INTEMPT ACADEMY

Sell

The 13 steps to capture every call, from the first recording to a summary your team can share. Tick them off as you go.

- [ ] 1. In the sidebar under Sales, open Meetings and look at the list of captured calls. — Lesson 8.1
- [ ] 2. Click Capture, choose Add to live meeting, paste a Google Meet, Zoom or Microsoft Teams link, optionally name it and pick a language, then click Join meeting. — Lesson 8.1
- [ ] 3. Open a meeting that is still running and watch the transcript update live. — Lesson 8.1
- [ ] 4. After the call, open the meeting: play the recording, read the AI summary and follow the speaker-attributed transcript. — Lesson 8.1
- [ ] 5. Go to Settings > Project > Meetings > Recording and set Record to Disabled, Only Audio, or Video and Audio. — Lesson 8.2
- [ ] 6. Under Auto Delete Meetings, turn on Auto Delete Meeting and choose a Retention Period on purpose. — Lesson 8.2
- [ ] 7. Open the Join tab, turn on Meetings Intempt Blu will join and choose which Auto-join calendar events qualify, or leave it off and use Capture per call. — Lesson 8.2
- [ ] 8. Open Select summary type, pick a template you have not generated yet (for example BANT Qualification Instrument) and watch the loading skeleton, then re-select General Summary to see it appear instantly. — Lesson 8.3
- [ ] 9. Reload the page and confirm the selector lands back on General Summary. — Lesson 8.3
- [ ] 10. Hover two or three transcript rows and tag them with a star, a thumbs up or down, and a note. — Lesson 8.3
- [ ] 11. In one meeting's Details header, click Copy link to create the public share link, then open it in a private window to see the read-only view. Check that a different meeting has no link yet. — Lesson 8.4
- [ ] 12. Go to Settings > Project > Meetings > Privacy and set Meeting recap visibility, for example Participants & project members, so the team can open calls without a link. — Lesson 8.4
- [ ] 13. Back in the Meetings list, filter by type Shared with Me to confirm teammates' calls are visible. — Lesson 8.4

YOU ARE DONE WHEN

- A bot joined a real call from a pasted link and the meeting shows in the list.
- Record mode, retention and auto-join are set once at project level.
- You generated a second summary template, saw the skeleton, reloaded and landed on General Summary, and tagged transcript rows.
- One meeting has a public link that opens in a private window, and recap visibility is set for the team.

CORE STACK

- **Intempt console** This is where every recording, summary and setting lives
- **A video meeting platform: Google Meet, Zoom or Microsoft Teams** This is where your calls happen. The notetaker joins any of the three
- **Project admin or owner role** This is the access you need to change how calls are recorded

OPTIONAL UPGRADES

- **Zoom** This is fine too, if your team meets on Zoom
- **Microsoft Teams** This is fine too, if your team meets on Teams
- **A connected calendar** This is how the notetaker joins your meetings on its own

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