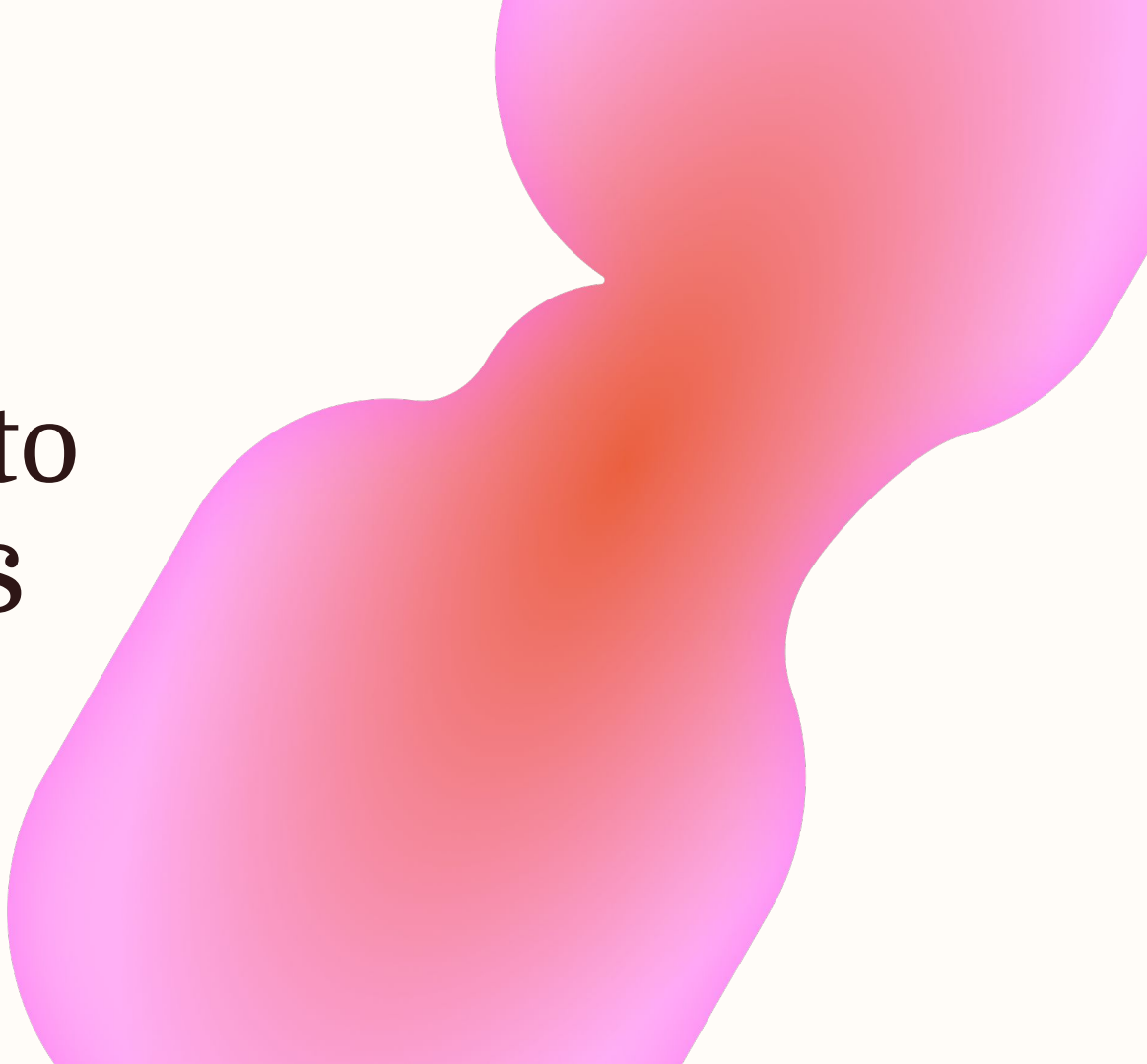


beam

Introduction to Beam Notes



Let's get started



Name and role



**Favourite part of
your job**

Please answer in the chat

Today's Session will cover...



What is Beam Notes?



