

Visit Report: Send to the Customer

Overview

In this section, you will find information about how to send a visit report to the customer, directly from Salesforce.

Concerned profiles:

All except Strategic Marketing

Step By Step

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Share a Visit Report with the customer

1 David opens the visit report he wants to share first with John and Michael

The screenshot shows the 'New Product Presentation' visit report form in Salesforce. The top navigation bar includes buttons for 'Edit', 'Delete', 'Clone', 'Sharing', 'Send Report to Customer', 'Send Report Internally', and 'Report Wizard'. The 'Send Report to Customer' button is highlighted with a red box. The form contains sections for 'Information', 'Internal Report', and 'Visit Report (Shared with Customer)'. The 'Information' section includes fields for Owner, Subject, Date of the Visit, GBU, BU, Visibility, and Visit Report Status. The 'Internal Report' section includes fields for Executive Summary, Objectives Of The Visit, Additional Notes, End Use, and Safety Visit. The 'Visit Report (Shared with Customer)' section includes a list of points discussed.

2 He clicks on the button Send Report to Customer

This screenshot is identical to the one above, showing the 'New Product Presentation' visit report form. The 'Send Report to Customer' button is highlighted with a red box. The form contains sections for 'Information', 'Internal Report', and 'Visit Report (Shared with Customer)'. The 'Information' section includes fields for Owner, Subject, Date of the Visit, GBU, BU, Visibility, and Visit Report Status. The 'Internal Report' section includes fields for Executive Summary, Objectives Of The Visit, Additional Notes, End Use, and Safety Visit. The 'Visit Report (Shared with Customer)' section includes a list of points discussed.

3 David can manually enter email addresses if needed

Visit Report Preview

To: john.smith@bayer.com

From: david.rempel@solway.com

CC: michael.baltani@bayer.com,john.smith@bayer.com,david.rempel@solway.com,christian.c.

TO Field
The email addresses entered in "TO" are coming from the related list "Customer Contacts" on the Visit Report.

4 David has also the choice of the template language and for the attachments to be included or not.

Select Template: Visit Report in Bulgarian

Select Attachment	File Name
☐	UserManagement.docx

Subject: ABB AG - Visit Report - 2015-11-24

Attachment Checkbox
All attachments coming from the Visit Report are listed here and can be ticked to be included in the email

5 Finally, David verifies the **title** and **content** of the email and adapts the text if needed. He also *checks* that his **signature** is well included in the email template.

Subject: BAYER CROPSCIENCE - Visit Report - 2015-07-14

Body


asking more from chemistry®

Date : 2015-07-14
Subject : New Product Presentation

Dear John Smith,
Dear John,

Thanks for the visit. I well understood your needs and will come back with some information to share with you.


asking more from chemistry®

Date : 2015-07-14
Subject : New Product Presentation

Dear John Smith,
Dear John,

Thanks for the visit. I well understood your needs and will come back with some information to share with you.

Kind regards,
David

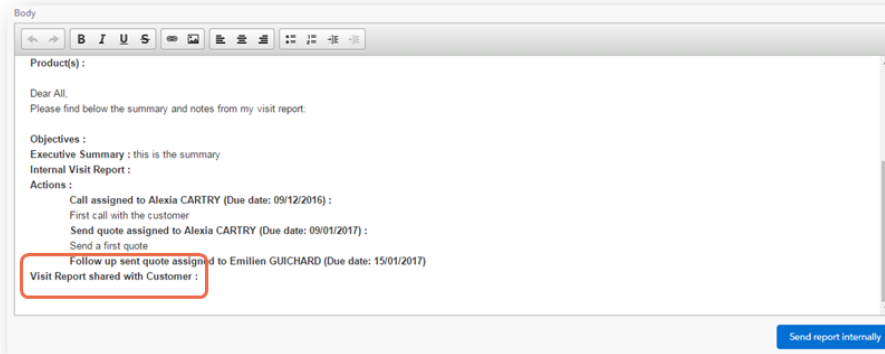
Send Visit Report To Participants



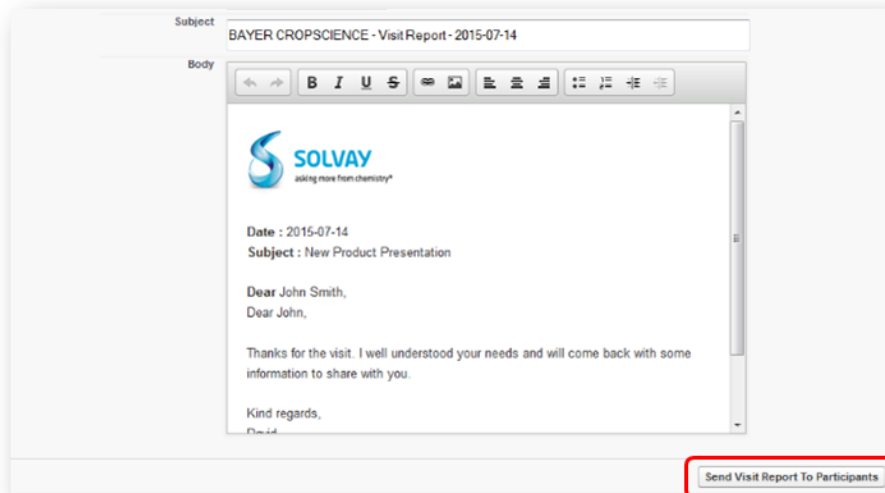
Don't panic! As you see, you can fully edit the content of the email before sending to the customer.

