

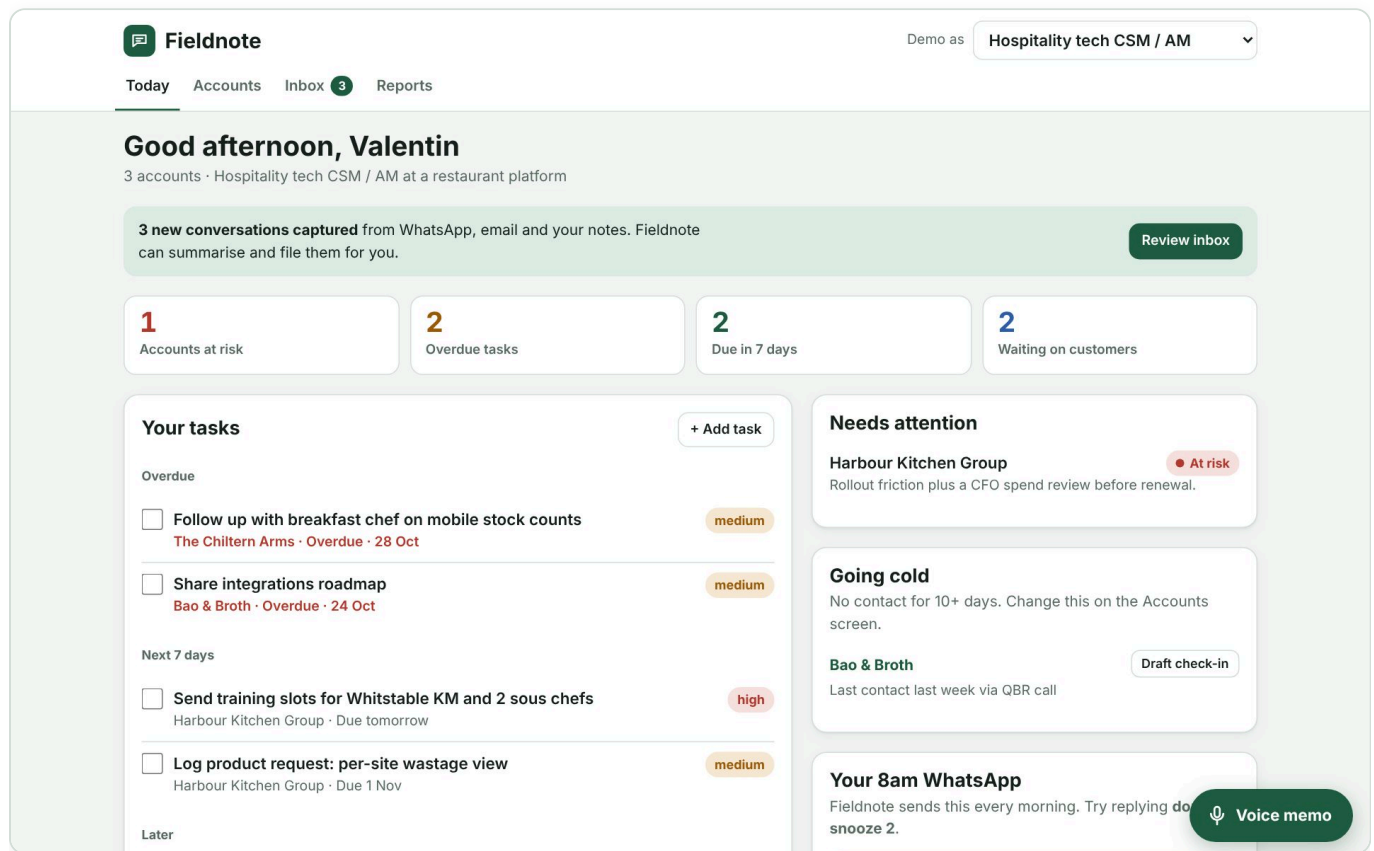
How to use Fieldnote

A step-by-step guide with screenshots of every screen. Prototype by Valentin Dupuy, with made-up accounts and data.

STEP 1

Getting started

Fieldnote turns WhatsApp chats, voice notes, calls and emails into CRM notes, tasks and reports, for account managers and ops managers in hospitality. All accounts, people and data in this prototype are made up.



The Today screen, where every day starts.