Logging in



Making a Recording



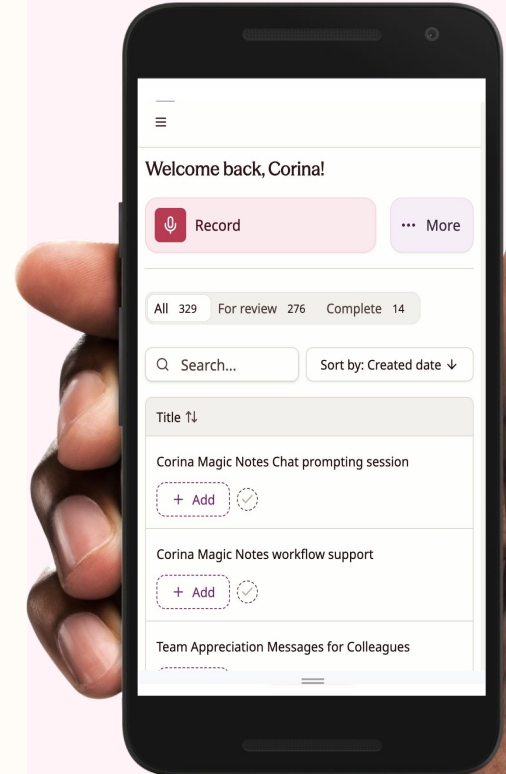
Editing a Beam Note



Organising Your Notes



Getting Support



beam



A group of caseworkers (85+) who use custom-built technology to improve our work.

Beam Notes

80,000+

People using Notes

2,000,000

Notes made

Working with 250+ partners across the UK & World



What is Beam Notes?

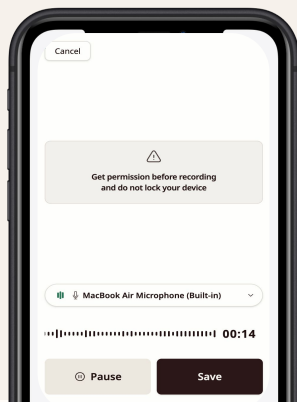
An AI-powered meeting summary tool



Beam Notes creates a strong 1st draft within minutes, but it's **your expertise** that refines it.

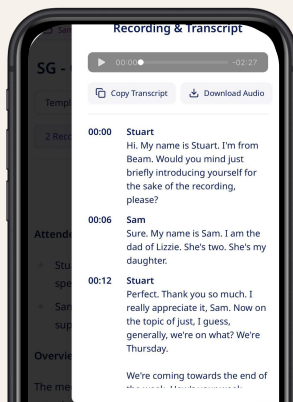
1

Record



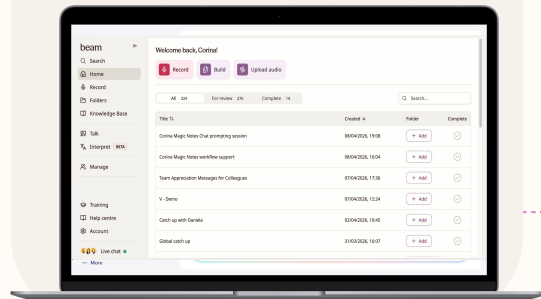
2

Summarise



3

Customise



Live Demo!

Start by introducing yourselves

"Is it ok if I record our conversation today?"

It will take notes and help me write everything up on our system quicker without missing any important details. The recording is only used to help with my notes, it's not stored long term.

- ✓ Focus on Listening
- ✓ Be Practical and Reassuring
- ✓ Keep it Friendly and Simple
- ✓ Be Empathetic and Supportive



Get consent before you record

"Is it ok if I record our conversation today?"

It will take notes and help me write everything up on our system quicker without missing any important details. The recording is only used to help with my notes, it's not stored long term.

