



POSCO International CRM Innovation TF

User Manual_Meeting Memo

2025. 10



Step 1

Meeting Memo Creation

-  **1. Register New Meeting Memo**
 - 1.1 Select Record Type**
 - 1.1.1 Use CLOVA Note**
 - 1.1.2 Use Teams**
 - 1.1.3 NDA Account**
 - 1.2 Enter Basic Information**
 - 1.3 Enter Meeting Details**
 - 1.4 Enter Attendance Information**
 - 1.5 Save and Submit**
 - 1.6 Add Additional Information and Utilize Features**
-  **2. Meeting Memo Editing**
 - 2.1 Editing from the Meeting Memo List View**
 - 2.2 Editing from the Meeting Memo Detail Page**

Step 2

Meeting Memo Saving / Submission

- ▶ 1. Temporary Save and Submit
 - 1.1 Edit Draft Information and Submit
- ▶ 2. Email and Notification Delivery
 - 2.1 Set Recipients / CC
 - 2.2 Review Sending Template and History

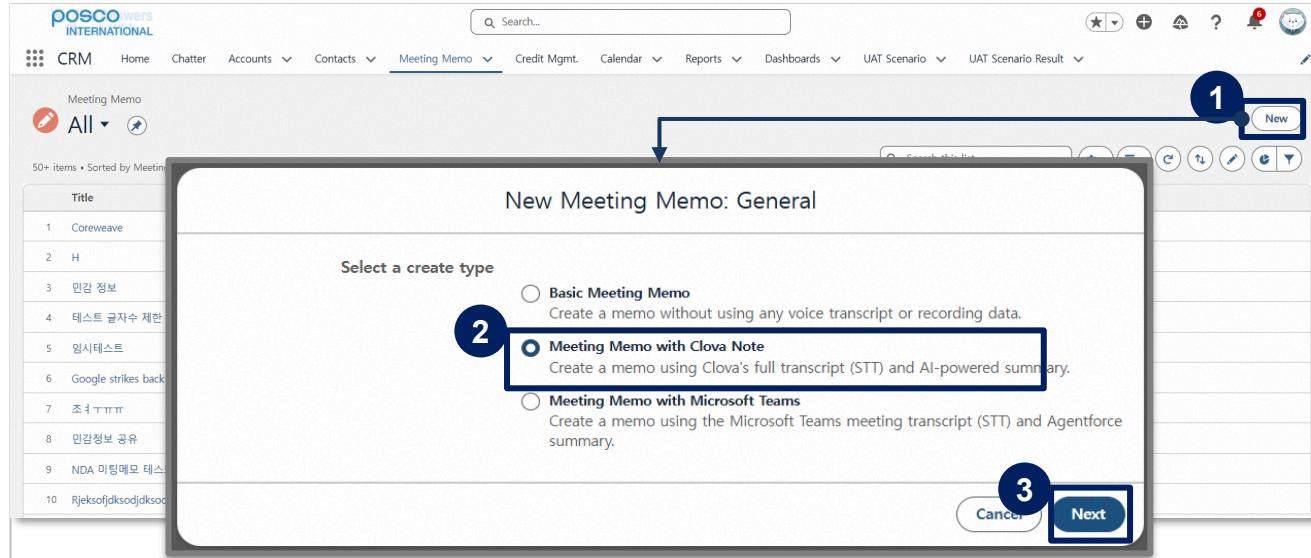
Step 3

Meeting Memo View

- ▶ 1. View Meeting Memo List
 - 1.1 View from Home Screen
 - 1.2 Use Filters in List View to Search Meeting Memos
- ▶ 2. View Detailed Meeting Memo
 - 2.1 View Related Information
 - 2.2 View Sensitive Information and Sharing Targets
 - 2.3 View To-Do List

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.1 Use CLOVA Note
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Click Create New
2. Select Create Meeting Memo Using CLOVA Note
3. Click Next

FAQ

- Q. Can I create a Meeting Memo without using the AI solution, as before?
 A. Yes. By selecting Basic Meeting Memo, you can create a Meeting Memo using the previous method.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.1 Use CLOVA Note
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

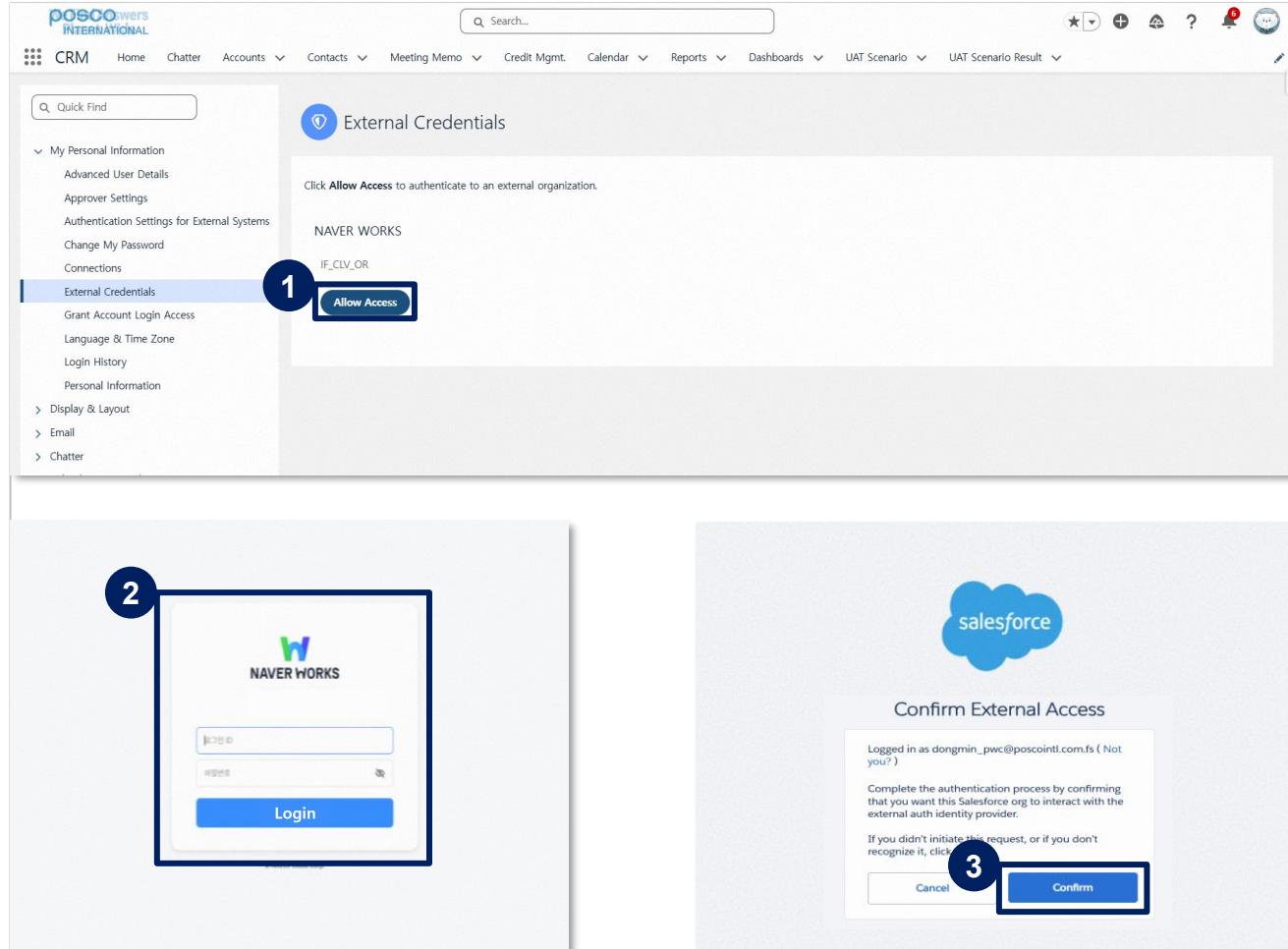
The screenshot shows the POSCO Web International interface with the 'Meeting Memo' menu selected. A modal window titled 'New Meeting Memo: General' is open. Inside the modal, there is a message: 'Clova Note authentication is required. Click the link below and select [Allow Access] to complete the authentication. If you have already completed authentication, please revoke it and authenticate again.' Below this message, a button labeled '1 Go to Clova Note Authentication' is circled in blue. Further down, instructions say 'After authentication, click the [Refresh] button below.' with a refresh icon.

1. Click Go to CLOVA Note Authentication

- Authentication is required when creating a Meeting Memo using CLOVA Note for the first time.
- Re-authentication is required every 90 days (the same authentication request screen will appear).

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.1 Use CLOVA Note
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Click Allow Access

- Authentication is required when creating a Meeting Memo using CLOVA Note for the first time.
- Re-authentication is required every 90 days (the same authentication request screen will appear)

2. CLOVA Note Account Login

- A separate request and issuance are required to obtain a CLOVA Note account. (Responsible Department: IT Planning Group).

3. Click Confirm

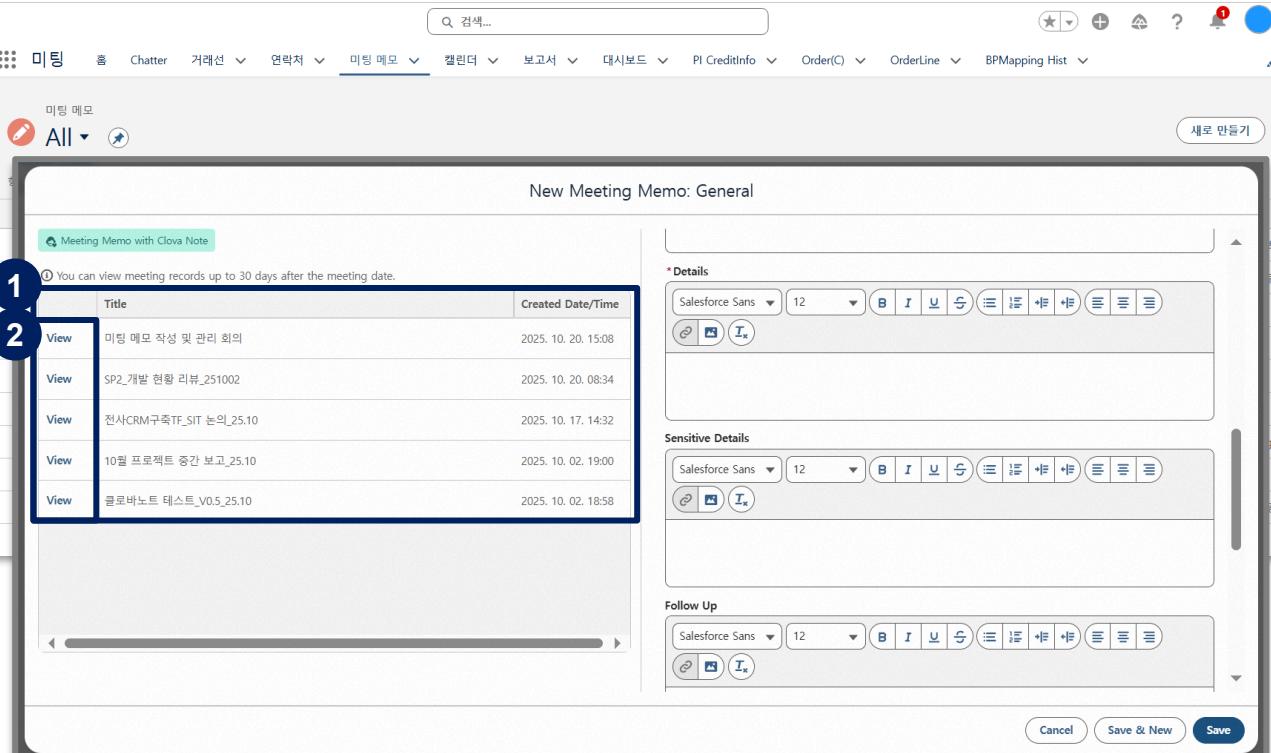
FAQ

Q. I can't log in with my usual intranet (EP, etc.) account. How can I log in?

A. You can request and receive a CLOVA Note account from the IT Planning Group.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.1 Use CLOVA Note
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



The screenshot shows the 'New Meeting Memo: General' screen. On the left, there is a sidebar with a list of recent meeting records. The first two records are highlighted with blue circles numbered 1 and 2. Record 1 is titled '미팅 메모 작성 및 관리 회의' and was created on 2025.10.20.15:08. Record 2 is titled 'SP2_개발 현황 리뷰_251002' and was created on 2025.10.20.08:34. The main area contains three text input fields labeled 'Details', 'Sensitive Details', and 'Follow Up', each with a rich text editor. At the bottom right of the main area are 'Cancel', 'Save & New', and 'Save' buttons.

View	Title	Created Date/Time
View	미팅 메모 작성 및 관리 회의	2025. 10. 20. 15:08
View	SP2_개발 현황 리뷰_251002	2025. 10. 20. 08:34
View	전사CRM구축TF_SIT 논의_2510	2025. 10. 17. 14:32
View	10월 프로젝트 중간 보고_2510	2025. 10. 02. 19:00
View	클로바노트 테스트_V0.5_25.10	2025. 10. 02. 18:58

1. Check Created CLOVA Note Meeting Records

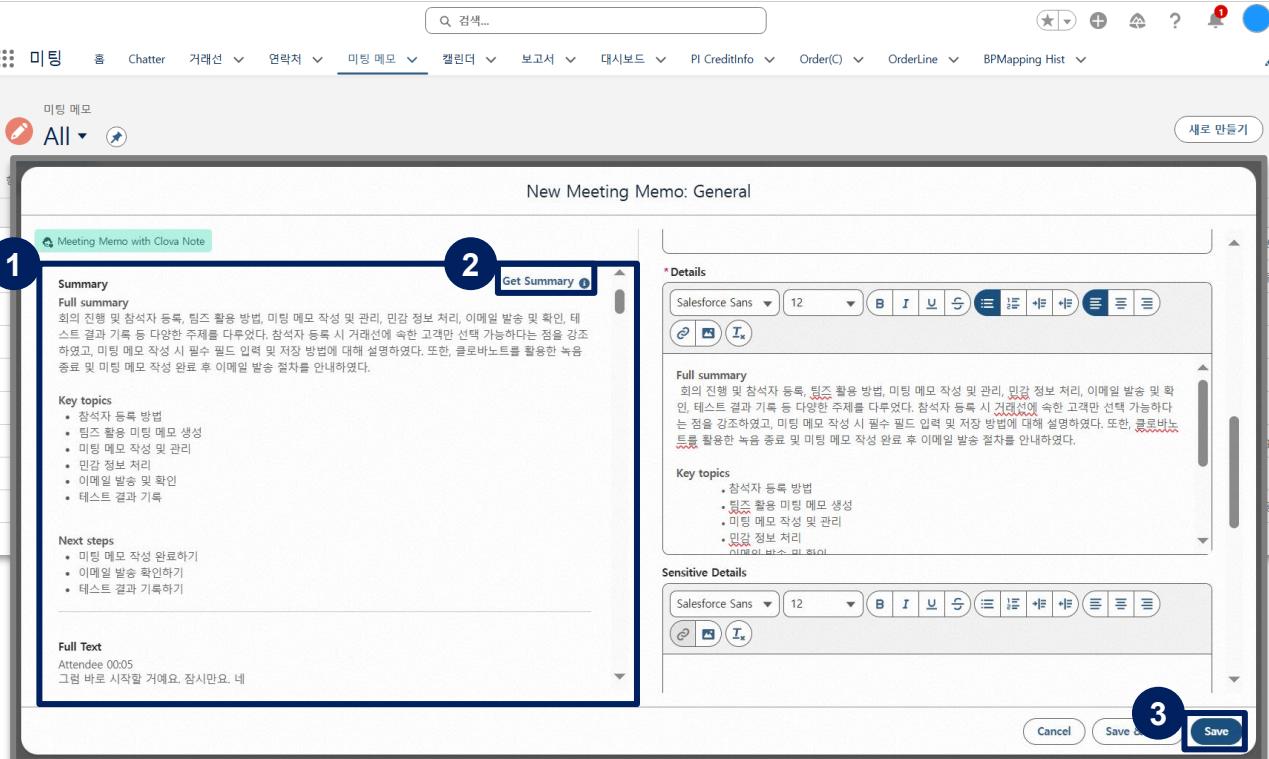
- Lists meeting records created within the last 30 days
- Only records created using the assigned business account are viewable after logging into CLOVA Note (records created with personal accounts are not accessible)
- All records are listed regardless of whether they were created via CLOVA Note web or mobile

2. Click View Details for the record you want to use when creating a Meeting Memo

- Among the summary and full transcript provided in View Details, the summary will not be available if it was not generated in CLOVA Note

Step 1. Meeting Memo Creation

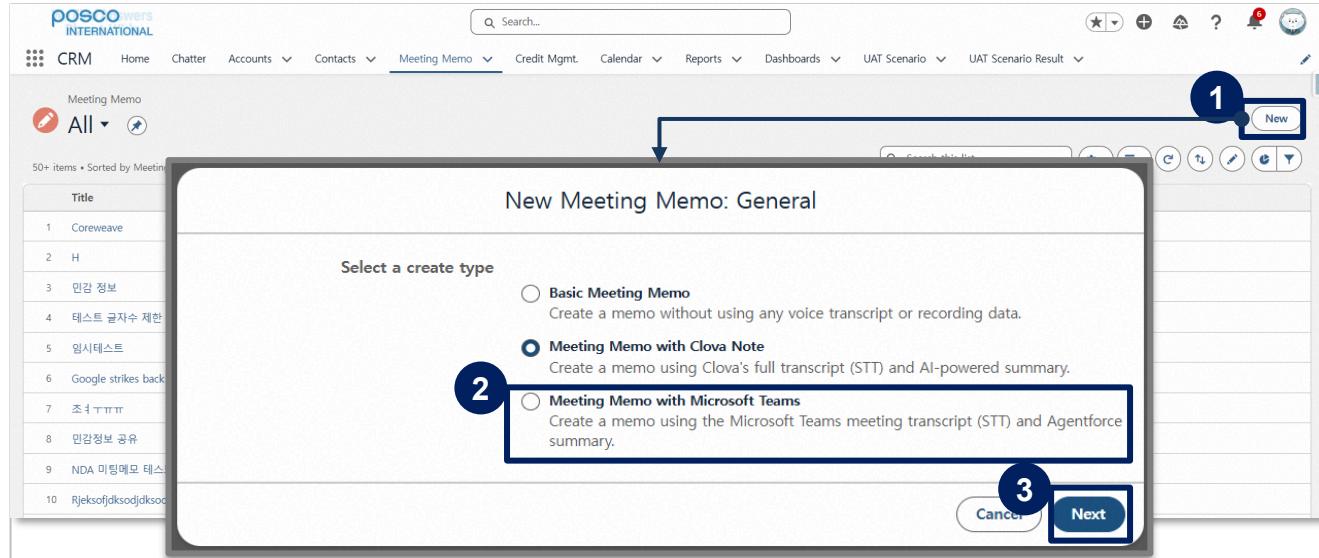
Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.1 Use CLOVA Note
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. **Review Summary and Full Transcript**
- Review the summary and full transcript of the meeting record selected in View Details
2. **Click Get Summary to copy the summary into the Details section on the right-hand side of the Meeting Memo**
3. **When clicking Save, both the summary and full transcript displayed on the left screen are saved together**
- For detailed information, refer to P.29

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Click Create New
2. Select Create Meeting Memo Using Microsoft Teams
3. Click Next

FAQ

- Q. Can I still create a Meeting Memo without using the AI solution?
- A. Yes. By selecting Basic Meeting Memo, you can create a Meeting Memo using the previous method.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

New Meeting Memo: General

General Information

- Title:** [제목] UAT_1일차_251020
- Created Date/Time:** 2025. 10. 20. 18:00
- Primary Account:** Search Accounts...
- Status:** Draft
- Time Zone:** (GMT+09:00) Korean Standard Time (Asia/S...)
- Start Date/Time:** 2025. 10. 23. AM 12:41
- End Date/Time:** 2025. 10. 23. AM 1:41
- Location:** Customer Site
- Online Meeting:**

Meeting Information

- Primary Type:** Select an Option
- Claim Type:** Quantity ...

Buttons: Cancel, Save & New, Save

1. Check Created Teams Meeting Records

- Lists meeting records created within the last 15 days
- Meeting records can be viewed only if the meeting was created via “New Event” or from the Teams calendar screen (records from meetings started or joined via the “Start Meeting Now” button are not retrievable)
- Records are accessible only if you created the meeting or were pre-registered as an attendee (unregistered participants cannot view the record)
- For details, refer to P.90

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

New Meeting Memo: General

General Information

Title	Status
[제목] UAT_1일차_251020	Draft
UAT_1일차_251020	(GMT+09:00) Korean Standard Time (Asia/S...)
Teams_주최자 테스트	Start Date/Time
Teams_전문 및 요약 확인_251010	2025. 10. 20. 18:00
팀즈 테스트_251002_11:00	2025. 10. 20. 15:00
	2025. 10. 15. 11:00
	2025. 10. 10. 18:30
	2025. 10. 02. 11:00

Meeting Information

Primary Type	Claim Type
Select an Option	Quantity ...

Save

- 1. (If needed) Click View More Previous Meetings**
 - Lists meetings created within the last 15 days
 - By clicking View More, you can view meetings created up to the past 60 days
- 2. Click View Details for the meeting record you wish to use in the memo**

FAQ

Q. I attended and recorded a Teams meeting, but the record doesn't appear.
 A. Using the "Start Meeting Now" button will not appear in the Meeting Memo. For details, refer to [Appendix] Teams Meeting Record Creation.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

New Meeting Memo: General

Meeting Memo with Microsoft Teams

Teams 주최자 테스트
2025. 10. 15. 11:00

1 Summary

Generate Agentforce Summary

Full Text

00:00:11 정소영(Jung, So-Young): 녹음 끊어요.

00:00:19 정소영(Jung, So-Young): 음.

00:00:19 신동민(Shin, Dong-Min): 음.

00:00:27 정소영(Jung, So-Young): 딴 얘기 좀 하다가.

00:00:31 신동민(Shin, Dong-Min): 유튜브 그 화면 공유해서 영상 소리가 또 아니면 뭐 좀 진짜로 다른 거 잠깐 얘기 먼저 하시죠?

General Information

Title:

Status: Draft

Primary Account: Search Accounts...

Time Zone: (GMT+09:00) Korean Standard Time (Asia/Seoul)

Add Account: Search Accounts...

Start Date/Time: 2025. 10. 23. AM 12:41

End Date/Time: 2025. 10. 23. AM 1:41

Location: Customer Site

Online Meeting:

Meeting Information

Primary Type: Select an Option

Claim Type:

Cancel Save & New Save

1. Click Generate Agentforce Summary

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

1

2

New Meeting Memo: General

Meeting Memo with Microsoft Teams

Summary

Key Decisions

- Meeting records will be accessible for up to 60 days from the meeting date
- Team members agreed to use the company email for Team collaboration tools
- Deleted conversation records will display a notification indicating their removal
- Button functionality will be limited to prevent excessive actions beyond predefined limits
- Meeting memo adjustments will align with user feedback and system capabilities

Main Discussion Points

- Clarification on the functionality of diagrams and charts within the system, including color adjustments and library integration
- Concerns regarding the management and visibility of deleted data and the need for a robust logic to handle such cases
- Discussion on the notification design for deleted records, ensuring clarity without using alarming colors
- Exploration of user interface improvements, including space optimization and icon placement
- Issues with the chronological order of conversation records and the need for system updates to address this
- Confirmation of email account requirements for tool access and ensuring compatibility with company standards
- Review of button functionality limits and the user experience when exceeding predefined actions

Follow-up Action Items

- Implement a notification system for deleted records with appropriate design elements

Get Summary

Details

Sensitive Details

Follow Up

Cancel Save & New Save

1. Review Generated Summary
2. Click Get Summary to copy the summary into the Details section of the Meeting Memo
3. When clicking Save, both the summary and full transcript displayed on the left screen are saved together
 - For detailed information, refer to P.29

FAQ

Q. Why is the summary copied to the Details section instead of the Summary section?

A. The summaries generated from recordings longer than 30–60 minutes are most similar in length and detail to what users typically write in the Details section.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.3 NDA Account
Menu	Meeting Memo	User	NDA Account Memo Access Manager
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

The screenshot shows the POSCO CRM interface with the 'Meeting Memo' menu selected. A 'New Meeting Memo' dialog box is open. Step 1 points to the 'New' button at the top right of the dialog. Step 2 points to the 'NDA' radio button in the 'Select a record type' section, which is highlighted with a blue box. Step 3 points to the 'Next' button at the bottom right of the dialog.

**The NDA record type selection input is visible only to designated NDA account access managers.
(It is not displayed to general users)**

1. Click Create New
2. Select NDA
 - Select “General” when creating a Meeting Memo for non-NDA accounts
3. Click Next

FAQ

Q. What's the difference between NDA and General record types?

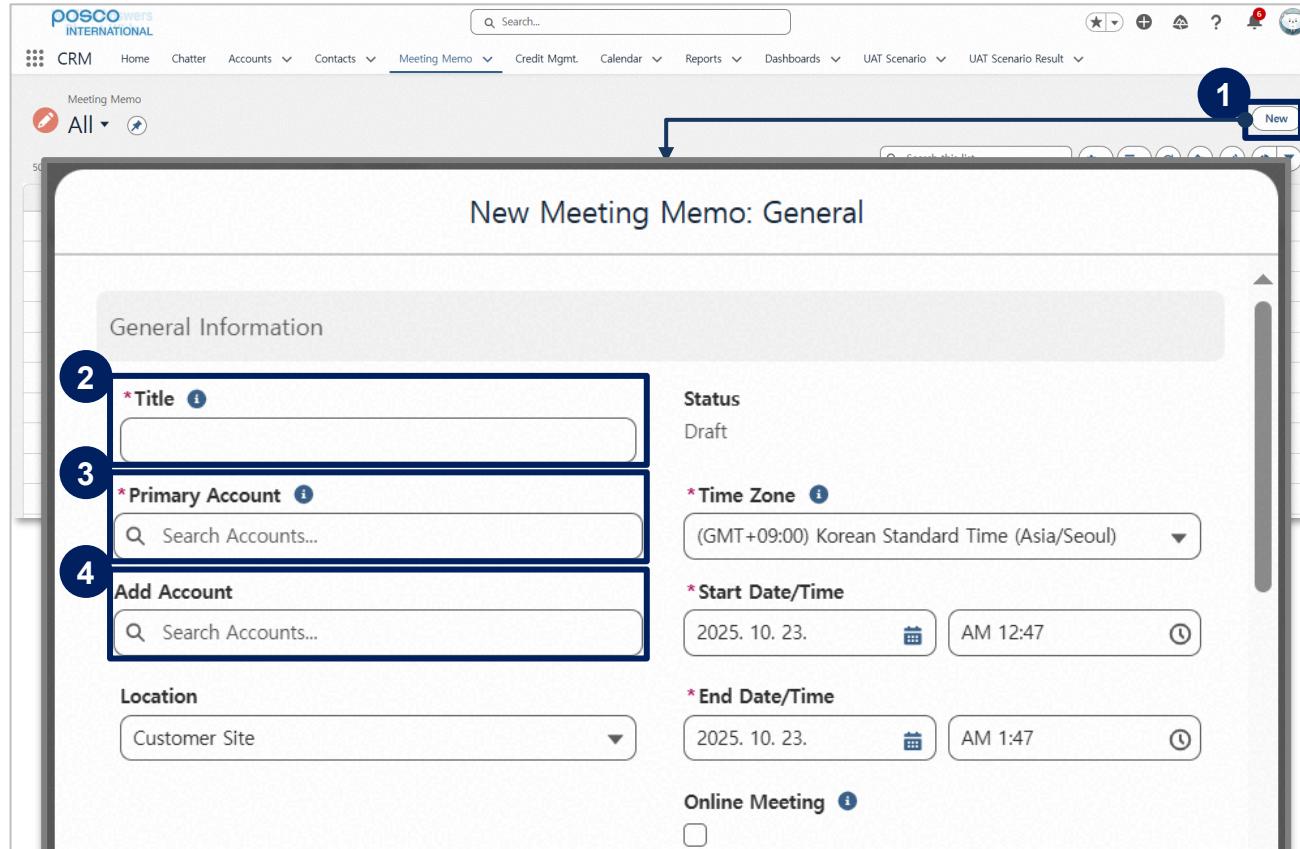
A. [Creation] NDA Meeting Memos can only be created by designated access managers.