- 1 **Pick who you are** with **Demo as** (top right): a hospitality tech CSM or a contract catering ops manager. Each has its own accounts.
- 2 **Four tabs:** Today, Accounts, Inbox and Reports.
- 3 **The green Voice memo button** is on every screen.

TIP Dates move with today, so the demo always looks current. Your ticks and notes are saved on your device only.

STEP 2

Today

The morning check: who needs you, what's overdue and what customers still owe you.

The screenshot shows the Fieldnote app interface. At the top, there's a header with the Fieldnote logo, a 'Demo as' dropdown set to 'Hospitality tech CSM / AM', and navigation tabs for 'Today', 'Accounts', 'Inbox' (with 3 items), and 'Reports'. The 'Today' tab is active, displaying four task tiles:

- Harbour Kitchen Group - Due tomorrow**: A tile with a checkbox and the task 'Log product request: per-site wastage view' (due 1 Nov) with a 'medium' priority tag.
- Later**: A tile with a checkbox and the task 'Book QBR before Christmas' (due 13 Nov) with a 'high' priority tag.
- Waiting on customers**: A section titled 'Things customers promised you. Tick when it arrives, or chase with a ready-made message.' containing two tasks: 'Lena to share new site opening dates' (due 26 Oct, 4 days late) and 'Dan to confirm Margate opening date' (due 3 Nov), both with 'Chase' buttons.

On the right side, there's a chat window for 'Bao & Broth' with a 'Draft check-in' button. Below the chat is a 'Your 8am WhatsApp' section showing a message from Fieldnote about replying 'done 1' or 'snooze 2'. The chat history shows a message from Bao & Broth at 08:00 asking for training slots, and a reply from Fieldnote at 17:37 confirming the task is ticked off. At the bottom, there's a 'Reply...' input field and a 'Voice memo' button.

The 8am WhatsApp, with a task ticked off by replying.

- 1 **The four tiles** show accounts at risk, overdue tasks, tasks due in 7 days and promises from customers.
- 2 **Needs attention and Going cold** list the accounts to call first.
- 3 **Your 8am WhatsApp**: reply **done 1** to tick a task off or **snooze 2** to push it a day.

STEP 3

Inbox

New conversations Fieldnote picked up from WhatsApp, email, call notes and visits.

The screenshot shows the Fieldnote app interface. At the top, there's a header with the Fieldnote logo, a 'Demo as' dropdown set to 'Hospitality tech CSM / AM', and navigation tabs for 'Today', 'Accounts', 'Inbox' (with a '3' badge), and 'Reports'. Below the header, the 'Inbox' section is titled 'Inbox' with a subtitle: 'Conversations Fieldnote picked up from WhatsApp, email, calls and visits. Tap **Summarise**, check what it found, then file it.' There are three conversation cards, each marked as 'New' in a green bubble. The first card is for 'Harbour Kitchen Group' (WhatsApp · today) and contains two messages from Kerry (Whitstable KM) dated 30/10/2026. The second card is for 'Bao & Broth' (Call notes · today) and contains a call note from Lena (C00) dated 29 min. The third card is for 'Harbour Kitchen Group' (Email · today) and contains an email from Dan Reyes to Valentin, dated today. Each card has a 'Summarise' button and a 'Show full text' button. A 'Voice memo' button is located at the bottom right of the screen.

Three new conversations waiting to be filed.

- 1 **Show full text** to read the original chat or email.
- 2 **Tap Summarise** and Fieldnote reads it and drafts the update.
- 3 **Try your own** at the bottom: paste a real chat, email or call notes.

TIP Opened inside Claude, the AI reads your own text. Elsewhere, the three examples show a ready-made result.

STEP 4

Check before filing

Nothing reaches the account until you have checked it.

Check before filing

Discard

Example result for this WhatsApp chat. Fix anything that's wrong, untick what you don't want, then file it.

Account

Harbour Kitchen Group

Account health

At risk

Summary

Whitstable's prep sheets aren't pulling the autumn menu, so the kitchen is back to manual prep ahead of a 280-cover Saturday. Training is booked for Kerry and two sous chefs. Allergen labels are missing on new dishes with an EHO visit due.