The field "Visit Report shared with Customer" is added at the end of the Visit Report email body

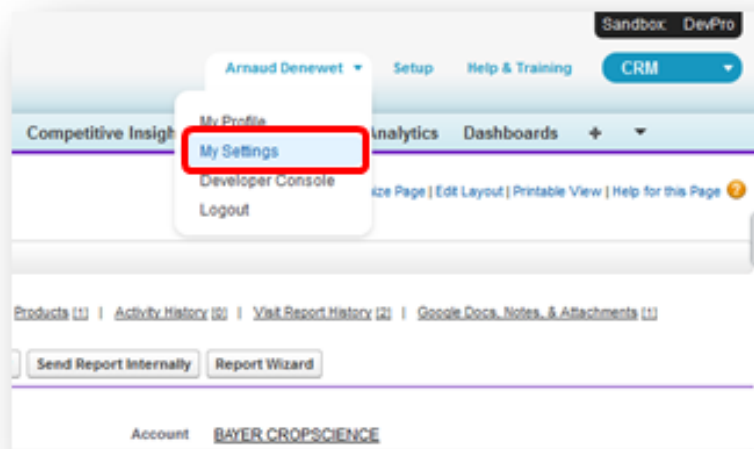
=> New Winter 17' Release



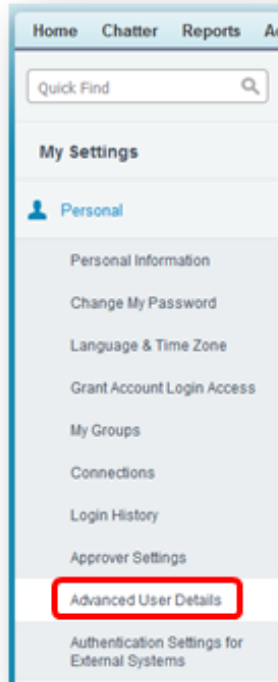
6 Once the visit report is ok for him, he clicks on **Send Report To Participants**



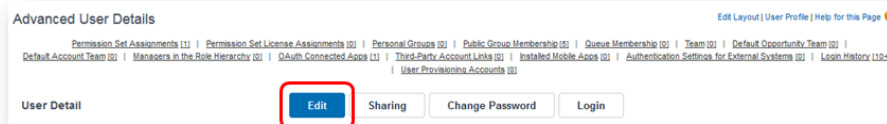
7 To update your signature, click on **your name** on the top right of the screen and click on **My Settings**.



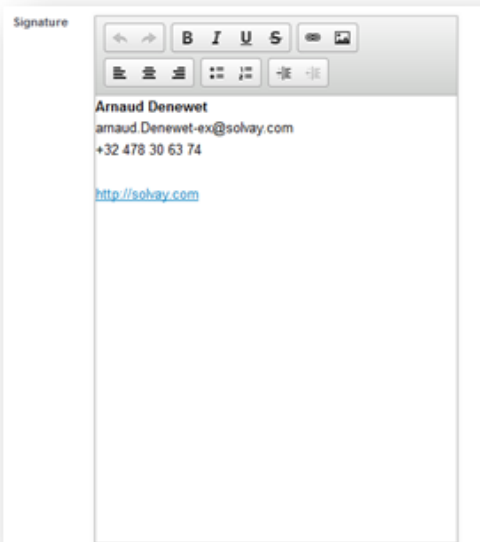
8 Then, in **Personal**, click on **Advanced User Details**



9 Finally, click on **Edit** and scroll down to **Signature**



10 In the field **Signature**, record your signature and click on **Save**



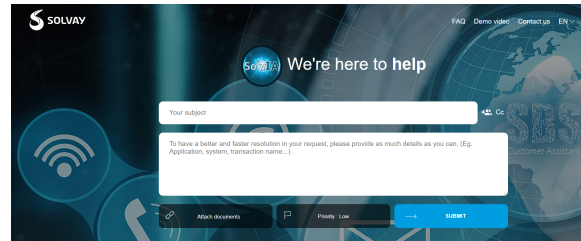
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Related articles

Need help?

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- [Activity: Create a customer visit in Salesforce](#)
 - [Visit Report Creation & Update](#)
 - [Visit Report: Send internally](#)
 - [Visit Report: Confidentiality management & Visit report wizard](#)

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example