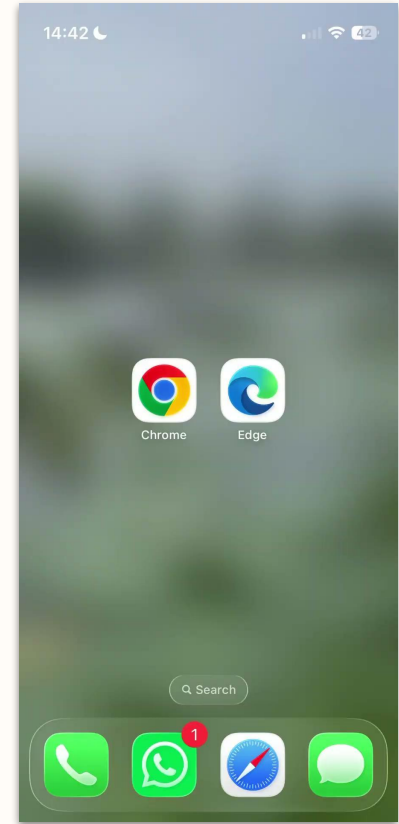
- ✓ Focus on Listening
- ✓ Be Practical and Reassuring
- ✓ Keep it Friendly and Simple
- ✓ Be Empathetic and Supportive



How to login to Beam Notes

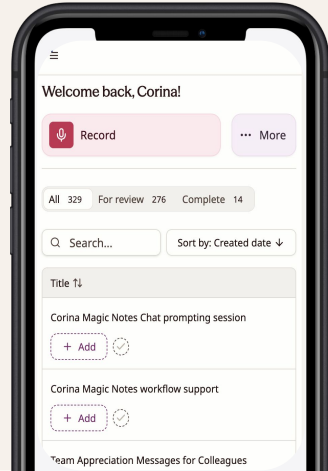
Open the Google Chrome or Microsoft Edge web browser app on your work phone and/or laptop and enter the following URL.

magicnotes.ai

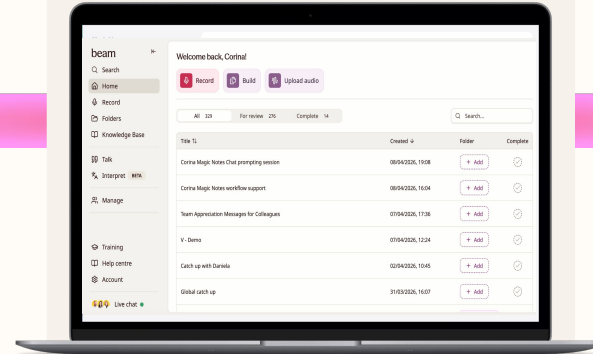


Recording a Note

Phone 📱 – stay on the Notes page & do not lock your phone




Laptop 🏠 – you can switch between tabs 🔄



How to make an in-person recording →

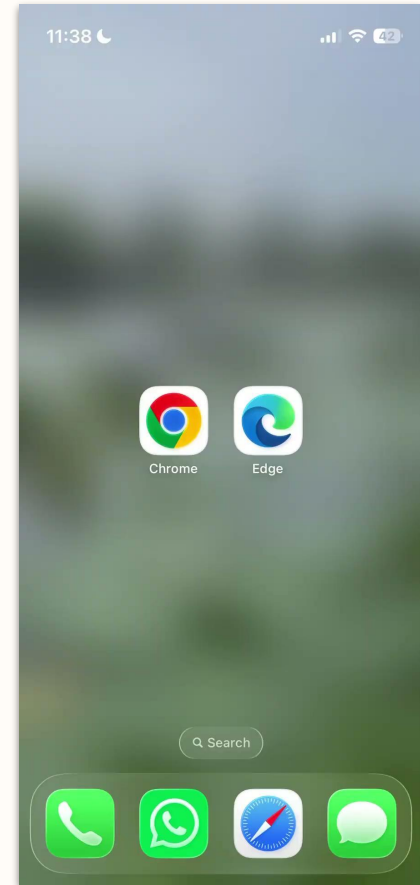
 **Get consent before you begin**

 **Start with an introduction**

 **Keep your device unlocked & stay on the tab**

 **Ask questions as you normally would**




 **Click save when you are finished**



How to record an Online Meeting

Magic Notes has rebranded to Beam Notes. Read more [here](#).


Welcome back, Bea!