Tasks for you

+ Add

☒

Get support to fix autumn menu sync, call Kerry by 11am

10/30/2026

high

☒

Run training for Kerry and 2 sous chefs

11/04/2026

high

☒

Fix missing allergen labels on prep sheets

10/31/2026

high

Waiting on the customer

+ Add

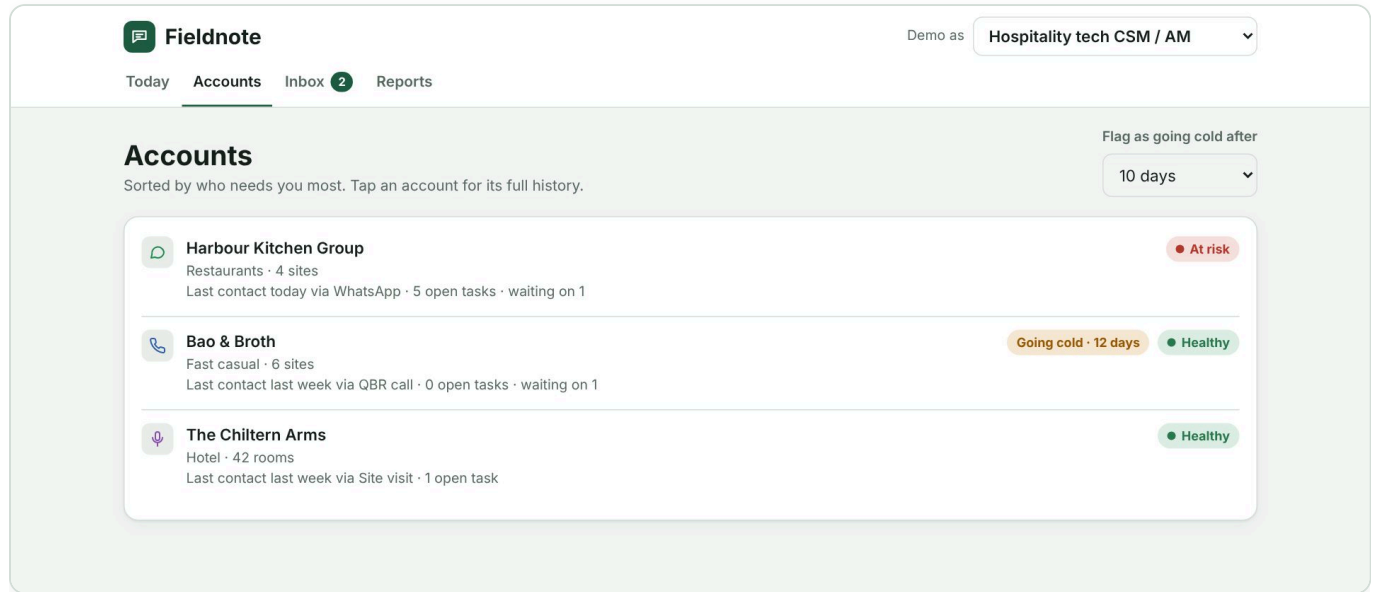
The check screen for a WhatsApp chat from a kitchen manager.

- 1 **Fix the summary** or the account health if it's wrong.
- 2 **Tasks for you and Waiting on the customer:** edit, untick or add.
- 3 **Mark as done:** tasks the conversation shows are finished close by themselves.
- 4 **File to account** when it looks right.