[Access] Only the author, their direct supervisor, and members explicitly granted view/edit permissions by the author can search or view the memo.

[Features] NDA Meeting Memos include a separate permission setting for memo access, but do not support Sensitive Info writing/sharing or Email Send functions.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.2 Entering Basic Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



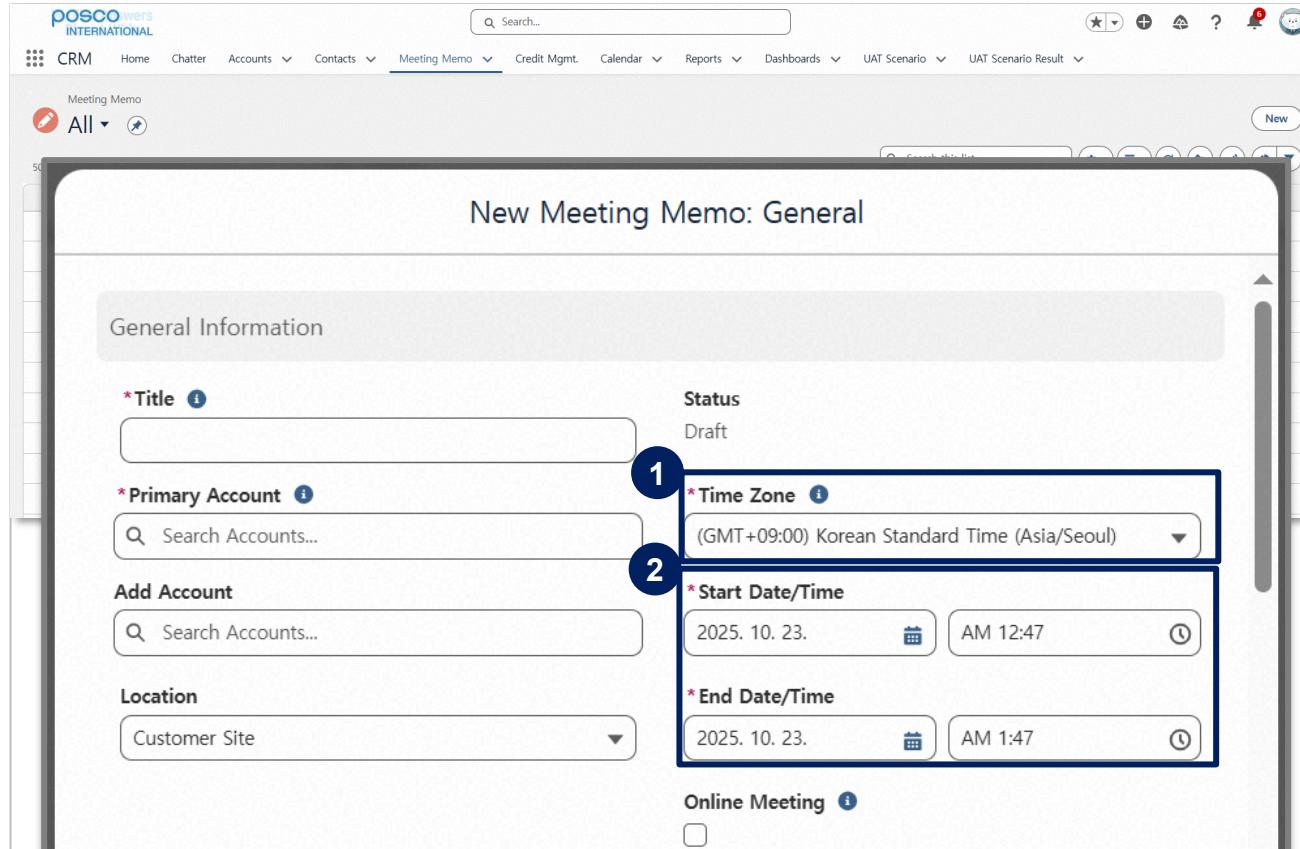
The screenshot shows the 'New Meeting Memo: General' form. The 'General Information' section contains fields for Title, Primary Account, Add Account, and Location. The 'Status' section shows 'Draft'. The 'Dates/Time' section includes Start Date/Time (2025. 10. 23. AM 12:47) and End Date/Time (2025. 10. 23. AM 1:47). A blue callout with the number 1 points to the 'New' button in the top right corner of the header.

1. Click Create New
2. Enter Title (Required)
 - Up to 50 characters allowed
3. Register Primary Account (Required)
 - If only one client participated, enter that account
 - If multiple clients participated, enter the key account based on the agenda
4. Add Additional Accounts
 - You can register additional clients if two or more attended
 - New client entries and multiple selections are supported

※ Record Type NDA : Meeting Memo can only be saved if it includes at least one NDA account. Once an NDA account is registered, any number of general accounts can be added. Regardless of record type, the memo structure and fields remain the same

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.2 Entering Basic Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



New Meeting Memo: General

General Information

*Title

*Primary Account (Search Accounts...)

Add Account (Search Accounts...)

Location (Customer Site)

Status: Draft

1 Time Zone (GMT+09:00) Korean Standard Time (Asia/Seoul)

2 *Start Date/Time 2025. 10. 23. AM 12:47

*End Date/Time 2025. 10. 23. AM 1:47

Online Meeting

1. Select Time Zone (Required)

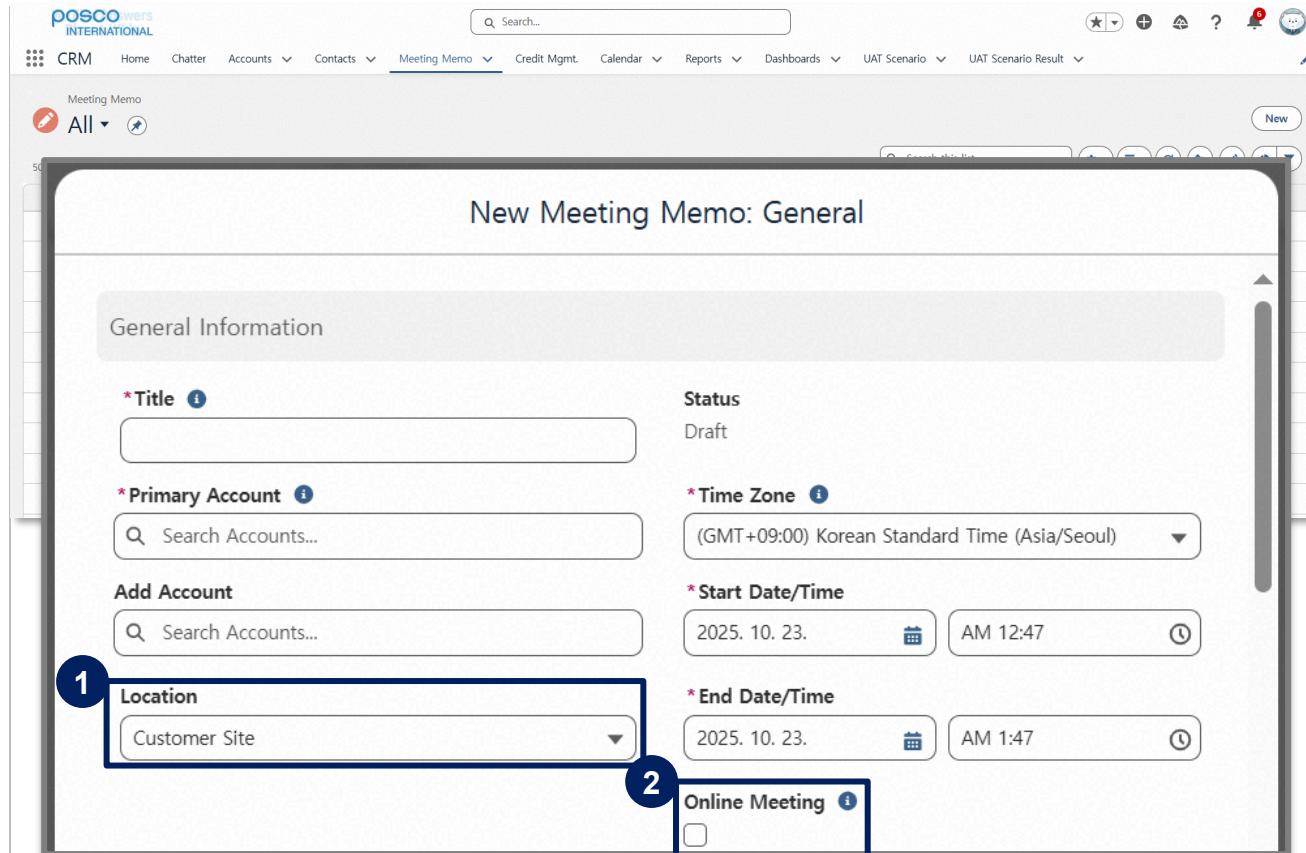
- Defaults to the user's configured standard time zone
- Change only when attending a meeting in a different region (e.g., business trip); meeting date/time entered will not be affected by the change

2. Set Start/End Date and Time (Required)

- Selecting or changing the start date automatically sets the end date to the same day
- Selecting a start time automatically sets the end time to one hour later
- Meeting date/time appears the same globally, regardless of time zone

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.2 Entering Basic Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



New Meeting Memo: General

General Information

*Title

Status
Draft

*Primary Account Search Accounts...

Add Account Search Accounts...

1 Location Customer Site

*Time Zone (GMT+09:00) Korean Standard Time (Asia/Seoul)

*Start Date/Time 2025. 10. 23. AM 12:47

*End Date/Time 2025. 10. 23. AM 1:47

2 Online Meeting

1. Select Location

- Choose from Headquarters, Client, or Other
- Headquarters: Automatically fills in the main office address upon saving
- Client: Automatically uploads the saved address of the registered Primary Account
- Other: Enter address manually

2. Select Online Meeting Option

- Choose if the meeting was conducted via video conference or conference call

FAQ

Q. Can I modify part of the address after selecting Headquarters or Client?
A. Yes. The address can be modified after saving the Meeting Memo.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.3 Entering Meeting Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

New Meeting Memo: General

Meeting Information

1 Primary Type

Select an Option

- Business Development
- Contract
- Post-Contract
- Claim
- Other

2 Claim Type

Quantity Sho...
Quality Defect
Logistics Claim

1. Select Meeting Type (Required)

- Choose one primary type that best represents the meeting:

- 1) New Business Proposal
- 2) Contract Discussion
- 3) Post-Contract Management
- 4) Claim
- 5) Others (e.g. Market trends)

2. Select Claim Type (Required)

- Only required if "Claim" is selected as the meeting type

- Not available for other meeting types
- Multiple selections allowed: Quantity Shortage, Quality Defect, Logistics Claim, Production Delay, Others

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.3 Entering Meeting Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

New Meeting Memo: General

1

2

3

Summary

Details

Sensitive Details

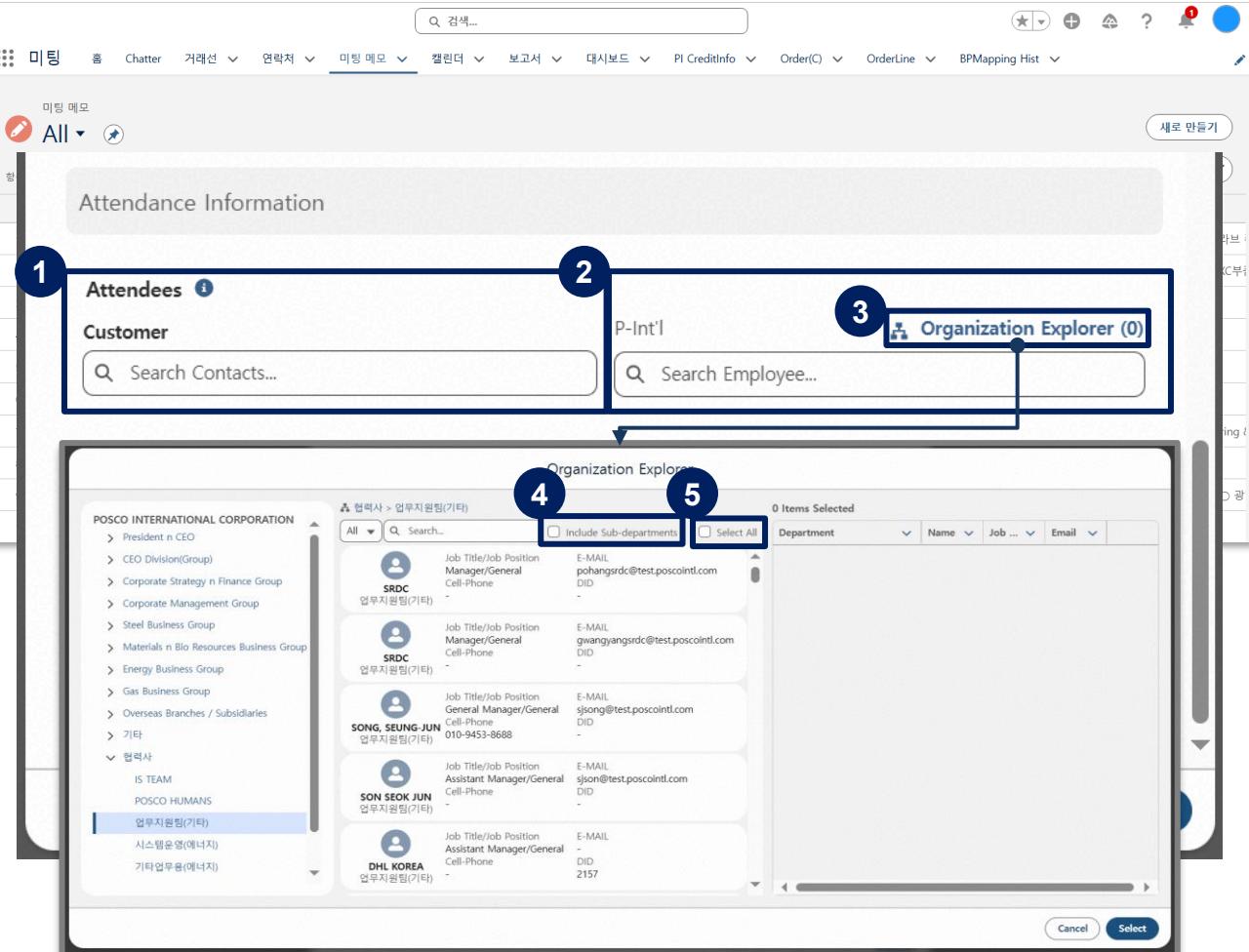
Follow Up

Cancel Save & New Save

1. Enter Summary (Required)
2. Enter Details (Required)
 - Information entered here is shared company-wide
3. Enter Sensitive Information
 - Enter any content that could pose issues if disclosed externally
 - Only users specified in “Sensitive Info Access” and their organization heads (per HR org chart) can view this information
 - Example: If belonging to A Division – B Department – C Group – D Section, both the designated users and leaders (D Section Head, C Group Head, B Department Head, A Division Head) can view
 - Up to 250 characters allowed (to prevent excessive sensitive data in Details; images/tables are not counted)

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.4 Entering Attendance Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Enter Client Attendees

- Only contacts registered under Primary Account or Additional Accounts can be added
- If a contact is not searchable, check whether they are registered under the client account

2. Enter Internal Attendees

- All employees can be registered regardless of CRM account ownership

3. Click Organization Chart to add department-level participants or view employee info

4. Click Include Sub-departments to select all sub-levels of the chosen department
5. Click Select All to add all members of the chosen department

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.4 Entering Attendance Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

The screenshot shows the 'New Meeting Memo Popup' window. At the top, there's a navigation bar with various menu items like 'Meeting', 'Chatter', '거래선', '연락처', 'Meeting Memo', '캘린더', '보고서', '대시보드', 'PI CreditInfo', 'Order(C)', 'OrderLine', and 'BPMapping Hist'. Below the navigation is a search bar with placeholder 'Q. 검색...'. The main area is titled 'Attendance Information'. It has sections for 'Attendees' (Customer, P-Int'l, Organization Explorer), 'Meeting Sensitive Share' (P-Int'l, Organization Explorer), and 'Gift History' (checkbox for 'Applicable'). At the bottom are 'Cancel', 'Save & New', and 'Save' buttons.

1. Enter Sensitive Info Access List

- Available only when sensitive information is entered
- Registered members can view sensitive information
- Only users with CRM accounts can be searched and added

2. Import Attendees (P-Int'l)

- Click to bulk register internal attendees (with CRM accounts) as sensitive info viewers
- Example: Internal attendees A, B, C, D, E (only A, B, C have CRM accounts) → A, B, C are registered

FAQ

Q. Some employees don't appear in the Sensitive Info Access search.

A. Sensitive information can only be viewed in CRM; therefore, only users with CRM accounts appear in the search list.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.4 Entering Attendance Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

The screenshot shows the 'Attendance Information' section of the POSCO International Meeting Memo Creation interface. It includes fields for 'Attendees' (Customer and P-Int'l), 'Meeting Sensitive Share' (P-Int'l), and 'Organization Explorer' (0). A callout box labeled '1' highlights the 'Gift History' checkbox, which is checked and labeled 'Applicable'. A callout box labeled '2' highlights the 'Receiver (Customer)' search field. A callout box labeled '3' highlights the 'Add Row' button.

- 1. Gift Record Applicable**
 - Select if any client attendees received gifts
- 2. Enter Gift Recipients and Gift Details**
 - Click (1) to open input fields
 - Enter recipients (only those registered as attendees can be selected)
 - Manually enter the gift name
- 3. Multiple Recipients or Gifts**
 - Click Add Row to add more recipients or gifts in the same manner

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.5 Save and Submit
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

1. Click to Temporarily Save and Create New

- Saves the current Meeting Memo as a draft and opens a new creation screen

2. Click to Temporarily Save

- Saves the current Meeting Memo as a draft and opens the detail view

※ Even after saving, the Meeting Memo is not shared company-wide; it remains visible only to the author in Draft status.

FAQ

- Q. How long can I keep a draft saved?
 A. There is no time limit for drafts, but for timely sharing, please complete and submit as soon as possible.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.5 Save and Submit
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

The screenshot shows the POSCO International CRM system's Meeting Memo creation page. At the top, there is a message: "This meeting memo is currently saved as a Draft. Once you've finished writing, please click the 'Complete' button to submit it." Below this, the main form contains fields for General Information (Title: Meeting Memo Manual_25.10, Primary Account: POSCO, Company/Instiution Name: POSCO, Start Date: 2025.10.23, End Date: 2025.10.23, Location: Customer Site, Address: 1 GOEDONG-DONG, NAM-GU, POHANG), Meeting Information (Primary Type: Post-Contract, Summary: TEST), and a Details section with a full summary. On the right, there is a Related sidebar showing Account (1), Attendees (0), Material Group (0), Gift History (0), and a Summary & Full Text (1) section. A large blue circle labeled '1' points to the 'Complete' button at the bottom right of the main form.

1. Click Complete to finalize and register the Meeting Memo (Company-wide Sharing)

- Clicking completes and shares the Meeting Memo company-wide
- Until completion, only the author can view it
- Email delivery and URL copy features become available after completion

※ A Meeting Memo is only shared company-wide when Complete is clicked. Before completion, it is visible only to the author.

FAQ

Q. The Delete button is not visible after completion. How can I delete it?

A. Completed Meeting Memos cannot be deleted. Please use the Edit function instead.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.5 Save and Submit
Menu	Meeting Memo	User	NDA Account Memo Access Manager
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

The screenshot shows the POSCO International CRM interface. In the top navigation bar, the 'Meeting Memo' menu item is highlighted. A 'Sharing' button is circled with a blue number 1. A modal window titled 'Share' is open, containing a search bar labeled 'Search User...' with a user icon. A dropdown menu for 'Meeting Memo Access Level' is open, showing 'Read Only' selected. The 'Save' button at the bottom right of the modal is also circled with a blue number 3. The background shows the meeting memo details page with fields like Title, Primary Account, Company/Institution Name, Start Date, End Date, Location, and Address (Local). The 'Meeting Memo' tab is active in the header.

The above Sharing function applies only to Meeting Memos for NDA accounts.

(It is not available for general account Meeting Memos)

1. Click Sharing
2. Search and register members to share the NDA account Meeting Memo with
3. Select Meeting Memo Access Level
 - Default: Read-only
 - If Read/Write is selected, shared members can edit the Meeting Memo

※ Record Type NDA : After completion, the memo must be shared via the Share function for registered members to access it

FAQ

Q. I don't see the Share button.

A. The Share function for NDA account Meeting Memos becomes available only after the memo is completed.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

The screenshot shows the POSCO WITS International Meeting Memo creation interface. A modal window titled 'Add Material Groups' is open. At the top of this modal is a search bar with the placeholder 'Material Group' and a dropdown menu showing 'Plate'. Below the search bar is a list of material groups: TITANIUM WHITE PLATE, TITANIUM BLACK PLATE, TIN PLATE (NON POSCO), TIN PLATE, and STS BLACK PLATE (POSCO). To the right of this list is a 'Related' tab, which is highlighted with a blue box and a circled '1'. Below the tabs is a section for 'Account' with one item listed: 'Account (1)' with 'POSCO' selected. To the right of this is a 'Sensitives' tab. Further down are sections for 'Attendees (0)', 'Material Group (0)', and 'Gift History (0)'. A large callout arrow points from the circled '1' to the 'Related' tab area. Another callout arrow points from the circled '2' to the 'Add Material Groups' button at the bottom right of the modal. In the background, the main application interface shows a navigation bar with 'Meeting Memo' selected, and a detailed page for 'Meeting Memo Manual 25.10' with sections like 'Add Material Groups', 'Meeting Information', 'Primary Type', 'Summary', and 'Details'. A separate 'Advanced Search' dialog is also visible, showing a grid of material group names and their levels (Lv. 3, Lv. 4) across four columns.

- 1. Click Related Information (default view on detail page)**
- 2. Click Add Product Item**
 - Record and manage items discussed during the meeting
 - Can add Material Group Lv. 3 or 4
- 3. Search and select material name (multiple selections allowed)**
 - Even partial keyword searches will display related items under Lv.3 or 4
- 4. Click to open Advanced Search in table view**
 - Check Material Groups from Level 1 to 4

FAQ

- Q. Can I add this information only after completion?
- A. It can be added anytime during Draft status and within 30 days after completion (the period allowed for editing Meeting Memos).

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

The screenshot shows the POSCO International CRM interface. In the top navigation bar, 'Meeting Memo' is selected. On the left, there's a sidebar with 'General Information' and a 'Contents' section containing 'Key topics' and 'Next steps'. The main area displays a 'Related' tab, which lists 'Account (1)', 'Attendees (0)', 'Material Group (0)', and 'Gift History (0)'. Below this is the 'Summary & Full Text' section, which contains a table with one item: Type (Clova), Title (미팅 메모 작성 및 관리 회의), and Created Date/Time (2025. 10. 20. PM 3:08). An arrow points from the 'Summary & Full Text' section down to the 'Title' field.

1. Click Related Information (default view on detail page)

2. Review Summary and Full Transcript Section

- When creating a Meeting Memo via CLOVA Note or Teams, summaries and transcripts viewed during temporary save are automatically stored

3. Click the title to view the full saved summary and transcript

FAQ

Q. The summary and transcript are missing.

A. Summaries and transcripts are only saved when the Meeting Memo is created using CLOVA Note or Teams. Please note that the specific record being viewed in Detail View at the time of clicking Temporary Save is the one that gets stored.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

WeFindAnswers Planet Wide

Meeting Memo

Meeting Memo Manual_25.10

Department: 업무지원팀(기타) Owner: 신동민 Primary Type: Post-Contract Meeting Date: 2025-10-23 (Asia/Seoul)

General Information

Title	Meeting Memo Manual_25.10	Status	Draft
Primary Account	POSCO	Complete Date	
Company/Instiution Name	포스코	Time Zone	(GMT+09:00) Korean Standard Time (Asia/Seoul)
Start Date	2025. 10. 23.	Start Time	AM 12:22:00
End Date	2025. 10. 23.	End Time	AM 1:22:00
Location	Customer Site	Online Meeting	
Address (Local)	1 GOEDONG-DONG, NAM-GU POHANG		

Meeting Information

Primary Type	Post-Contract
Summary	TEST
Details	Full summary 회의 진행 및 참석자 등록, 팀즈 활용 방법, 미팅 메모 작성 및 관리, 민감 정보 처리, 이메일 발송 및 확인 테스트 결과 기록 등 다양한 주제를 다루었다. 참석자 등록 시 거래선에 속한 고객만 선택 가능하다는 점을 강조하였고, 미팅 예모 작성 시 필수 필드 입력 및 저장 방법에 대해 설명하였다. 또한, 헐트바노트를 활용한 녹음 종료 및 미팅 예모 작성 완료 후 이메일 발송 절차를 안내하였다.

