

Visit Report Creation & Update

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Overview

In this section, you will find information about how to create a visit report in Salesforce and how to update a visit report, including:

- Associate a product to the visit report
- Associate a customer contact or a Solvay contact to the visit report
- Attach a document to the visit report

Concerned profiles:

Sales - Customer Service Representatives (all except Strategic Marketing)

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Step By Step

Definition & Objectives

Sales Planning is the process supporting the planning, preparation, execution, and restitution of a **Customer Visit**. It supports the development of an Opportunity, the execution of a defined Account Plan, the collection of Leads of interest for other BU, or even the continuous management of Competitive.

A **visit report** captures 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.

How to create a visit report

Visit reports created from an activity



Activities

- [Select activities "Customer Visit" to allow creating a visit report from it](#)



Visit Report

- [Are created from an activity "Customer Visit" or from scratch.](#)
- [A Visit report can only be linked to 1 activity.](#)

When created from an activity, a visit report will be pre-filled with:

- [Subject of the activity](#)
- [Date of the activity](#)
- [Account and Contact](#)
- [Attendees: Solvay Participants and Customer Contacts](#)

Create a visit report

1 David wants now create a visit report. For this, he *opens* the event and clicks on **Generate Visit Report**

The screenshot shows the Salesforce CRM Lightning interface. At the top, there's a navigation bar with various tabs like Home, Accounts, Chatter, Visit Reports, Dashboards, Contacts, Opportunities, Quotes, Reports, Contracts, Cases, Calendar, and More. The 'Calendar' tab is active, showing a list of events. The event 'test' is selected, and its details are displayed below. The 'Generate Visit Report' button is highlighted in the top right corner of the event details section.

2 As David started from the visit, some information are already filled in. So convenient!

The screenshot shows the 'New Visit Report' form in Salesforce. The form is pre-filled with information from the event. A callout box on the left states: 'Subject Date of the Visit Account Contact are prefilled because of the event'. Another callout box on the right states: 'Status is Draft per default'. The form fields include: Subject (test), Date of the Visit (17/10/2018), Account (TEST TRAINING), Contact (John Doe), GBU (None), BU (None), Visit Report Status (Draft), and Visit Type (In Person). There are also links for 'View all dependencies' and 'Topics Discussed'.

3 Before writing the feedback, David *defines* the Visit Report **visibili ty** and the GBU. He has 3 options:

- “Shared”**: it means the VR is visible by all the users in Salesforce
- “GBU restricted”**: it means only the users in the GBU defined below are able to see the VR
- “Visit Report Team ”**: only the colleagues added in the “Visit Report Team ” will be able to view the VR

Due to Legal Anti-trust constraints, a Visit Report can be automatically forced to « **GBU Restricted** » instead if « **Shared** ». It happens if the Visit Report concerns some specific products or contains some keywords that are confidential for some other GBUs. For R4.0, this is only activated for AROMA Performance.

The screenshot shows the 'New Visit Report' form in Salesforce, focusing on the 'Main Information' section. A callout box on the left states: 'GBU-BU are not related it means that you have to define first the GBU then the BU'. The form fields include: Subject (Wiki Update), Date of the Visit (17/10/2018), Account (John Doe), GBU (Aroma Performance), BU (Aroma Ingredients), Visit Report Status (Draft), and Visit Type (None). There are also links for 'View all dependencies' and 'Topics Discussed'.

The GBU and BU are mandatory fields

4

Once the visibility and the GBU defined, David *fills* in the **Executive Summary (mandatory)** and adds additional comments in **Internal Visit Report**.



In "Internal Visit Report", you can enter rich text like bold, tables, bullets, etc.

He can also shared with the customer some feedback in the dedicated section.

Internal Report (Shared Internally)

Objectives Of The Visit

Executive Summary

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), Link (L), Bulleted List (List), Numbered List (List), Indent (Increase/Decrease), Outdent (Increase/Decrease), Table (Table), Link (Link), Image (Image), and Link (Link).

...

Internal Visit Report

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), Link (L), Bulleted List (List), Numbered List (List), Indent (Increase/Decrease), Outdent (Increase/Decrease), Table (Table), Link (Link), Image (Image), and Link (Link).