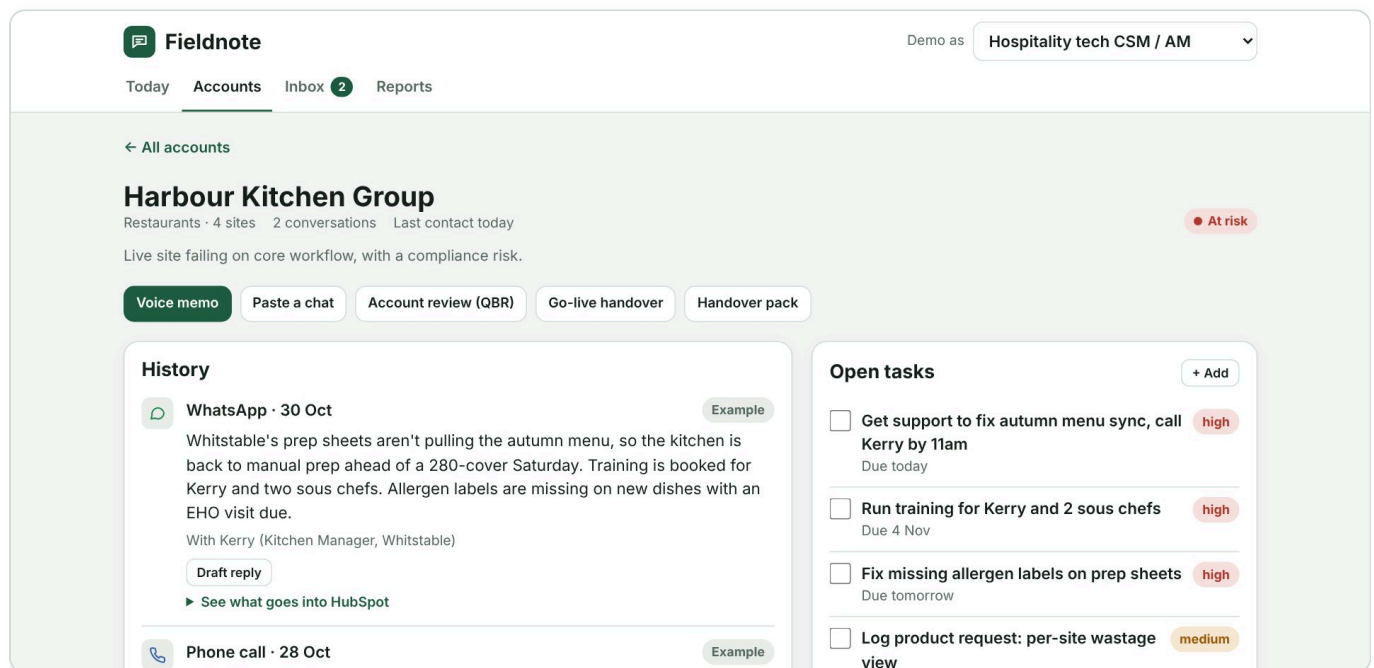
STEP 5

Accounts and the account page

Every account sorted by who needs you most, and everything about one account in one place.



Accounts, at-risk ones first.



The account page: history, tasks, key facts and people.

- 1 **History:** every conversation, newest first, with what would go into HubSpot.
- 2 **Key facts and People** fill in from the conversations, with no typing.
- 3 **One-tap documents:** account review (QBR), go-live handover, handover pack and draft replies.

STEP 6

Voice memo

The fastest way to log a site visit.

The screenshot shows the 'Voice memo' app interface. At the top, there's a title 'Voice memo' and a 'Cancel' button. Below the title, a dropdown menu labeled 'Which account?' shows 'Harbour Kitchen Group'. A green bar with a microphone icon and the text 'Tap the microphone on your keyboard and just talk. Don't worry about tidy sentences.' is present. Below this, a horizontal menu has tabs: 'Who you saw', 'What was agreed', 'Orders', 'Problems', 'Allergens or compliance', and 'Next steps'. The 'Who you saw' tab is active, showing a text area with the text 'Just left Whitstable. Kerry is trained, menu sync fixed, allergen labels printed for the EHO visit.' At the bottom, there is a large green button labeled 'Summarise and check'.

A voice memo after leaving a site.

- 1 **Tap Voice memo** and pick the account.
- 2 **Tap the microphone on your keyboard** and just talk. The chips remind you what to cover.
- 3 **Summarise and check** opens the same check screen as the inbox.

TIP If you lose signal or close it halfway, your memo is still there when you come back.

STEP 7

Go-live handover

When a customer goes live, the account moves from onboarding to customer success. This is where promises usually get lost.

Go-live handover: Harbour Kitchen Group

CopyClose

Basic version. The AI writes a fuller handover when this page is opened in Claude.

Go-live handover: Harbour Kitchen Group

Restaurants · 4 sites · At risk · from Valentin (onboarding) to customer success

Why they signed

- Whitstable went live Monday but the kitchen manager isn't trained and staff still print old prep sheets. Dan finds the weekly GP report weak because wastage isn't split by site. Renewal is in January and the CFO is reviewing software spend.

What was promised

- Margate opening February: onboard from day 1: Expansion signal

Who's trained

- [Not logged yet]

Results so far

- Whitstable covers: 280 on Saturdays

Open issues and risks

- [high] Prep sheets not syncing new menu
- [high] Allergen labels missing on new dishes
- [high] Whitstable kitchen manager not trained
- [medium] Weekly GP report not split by site
- [high] CFO reviewing software spend before renewal

Open tasks

- Get support to fix autumn menu sync, call Kerry by 11am (due today)
- Run training for Kerry and 2 sous chefs (due 4 nov)
- Fix missing allergen labels on prep sheets (due tomorrow)
- Log product request: per-site wastage view (due 1 nov)
- Book QBR before Christmas (due 13 nov)

The go-live handover for Harbour Kitchen Group.