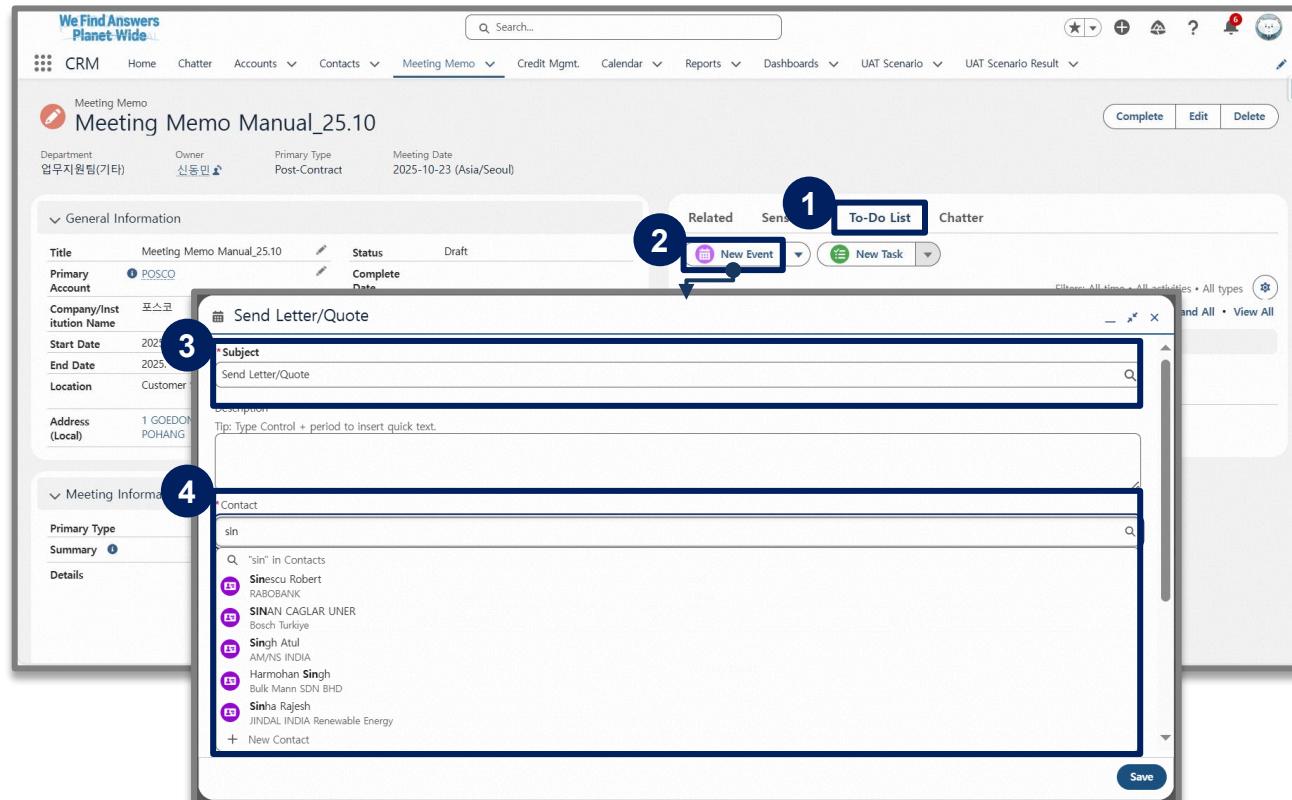
1. Click Sensitive Information
2. Upload Sensitive Information File
 - Expands sharing method beyond text-based sensitive information to include file uploads

FAQ

- Q. Who can view uploaded sensitive information files?
- A. Files are shared only with members registered in the "Sensitive Info Access List," same as text-based sensitive information. (Direct supervisors such as Group Heads, Team Leaders, and Division Heads can view even if not registered)

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		



The screenshot shows the POSCO CRM interface with the 'Meeting Memo' module open. The 'To-Do List' tab is active. A callout '1' points to the 'To-Do List' button. A callout '2' points to the 'New Event' button. The 'Subject' field contains 'Send Letter/Quote'. The 'Contact' dropdown menu shows search results for 'sin', listing various contacts like Sinescu Robert, SINAN CAGLAR UNER, Singh Atul, etc.

1. Click To-Do List
2. Click New Event
3. Enter Event Title
4. Select Event Target (Client) Cannot save if selecting a client not registered in the Meeting Memo
 - Once saved, the event appears in the client's Contact Detail page under "Activity" and in the client's Account "Timeline" tab

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

The screenshot shows the POSCO CRM interface with the 'Meeting Memo' menu selected. A 'Send Letter/Quote' dialog box is open, overlaid on the main page. The dialog has four numbered steps:

- Step 1: Shows the 'Start Date' and 'End Date' fields, both set to 2025-10-23.
- Step 2: Shows the 'Time Before Event' dropdown set to '15 minutes'.
- Step 3: Shows the 'Attendees' section with a search bar and a button labeled '신동민'.
- Step 4: Shows the 'Save' button at the bottom right of the dialog.

1. Select Event Start/End Date and Time

- Changing the start date automatically sets the end date to the same day
- Selecting a start time automatically sets the end time to one hour later

2. (Optional) Set Reminder

- Reminder can be set based on event start time
- Reminder: Salesforce notification

3. (Optional) Register Event Attendees

- Internal P-Intl members can be added
- Event is automatically added to attendees' Salesforce calendars

4. Click Save

Step 1. Meeting Memo Creation

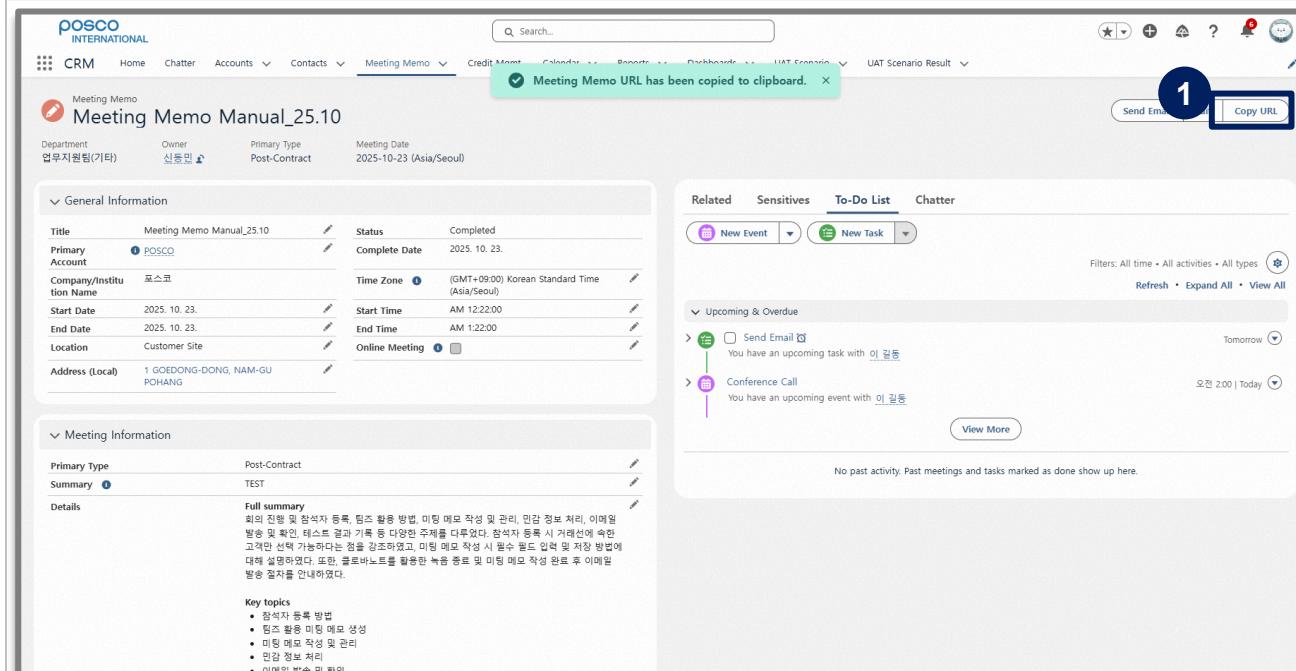
Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

The screenshot shows the POSCO CRM interface for creating a new meeting memo. The main header bar includes 'Meeting Memo' in the top navigation. The main content area displays a 'Meeting Memo Manual_25.10' entry with details like 'Title: Meeting Memo Manual_25.10', 'Status: Draft', and 'Owner: 신동민'. Below this, a 'General Information' section is visible. A 'To-Do List' tab is selected, showing a 'New Task' button (circled 1). A modal window for task creation is overlaid, containing fields for 'Subject' (Send Email), 'Description' (Send Email), 'Due Date' (2025. 10. 24), 'Assigned To' (신동민), and a 'Reminder Set' section. Step numbers 1 through 6 are circled on the modal window to guide the user through the task creation process.

1. Click New Task and Enter Title
2. Select Task Target (Client)
 - Cannot save if selecting a client not registered in the Meeting Memo
 - Once saved, the task appears in the client's Contact Detail page under "Activity" and in the client's Account "Timeline" tab
3. Select Due Date
4. Assign Responsible Person
 - Creator is assigned by default; can be changed
 - Upon reassignment and saving, email notification is sent to the new assignee
5. (Optional) Set Reminder
6. Click Save to create the task

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		



The screenshot shows the POSCO CRM interface for creating a new meeting memo. At the top, there's a green notification bar stating "Meeting Memo URL has been copied to clipboard." Below the header, the "Meeting Memo" menu is selected. The main form contains fields for Title (Meeting Memo Manual_25.10), Primary Account (POSCO), Company/Institution Name (포스코), Start Date (2025. 10. 23.), End Date (2025. 10. 23.), Location (Customer Site), and Address (Local) (1 GOEDONG-DONG, NAM-GU, POHANG). Under the "Meeting Information" section, the Primary Type is Post-Contract and the Summary is TEST. The "Details" section includes a "Full summary" paragraph and a "Key topics" list:

- 회의 진행 및 참석자 등록, 템즈 활용 방법, 미팅 메모 작성 및 관리, 민감 정보 처리, 이메일 발송 및 확인, 테스크 결과 기록 등 다양한 주제를 다룬다. 참석자 등록 시 거래선에 속한 고객안 신속 가능하다는 점을 강조하고, 미팅 메모 작성 시 필수 필드 입력 및 저장 방법에 대해 설명하였다. 또한, 클로바노트를 활용한 녹음 촬영 및 미팅 메모 작성 완료 후 이메일 발송 절차를 안내하였다.
- 템즈 활용 방법
- 템즈 활용 미팅 메모 생성
- 미팅 메모 작성 및 관리
- 민감 정보 처리
- 이메일 발송 및 확인

1. Click Copy URL

- Copies the Meeting Memo URL
- Useful for attaching to travel expense reports, etc.

Step 1. Meeting Memo Creation

Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.1 Editing from the Meeting Memo List View
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Listview Filter > Edit		

The screenshot shows the POSCO CRM interface. On the left, there's a sidebar with various menu items like CRM, Home, Chatter, Accounts, Contacts, Meeting Memo, Credit Mgmt, Calendar, Reports, Dashboards, UAT Scenario, and UAT Scenario Result. The 'Meeting Memo' item is currently selected. The main area shows a list of meeting memos with columns for Title, Primary Account, Primary Type, Material Group, Meeting Date, Department, and Summary. A specific memo titled 'My Meeting Memo (Completed)' is selected. A context menu is open over this memo, with the 'Edit' option highlighted. Below the list, a detailed edit form is displayed for a memo titled 'Edit 미팅메모 매뉴얼_25.10'. The form includes fields for General Information (Title, Primary Account, Company/Institution Name, Start Date, End Date, Location), Address (Local) (Address Search, Country/Territory, City, Street, ZIP/Postal Code), and a status section (Status: Completed, Complete Date: 2025. 10. 16., Time Zone: (GMT+09:00) Korean Standard Time (A...), Start Time: PM 4:27, End Time: PM 5:27, Online Meeting: checked). At the bottom of the form are 'Cancel', 'Save & New', and 'Save' buttons.

1. Select List View Filter: My Meeting Memo (Completed)
2. Click the down arrow icon of the memo to edit
3. Opens edit popup for the selected Meeting Memo
4. Editable fields: all except Related Info and Sensitive Info
 - Related Info includes additional accounts, attendees, and gift records

※ Editable for 1 month after submission
- No time limit for drafts

FAQ

- Q. Can I edit after submission?
A. Yes, edits are allowed for 1 month after completion

Step 1. Meeting Memo Creation

Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.2 Editing from the Meeting Memo Detail Page
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Edit		

The screenshot shows the POSCO International CRM interface. The top navigation bar includes links for Home, Chatter, Accounts, Contacts, Meeting Memo (highlighted), Credit Mgmt., Calendar, Reports, Dashboards, UAT Scenario, and UAT Scenario Result. The main content area displays a meeting memo titled "미팅메모 매뉴얼_25.10". The "General Information" section contains fields for Title (Title), Primary Account (POSCO), Status (Completed), Start Date (2025. 10. 16.), End Date (2025. 10. 16.), Location (Customer Site), and Address (Local) (POHANG). Below this, there are sections for Meeting Information (Primary Type, Summary, Details, Follow Up) and Owner Information (Owner, Department). On the right side, there are tabs for Add Accounts, Add Attendees, and Add Material Groups. At the bottom, there are buttons for Cancel, Save & New, and Save.

1. Click Edit
2. Editable fields: all except Related Info and Sensitive Info
 - Related Info includes accounts, attendees, and gift records

FAQ

- Q. How do I edit Sensitive Information?
 A. Go to the “Sensitive Info” tab. See P.38 for details.

Step 1. Meeting Memo Creation

Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.2 Editing from the Meeting Memo Detail Page
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page		

The screenshot shows the POSCO CRM interface for a Meeting Memo titled "미팅메모 매뉴얼_25.10". The main page displays basic information like Title, Status, Date, and Time. A modal window titled "Add Accounts" is open, showing a search bar and a list of accounts: "SEHA (SAMSUNG ELECTRONICS HOME APPLIANCE AMERICA)" and "POSCO". The "Related" tab in the background lists "Account (2)" with items "POSCO" and "삼성SDS". Three numbered circles (1, 2, 3) point to the edit icon on the main page, the "Add Accounts" button in the modal, and the delete icon in the related list respectively.

1. Click pencil icon to edit
- Basic and meeting information can be modified
2. In “Related” tab, click Add to include additional info
- Can add account, attendee, and gift details
3. Click down arrow icon to delete

Step 1. Meeting Memo Creation

Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.2 Editing from the Meeting Memo Detail Page
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page		

The screenshot shows the POSCO CRM interface for a Meeting Memo. On the left, there's a sidebar with sections like General Information, Meeting Information, and Owner Information. The main area displays the meeting details: Title (미팅메모 매뉴얼_25.10), Primary Account (POSCO), Primary Type (Business Development), and Date (2025-10-16). On the right, there are tabs: Related, Sensitive (highlighted with a blue box and number 1), To-Do List, and Chatter. The Sensitive tab contains three sub-sections: Meeting Sensitive, Meeting Sensitive Share, and Meeting Sensitive Files.

- Meeting Sensitive:** Shows sensitive details like 'Meeting Memo' and 'Business Development'.
- Meeting Sensitive Share:** Shows three items shared with '김다영' (IS TEAM), 'Sales Rep. 2' (Steel Business Group), and '정소영' (업무지원팀(기타)). It includes an 'Add Meeting Sensitive Share' button (number 2).
- Meeting Sensitive Files:** Shows a file named '01 포스코인터내셔널 클로바 연동시나리오.pptx' uploaded on 2025.10.23 (number 5).

- Click Sensitive Info tab
- Click pencil icon to edit sensitive information
- Click Add Sensitive Info Access to add viewers
- Click down arrow icon to remove viewers
- Click Upload File to add sensitive info files
 - Files are viewable/downloadable only by registered Sensitive Info Access members

Step 1. Meeting Memo Creation

Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.2 Editing from the Meeting Memo Detail Page
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page		

The screenshot shows the POSCO CRM interface. In the center, there's a detailed view of a meeting memo titled 'Meeting Memo 매뉴얼_25.10'. On the right, a modal window titled 'Edit File Details' is open, showing file metadata like title, primary account, and location. Below the main view, a section titled 'Meeting Sensitive Files (0)' lists a single file: '01_포스코인터넷내셔널_클로바_연동시나리오.pptx'. Step 1 is indicated by a blue circle with '1' over the file name. Step 2 is indicated by a blue circle with '2' over a downward-pointing arrow icon next to the file. Step 3 is indicated by a blue circle with '3' over a 'View All' button. Step 4 is indicated by a blue circle with '4' over the file entry in the list, which is now empty.

1. [Edit Method 1] Click Sensitive Info File
2. Click down arrow icon to delete uploaded file
3. [Edit Method 2] Click View All
4. Click down arrow icon to delete uploaded file

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	1. Temporary Save and Submit	Step (Lv.3)	1.1 Edit Draft Information and Submit
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Listview Filter		

Meeting Memo

My Meeting Memo (Draft)

1	Title ↑	Primary Account	Primary Type	Mat...	Meeting Date	Department	Summary
2	네이버클로바	마린이노베이션	Post-Contract		2025. 10. 20.	업무지원팀(기타)	o
3	미팅메모 매뉴얼_25.10	POSCO	Contract		2025. 10. 16.	업무지원팀(기타)	미팅메모 매뉴얼 요약
4	바로바로	POSCO	Contract		2025. 10. 20.	업무지원팀(기타)	.
5	아이나나아	삼성SDS	Contract		2025. 10. 20.	업무지원팀(기타)	.
6	이투이 테스트_25.10	POSCO	Post-Contract		2025. 10. 20.	업무지원팀(기타)	요약
7	케스트	POSCO	Post-Contract		2025. 10. 21.	업무지원팀(기타)	.
	팁스 테스트	마린이노베이션	Contract		2025. 10. 20.	업무지원팀(기타)	주요 결정 사항미팅 메모 작성 및 저장 프로세스의 테스트 완료인감

- 1. Select List View Filter: My Meeting Memo (Draft)**
 - Displays all Meeting Memos saved as drafts
- 2. Click the title in the “Title” column**
 - Opens the Meeting Memo detail page

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	1. Temporary Save and Submit	Step (Lv.3)	1.1 Edit Draft Information and Submit
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page		

The screenshot shows the 'Meeting Memo' detailed page. At the top, there's a message: 'This meeting memo is currently saved as a Draft. Once you've finished writing, please click the 'Complete' button to submit it.' Below this, the main content area includes:

- General Information:** Title: 이투이 테스트_25.10, Primary Account: POSCO, Company/Institution Name: 포스코, Start Date: 2025. 10. 20., End Date: 2025. 10. 20., Location: Customer Site, Address (Local): POHANG 경북 포항시 고동동 1번지.
- Meeting Information:** Primary Type: Post-Contract, Summary: 요약, Details: 전체 요약 (with note about handling cases where employee numbers are missing).
- Related:** Shows 1 account (POSCO) and 4 attendees (김 준철, 김다영, 신동민, 정소영) with their respective affiliations and attendee types.

1. If needed, edit Meeting Memo and click Complete

- For editing steps, refer to Step 1: Create Meeting Memo → Step 2: Edit Meeting Memo

FAQ

- Q. Where is the Send Email button?
 A. Available after clicking Complete. It appears in the same location as the Complete button.

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.1 Set Recipients / CC
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sending Email		

1. Click Send Email
2. Set recipients/CC for email/notification
 - Use org chart modal to register by department
 - Up to 100 recipients per send (1) Recipients
 - Internal attendees registered in P-Int'l are auto-added (2) CC
 - Only members registered in Sensitive Info Access are auto-added
 - Example: Attendees_P-Int'l: A, B, C; Sensitive Info Access: A, B, C, D, E → D and E are added as CC

※ Notification: Bell alert in top-right of Salesforce

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.1 Set Recipients / CC
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sending Email		

The screenshot shows the 'Send Email' dialog box overlaid on the Meeting Memo detailed page. The dialog has two main sections: 'Recipients' and 'CC'. Under 'Recipients', three users are listed: 김다영, 정소영, and 신동민. Under 'CC', three users are listed: Sales Rep 2, 한상훈, and 장우석. A callout box labeled '1' points to the 'Type' section, which contains two checkboxes: 'Email' (checked) and 'Notification' (unchecked). A callout box labeled '2' points to the 'Send' button at the bottom right of the dialog.

1. Select Send Type (multiple options allowed)

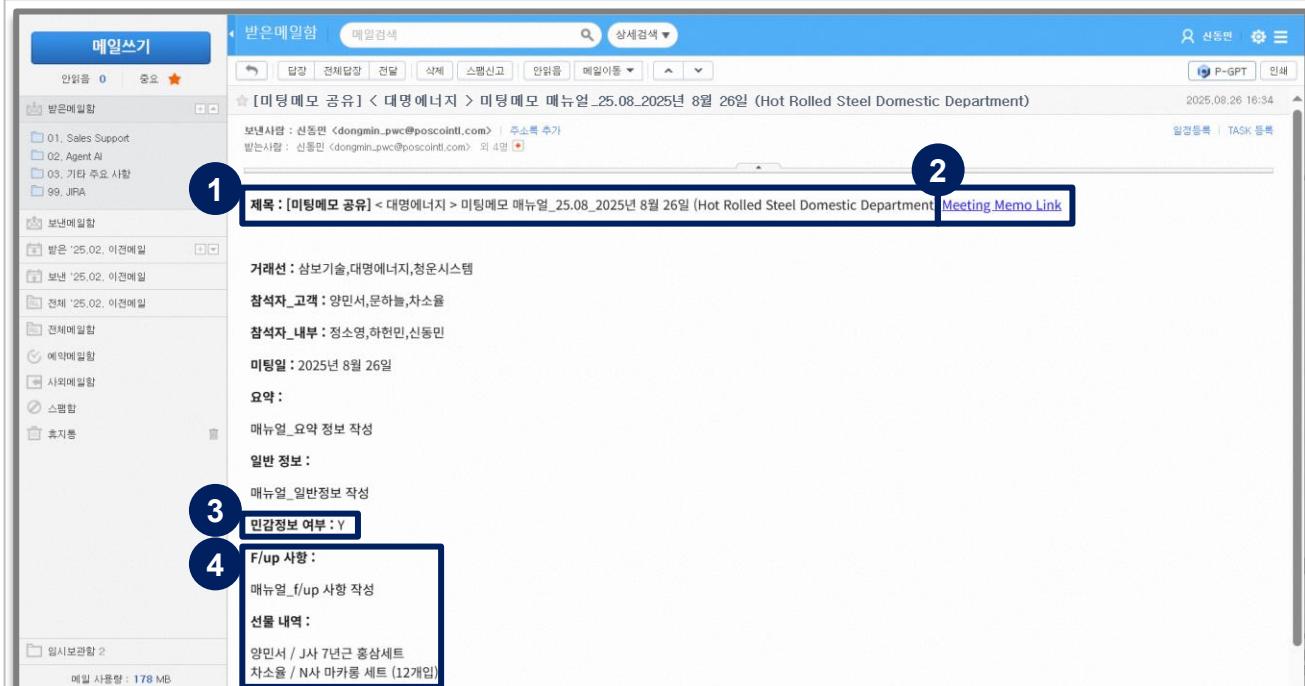
- Email is mandatory
- Notification is optional
- Can send both simultaneously

2. Click Send

※ Notification: Sent only to CRM users (Salesforce account holders) among selected recipients/CC

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.2 Review Sending Template and History
Menu	Meeting Memo	User	All Employees
Navigation	EP > Inbox		



1. Check received email

- (1) Subject Template
 - "<Main Account Name> + Meeting Memo Title + Meeting Date + Author's Department Lv.3"
 - If Lv.3 doesn't exist, higher level is shown
- (2) Also includes account, attendees, meeting date, summary, general info, follow-up items, and gift records

2. Click to open Meeting Memo detail page

- Only accessible to CRM account holders

3. Sensitive Info status displayed

- If written = Y
- If not written = N

4. Follow-up and gift sections are hidden if not filled

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.2 Review Sending Template and History
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sending Email		

The screenshot shows the 'Meeting Memo' section of the POSCO International CRM system. The top navigation bar includes 'Search...', 'CRM', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Meeting Memo', 'Credit Mgmt.', 'Calendar', 'Reports', 'Dashboards', 'UAT Scenario', and 'UAT Scenario Result'. The main area displays a meeting memo titled '이투이 테스트_25.10'. On the right, there's a toolbar with 'Send Email', 'Edit', and 'Copy URL'. A large central window is titled 'Send Email'. It contains fields for 'Recipients' (Organization Explorer 0) and 'CC' (Organization Explorer 0), both with search bars and lists of employees. To the right, there are checkboxes for 'Type' (Email checked, Notification unchecked). Below these are sections for 'Add Accounts' and 'Add Attendees', each with dropdown menus and search bars. A sidebar on the left lists various filters like 'Department', 'Owner', 'Primary Type', 'Meeting Date', and 'Meeting Details'. Step 1 is highlighted over the 'Send Email' button. Step 2 is highlighted over the 'Meeting Email History' section, which shows a list of 5 items sent on 2025.10.23. Step 3 is highlighted over the search bar in the 'Meeting Email History' list. Step 4 is highlighted over the 'Send' button at the bottom right of the main window.

1. Click Send Email
2. View email send history
 - Shows recipients, type (To/CC), and send time
3. Search email recipients
 - Useful for tracking after bulk sends
4. Click Send to resend email

FAQ

- Q. Can I recall a sent email?
 A. No, recall is not possible. EP mail integration is planned for future recall support.

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.2 Review Sending Template and History
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sending Email		

The screenshot shows the POSCO CRM interface with the 'Meeting Memo' menu selected. On the left, there's a detailed view of a meeting memo titled '이투이 테스트_25.10'. The main area displays a list of notifications. The first notification, highlighted with a blue box and labeled '2', is about a meeting memo titled "이투이 테스트_25.10" shared by '업무지원팀(기타)_신동민'. It includes details like the meeting date (2025. 10. 20), primary account (POSCO), and meeting type (Post-Contract). Below this, there are other notifications for conference calls and a post from '냉연내수그룹_이강수'.