 Record  Build  Upload audio

All 76 For review 52 Complete 19

| Title ↑↓ | Created ↓ | Folder | Complete |
|--|-------------------|--------------------------------------|-------------------------------------|
| Magic Notes User Feedback Bea | 24/04/2026, 11:01 | + Add | <input checked="" type="checkbox"/> |
| Magic Notes Quarterly Business Review Renewal and Adoption | 24/04/2026, 10:01 | + Add | <input checked="" type="checkbox"/> |
| Child X Multi disciplinary assessment | 23/04/2026, 16:45 | + Add | <input checked="" type="checkbox"/> |
| Quarterly Business Review Social Work Scotland | 23/04/2026, 16:33 | Social Work Scotland | <input checked="" type="checkbox"/> |
| Child X Multi disciplinary assessment and EHCP support | 23/04/2026, 15:19 | Demo | <input checked="" type="checkbox"/> |

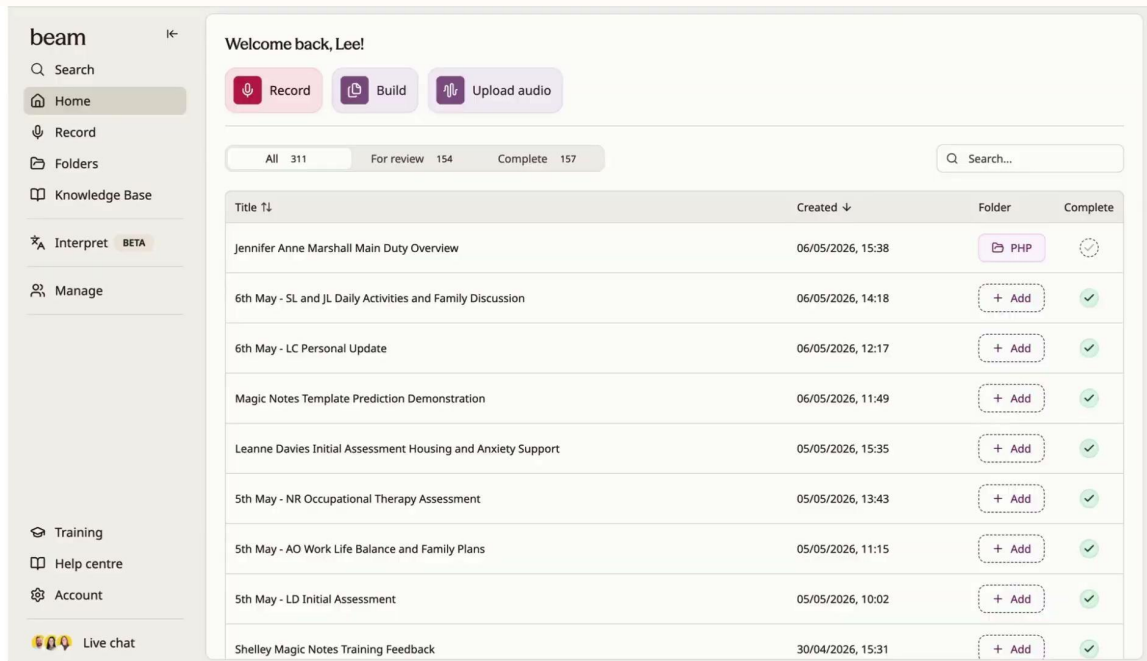
www.loom.com is sharing your screen. [Stop sharing](#) [Hide](#)



- Search
- Home
- Record
- Folders
- Knowledge Base
- Talk
- Interpret **BETA**
- Manage
- Training
- Help centre
- Account
- Live chat



You can now make a Notes recording without internet access!



The screenshot shows the beam.org user interface. On the left is a navigation sidebar with options: Search, Home, Record, Folders, Knowledge Base, Interpret (BETA), and Manage. The main content area displays a welcome message and three buttons: Record, Build, and Upload audio. Below these are filters for 'All 311', 'For review 154', and 'Complete 157', along with a search bar. A table lists recordings with columns for Title, Created, Folder, and Complete. The table contains several entries, each with a '+ Add' button and a status icon (either a checkmark or a loading spinner).