- 1 **Open any account** and tap **Go-live handover**, or use **Go-live** on the Reports tab.
- 2 **It pulls together** why they signed, what was promised, who's trained, results so far, risks and open tasks.
- 3 **First 30 days:** what customer success should do first. Copy it into your CRM or an email.

TIP Check it with the CSM on a 15-minute handover call, so nothing is lost between teams.

STEP 8

Reports

Written for you from everything logged. Nothing to fill in.

 **Fieldnote**

Demo as Hospitality tech CSM / AM 

Today Accounts Inbox **2** Reports

Reports

Written for you from everything logged. Nothing to fill in.

Weekly digest

Sent to you and your manager every Monday.

Copy as email

Weekly digest: Valentin

Week to 30 Oct · 3 accounts

- 2 conversations logged
- 3 tasks completed (1 closed automatically)
- 1 tasks overdue
- 1 customer promises late

Harbour Kitchen Group: At risk

- Live site failing on core workflow, with a compliance risk.
- 2 conversations this week, 5 open tasks
- Top risk: Prep sheets not syncing new menu

Bao & Broth: Healthy, going cold (12 days)

- Strong results and expansion plans.
- 0 conversations this week, 0 open tasks

The Chiltern Arms: Healthy

- Clear time saving, GM is a fan.
- 0 conversations this week, 1 open task

Account packs

One tap documents built from an account's full history.

Harbour Kitchen Group
Restaurants · 4 sites

QBR Go-live Handover

Bao & Broth
Fast casual · 6 sites

QBR Go-live Handover

The Chiltern Arms
Hotel · 42 rooms

QBR Go-live Handover

QBR: an account review to prepare a meeting with the customer. **Go-live:** the onboarding to customer success handover, with what was sold, promised and trained. **Handover:** everything a colleague needs to take the account over.

Voice memo

The weekly digest and account packs.

- 1 Weekly digest:** conversations, tasks done, overdue items and each account's health. Copy as email for your manager.
- 2 Account packs:** QBR, go-live handover and handover pack for every account.
- 3 Client report** (catering ops view): the monthly report for your client contact.

STEP 9

The landing page

A one-page site to explain Fieldnote in ten seconds and collect early users.

 **Fieldnote**

FOR ACCOUNT MANAGERS AND OPS MANAGERS IN HOSPITALITY

Talk to your customers. Fieldnote writes it up.

WhatsApp chats, voice notes, calls and site visits become clean CRM notes, tasks and reports. No more typing it all up at 9pm.

[Get early access](#) [See how it works](#)

In development. Looking for 20 early users to shape it.

WhatsApp ð you, leaving site

 0:41

"Just left Whitstable. Kerry's not trained yet and they're doing prep by hand again, 280 covers Saturday. Booked training Thursday 2pm. Allergen labels missing on the new dishes, EHO due this monthâ;"

ð Filed in 10 seconds

Harbour Kitchen ð Whitstable

Prep sheets aren't pulling the autumn menu ahead of a 280-cover Saturday. Allergen labels missing with an EHO visit due.

☐ Fix menu sync, call Kerry by 11am

☐ Train Kerry and 2 sous chefs

☐ Add allergen labels to new dishes

Today

Thu 2pm

Tomorrow

â HubSpot note and 3 tasks created

The hero: a voice note becomes a CRM note.

HOW IT WORKS

Four steps, and you only do the first.

1

Capture

Keep using WhatsApp, calls and email. Send a quick voice memo after a visit. That's it.

2

Check

Fieldnote writes the summary, tasks and who said what. You check it in seconds before it's filed.

3

Act

Tasks close themselves when a later chat shows they're done. An 8am WhatsApp tells you what's due.

4

Sync

Notes and tasks land in your CRM, starting with HubSpot. QBRs and client reports write themselves.

WHO IT'S FOR

Built by someone who did the job.

How it works, in four steps.

- 1 Hero:** the whole idea in one picture.
- 2 Who it's for** and the go-live handover, with real examples.
- 3 Waitlist** for CSMs and ops managers who want early access.