1. Click Salesforce Bell Notification
2. Check received Meeting Memo notification

- Click title to open Meeting Memo detail page

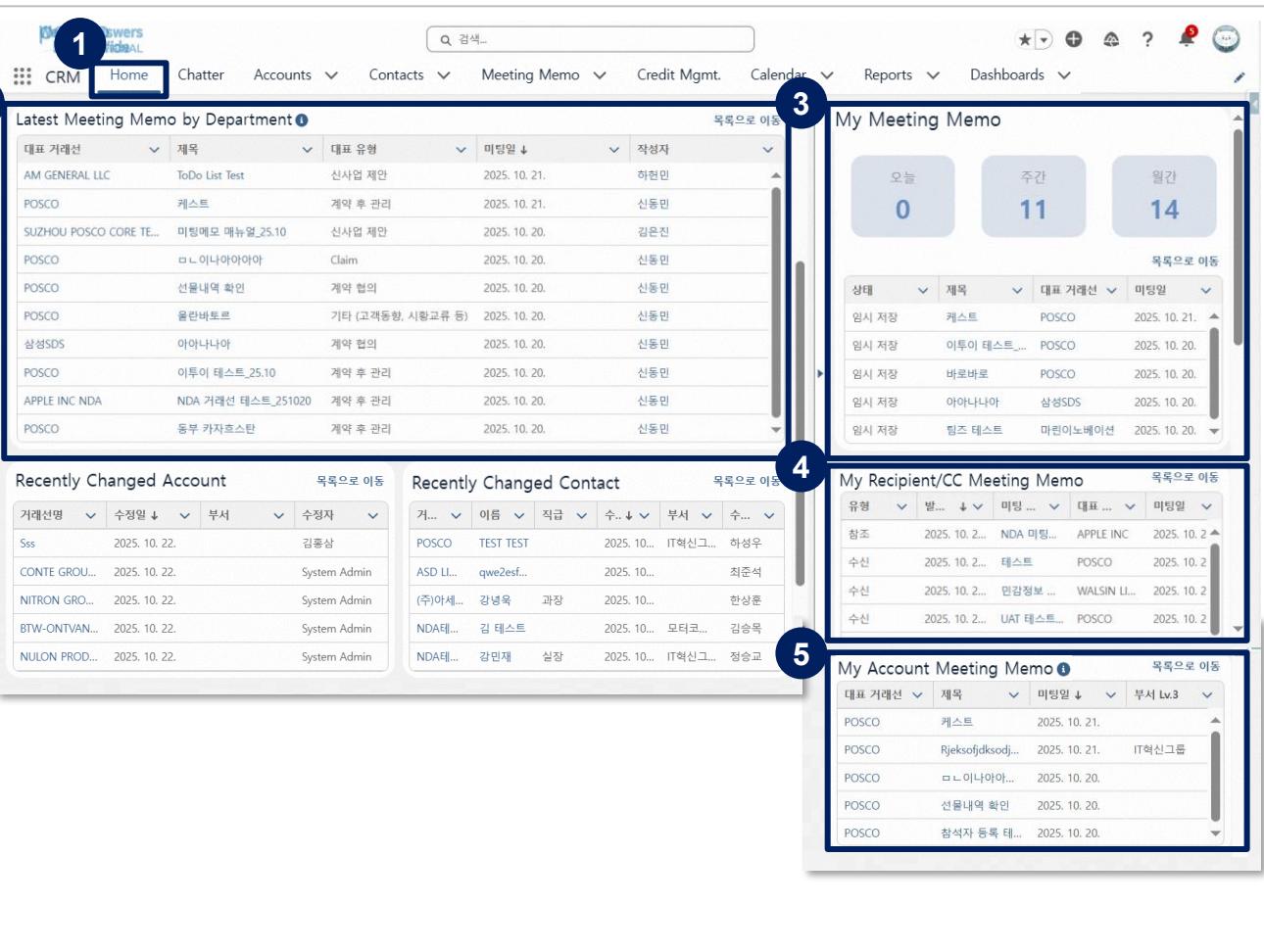
(1) Title Template : Author's Department Lv.3 + Author Name + Meeting Memo Title

(2) Content Template : Meeting Date, Main Account Name, Meeting Type

※ Notification: Sent only to CRM users (Salesforce account holders) among selected recipients/CC

Step 3. Meeting Memo View

Step (Lv.2)	1. View Meeting Memo List	Step (Lv.3)	1.1 View from Home Screen
Menu	Meeting Memo	User	All Employees
Navigation	Home		

2 

3 

4 

5 

6 

7 

1. Click Home (default Salesforce landing page)

2. View latest Meeting Memos by organization

- Shows memos created in user's org within last 7 days
- Org: Based on group; if unavailable, shows higher org

3. View user-created memos by day/week/month

- Includes both draft and completed memos
- Drafts appear at the top

4. View memos where user is recipient or CC

5. View memos created under user's starred accounts

※ Click Meeting Memo title to open detail page (applies to ①–⑤)

Step 3. Meeting Memo View

Step (Lv.2)	1. View Meeting Memo List	Step (Lv.3)	1.2 Use Filters in List View to Search Meeting Memos
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Listview Filter		

1 Recently Viewed

18 items • Updated a few seconds ago

Meeting Memo

Meeting Memo (Department)

My Meeting Memo (Completed)

My Meeting Memo (Draft)

Recently Viewed (Pinned list)

All Other Lists

All의 사본

All의 사본

Title	Primary Account	Primary Type	Mat...	Meeting Date	C...	Department	O...	Summary
1 이투이 테스트_25.0	POSCO	Post-Contract		2025. 10. 20.	2025....	업무지원팀(기타)	신동민	요약
2 미팅메모 메뉴얼_25.10	POSCO	Business Development		2025. 10. 16.	2025....	업무지원팀(기타)	신동민	미팅메모 메뉴얼_요약
3 Meeting Memo Manual_25.10	POSCO	Post-Contract		2025. 10. 23.	2025....	업무지원팀(기타)	신동민	TEST
4 네이버클로바								
5 미팅메모 메뉴얼_25								
6 케스트								
7 팀즈 테스트								
8 아아나나아								
9 선물내역 확인								

- 1. Click List View Filter on left panel**
- 2. Select filter to view memos based on conditions**
 - (1) **Meeting Memo (Department)**
 - Regular users: View memos created in their group
 - Team Leaders and above: View all memos created in subordinate orgs
 - (2) **My Meeting Memo (Completed)**
 - View only submitted memos
 - (3) **My Meeting Memo (Draft)**
 - View only draft memos

Step 3. Meeting Memo View

Step (Lv.2)	2. View Detailed Meeting Memo	Step (Lv.3)	2.1 View Related Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page		

Meeting Memo
미팅메모 매뉴얼_25.10

General Information

- Title: 미팅메모 매뉴얼_25.10
- Status: Completed
- Primary Account: POSCO
- Company/Institution Name: 포스코
- Start Date: 2025. 10. 16.
- End Date: 2025. 10. 16.
- Location: Customer Site
- Address (Local): POHANG 경북 포항시 고동읍 1번지

Meeting Information

- Primary Type: Business Development
- Summary: 미팅메모 매뉴얼_요약
- Details: 미팅메모 매뉴얼_일반정보
- Follow Up: 미팅메모 매뉴얼_f/u 사항

Owner Information

- Owner: 신동민
- Department Lv.1: 협력사
- Department Lv.2: Department Lv.2
- Department Lv.3: Department Lv.3
- Department Lv.4: 업무지원팀(기타)

Related

- Account (2): POSCO, 삼성SDS
- Attendees (4): 김운진, 김준철, 정소영, 신동민
- Material Group (0)
- Gift History (1): Teams 주최자 테스트
- Summary & Full Text (1): Teams 주최자 테스트
- Files (0): No files attached.

1. View Related Info
 - Includes account, attendees, product items, gift records, summary, transcript, and attachments
2. Click View All in Related Info section to see full details

Step 3. Meeting Memo View

Step (Lv.2)	2. View Detailed Meeting Memo	Step (Lv.3)	2.2 View Sensitive Information and Sharing Targets
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sensitive Information		

The screenshot shows the POSCO International Meeting Memo Detail Page. The top navigation bar includes CRM, Home, Chatter, Accounts, Contacts, Meeting Memo (selected), Credit Mgmt., Calendar, Reports, Dashboards, UAT Scenario, and UAT Scenario Result. The main content area has tabs for General Information, Meeting Information, and Owner Information. A callout labeled 1 points to the 'Sensitive' tab in the top right of the main content area, which displays 'Meeting Sensitive' information and a list of 'Meeting Sensitive Share' members. A callout labeled 2 points to the 'View All' button in the same section.

1. View Sensitive Info, Files, and Access List

- Shows sensitive info, files, and access members for the memo
- If no sensitive info written: "No sensitive information available"
- If written but no access: "You do not have permission to view sensitive information"
- If no access, cannot view access member list either

2. Click View All to see full access list

- Up to 10 members shown without View All; 11+ requires View All

Step 3. Meeting Memo View

Step (Lv.2)	2. View Detailed Meeting Memo	Step (Lv.3)	2.3 View To-Do List
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > To-Do List		

Meeting Memo
미팅메모 매뉴얼_25.10

Department: 업무지원팀(기타) Owner: 신동민 Primary Type: Business Development Meeting Date: 2025-10-16 (Asia/Seoul)

General Information

Title: 미팅메모 매뉴얼_25.10	Status: Completed
Primary Account: POSCO	Complete Date: 2025. 10. 16.
Company/Institution Name: 포스코	Time Zone: (GMT+09:00) Korean Standard Time (Asia/Seoul)
Start Date: 2025. 10. 16.	Start Time: PM 4:27:00
End Date: 2025. 10. 16.	End Time: PM 5:27:00
Location: Customer Site	Online Meeting: 1
Address (Local): Pohang 경북 포항시 괴정동 1번지	

Meeting Information

Primary Type: Business Development	Summary: 미팅메모 매뉴얼 요약
Details: 미팅메모 매뉴얼 일반정보	Follow Up: 미팅메모 매뉴얼 F/up 사항

Owner Information

Owner: 신동민	Department: 업무지원팀(기타)
Department Lv1: 협력사	Department Lv2:
Department:	Department:

To-Do List

- New Event
- New Task

Filters: All time • All activities • All types

Upcoming & Overdue

1. 25.10-11 채고 수준 재충부 You have an upcoming task with 이길동 Today

October • 2025

포스코 2주간공장 방문 You had an event with 이길동 오전 10:30 | Yesterday

No more past activities to load.

- 1. View To-Do List**
- Shows events and tasks created from the Meeting Memo

Step 1

Meeting Memo Creation

-  **1. Register New Meeting Memo**
 - 1.1 Select Record Type**
 - 1.1.1 Use CLOVA Note**
 - 1.1.2 Use Teams**
 - 1.1.3 NDA Account**
 - 1.2 Enter Basic Information**
 - 1.3 Enter Meeting Details**
 - 1.4 Enter Attendance Information**
 - 1.5 Save and Submit**
 - 1.6 Add Additional Information and Utilize Features**
-  **2. Meeting Memo Editing**
 - 2.1 Editing from the Meeting Memo List View**
 - 2.2 Editing from the Meeting Memo Detail Page**

Step 2

Meeting Memo Saving / Submission

- ▶ 1. Temporary Save and Submit
 - 1.1 Edit Draft Information and Submit
- ▶ 2. Email and Notification Delivery
 - 2.1 Set Recipients / CC
 - 2.2 Review Sending Template and History

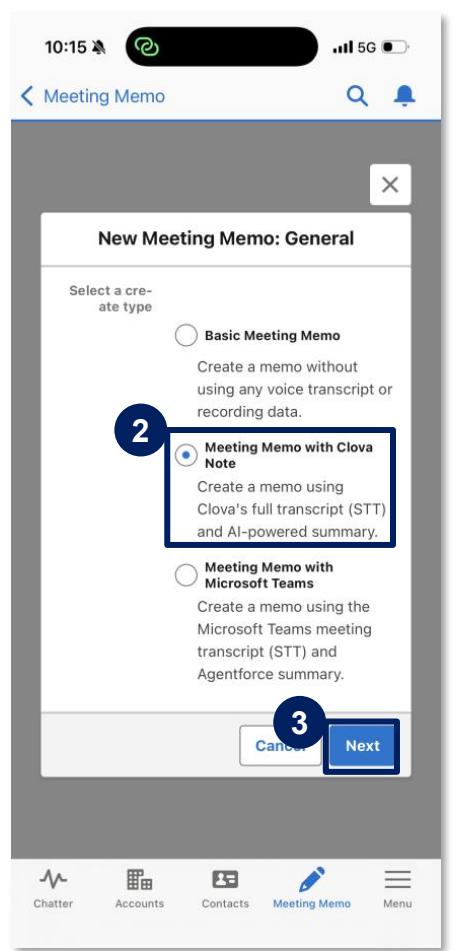
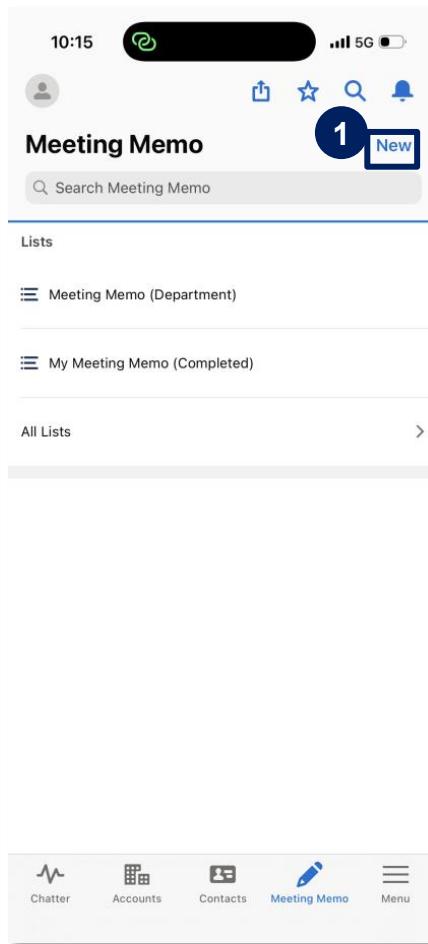
Step 3

Meeting Memo View

- ▶ 1. View Meeting Memo List
 - 1.1 Use Filters in List View to Search Meeting Memos
- ▶ 2. View Detailed Meeting Memo
 - 2.1 View Related Information
 - 2.2 View Sensitive Information and Sharing Targets
 - 2.3 View To-Do List

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.1 Use CLOVA Note
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Click Create New
2. Select Create Meeting Memo Using CLOVA Note
3. Click Next

FAQ

- Q. Can I create a Meeting Memo without using the AI solution, as before?
- A. Yes. By selecting Basic Meeting Memo, you can create a Meeting Memo using the previous method.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.1 Use CLOVA Note
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Check Created CLOVA Note Meeting Records

- Lists meeting records created within the last 30 days
- Only records created using the assigned business account are viewable after logging into CLOVA Note (records created with personal accounts are not accessible)
- All records are listed regardless of whether they were created via CLOVA Note web or mobile

2. Click View Details for the record you want to use when creating a Meeting Memo

- Among the summary and full transcript provided in View Details, the summary will not be available if it was not generated in CLOVA Note

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.1 Use CLOVA Note
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

The figure consists of three screenshots of a mobile application interface for creating a new meeting memo.

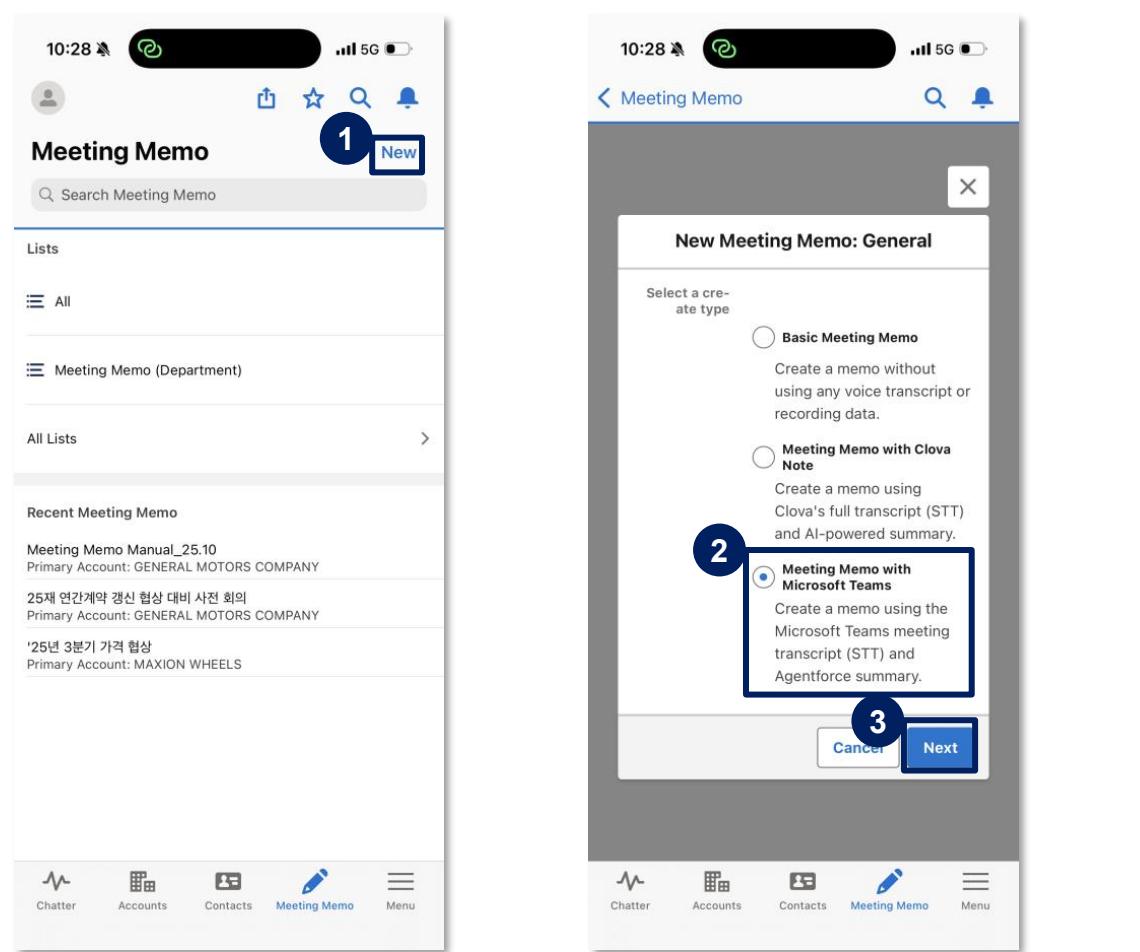
- Screenshot 1:** Shows the 'New Meeting Memo: General' screen. It includes sections for 'Key topics' (MDA 필터 사용 문제, 클로바 인포 메시지 테스트, 아이콘 크기 조정) and 'Next steps' (필터 사용 개선 방안 마련하기, 아이콘 및 패딩 조정하기). A blue circle labeled '1' is positioned over the 'Full summary' section.
- Screenshot 2:** Shows the 'Get Summary' button being clicked. A blue circle labeled '2' is positioned over this button.
- Screenshot 3:** Shows the 'Save' button being clicked. A blue circle labeled '3' is positioned over this button.

At the bottom of each screenshot, there are navigation icons for Chatter, Accounts, Contacts, Meeting Memo, and Menu.

- 1. Review Summary and Full Transcript**
 - Review the summary and full transcript of the meeting record selected in View Details
- 2. Click Get Summary to copy the summary into the Details section on the right-hand side of the Meeting Memo**
- 3. When clicking Save, both the summary and full transcript displayed on the left screen are saved together**
 - For detailed information, refer to P.71

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



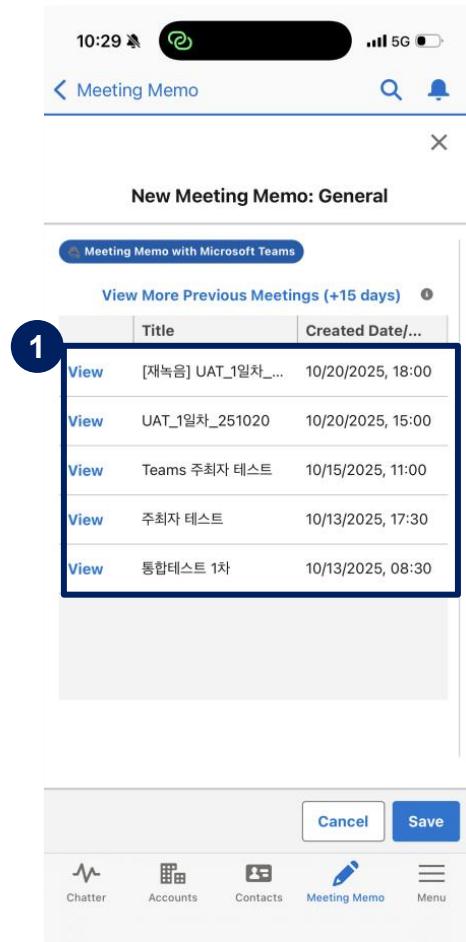
1. Click Create New
2. Select Create Meeting Memo Using Microsoft Teams
3. Click Next

FAQ

- Q. Can I still create a Meeting Memo without using the AI solution?
- A. Yes. By selecting Basic Meeting Memo, you can create a Meeting Memo using the previous method.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

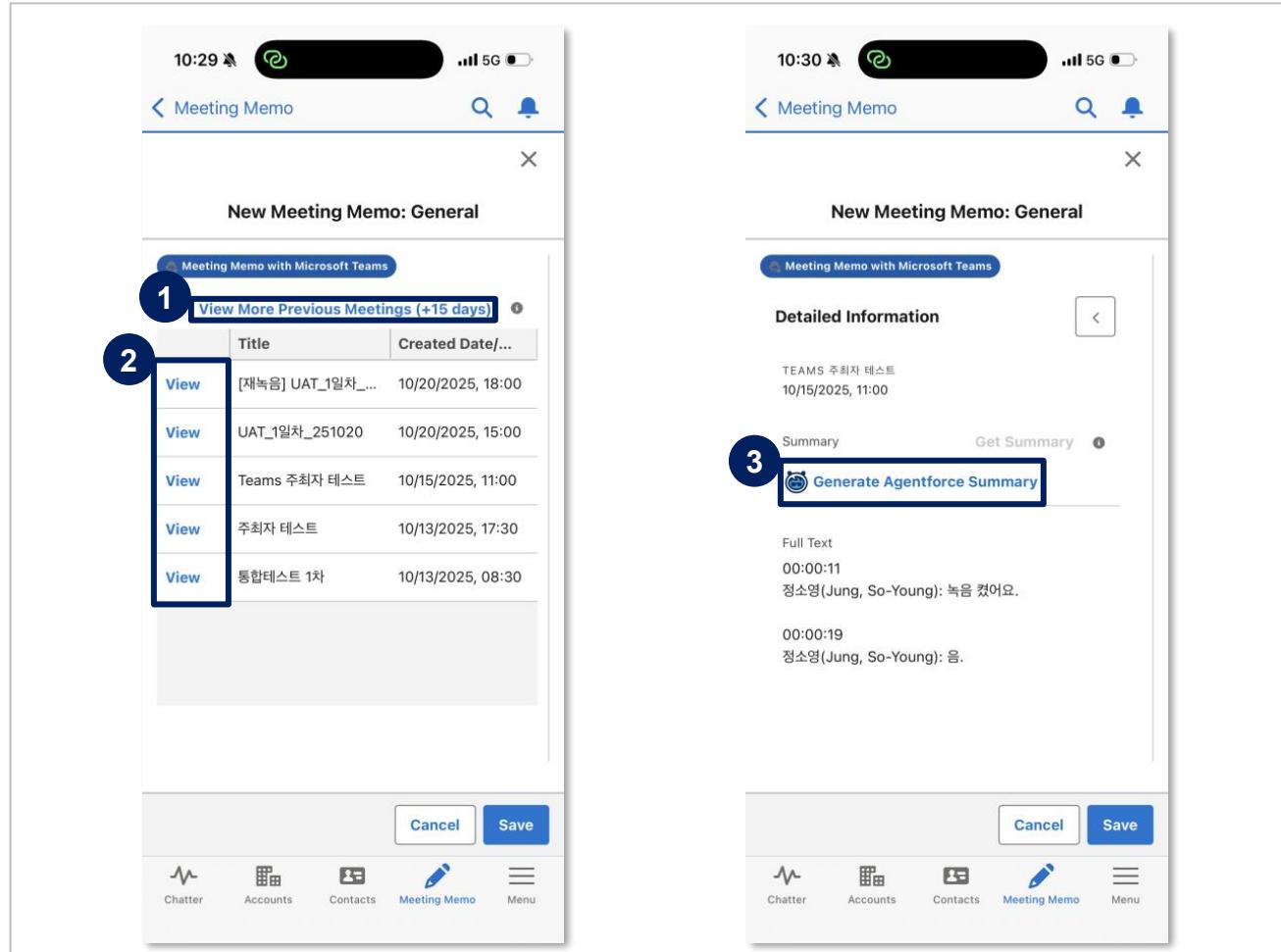


1. Check Created Teams Meeting Records

- Lists meeting records created within the last 15 days
- Meeting records can be viewed only if the meeting was created via “New Event” or from the Teams calendar screen (records from meetings started or joined via the “Start Meeting Now” button are not retrievable)
- Records are accessible only if you created the meeting or were pre-registered as an attendee (unregistered participants cannot view the record)

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



The screenshots show the 'New Meeting Memo: General' screen. On the left, a list of previous meetings is shown with a blue box around the first item and a circled '1' above it. A second circled '2' points to the 'View' button for the first meeting. On the right, the 'Detailed Information' section is displayed, showing a summary and a 'Generate Agentforce Summary' button, which is also circled with a '3'.

