

V

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Creator (Descending) Term Definition Abbreviations Synonyms Labels

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Visit report Created Jan 22, 2019 (05:44) by Unknown User (Sylvain Michel Alexandre Pingont)

Definition

[Link](#) [Link](#)

Functionality in Salesforce.com allowing to capture the outcome of the customer visit. Visit report contains an internal summary of the discussion (for internal reading) and all the required elements to send the minutes to the customer. This visit report can be shared internally and externally from Salesforce by using predefined email templates.

Label(s)

- [Salesforce.com](#)
- [sales_planning](#)
- [customer_visit](#)
- [event](#)

Visit report wizard Created Jan 22, 2019 (05:44) by Unknown User (Sylvain Michel Alexandre Pingont)

Definition

[Link](#) [Link](#)

Process in Salesforce.com allowing to quickly create additional records from the Visit Report on top of the typical visit report functions. The available records that can be created are: competitive insights, cross BU leads, action items (follow-up tasks) and action items (follow-up activities).

Label(s)

- [Salesforce.com](#)
- [sales_planning](#)
- [customer_visit](#)
- [visit_report](#)

View Created Jan 22, 2019 (05:44) by Unknown User (Sylvain Michel Alexandre Pingont)

Definition

[Link](#) [Link](#)

View is the gateway to the website reports and determines which data from your site appears in the reports or dashboard in Google Analytics.

Synonym(s)

views

Label(s)

- [google_analytics](#)