| Title ↑ | Created ↓ | Folder | Complete |
|--|-------------------|--------|----------|
| Jennifer Anne Marshall Main Duty Overview | 06/05/2026, 15:38 | PHP | ⌚ |
| 6th May - SL and JL Daily Activities and Family Discussion | 06/05/2026, 14:18 | + Add | ✓ |
| 6th May - LC Personal Update | 06/05/2026, 12:17 | + Add | ✓ |
| Magic Notes Template Prediction Demonstration | 06/05/2026, 11:49 | + Add | ✓ |
| Leanne Davies Initial Assessment Housing and Anxiety Support | 05/05/2026, 15:35 | + Add | ✓ |
| 5th May - NR Occupational Therapy Assessment | 05/05/2026, 13:43 | + Add | ✓ |
| 5th May - AO Work Life Balance and Family Plans | 05/05/2026, 11:15 | + Add | ✓ |
| 5th May - LD Initial Assessment | 05/05/2026, 10:02 | + Add | ✓ |
| Shelley Magic Notes Training Feedback | 30/04/2026, 15:31 | + Add | ✓ |

Make sure you are already logged in.

Use the same website on your normal browser.

beam.org/login

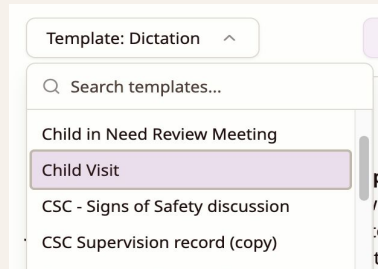
Once you've made a recording, the summary will generate later, when you have signal again.



Understand how to customise your Notes

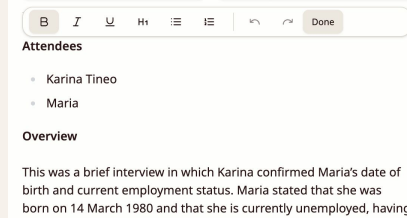
1

Change Template



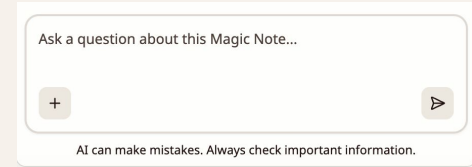
2

Directly Edit



3

Use the Chat



Chat with your Notes

Beam Notes

Make easy structural changes

'Change the spelling of X to Y'

Help with follow up actions

'Write an email to X detailing next steps'

Ask direct questions

'Did they mention the doctor's name or any medications?'



Add Audio to your Notes

+ Add audio



Observations



Reflections



Analysis



Forgotten
details



We have created custom templates for your workflow

Template: General Meeting ▾

Your Retention Period Is **X DAYS**

A template is a structure that Beam Notes follows.

It makes changes to:

- Formatting
- Language
- Style
- Headings
- Content

Your Templates Include:

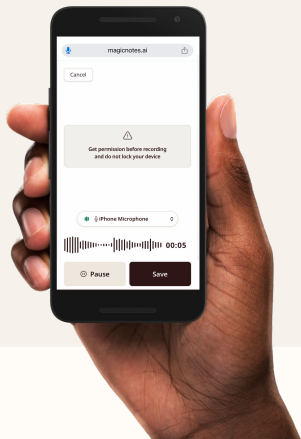


beam

Record and Build work together, and as standalone solutions

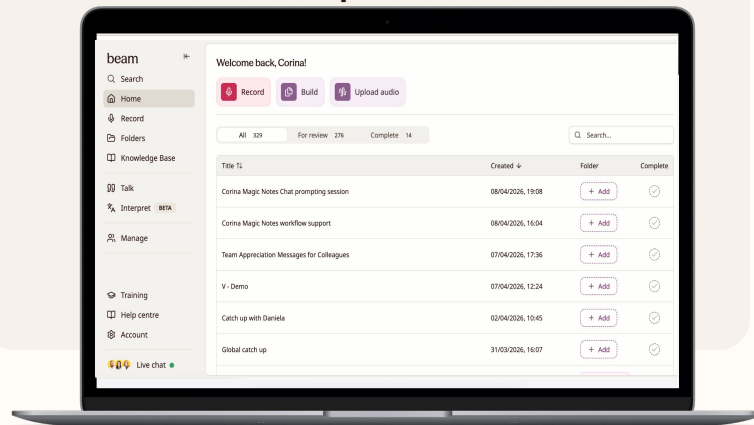
Record

Turns any conversation into structured summaries and case notes in seconds



Build

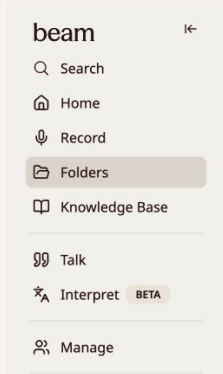
Combines multiple documents, recordings, handwritten notes and video to create reports