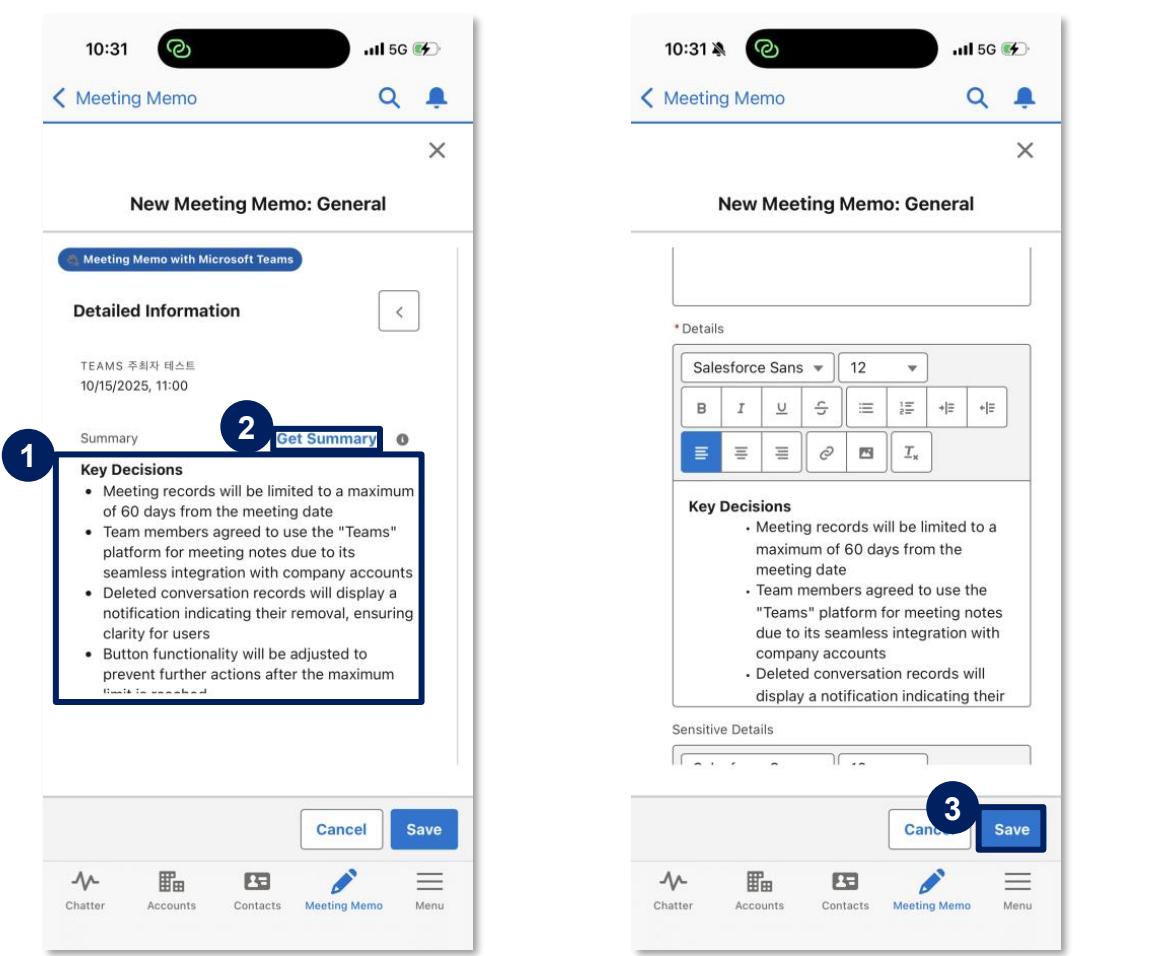
- 1. (If needed) Click View More Previous Meetings**
 - Lists meetings created within the last 15 days
 - By clicking View More, you can view meetings created up to the past 60 days
- 2. Click View Details for the meeting record you wish to use in the memo**
- 3. Click Generate Agentforce Summary**

FAQ

Q. I attended and recorded a Teams meeting, but the record doesn't appear.
A. Using the "Start Meeting Now" button will not appear in the Meeting Memo. For details, refer to [Appendix] Teams Meeting Record Creation.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.2 Use Teams
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1

2 Get Summary

3 Save

Key Decisions

- Meeting records will be limited to a maximum of 60 days from the meeting date
- Team members agreed to use the "Teams" platform for meeting notes due to its seamless integration with company accounts
- Deleted conversation records will display a notification indicating their removal, ensuring clarity for users
- Button functionality will be adjusted to prevent further actions after the maximum limit is reached

Cancel Save

Chatter Accounts Contacts Meeting Memo Menu

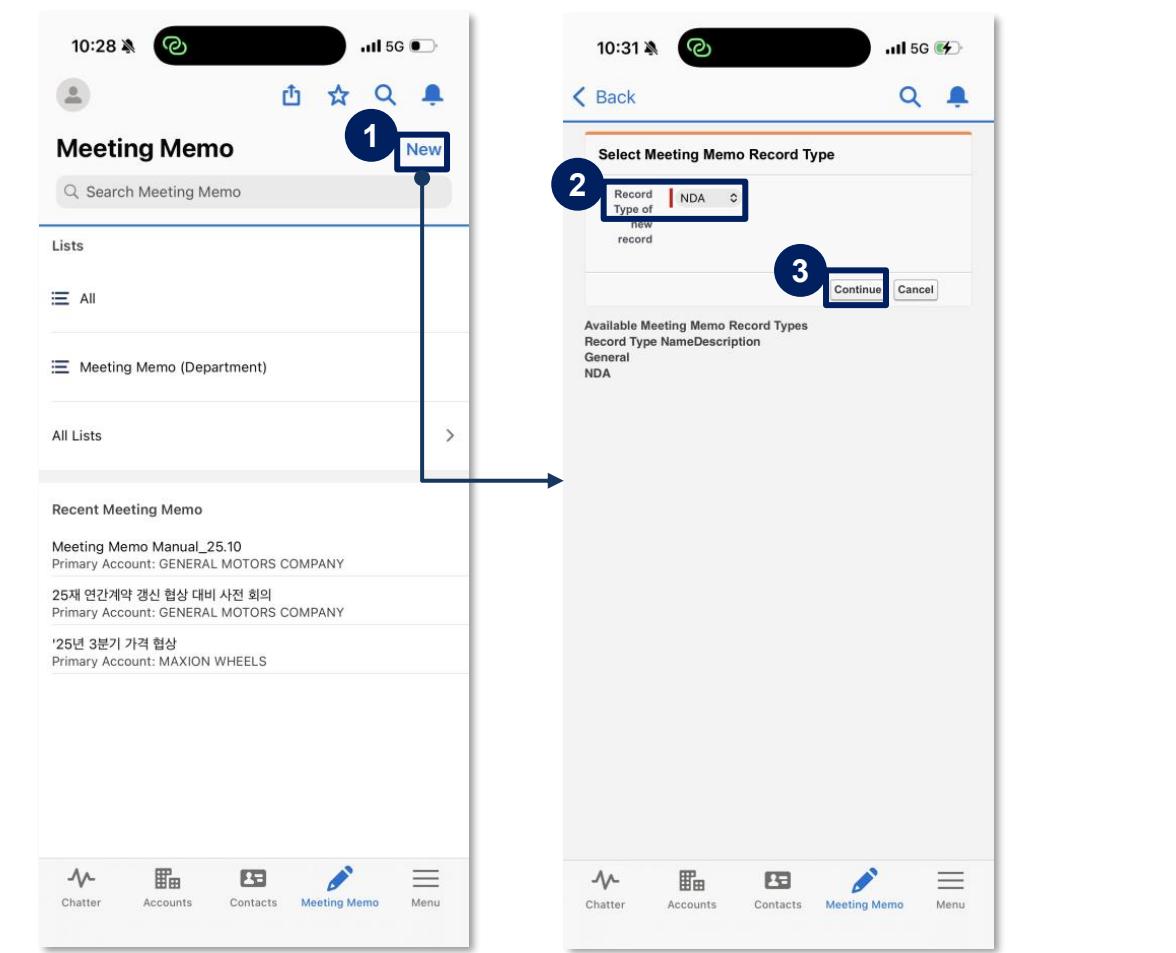
1. Review Generated Summary
2. Click Get Summary to copy the summary into the Details section of the Meeting Memo
3. When clicking Save, both the summary and full transcript displayed on the left screen are saved together
 - For detailed information, refer to P.71

FAQ

- Q. Why is the summary copied to the Details section instead of the Summary section?
- A. The summaries generated from recordings longer than 30–60 minutes are most similar in length and detail to what users typically write in the Details section.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Select Record Type_1.1.3 NDA Account
Menu	Meeting Memo	User	NDA Account Memo Access Manager
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Click Create New
2. Select NDA
 - Select "General" when creating a Meeting Memo for non-NDA accounts
3. Click Continue

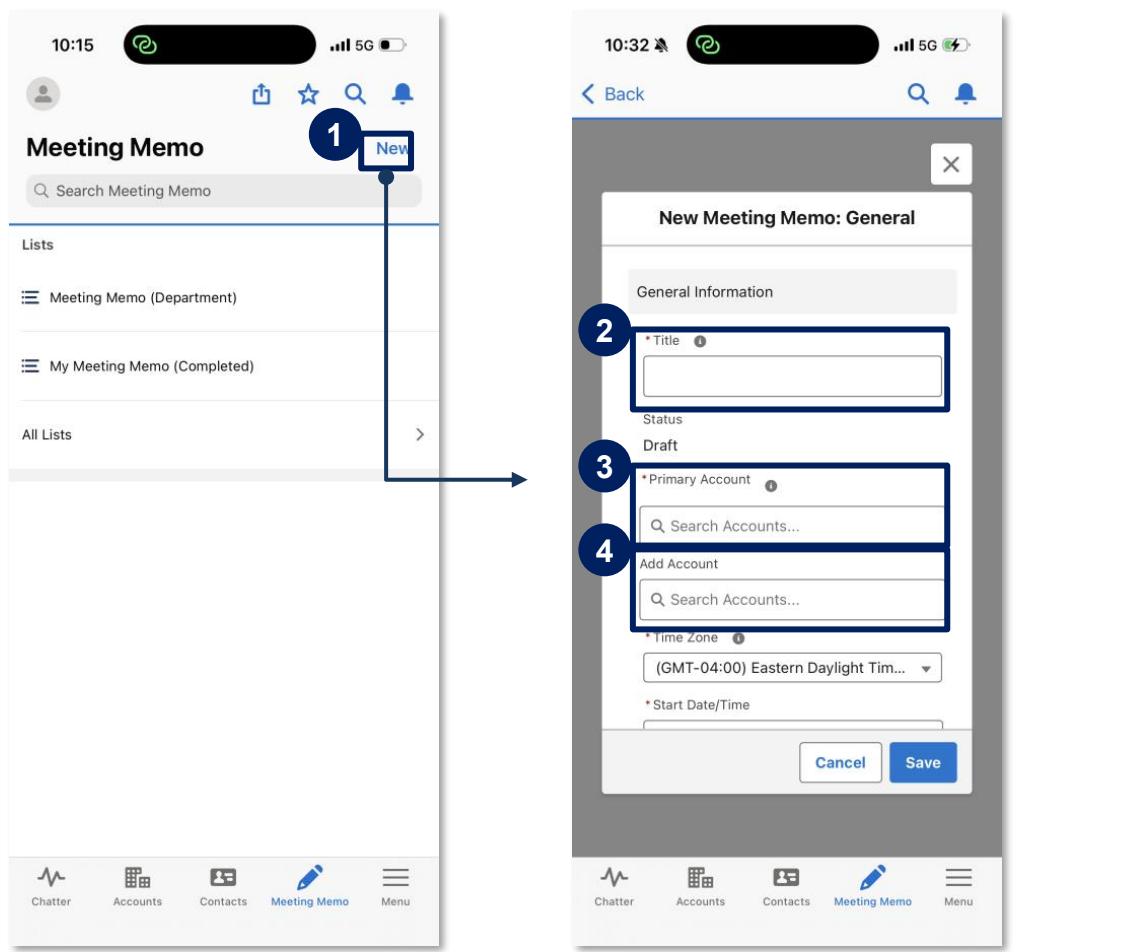
FAQ

Q. What's the difference between NDA and General record types?

A. [Creation] NDA Meeting Memos can only be created by designated access managers.
 [Access] Only the author, their direct supervisor, and members explicitly granted view/edit permissions by the author can search or view the memo.
 [Features] NDA Meeting Memos include a separate permission setting for memo access, but do not support Sensitive Info writing/sharing or Email Send functions.

Step 1. Meeting Memo Creation

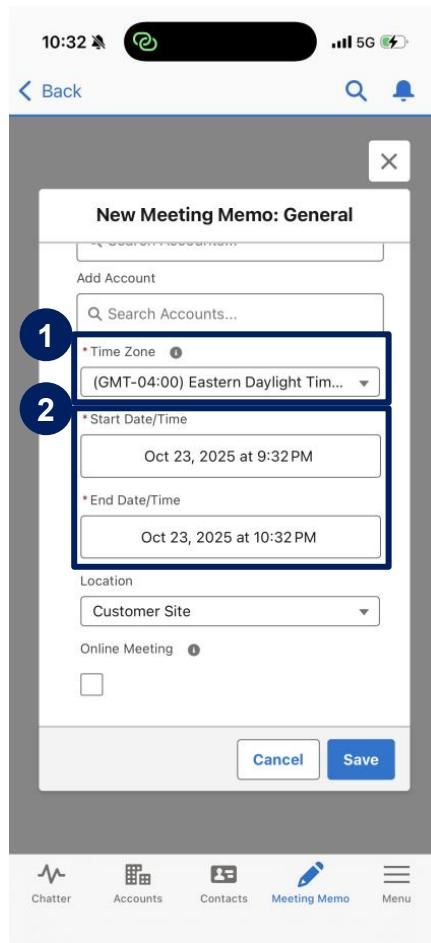
Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.2 Entering Basic Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Click Create New
 2. Enter Title (Required)
 - Up to 50 characters allowed
 3. Register Primary Account (Required)
 - If only one client participated, enter that account
 - If multiple clients participated, enter the key account based on the agenda
 4. Add Additional Accounts
 - You can register additional clients if two or more attended
 - New client entries and multiple selections are supported
- ※ Record Type NDA : Meeting Memo
can only be saved if it includes at least one NDA account. Once an NDA account is registered, any number of general accounts can be added.
Regardless of record type, the memo structure and fields remain the same

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.2 Entering Basic Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Select Time Zone (Required)

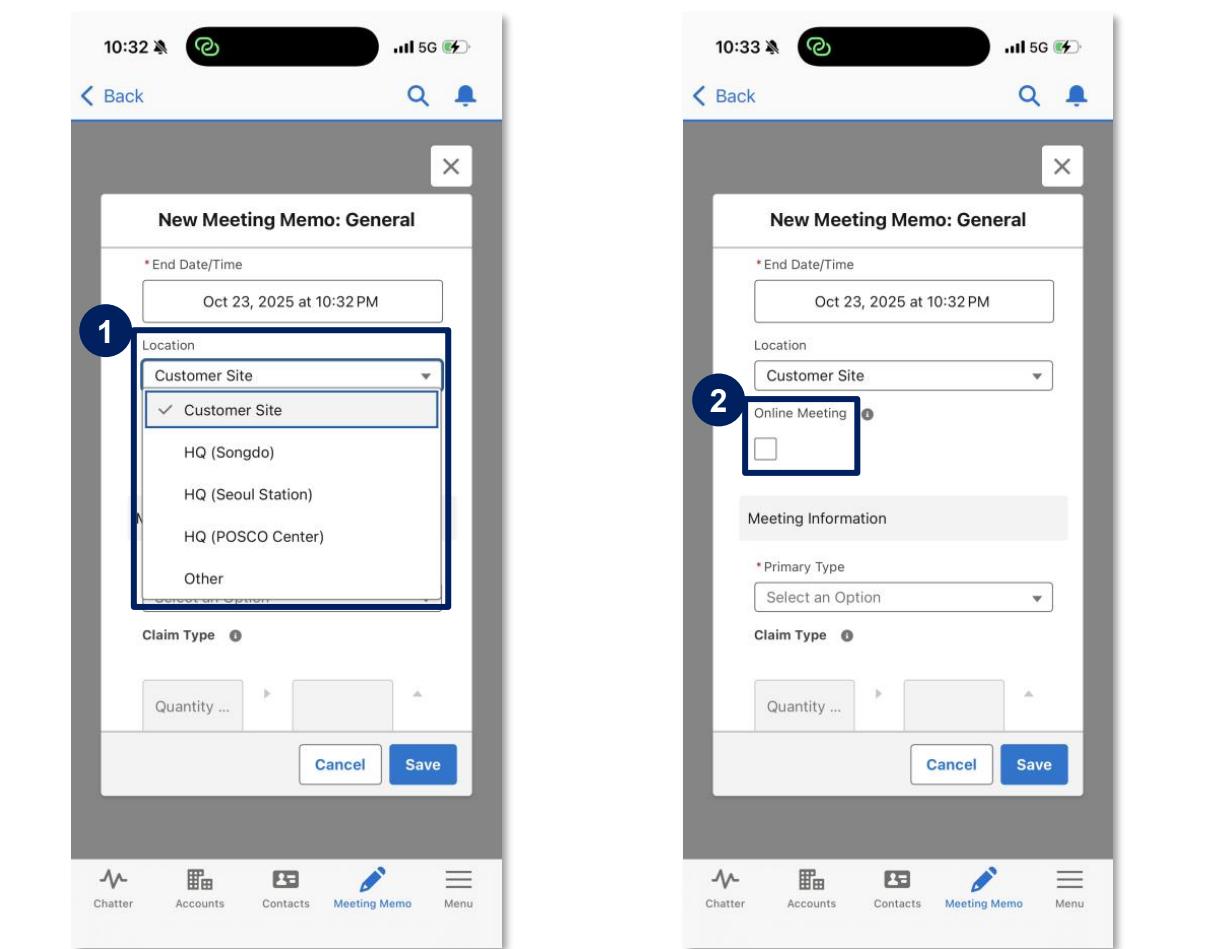
- Defaults to the user's configured standard time zone
- Change only when attending a meeting in a different region (e.g., business trip); meeting date/time entered will not be affected by the change

2. Set Start/End Date and Time (Required)

- Selecting or changing the start date automatically sets the end date to the same day
- Selecting a start time automatically sets the end time to one hour later
- Meeting date/time appears the same globally, regardless of time zone

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.2 Entering Basic Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



The screenshot displays two consecutive steps in the 'New Meeting Memo: General' creation process:

Screenshot 1: The 'Location' field is highlighted, showing a dropdown menu with 'Customer Site' selected. Other options include 'HQ (Songdo)', 'HQ (Seoul Station)', 'HQ (POSCO Center)', and 'Other'. A blue circle labeled '1' points to the 'Customer Site' option.

Screenshot 2: The 'Online Meeting' field is highlighted, showing a dropdown menu with 'Online Meeting' selected. Other options include 'In Person'. A blue circle labeled '2' points to the 'Online Meeting' option.

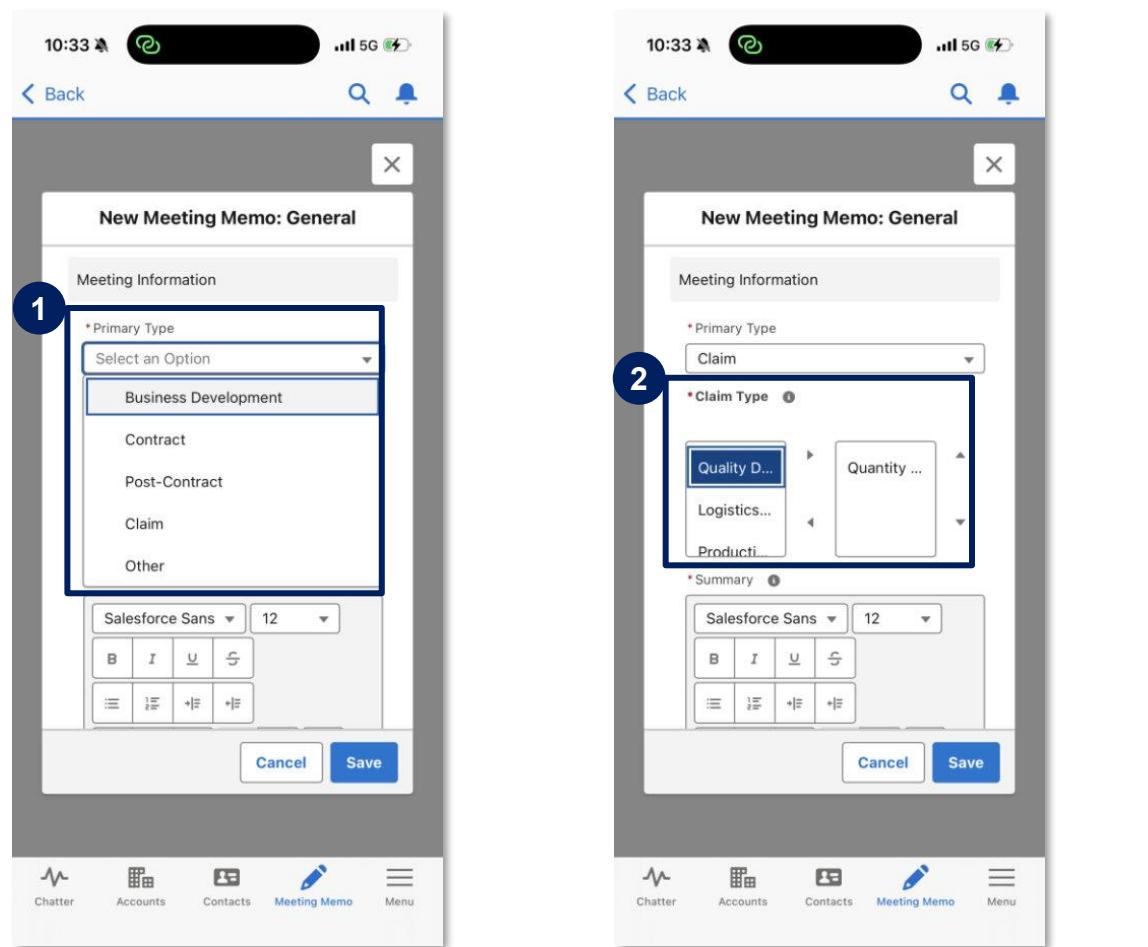
- 1. Select Location**
 - Choose from Headquarters, Client, or Other
 - Headquarters: Automatically fills in the main office address upon saving
 - Client: Automatically uploads the saved address of the registered Primary Account
 - Other: Enter address manually
- 2. Select Online Meeting Option**
 - Choose if the meeting was conducted via video conference or conference call

FAQ

Q. Can I modify part of the address after selecting Headquarters or Client?
A. Yes. The address can be modified after saving the Meeting Memo.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.3 Entering Meeting Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

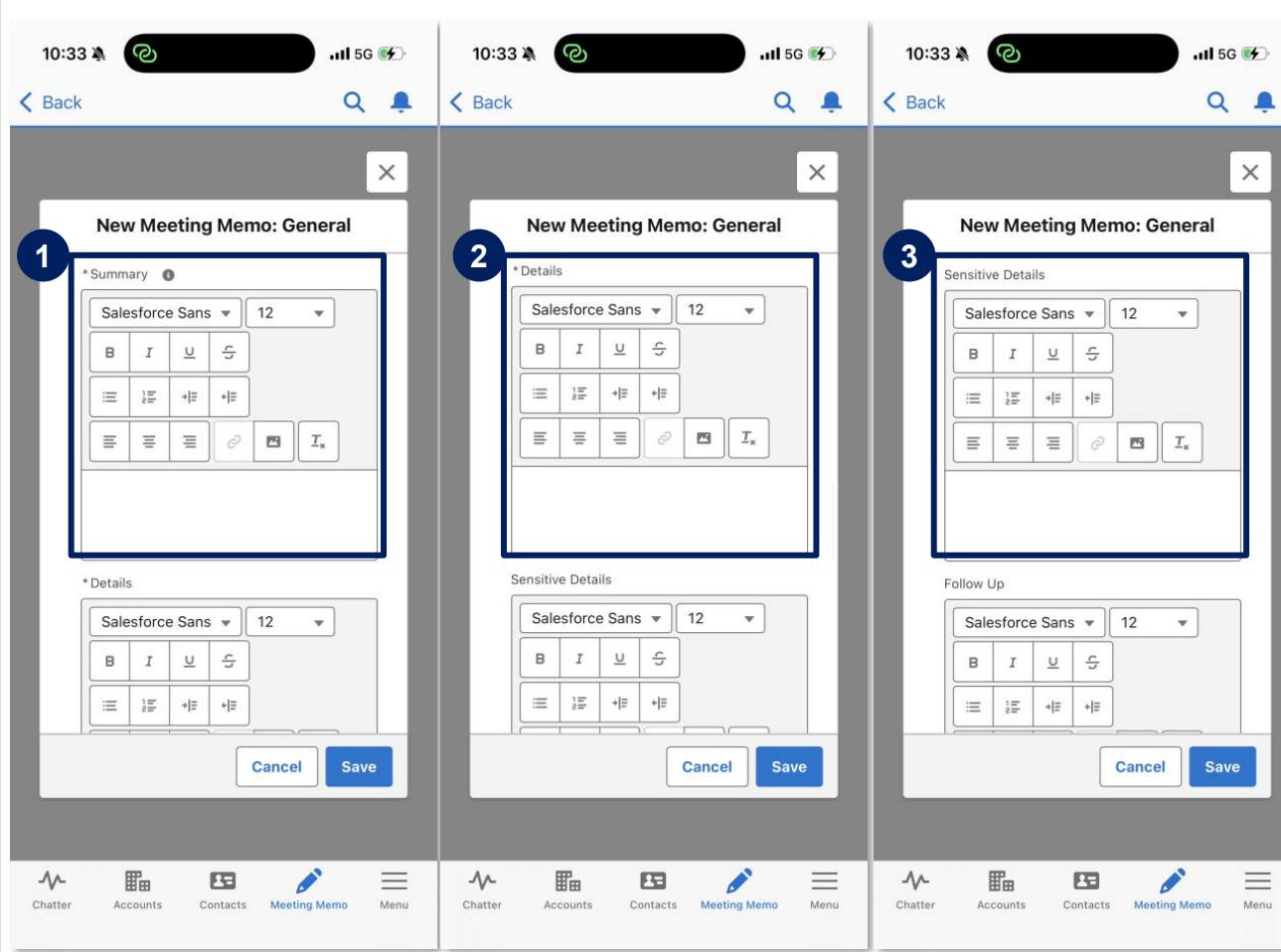


The screenshot displays two consecutive steps in the 'New Meeting Memo: General' creation process. In the first step (Screenshot 1), the user is prompted to select a primary meeting type from a dropdown menu. The available options are: Business Development, Contract, Post-Contract, Claim, and Other. In the second step (Screenshot 2), after selecting 'Claim' as the primary type, the user is presented with a list of claim types. The visible options are Quality Defect, Logistics Shortage, and Production Delay.

- 1. Select Meeting Type (Required)**
 - Choose one primary type that best represents the meeting:
 - 1) New Business Proposal
 - 2) Contract Discussion
 - 3) Post-Contract Management
 - 4) Claim
 - 5) Others (e.g. Market trends)
- 2. Select Claim Type (Required)**
 - Only required if "Claim" is selected as the meeting type
 - Not available for other meeting types
 - Multiple selections allowed: Quantity Shortage, Quality Defect, Logistics Claim, Production Delay, Others

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.3 Entering Meeting Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		

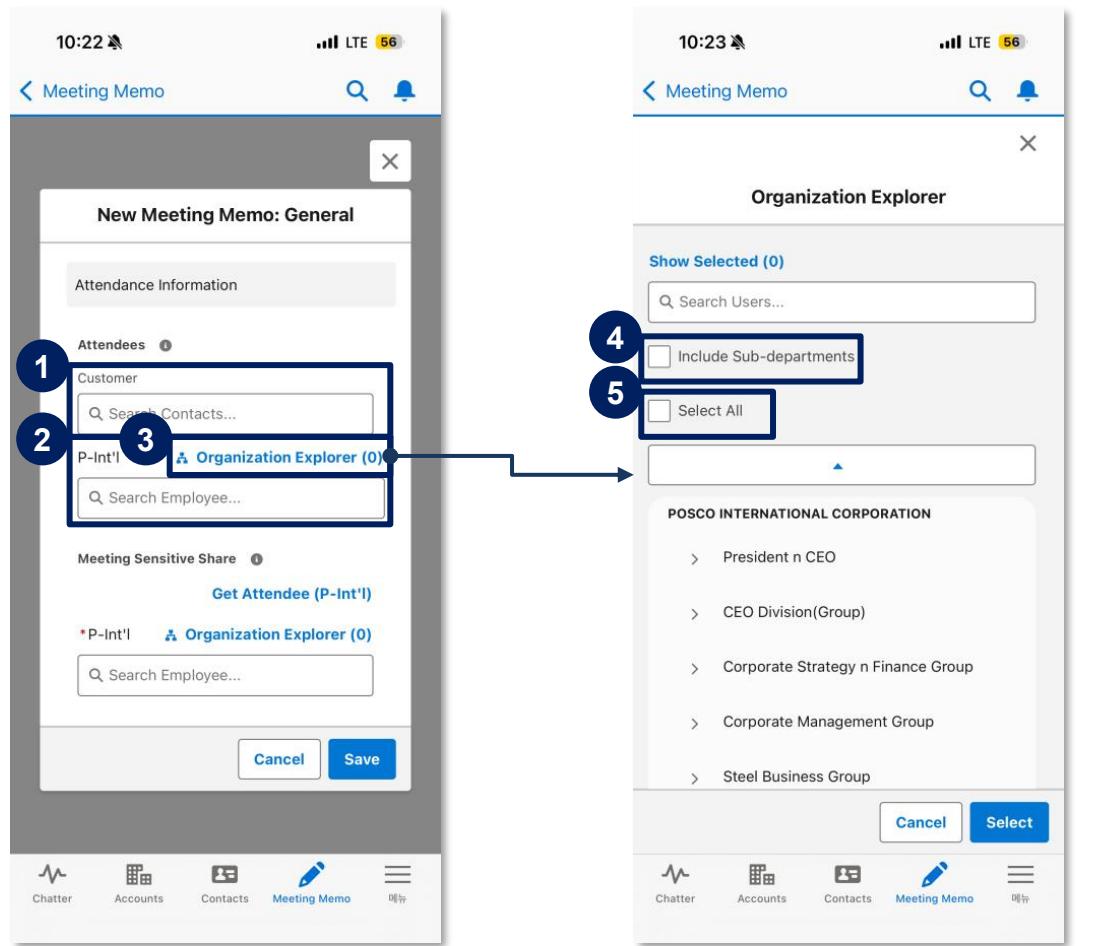


The image shows three sequential screenshots of a mobile application's "New Meeting Memo: General" dialog box. The first screenshot (1) shows the "Summary" section with a rich text editor and a "Save" button at the bottom. The second screenshot (2) shows the "Details" section, which includes the same rich text editor and a "Save" button. The third screenshot (3) shows the "Sensitive Details" section, also featuring a rich text editor and a "Save" button. At the very bottom of each screenshot, there is a navigation bar with icons for Chatter, Accounts, Contacts, Meeting Memo (which is highlighted in blue), and Menu.

