

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

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Step By Step

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 Salesforce interface for a Visit Report titled 'New Product Presentation'. The page includes a navigation bar with 'Show Feed' and 'Back to List: Contacts'. Below this is a breadcrumb trail: '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 (0) | Google Docs, Notes & Attachments (0)'. The main section is 'Visit Report Detail' with 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 'Information' section shows details for the report, including Owner (Arnaud Denewet), Subject (New Product Presentation), Date of the Visit (03/03/2016), GBU (Pericoides), BU, Visibility (Shared), and Visit Report Status (Drafted). The 'Internal Report' section contains an Executive Summary, Objectives of the Visit, Additional Notes, End Use (SOLVENT FOR FORMULATION OF UREASE INHIBITOR), and Safety Visit. The 'Visit Report (Shared with Customer)' section lists the following points discussed: 'Product Solvent X32: interest and need to have more documentation' and 'Current contract prolongation: to be discussed later'.

2 He clicks on the button Send Report to Customer

This screenshot is identical to the one above, showing the Salesforce interface for the 'New Product Presentation' Visit Report. The 'Send Report to Customer' button is highlighted with a red box, indicating the next step in the process.

3

David can manually enter email addresses if needed

Visit Report Preview

To: john.smith@bayer.com

From: david.rempel@solvay.com

CC: michael.ballani@bayer.com, john.smith@bayer.com, david.rempel@solvay.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
<input type="checkbox"/>	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

 SOLVAY
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.

 SOLVAY
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

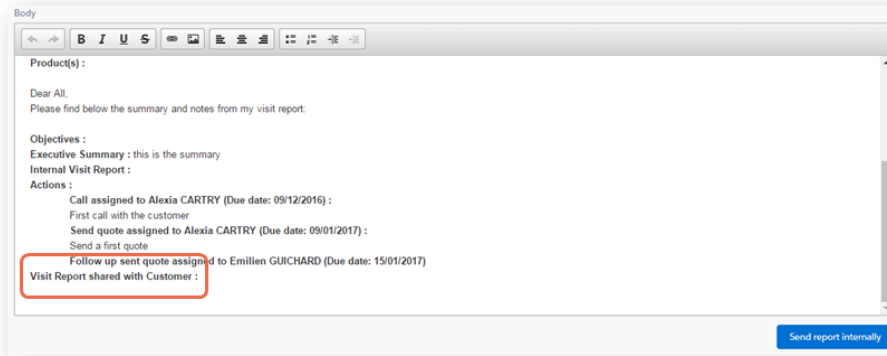
Send Visit Report To Participants



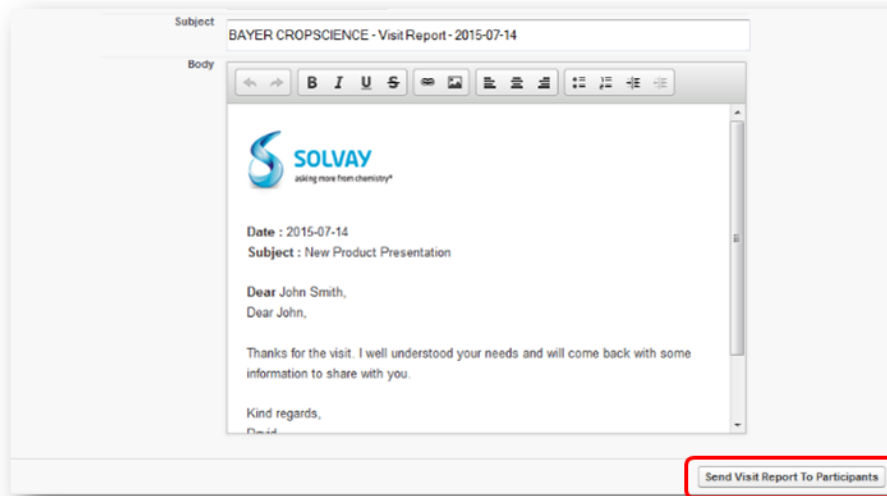
Don't panic! As you see, you can fully edit the content of the email before sending to the customer.

