11/22/19	Andromeda company	Discussion about new opportunities	Andromeda company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
11/22/19	Calicut company	Company profile presentation	Calicut company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
11/22/19	Dephoo company	Call to discuss business opportunities	Dephoo company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
12/02/19	Castrospk company	Call to discuss business opportunities	Castrospk company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
12/02/19	Caro-Minar company	Assessment opportunities	Caro-Minar company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
12/02/19	Andromeda company	Review Meeting		Leontineburg	Julian HUGO	Summary
12/02/19	Centurio company	Call to discuss business opportunities	Centurio company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
12/02/19	L.I.	Call to discuss business opportunities	Liquida company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
12/02/19	L.I.	Call to discuss business opportunities	Alpina company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
12/02/19	Stratoc company	Call to discuss business opportunities	Stratoc company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
12/02/19	Auriga company	New opportunity affected	Auriga company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...
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12/02/19	Castrospk company	Company profile presentation	Castrospk company	Leontineburg	Julian HUGO	From a legal point of view, a merger is a legal consolidation of two entities into one entity...

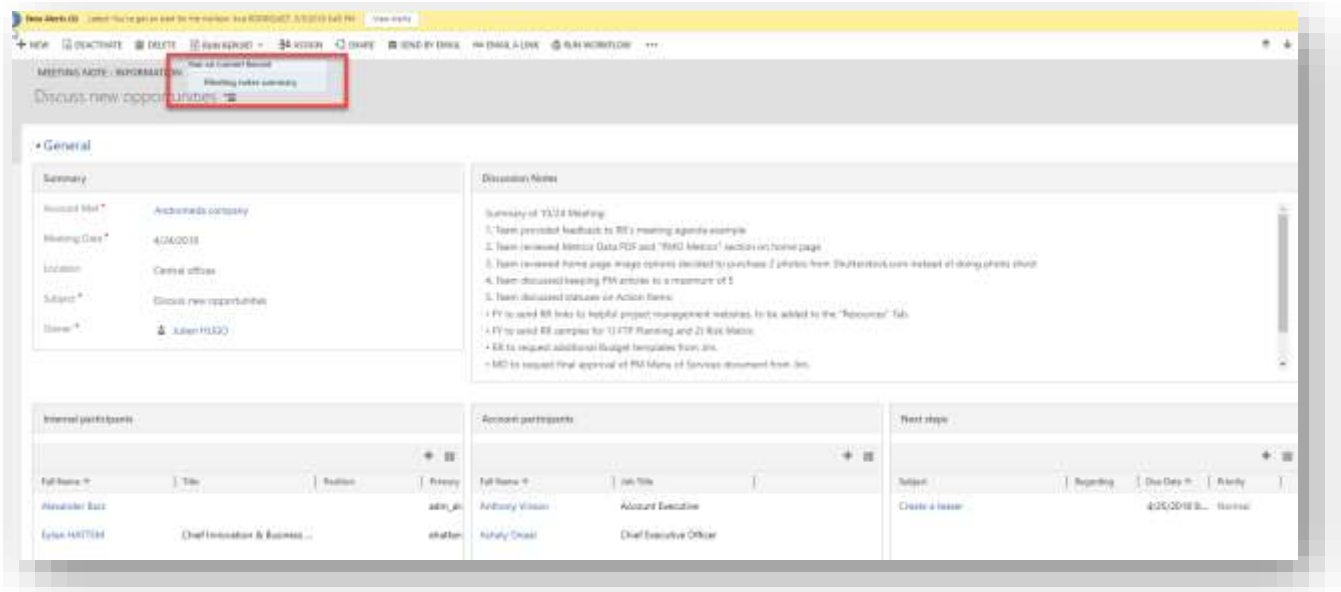
### 4.3 Send by email

Users can send a summary of the meeting to your colleagues, from the customer or inside your company. These can be people that do not have access to D365 CEM but they want to know what happened in the important meeting.

To do that, you just have to open the Meeting Note form and click on “Send by email” option.

### 4.4 Print the Meeting Note summary

Often, users wish to print the meeting summary. To do that, you just have to open the Meeting Note form and click on Run report → [Meeting Notes summary](#).



### 4.5 Working from your mobile phone

Another way to access the Meeting Note is from your mobile device.

From the App, you can manage your accounts, contacts and Meeting Notes. The most popular feature is that you can speak directly to your mobile and the summary of the meeting will be recorded in the Meeting Note. So, when you came from a meeting in a taxi, you can capture the summary of your meeting.

You can work with the mobile app in offline mode when the device is disconnected from the internet. The app provides a rich offline experience which lets you to work with basic commands

like create, read, update, and delete plus business processes - so you always stay productive. Once you're back online, changes you've made are synchronized with Dynamics 365.

Click [here](#) to start working with your Meeting Notes App.

## 4.6 Working from your Outlook

You can also access Meeting Notes accelerator from Outlook. If the user has the Dynamics 365 App for Outlook, a frequently used feature is that you can create a Meeting Note directly, from an appointment.

If you would like to configure Dynamics 365 App for Outlook for your users, just click [here](#). This is the [user guide](#).