1. Enter Summary (Required)
2. Enter Details (Required)
 - Information entered here is shared company-wide
3. Enter Sensitive Information
 - Enter any content that could pose issues if disclosed externally
 - Only users specified in “Sensitive Info Access” and their organization heads (per HR org chart) can view this information
 - Example: If belonging to A Division – B Department – C Group – D Section, both the designated users and leaders (D Section Head, C Group Head, B Department Head, A Division Head) can view
 - Up to 250 characters allowed (to prevent excessive sensitive data in Details; images/tables are not counted)

Step 1. Meeting Memo Creation

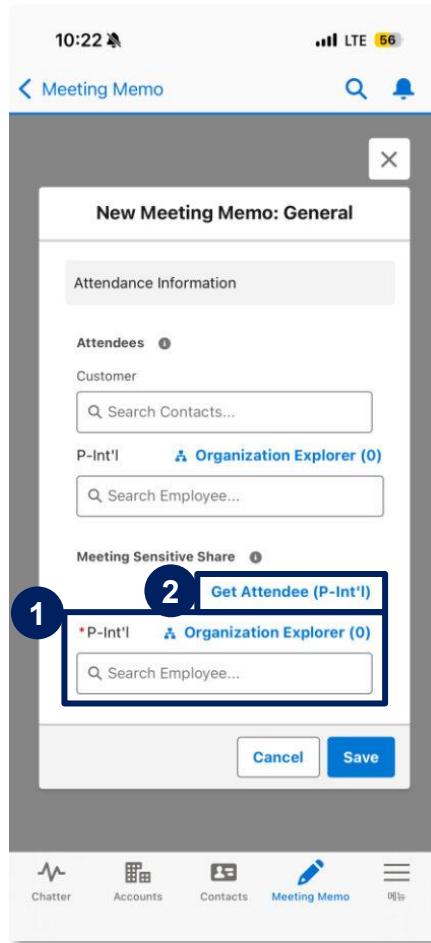
Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.4 Entering Attendance Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



- 1. Enter Client Attendees**
 - Only contacts registered under Primary Account or Additional Accounts can be added
 - If a contact is not searchable, check whether they are registered under the client account
- 2. Enter Internal Attendees**
 - All employees can be registered regardless of CRM account ownership
- 3. Click Organization Chart to add department-level participants or view employee info**
- 4. Click Include Sub-departments to select all sub-levels of the chosen department**
- 5. Click Select All to add all members of the chosen department**

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.4 Entering Attendance Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



1. Enter Sensitive Info Access List

- Available only when sensitive information is entered
- Registered members can view sensitive information
- Only users with CRM accounts can be searched and added

2. Get Attendees (P-Int'l)

- Click to bulk register internal attendees (with CRM accounts) as sensitive info viewers
- Example: Internal attendees A, B, C, D, E (only A, B, C have CRM accounts) → A, B, C are registered

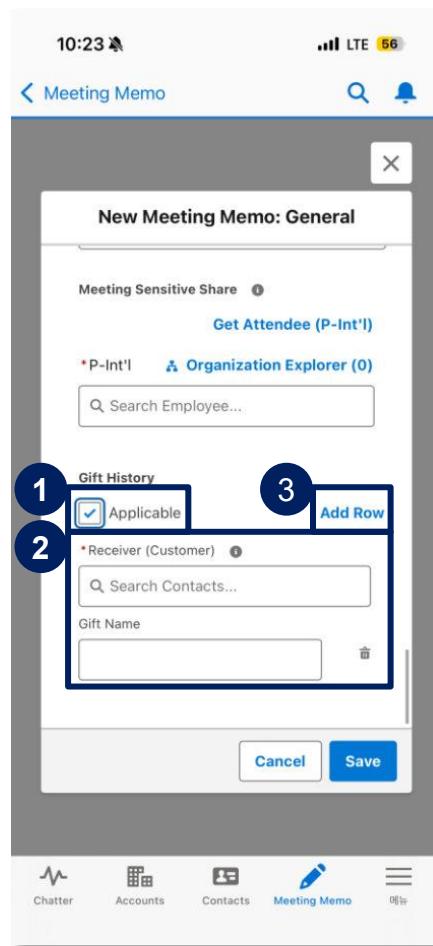
FAQ

Q. Some employees don't appear in the Sensitive Info Access search.

A. Sensitive information can only be viewed in CRM; therefore, only users with CRM accounts appear in the search list.

Step 1. Meeting Memo Creation

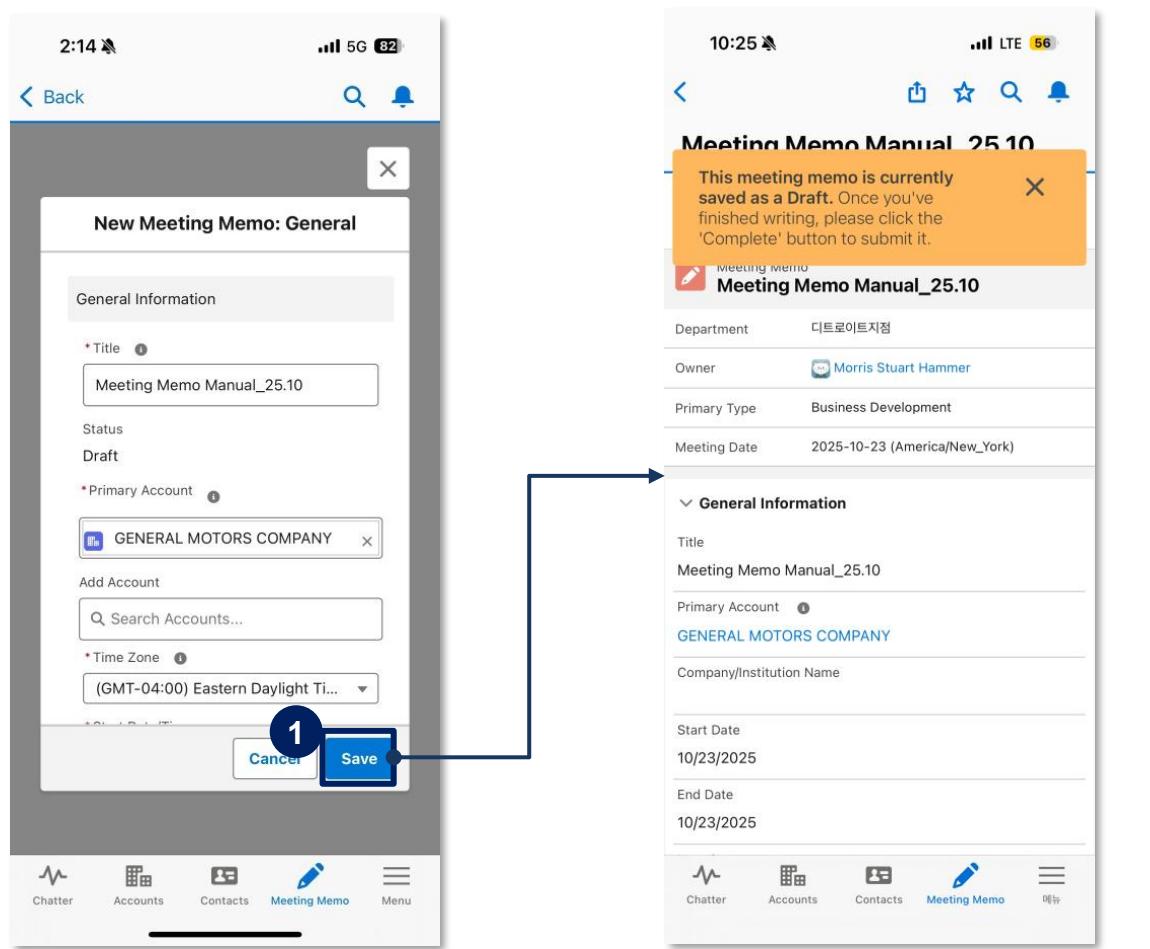
Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.4 Entering Attendance Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



- 1. Gift Record Applicable**
 - Select if any client attendees received gifts
- 2. Enter Gift Recipients and Gift Details**
 - Click (①) to open input fields
 - Enter recipients (only those registered as attendees can be selected)
 - Manually enter the gift name
- 3. Multiple Recipients or Gifts**
 - Click Add Row to add more recipients or gifts in the same manner

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.5 Save and Submit
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup		



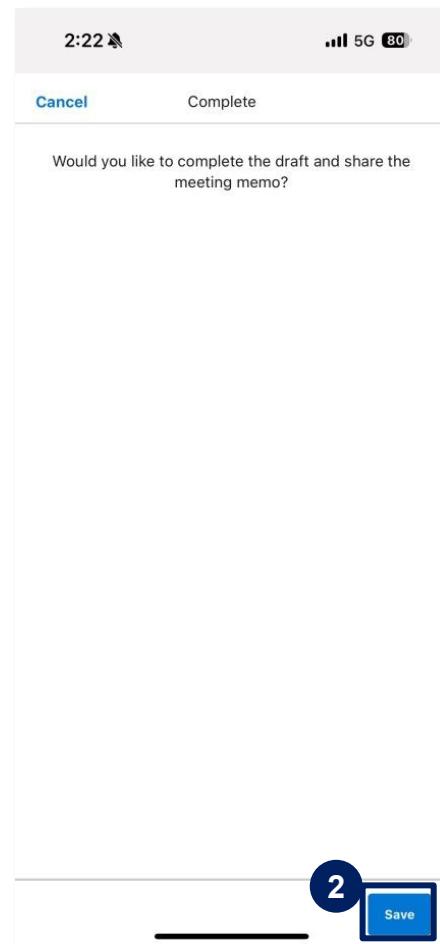
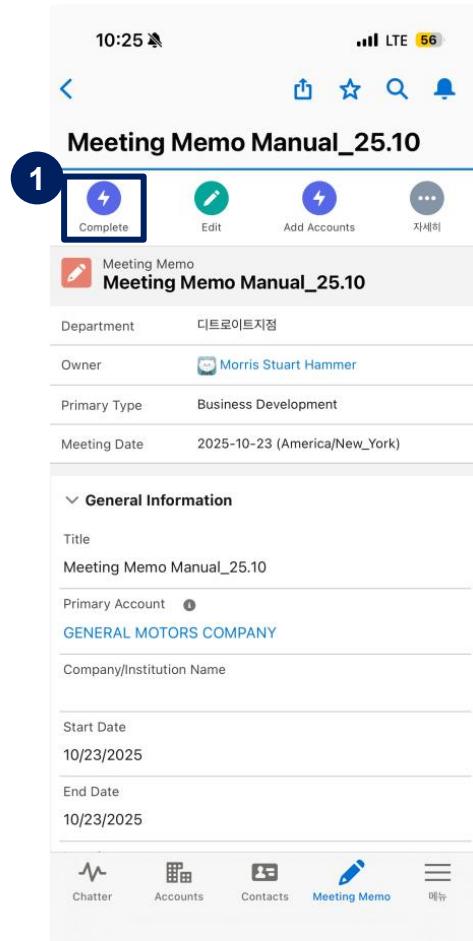
1. Click to Temporarily Save
 - Saves the current Meeting Memo as a draft and opens the detail view
- ※ Even after saving, the Meeting Memo is not shared company-wide; it remains visible only to the author in Draft status.

FAQ

- Q. How long can I keep a draft saved?
 A. There is no time limit for drafts, but for timely sharing, please complete and submit as soon as possible.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.5 Save and Submit
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		



1. Click Complete
2. Click Save to finalize and register the Meeting Memo (Company-wide Sharing)

- Clicking completes and shares the Meeting Memo company-wide
 - Until completion, only the author can view it
 - Email delivery and URL copy features become available after completion

※ A Meeting Memo is only shared company-wide when Complete is clicked. Before completion, it is visible only to the author.

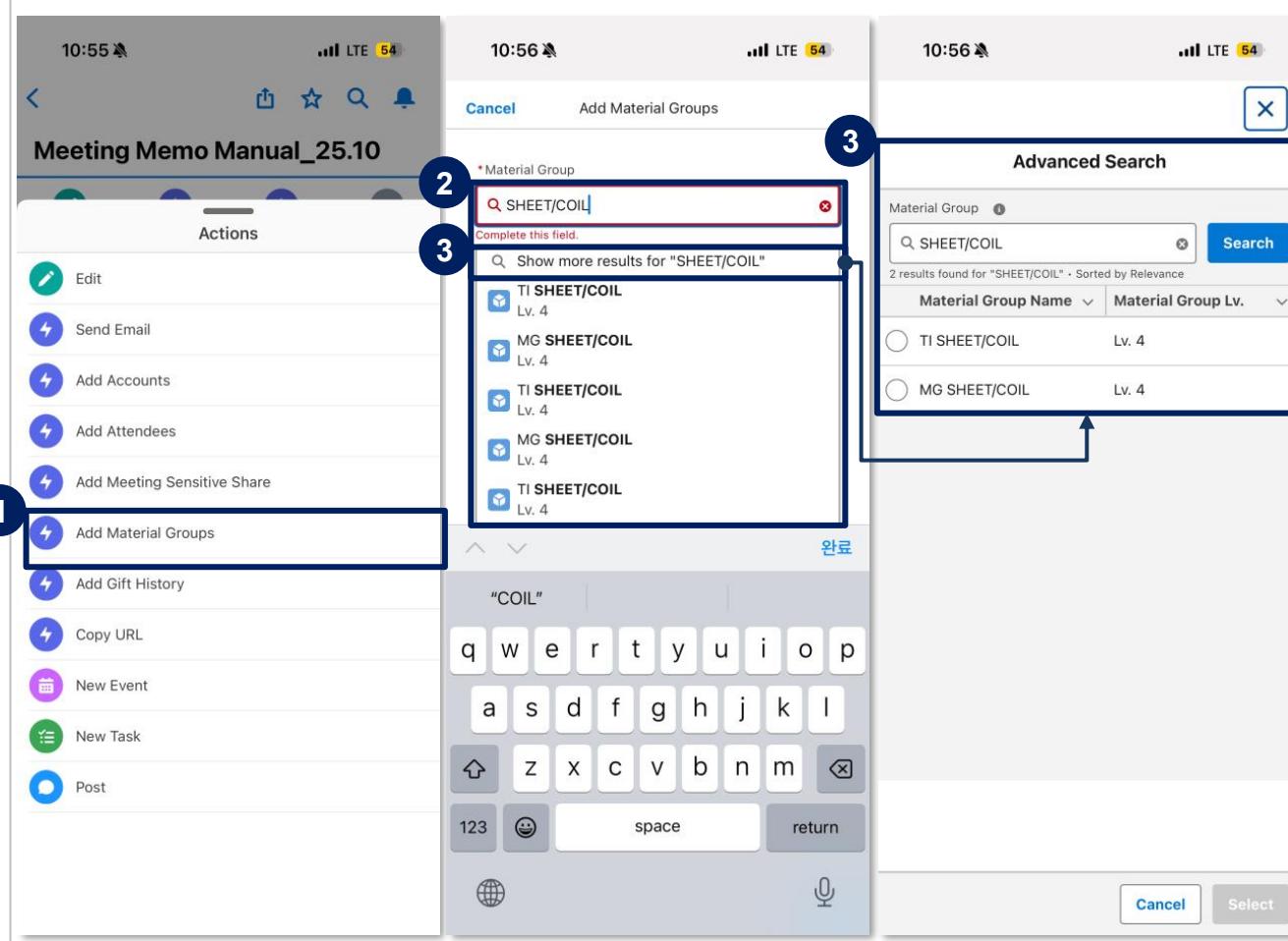
FAQ

Q. The Delete button is not visible after completion. How can I delete it?

A. Completed Meeting Memos cannot be deleted. Please use the Edit function instead.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		



- 1. Click Add Material Group**
 - Record and manage items discussed during the meeting
 - Can add Material Group Lv. 3 or 4
- 2. Search and select material name (multiple selections allowed)**
 - Even partial keyword searches will display related items under Lv.3 or 4
- 3. Click to open Advanced Search in table view**
 - Check Material Groups from Level 1 to 4

FAQ

- Q. Can I add this information only after completion?
- A. It can be added anytime during Draft status and within 30 days after completion (the period allowed for editing Meeting Memos).

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

Screenshot 1: The 'Summary & Full Text' section is highlighted. A blue circle labeled '1' points to the 'Summary & Full Text (1)' button.

Screenshot 2: The title 'NDA Filter' is highlighted. A blue circle labeled '2' points to the title field.

Screenshot 3: The detailed view of the saved meeting memo. It shows the title 'NDA Filter', a summary section with text about MDA filters, and a '주요 주제' (Main Topic) section with bullet points: 'MDA 필터 사용 문제', '클로바 인포 메시지 테스트', and '아이콘 크기 조정'.

1. Review Summary and Full Text Section

- When creating a Meeting Memo via CLOVA Note or Teams, summaries and transcripts viewed during temporary save are automatically stored

2. Click the title to view the full saved summary and transcript

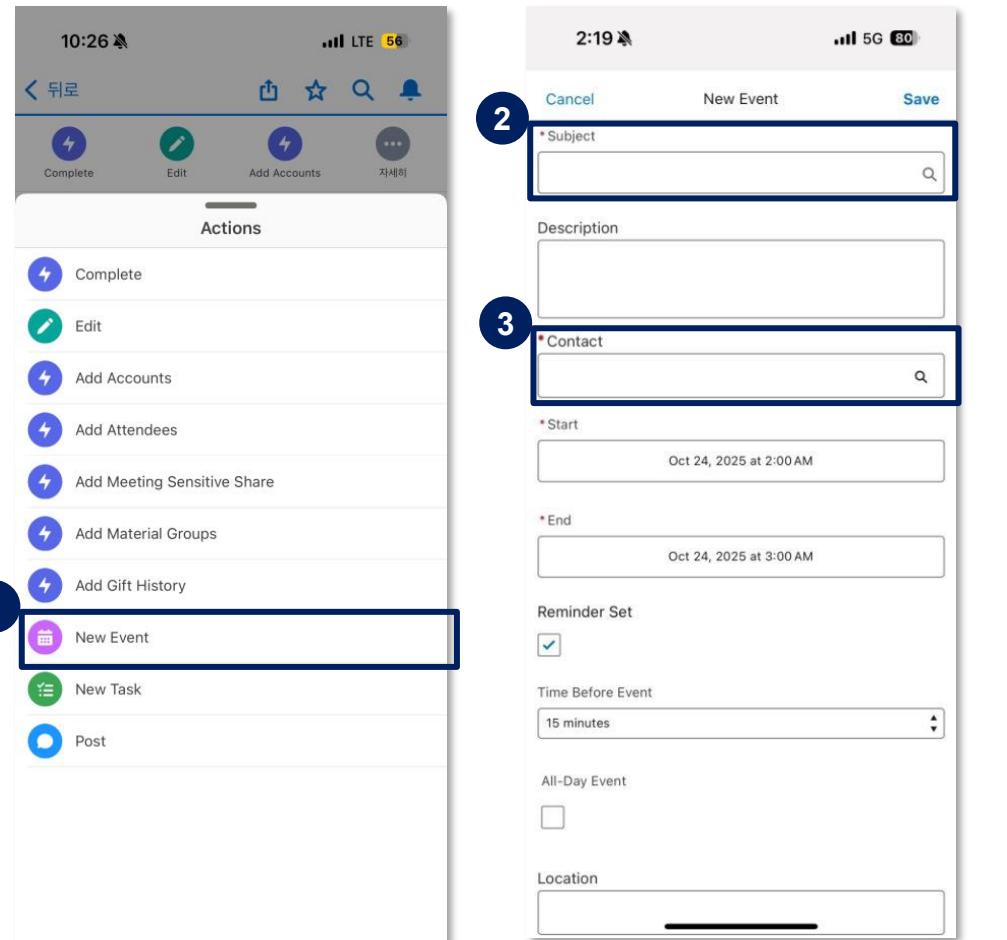
FAQ

Q. The summary and transcript are missing.

A. Summaries and transcripts are only saved when the Meeting Memo is created using CLOVA Note or Teams. Please note that the specific record being viewed in Detail View at the time of clicking Temporary Save is the one that gets stored.

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

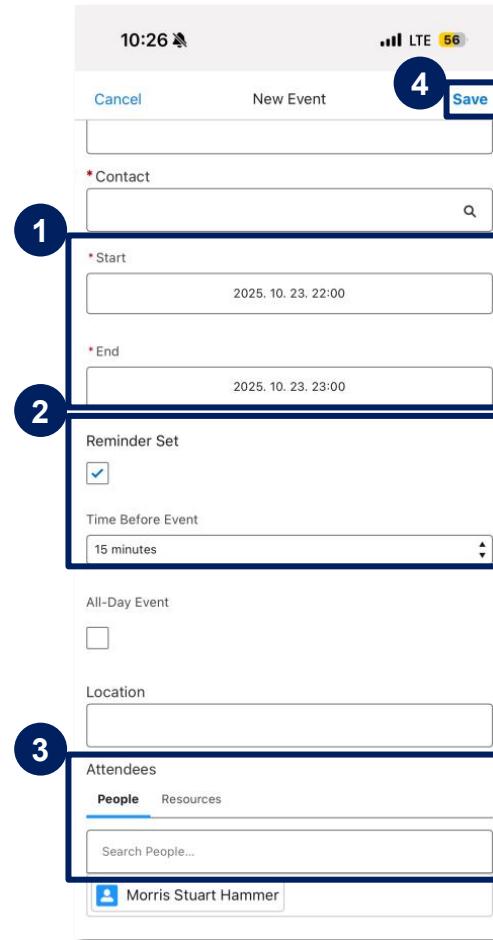


The image consists of two screenshots. The left screenshot shows a mobile application interface with a navigation bar at the top and a list of actions on the left. One action, 'New Event', is highlighted with a blue circle containing the number 1. The right screenshot shows a 'New Event' dialog box with fields for Subject, Description, Contact, Start, and End. The 'Contact' field is highlighted with a blue circle containing the number 3.

1. Click New Event
2. Enter Event Subject
3. Select Target Contact
 - Cannot save if selecting a client not registered in the Meeting Memo
 - Once saved, the event appears in the client's Contact Detail page under "Activity" and in the client's Account "Timeline" tab

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		



The screenshot shows the 'New Event' screen with four numbered steps:

- 1. Set Start and End Times:** The 'Start' field is set to '2025. 10. 23. 22:00' and the 'End' field is set to '2025. 10. 23. 23:00'.
- 2. Set Reminder:** The 'Reminder Set' checkbox is checked, and the 'Time Before Event' dropdown is set to '15 minutes'.
- 3. Add Attendees:** The 'Attendees' section is expanded, showing the 'People' tab selected. A search bar shows 'Search People...' and a result 'Morris Stuart Hammer' is listed.
- 4. Click Save:** The 'Save' button at the top right of the form is highlighted.