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

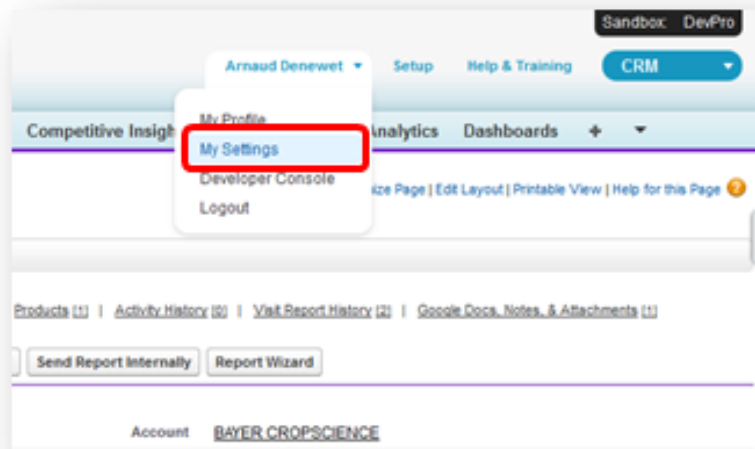
=> New Winter 17' Release



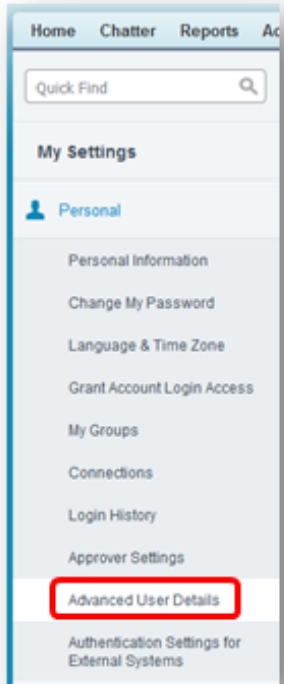
6 Once the visit report is ok for him, he clicks on **Send Report To Participants**



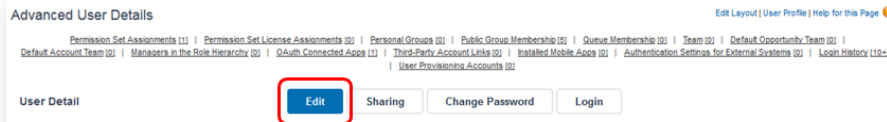
7 To update your signature, click on **your name** on the top right of the screen and click on **My Settings**.



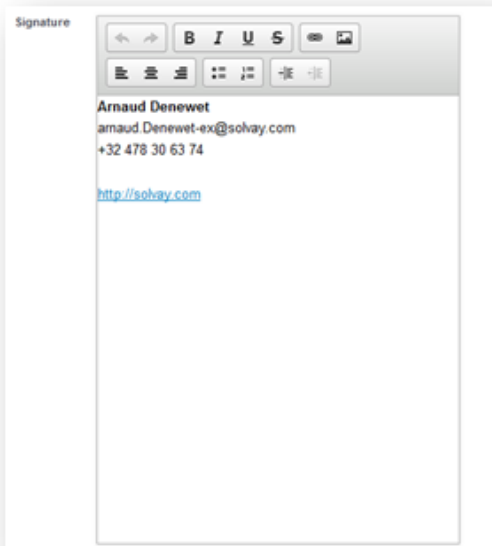
8 Then, in **Personal**, click on **Advanced User Details**



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



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



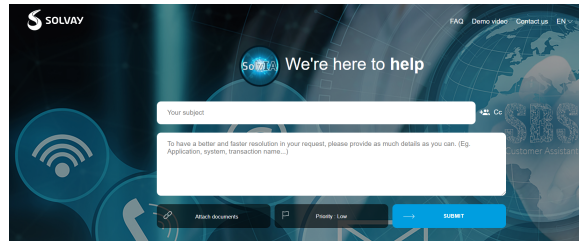
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- [Activity: Create a customer visit in Salesforce](#)
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 - [Visit Report: Confidentiality management & Visit report wizard](#)

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/>



The screenshot shows the Solvia support portal interface. At the top left is the Solvia logo. The main heading is "We're here to help". Below this is a form with a "Your subject:" label and a text input field. To the right of the input field is a "Help Center" link. Below the input field is a larger text area with a placeholder text: "To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)". At the bottom of the form, there is a "Attach screenshots" button, a "Priority: Low" dropdown menu, and a blue "SUBMIT" button. The background features a globe and various icons like a Wi-Fi symbol and a person.

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