

Visit Report: Confidentiality management & Visit report wizard

Overview

In this section, you will find information about the confidentiality settings of a visit report and optional actions you can create from a visit report. The 'report wizard' is a functionality allowing to create and link records to a visit report, such as competitive insights, cross-bu leads, follow-up tasks and activities.

Concerned profiles:

All except Strategic Marketing

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Step By Step

Confidentiality

Visit Report Cus

1st visit

Show Feed

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[Competitive Insights \[0\]](#) | [Customer Contacts \[1\]](#) | [Products \[0\]](#) | [Opportunity Links \[0\]](#) | [Visit Report Team \[2\]](#) | [Cross BU Leads \[0\]](#) | [Activity History \[3\]](#) | [Open A Google Docs, Notes, & Attachments \[1\]](#)

Visit Report Detail Save Cancel

▼ Information

Owner	Charles Lachaize [Change]	Account	CHEMALIST
Subject	1st visit	Contact	richard delano
Date of the Visit	07/04/2017	Activity	No Activity
GBU	Silica	Account Plan	
BU	Silicate	Case	
Visibility	Visit Report Team ▼	Contract	
Visit Report Status	Shared	WEGO ID	
	GBU Restricted	Opportunity	
	Visit Report Team		

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• **S h a r e d**
: A l l C R M u s e r s w i l l h a v e v i s i b i l i t y o n y o u r V i s i t r e p o r t

• **G B U R e s t r i c t e d**
: Y o u r v i s i t r e p o r t w i l l b e r e s t r i c t e d t o y o u r G B U C R M u s e r s

• Visit Report Team
: Your visit report is limited to the "Solve a Contact's" identified in the visit report

Create actions from a Visit Report

1

David wants to create a Cross BU Lead and a task related to his visit report. Is there an easy way? Of course! A quick process is in place to quickly create records from the Visit Report. Let's see what it is.

2

David opens the Visit Report and clicks on the button on Report Wizard

Visit Report: New Product Presentation

Customize Page | Edit Layout | Printable View | Help for this Page

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Competitive Insights (0) | Cross BU Leads (0) | Customer Contacts (1) | Solvay Contacts (1) | Open Activities (0) | Opportunities (0) | Products (0) | Activity History (0) | Visit Report History (2) | [Google Docs, Notes, & Attachments \(0\)](#)

Visit Report Detail

Edit | Delete | Clone | Sharing | Send Report to Customer | Send Report Internally | **Report Wizard**

Information

Owner	Arnaud Denevet (Change)	Account	AYER CROPSCIENCE
Subject	New Product Presentation	Opportunity	
Date of the Visit	03/03/2016	Contact	Thomas O'Malley
GBU	Peroides	Activity	View Activity
BU		Account Plan	
Visibility	Shared	Case	
Visit Report Status	Drafted	WEGO ID	

Internal Report

Executive Summary: Visit has been very positive. Interest in our product and first contact taken for potential opp.

Objectives Of The Visit

Additional Notes

End Use: SOLVENT FOR FORMULATION OF UREASE INHIBITOR

Safety Visit

Visit Report (Shared with Customer)

Visit Report: Following points discussed:

- Product Solvent X32: interest and need to have more documentation
- Current contract prolongation: to be discussed later

3

David selects the record he wants to create and clicks on Next

Would you like to record additional information? ! = Required Information

Select one or more options

Record Additional Information

Competitive Insight

Cross BU Leads

Action Items (follow-up tasks)

Action Items (follow-up activities)

None

Next

4

David is now on the Competitive Insight edit page where he enters the needed information and then clicks on Next

Create Competitive Insight ! = Required Information

Competitor Name	Dupont	Sold-To Account	Happy Chemi
GBU	Novocare	Ship-To Account	
Region	NA	End-Use	
Competitor Product Reference		Customer Potential Volume	
Source of information	Discussion with client	Unit of Measure	1KG
Contract End Date	31/12/2016 [26/08/2015]	Estimated Price	25,000
Comments		Competitor's Plant	
		Confidence Degree	

Previous **Next**

Sold-to Account
Field is pre-populated based on the Account of the Visit Report

5

David is now on the Cross BU Lead edit page where he enters the needed information and then clicks on Next

Create Cross BU Leads Required Information

Lead Name	<input type="text"/>	Account	ABB AG
GBU Initiating the Lead	Novicare	GBU Receiving the Lead	<input type="text"/>
End Use	<input type="text"/>	Description	<input type="text"/>

Sold-to Account
Field is pre-populated based on the Account of the Visit Report

6

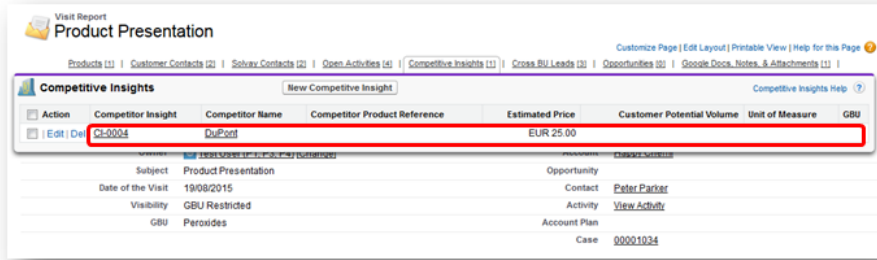
David is now on the Task edit page where he enters the needed information and then clicks on Next

Create Action Items Task Required Information

Assigned To	Pedro Pinto	Name	Contact Clark Kent
Subject	Send Letter	Related To	Account
Due Date	[26/08/2015]	Status	Not Started
Priority	High	Description	<input type="text"/>

7

Done! David successfully created some records related to the Visit Report. In the related list, he can consult the records created



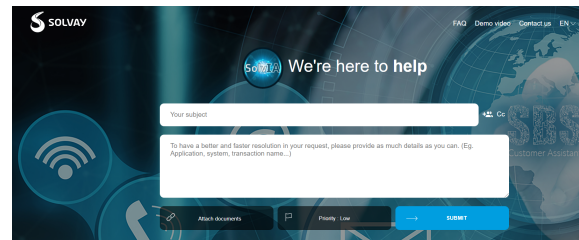
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Related articles

- [Activity: Create a customer visit in Salesforce](#)
- [Visit Report Creation & Update](#)
- [Visit Report Emailing to customer](#)
- [Visit Report Emailing internal email](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
- [19. Competitive Insights & Competitors](#)

Need help?

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