1. Select Event Start/End Date and Time

- Changing the start date automatically sets the end date to the same day
- Selecting a start time automatically sets the end time to one hour later

2. (Optional) Set Reminder

- Reminder can be set based on event start time
- Reminder: Salesforce notification

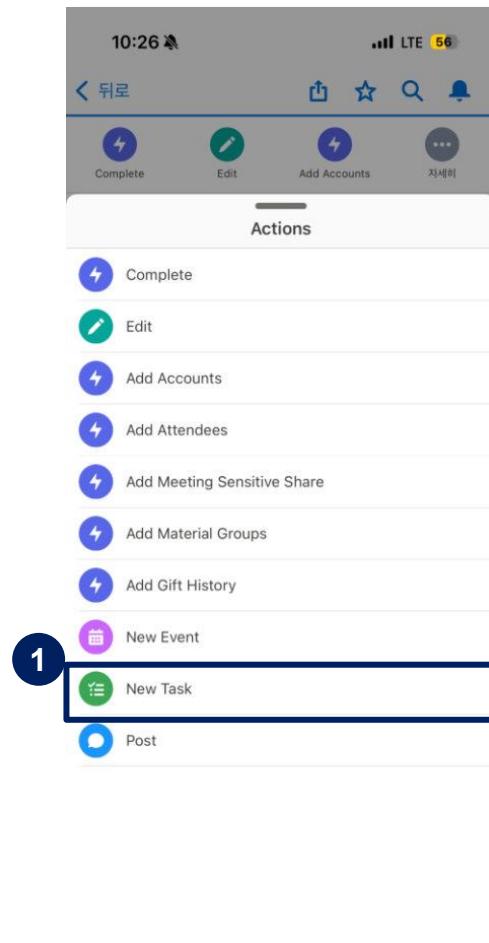
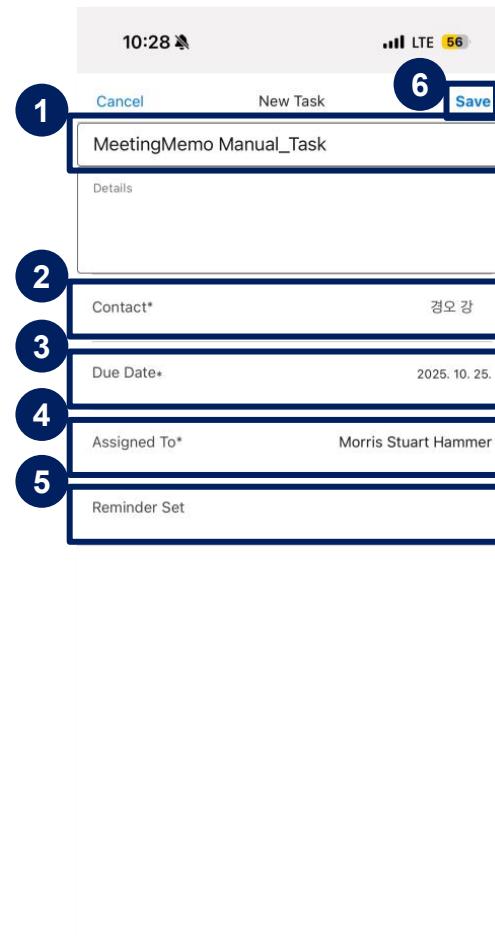
3. (Optional) Register Event Attendees

- Internal P-Intl members can be added
- Event is automatically added to attendees' Salesforce calendars

4. Click Save

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		

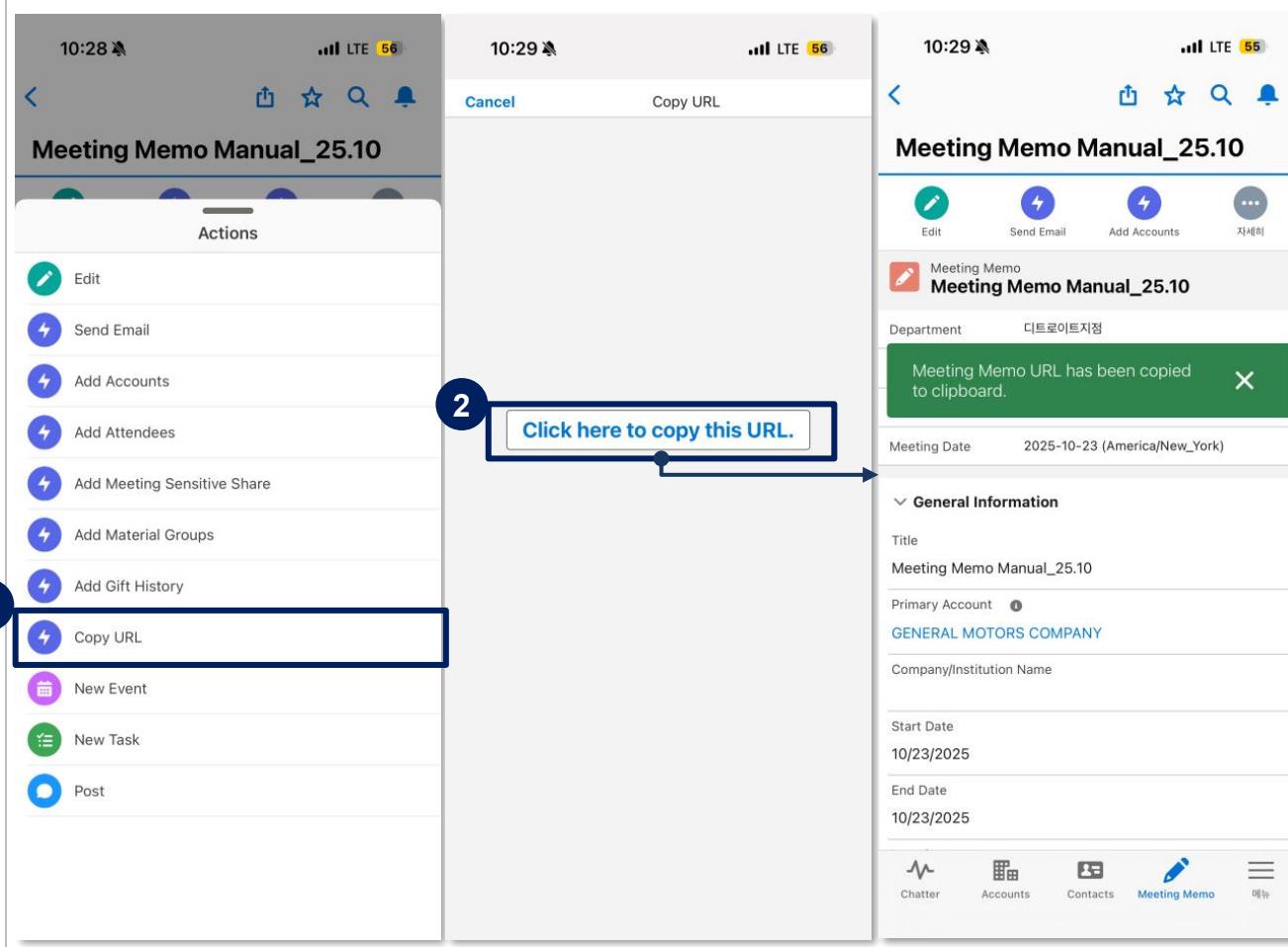



A screenshot of a 'New Task' creation dialog. The dialog has a title 'New Task' with 'Cancel' and 'Save' buttons. Step 1: The task title is 'MeetingMemo Manual_Task'. Step 2: The contact is set to '경오 강'. Step 3: The due date is '2025. 10. 25.'. Step 4: The assigned person is 'Morris Stuart Hammer'. Step 5: The reminder set is empty. Step 6: The 'Save' button is highlighted with a blue circle.

1. Click New Task and Enter Title
2. Select Target Contact (Client)
 - Cannot save if selecting a client not registered in the Meeting Memo
 - Once saved, the task appears in the client's Contact Detail page under "Activity" and in the client's Account "Timeline" tab
3. Select Due Date
4. Assign Responsible Person
 - Creator is assigned by default; can be changed
 - Upon reassignment and saving, email notification is sent to the new assignee
5. (Optional) Set Reminder
6. Click Save to create the task

Step 1. Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.6 Add Additional Information and Utilize Features
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > New Meeting Memo Popup > Detailed Page		



1. Click Copy URL
2. Click “Click here to copy this URL”
 - Copies the Meeting Memo URL
 - Useful for attaching to travel expense reports, etc.

Step 1. Meeting Memo Creation

Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.1 Editing from the Meeting Memo List View
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Listview Filter > Edit		

1. Select List View Filter: My Meeting Memo (Completed)

2. Swipe the Meeting Memo from right to left.

3. Click the desired memo.

4. Click Edit to modify the entered information (excluding related information and sensitive information)

- Related Info includes additional accounts, attendees, and gift records

1. Select List View Filter: My Meeting Memo (Completed)
2. Swipe the Meeting Memo from right to left.
3. Click the desired memo.
4. Click Edit to modify the entered information (excluding related information and sensitive information)

- Related Info includes additional accounts, attendees, and gift records

※ Editable for 1 month after submission
- No time limit for drafts

FAQ

- Q. Can I edit after submission?
A. Yes, edits are allowed for 1 month after completion

Step 1. Meeting Memo Creation

Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.2 Editing from the Meeting Memo Detail Page
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Edit		

1. Click the Edit button on the detail page.

Meeting Memo Manual_25.10

Meeting Memo Manual_25.10

Department: 디트로이트지점
Owner: Morris Stuart Hammer
Primary Type: Business Development
Meeting Date: 2025-10-23 (America/New_York)

General Information

Title: Meeting Memo Manual_25.10
Primary Account: GENERAL MOTORS COMPANY
Company/Institution Name: Meeting Memo Manual_25.10

Start Date: 2025. 10. 23.
End Date: 2025. 10. 23.
Location: Customer Site
Address (Local): 300 RENAISSANCE CTR, DETROIT,
Address (Local) (City): DETROIT, MI 48226
Address (Local) (State/Province): MI

Chatter Accounts Contacts Meeting Memo

2. Edit the meeting memo details.

Meeting Memo Manual_25.10

General Information

Title: Meeting Memo Manual_25.10
Primary Account: GENERAL MOTORS COMPANY
Company/Institution Name: Meeting Memo Manual_25.10

Start Date: 2025. 10. 23.
End Date: 2025. 10. 23.
Location: Customer Site
Address (Local): 300 RENAISSANCE CTR, DETROIT,
Address (Local) (City): DETROIT, MI 48226
Address (Local) (State/Province): MI

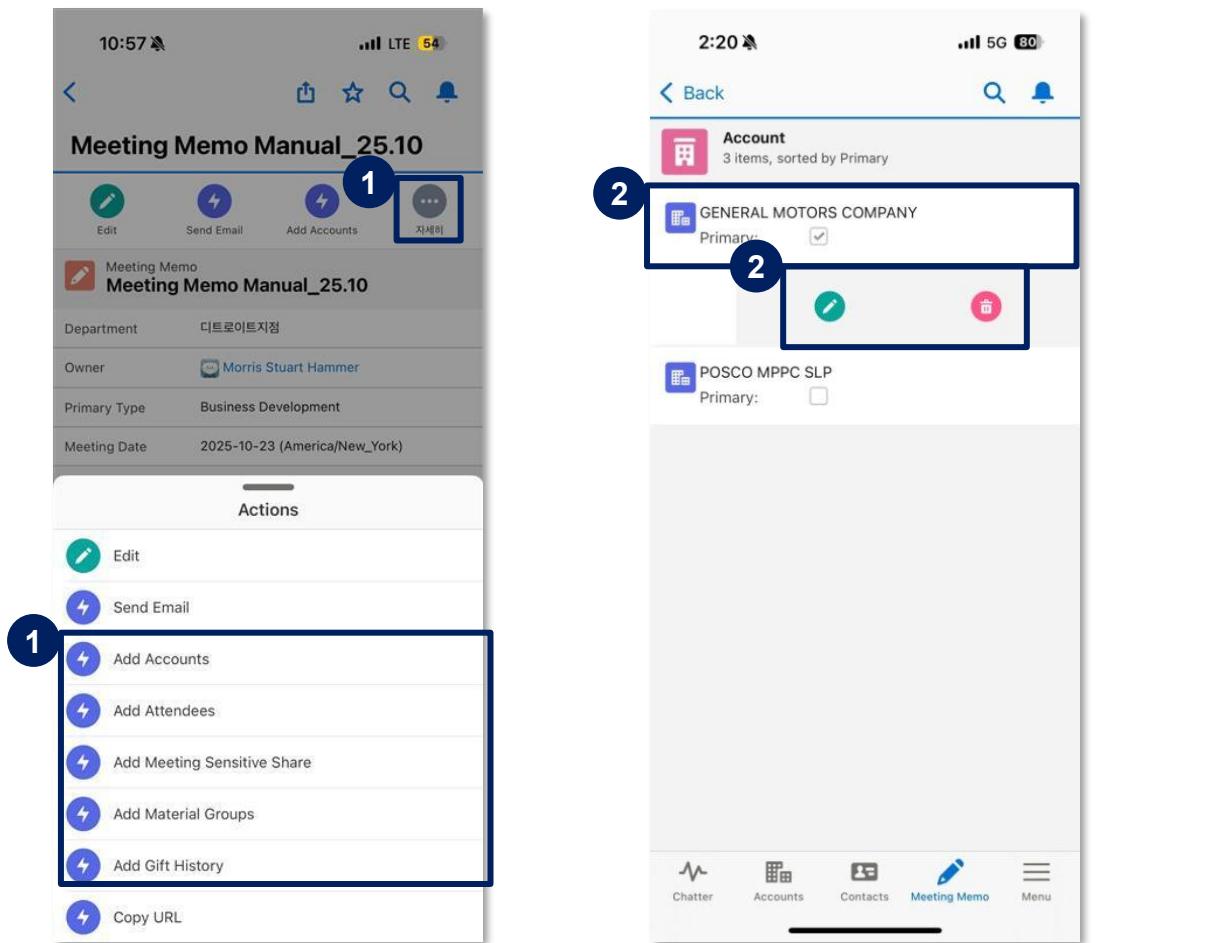
- Click Edit
- Editable fields: all except Related Info and Sensitive Info
 - Related Info includes accounts, attendees, and gift records

FAQ

- Q. How do I edit Sensitive Information?
 A. Go to the "Sensitive Info" tab. See P.31 for details.

Step 1. Meeting Memo Creation

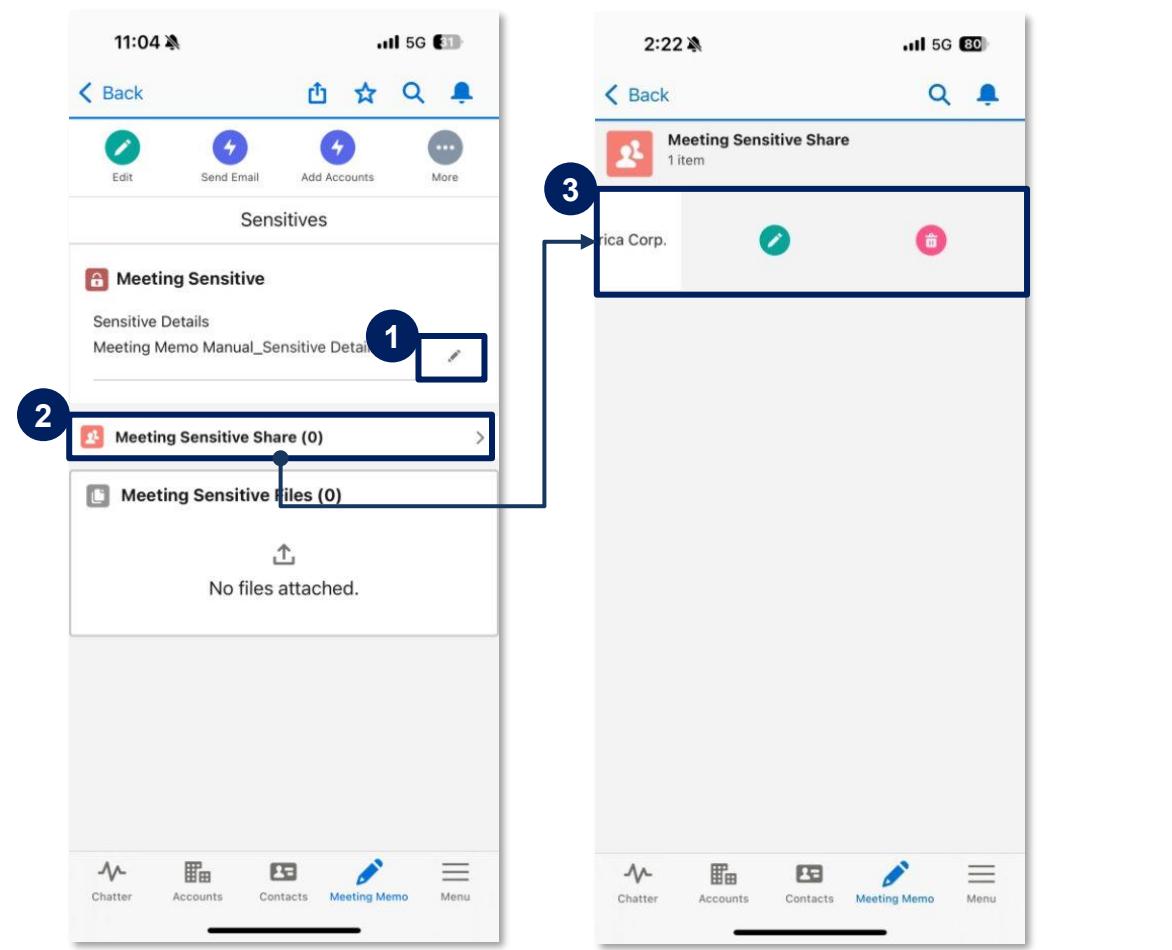
Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.2 Editing from the Meeting Memo Detail Page
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page		



1. In each Meeting Memo detail page, click Details (자세히) to edit information within the related information section
- such as account details, attendee information, and gift records.
2. Swipe the detailed information of the section to be edited from right to left to edit or delete it.

Step 1. Meeting Memo Creation

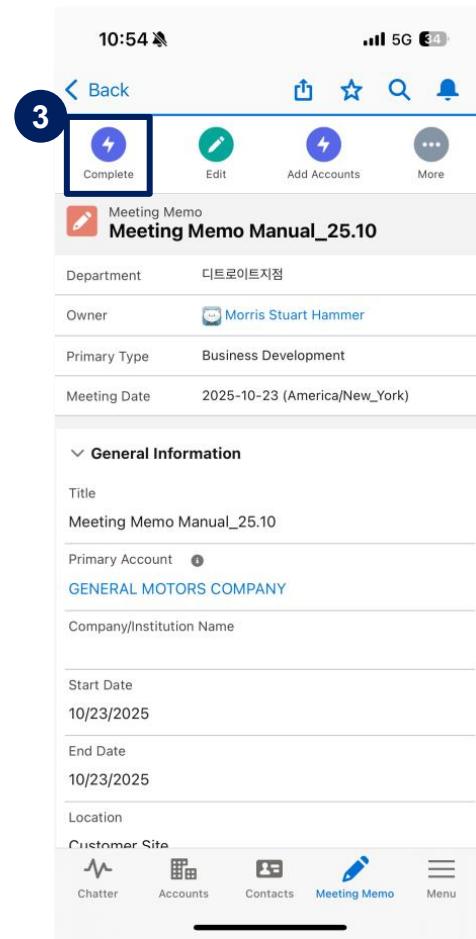
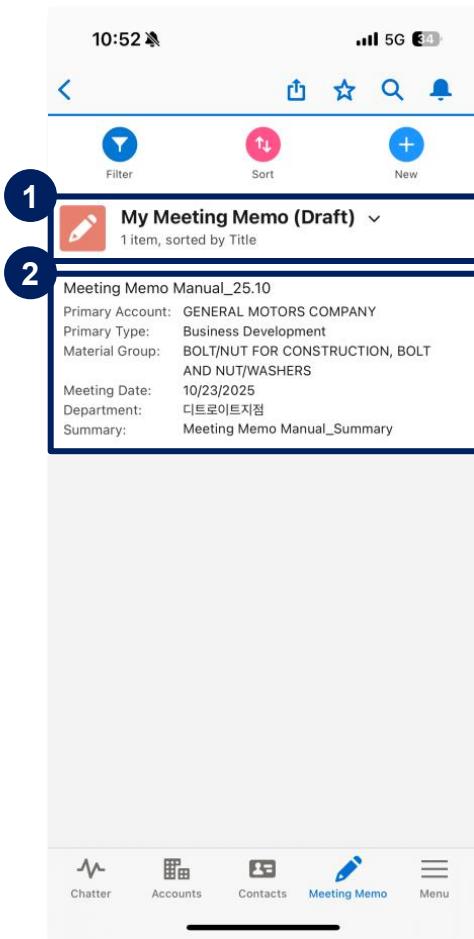
Step (Lv.2)	2. Meeting Memo Editing	Step (Lv.3)	2.2 Editing from the Meeting Memo Detail Page
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page		



1. Click pencil icon to edit sensitive information
2. Click Add Sensitive Info Access (Meeting Sensitive Share) to edit or add viewers
3. Swipe the detailed information of the section to be edited from right to left to edit or delete it.

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	1. Temporary Save and Submit	Step (Lv.3)	1.1 Edit Draft Information and Submit
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Listview Filter		



- Select List View Filter: My Meeting Memo (Draft)**
 - Displays all Meeting Memos saved as drafts
- Click the title in the “Title” column**
 - Opens the Meeting Memo detail page
- If needed, edit Meeting Memo and click Complete**
 - For editing steps, refer to Step 1: Create Meeting Memo → Step 2: Edit Meeting Memo

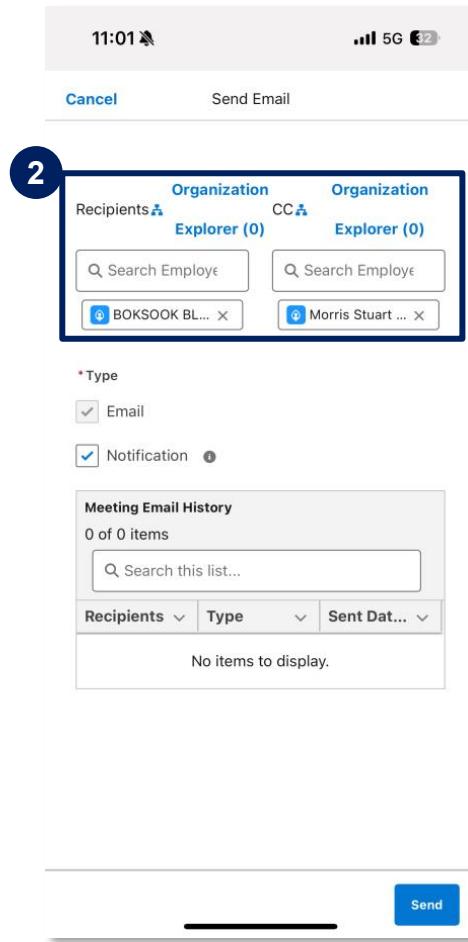
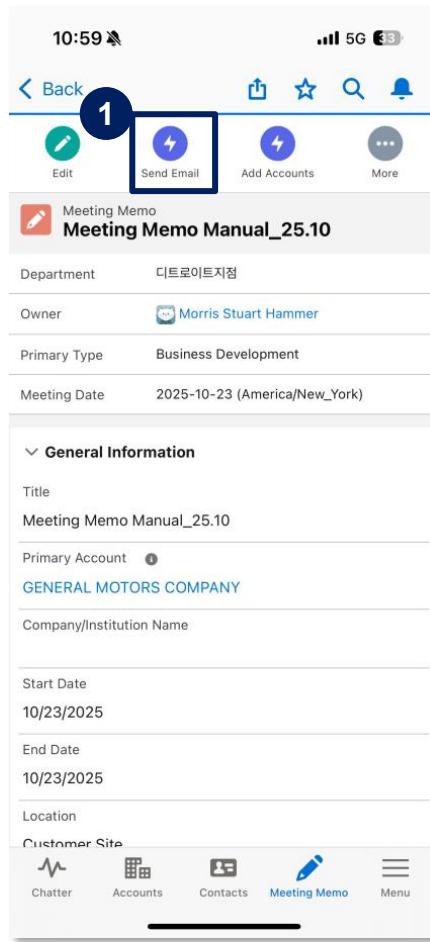
FAQ

Q. Where is the Send Email button?

A. Available after clicking Complete. It appears in the same location as the Complete button.

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.1 Set Recipients / CC
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sending Email		

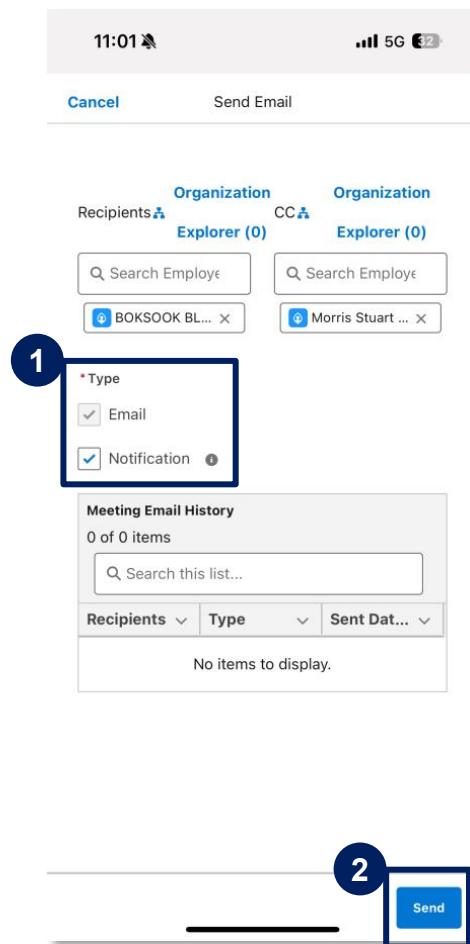


1. Click Send Email
2. Set recipients/CC for email/notification
 - Use org chart modal to register by department
 - Up to 100 recipients per send (1) Recipients
 - Internal attendees registered in P-Int'l are auto-added (2) CC
 - Only members registered in Sensitive Info Access are auto-added
 - Example: Attendees_P-Int'l: A, B, C; Sensitive Info Access: A, B, C, D, E → D and E are added as CC

※ **Notification:** Bell alert in top-right of Salesforce

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.1 Set Recipients / CC
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sending Email		



1. Select Send Type (multiple options allowed)

- Email is mandatory
- Notification is optional
- Can send both simultaneously

2. Click Send

※ **Notification: Sent only to CRM users (Salesforce account holders) among selected recipients/CC**

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.2 Review Sending Template and History
Menu	Meeting Memo	User	All Employees
Navigation	EP > Inbox		

1. Check received email

(1) Subject Template
- "<Main Account Name> + Meeting Memo Title + Meeting Date + Author's Department Lv.3"

- If Lv.3 doesn't exist, higher level is shown

(2) Also includes account, attendees, meeting date, summary, general info, follow-up items, and gift records

2. Click to open Meeting Memo detail page

- Only accessible to CRM account holders

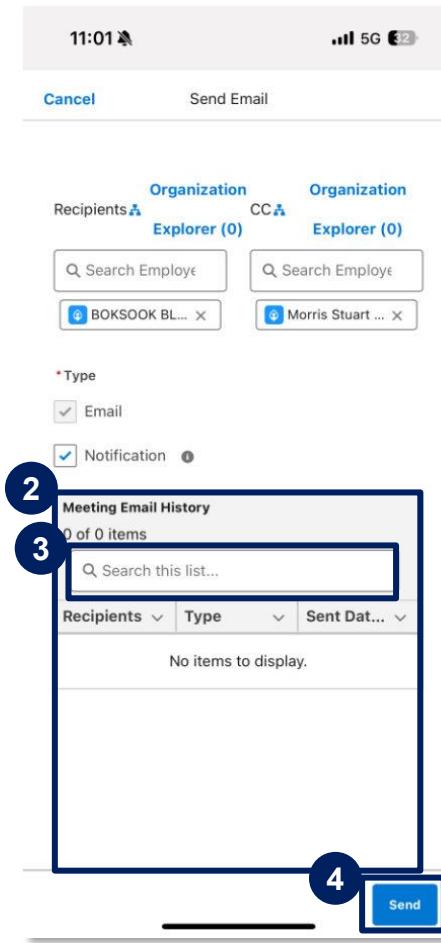
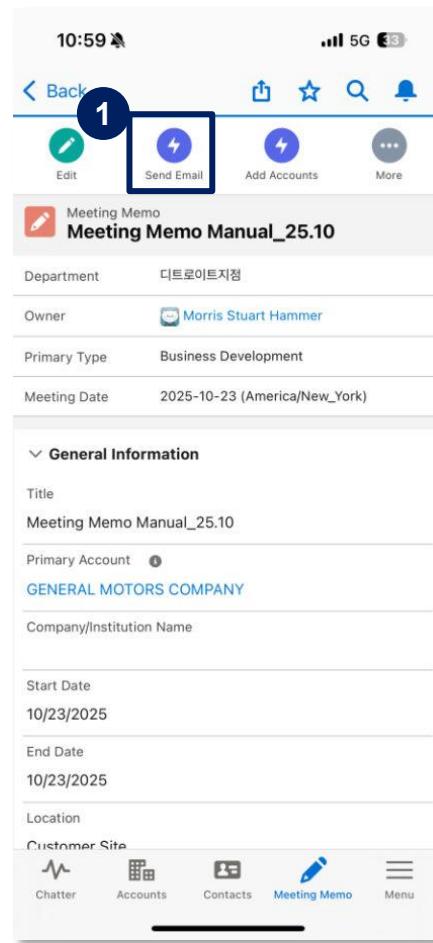
3. Sensitive Info status displayed

- If written = Y
- If not written = N

4. Follow-up and gift sections are hidden if not filled

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.2 Review Sending Template and History
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sending Email		



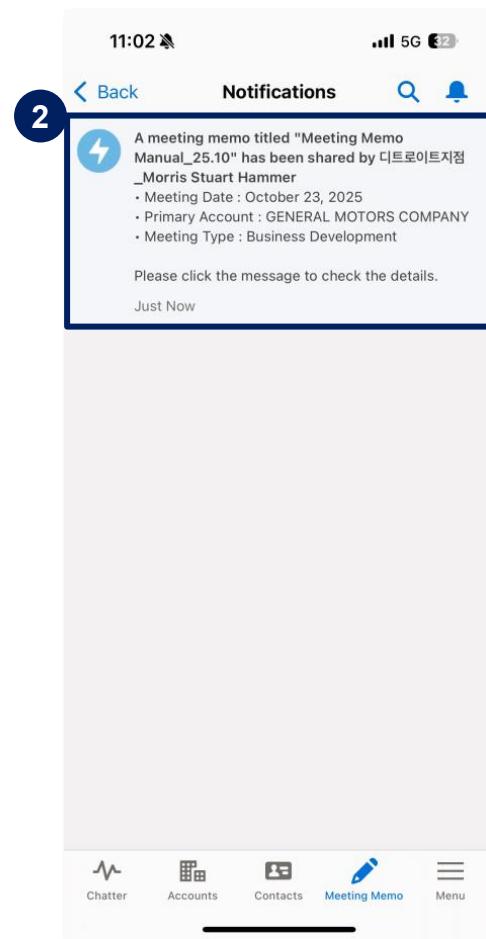
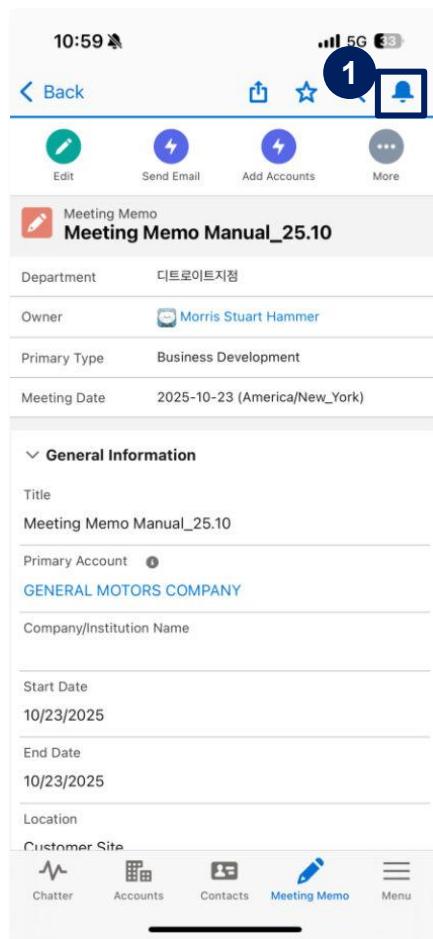
1. Click Send Email
2. View email send history
 - Shows recipients, type (To/CC), and send time
3. Search email recipients
 - Useful for tracking after bulk sends
4. Click Send to resend email

FAQ

- Q. Can I recall a sent email?
 A. No, recall is not possible. EP mail integration is planned for future recall support.