Advanced Notes Training

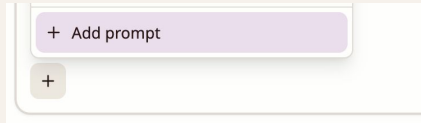
1

Folders



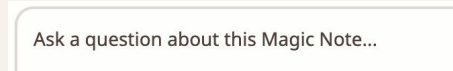
2

Saving Prompts



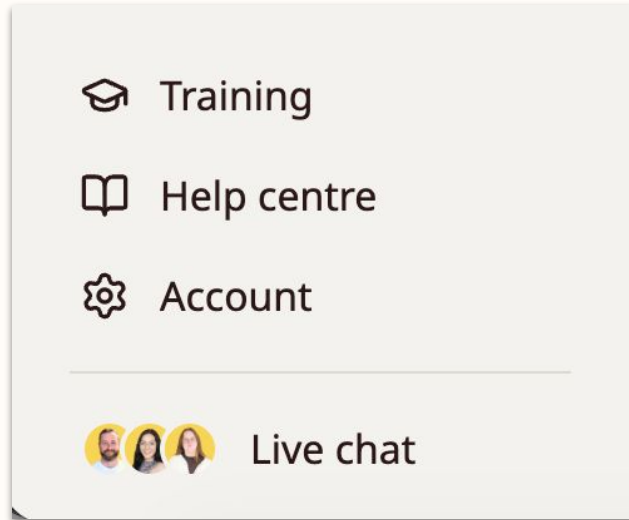
3

Mastering Prompts



How to get in touch with us

Depending on your region:





- Email us at support@beam.org
- Leave feedback using the star rating at the bottom of your summaries




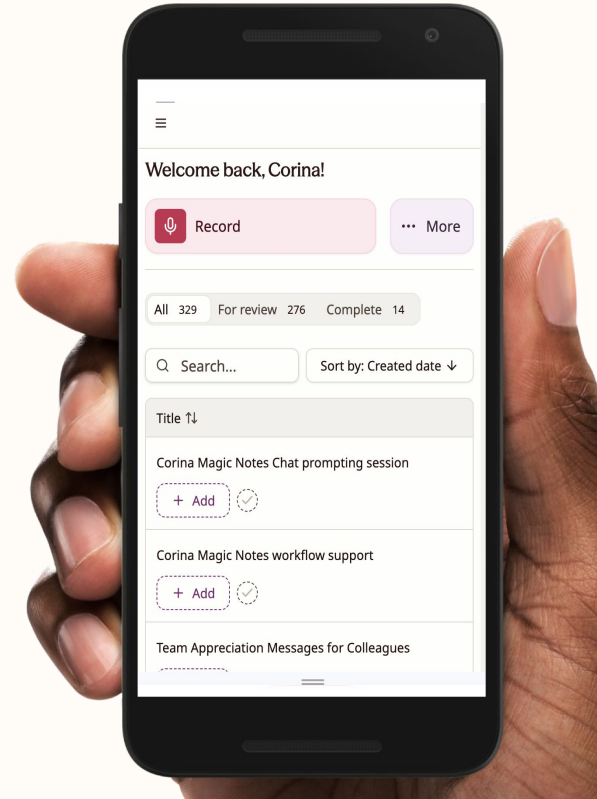
What happens next?

 **Have a go at creating 3 Beam Notes this week**

 Remember to rate the quality of each summary and share written feedback

 We will use your feedback to keep improving Beam Notes

 Attend our Advanced Beam Notes Training session after using the tool for a month.



Recap

1

Start by asking for consent and once recording make introductions.

2

You can add your judgements and observations easily by 'Adding Audio'

3

You can use Beam Notes to create things like letters and emails.

4

Beam Notes helps us to be more present in conversations by recording everything that was said and providing a summary of the conversation

Training Feedback:

3 Questions about your Intro to Beam Notes



Europe's Top Financial Inclusion Startup



Best Technology Social Enterprise



Queen's Award for Enterprise Promoting Opportunity