Step 2. Meeting Memo Saving / Submission

Step (Lv.2)	2. Email and Notification Delivery	Step (Lv.3)	2.2 Review Sending Template and History
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sending Email		

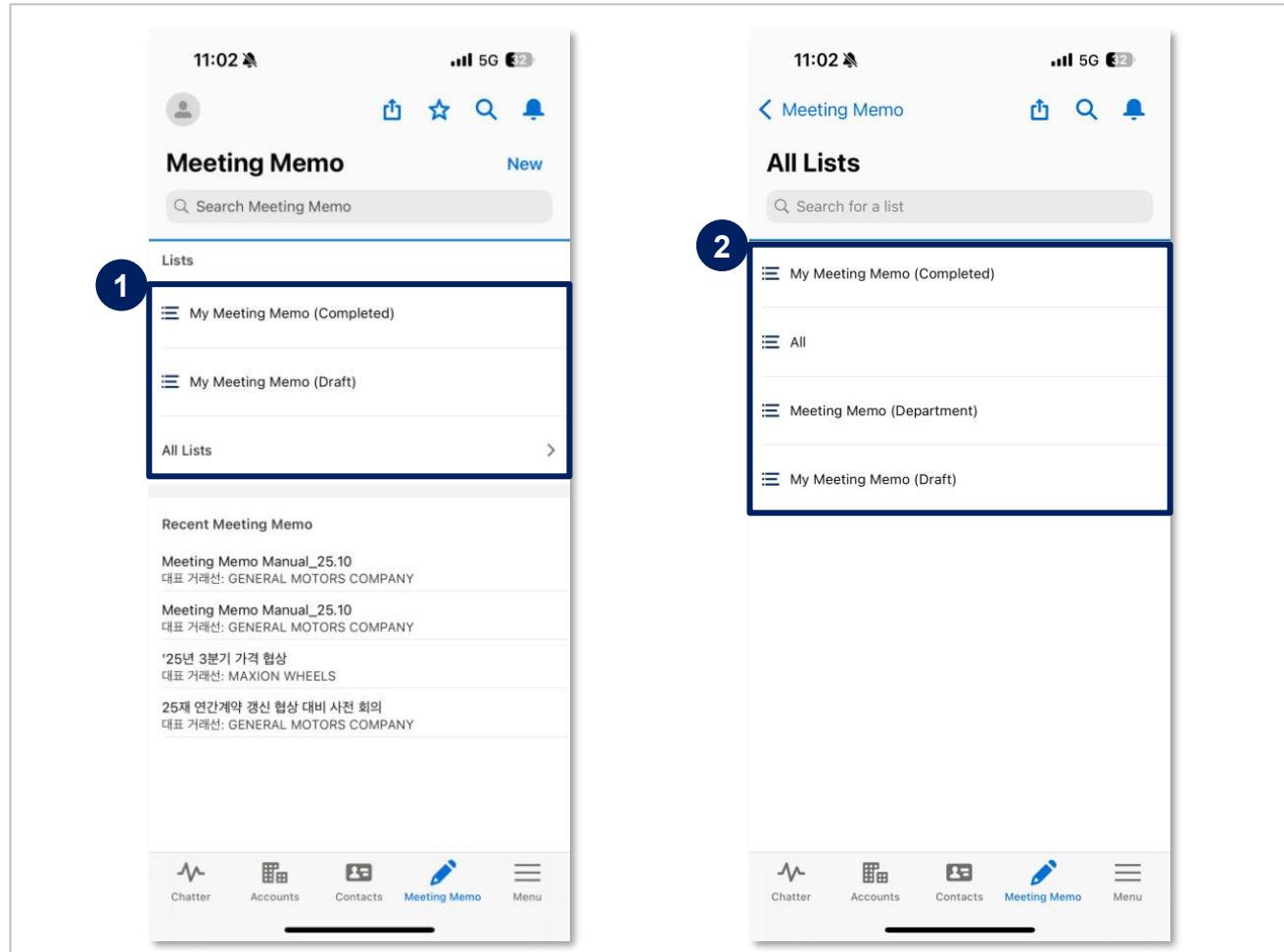


1. Click Salesforce Bell Notification
 2. Check received Meeting Memo notification
 - Click title to open Meeting Memo detail page
- (1) Title Template : Author's Department Lv.3 + Author Name + Meeting Memo Title
 (2) Content Template : Meeting Date, Main Account Name, Meeting Type

※ Notification: Sent only to CRM users (Salesforce account holders) among selected recipients/CC

Step 3. Meeting Memo View

Step (Lv.2)	1. View Meeting Memo List	Step (Lv.3)	1.1 Use Filters in List View to Search Meeting Memos
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Listview Filter		



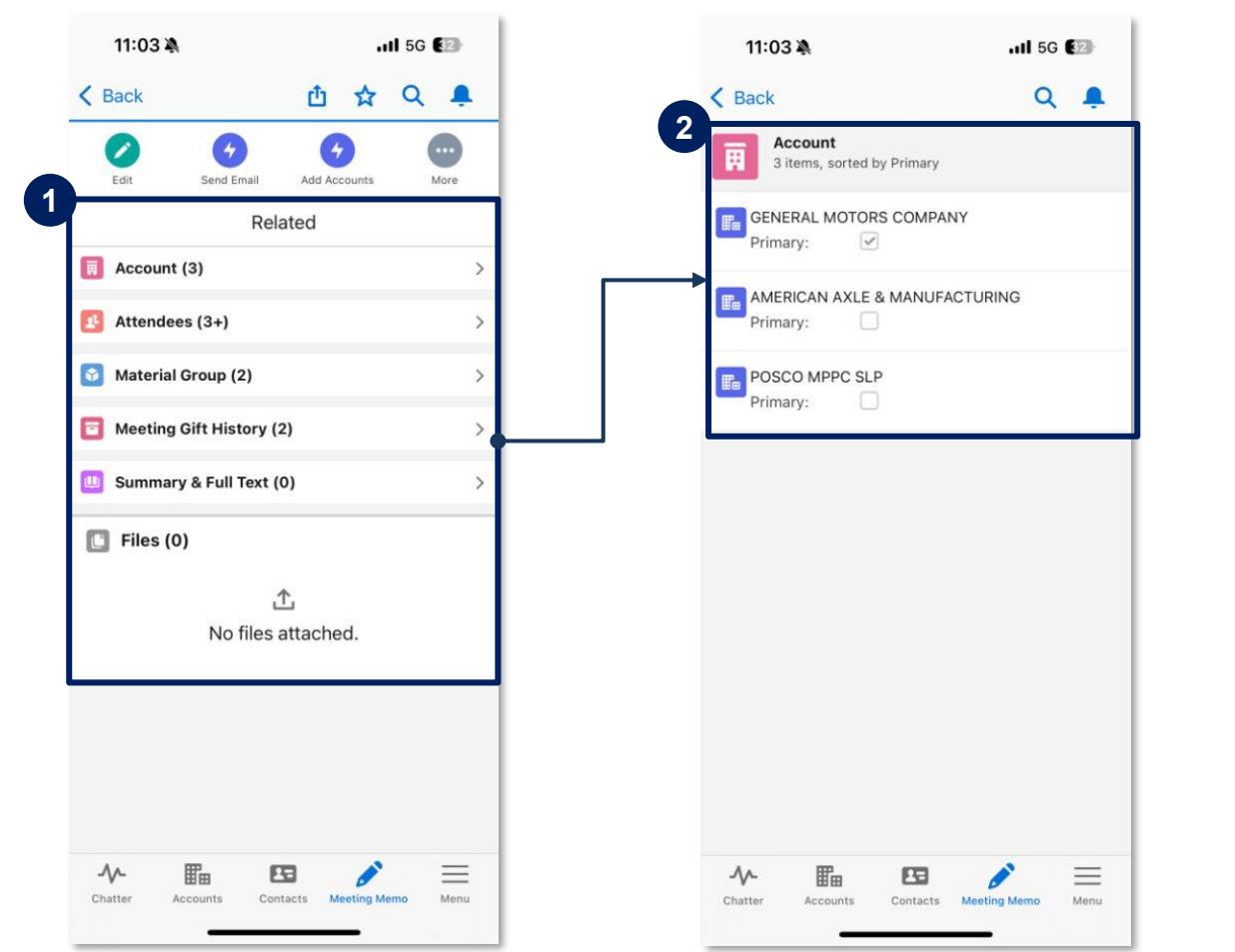
1. Click the List View filter name or All Lists.

2. Select filter to view memos based on conditions

- (1) Meeting Memo (Department)
 - Regular users: View memos created in their group
 - Team Leaders and above: View all memos created in subordinate orgs
- (2) My Meeting Memo (Completed)
 - View only submitted memos
- (3) My Meeting Memo (Draft)
 - View only draft memos

Step 3. Meeting Memo View

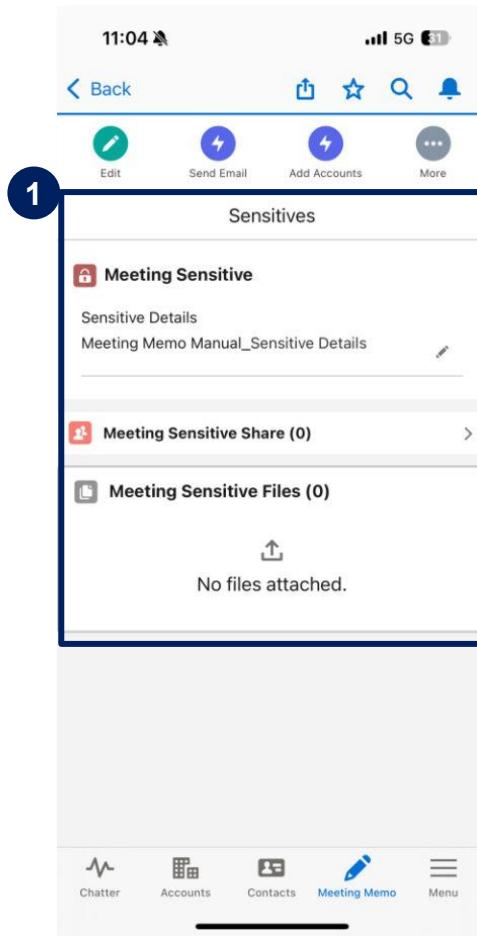
Step (Lv.2)	2. View Detailed Meeting Memo	Step (Lv.3)	2.1 View Related Information
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page		



- 1. View Related Info**
- Includes account, attendees, Material Groups, gift records, summary, transcript, and attachments
- 2. View Related Information**
- You can view details by clicking the account, attendees, handled products, gift records, summary and full transcript, or attachments linked to the Meeting Memo.

Step 3. Meeting Memo View

Step (Lv.2)	2. View Detailed Meeting Memo	Step (Lv.3)	2.2 View Sensitive Information and Sharing Targets
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > Sensitive Information		



1. View Sensitive Information, Files, and Sharing Targets

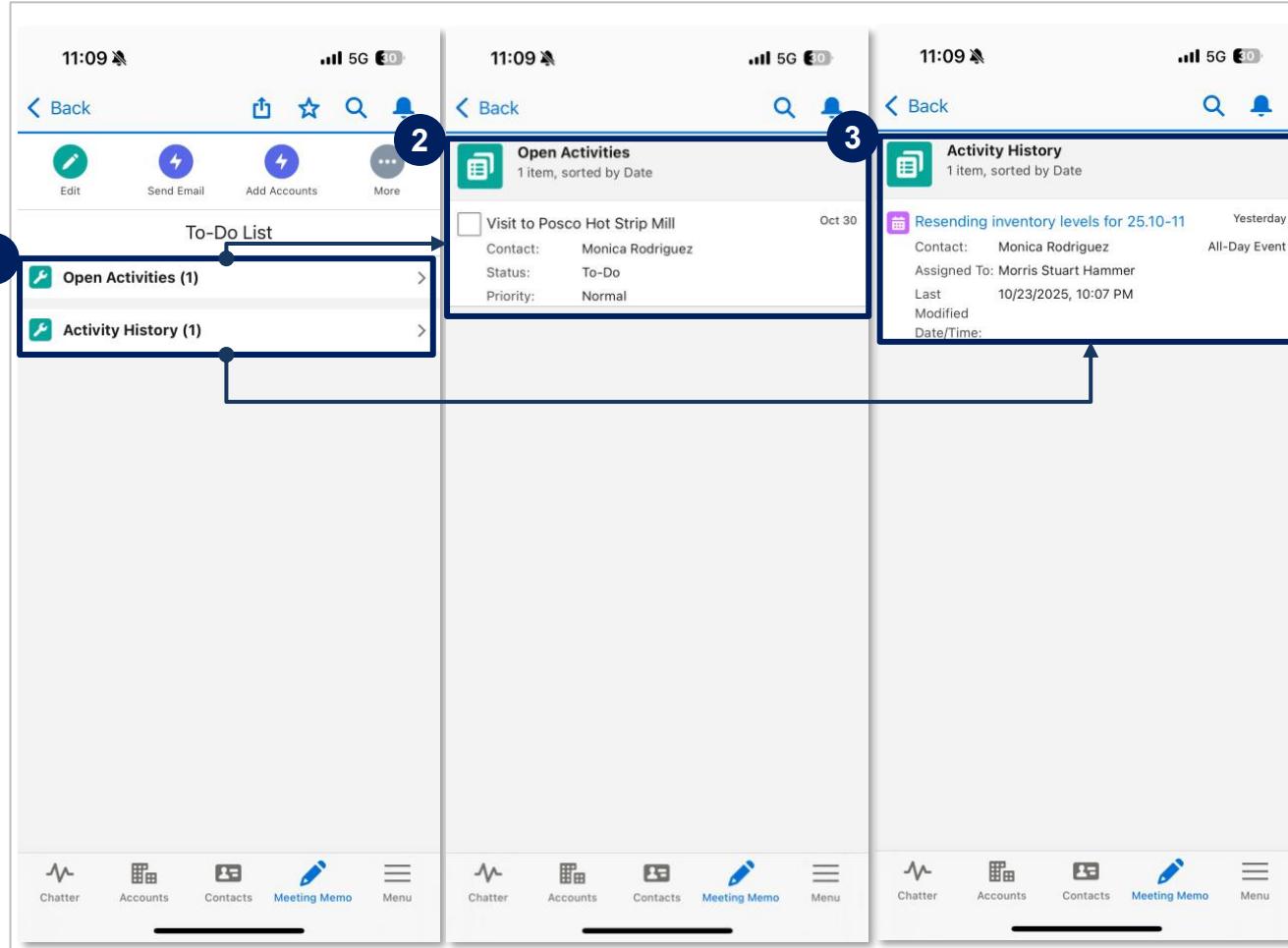
- You can view the sensitive information, files (only titles and existence status), and sharing targets recorded in the Meeting Memo.
- When you lack permission to view sensitive information, you also cannot see the list of employees included in the sharing target list.

※ For sensitive information files, only the file title and existence status can be viewed in mobile environments.

- Detailed viewing and additional uploads are not available.

Step 3. Meeting Memo View

Step (Lv.2)	2. View Detailed Meeting Memo	Step (Lv.3)	2.3 View To-Do List
Menu	Meeting Memo	User	All Employees
Navigation	Home > Meeting Memo Menu > Meeting Memo Detailed Page > To-Do List		

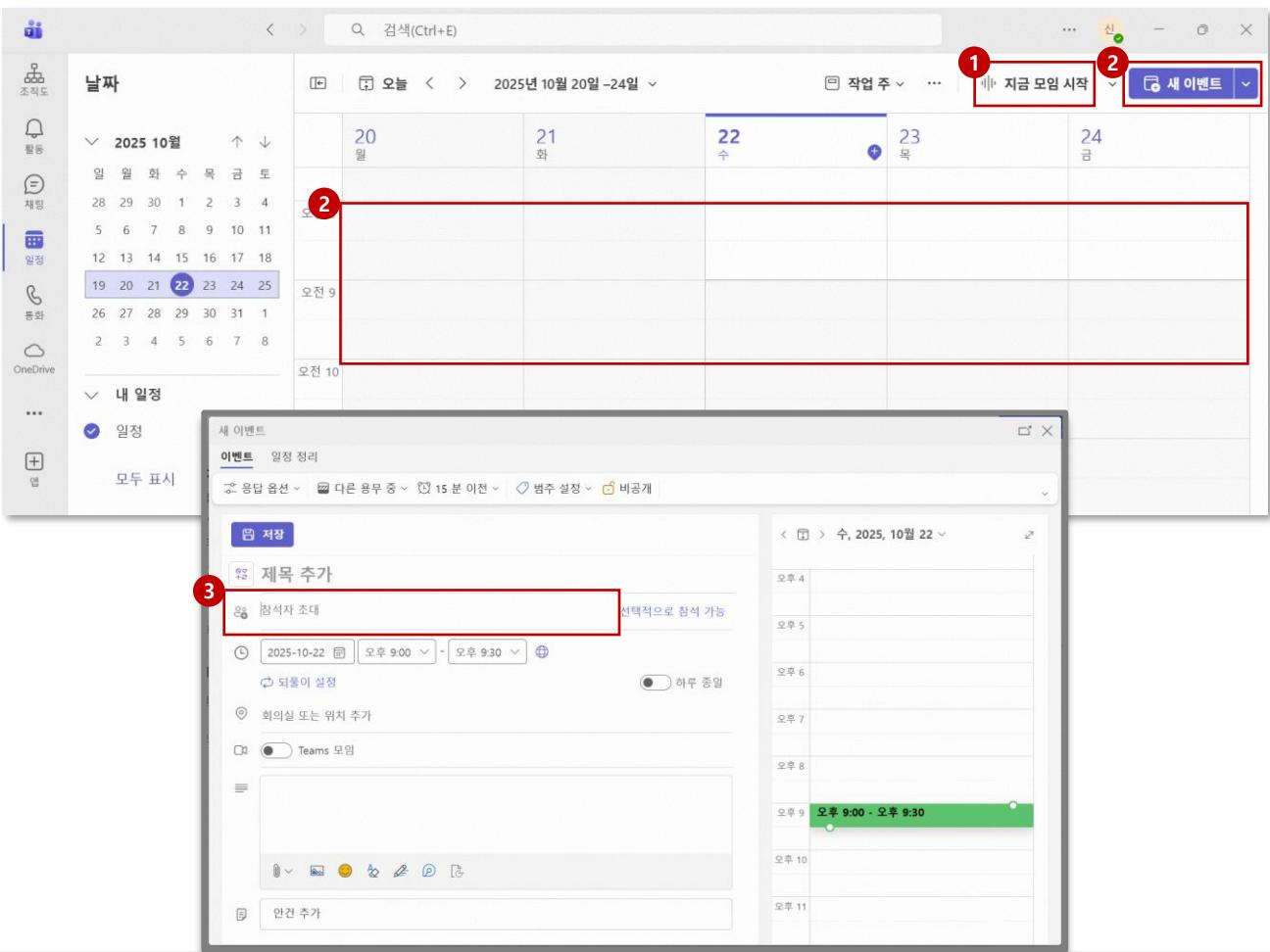


1. View To-Do List

- You can view events and tasks created in the Meeting Memo based on their due dates.

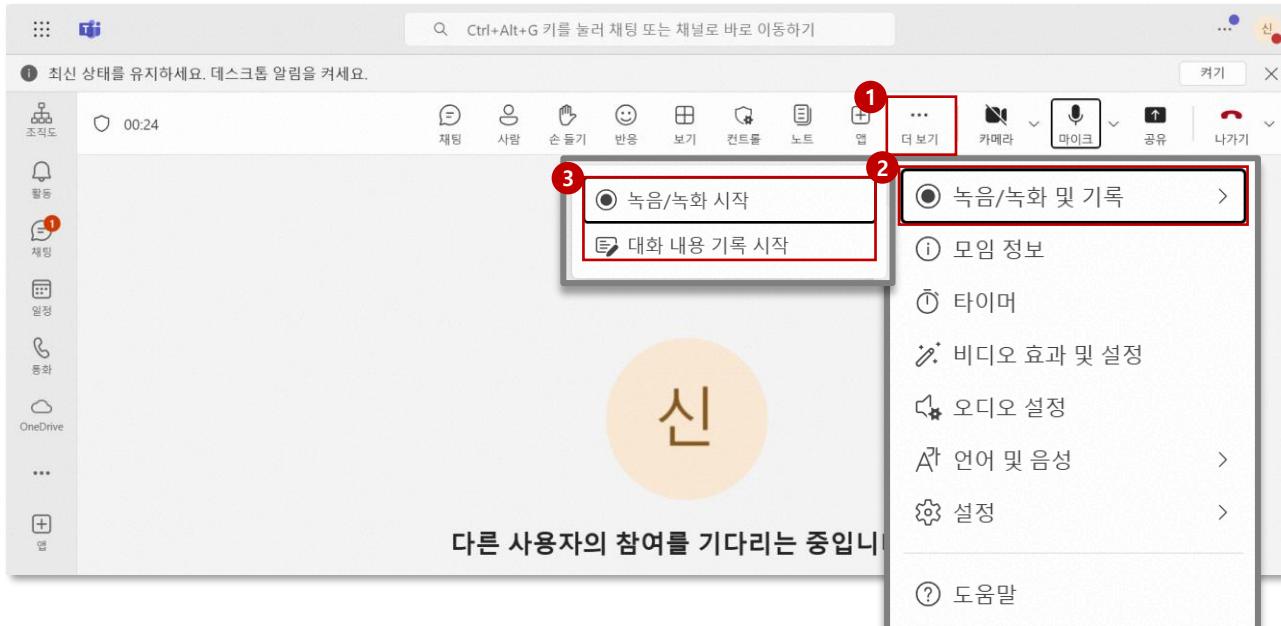
- 2. Open Activities: Displays events and tasks whose due dates or start times have not yet arrived.**
- 3. Activity History: Displays events and tasks whose due dates or start times have passed.**

[Appendix] Teams Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Meeting Memo Using AI – Teams
Menu	-	-	-
Navigation	-	-	-
	 <p>The screenshot shows the Microsoft Teams calendar interface. A red box highlights the 'New Event' button in the top right corner of the calendar header. Another red box highlights the 'Meeting Now' button in the top right corner of the calendar header. A third red box highlights the 'Subject' field in the 'New Event' dialog box.</p>		<ol style="list-style-type: none"> If meeting is created using “Start Meeting Now,” transcript cannot be retrieved in Meeting Memo Create meeting via New Event or Calendar screen <ul style="list-style-type: none"> Only these methods allow transcript retrieval Invite Attendees <ul style="list-style-type: none"> Attendees not invited during meeting creation cannot view transcript, even if they joined via shared URL or recording Creator can view transcript regardless of invite status <p>※ Transcripts are not retrievable if meeting is created via “Start Meeting Now.” Please use New Event or Calendar screen to create meetings.</p>

[Appendix] Teams Meeting Memo Creation

Step (Lv.2)	1. Register New Meeting Memo	Step (Lv.3)	1.1 Meeting Memo Using AI – Teams
Menu	-		
Navigation	-		



1. Click More
 2. Click Record/Transcript
 3. Click Start Recording or Start Transcript
- Even if meeting ends without manually stopping recording, transcript is generated
 - Transcript is generated only when recording or transcript is started
- ※ Transcripts are not retrievable if meeting is created via “Start Meeting Now.” Please use New Event or Calendar screen to create meetings.**