Visit Report (Shared with Customer)

Visit Report shared with Customer

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), Link (L), Bulleted List (List), Numbered List (List), Indent (Increase/Decrease), Outdent (Increase/Decrease), Table (Table), Link (Link), Image (Image), and Link (Link).

Review the price|

5

David can *mention* in the Visit Report if this concerned a **Safety Visit** or not. Plus as David record all information at once, he *defines* the Visit Report Status as **Completed**. Novecare use the **Unmet Needs** to give guidance to R&D

End Use

Search Market Segments...



Safety Visit

☐

Unmet Needs

Visit Report (Shared with Customer)

6

For Soda Ash, Coatis, Fibras, Aroma Performance, Pepol, Peroxide and Silica a notification is sent to the Visit Report team, when the status is completed.

Visit Report Notification_completed

Customize Page | Printable View | Help for this Page

Back to List | Email Templates

Customer Contacts (2) | Products (2) | Opportunities Links (2) | Quote Links (2) | Visit Report Teams (2) | Cross GBU Leads (2) | Activity History (2) | Open Activities (2) | Visit Report History (2) | Files (2)

Visit Report Detail

Information

Owner	Lella RADJAH (Change)	Account	ACCOUNT TEST
Subject	Notification_completed	Contact	JDS Test
Date of the visit	8/01/2018	Activity	No Activity
GBU	Aroma Performance	Account Plan	
GBU	Aroma Ingredients	Case	
Visibility	Shared	Contract	
Visit Report Status	Completed	WEGO ID	
Visit Report Type		GBU Customer Classification	

Unread 1-46 of 46

Sandbox: ACCOUNT TEST - Visit Report - 2018-01-08 - (Internal Report - Notification_com... - Account... 10:25 am

Activity History

Log a Call | Mail Merge | Send an Email | View All

Action	Subject	Name	Task/Event Record Type	Task Due Date	Status	Status	Assigned To
Edit Del	Email: ACCOUNT TEST - Visit Report - 2018-01-08 - (Internal Report - Notification_completed)	JDS Test	Other	8/01/2018	Completed		Lella RADJAH

7

Finally, David *records* the **Visit Report share with Customer** that will be shared with the customer afterwards.

Visit Report (Shared with Customer)

Visit Report shared with Customer



Review the price

8

That's it! David has created his VR in Salesforce. Well done !

For **GBU Silica** only, a notification is automatically triggered to the users in the Visit Report Team and in Email Mapping Rules matching the Visit Report criterias when a Visit Report status is set to Completed (plus the owner in CC).

Visit Report
Link contract

+ Follow Send Report Internally Send Report to Customer Edit Close

Account / Country: TEST LEILA / Argentina Contact: Anne GILLES GBU / BU: Aroma Performance / Aroma Ingredients Date of the Visit: 12/10/2018 Visit Report Status: Completed Visibility: Shared

Chatter Details Business Service Competitive Insights Related

▼ Main Information

Subject	Link contract	Account	TEST LEILA
Date of the Visit	12/10/2018	Contact	Anne GILLES
GBU	Aroma Performance	GBU Customer Classification	GBU Customer Classification not defined for this Account
BU	Aroma Ingredients	Visit Report Status	Completed
Visibility	Shared	Visit Type	
Owner	Leila RADJAH	Topics Discussed	

RELATED CONTACT

RELATED CONTACT LIST (1)

NAME	DPT	FUNCTION	ROLE
Anne GILLES	Production	Assistant	Participant

VISIT REPORT TEAM

+ Add Default Team +

TEAM MEMBER LIST (1)

NAME	ROLE
Leila RADJAH	Participant

Optional Visit Report Information

If a Visit Report is created on an Account I am following, every time a new Visit Report is created on this Account I will be notified inside my Chatter feed.

Account
AALCHEM

Hide Feed Click to add topic: ?

Post File Link More

Write something...

Share

Following

Followers Show All (1)

Yazan Abbassi

A new Visit Report has been created on an Account you are following.

New Visit Report
/a179E0000000ELjQAM

Comment Like Today at 11:54

You can create an opportunity directly from your Visit Report.

Go in the recommendation component and Click on the button "+", choose opportunity and then creation process begins

CUSTOMER VISIT

+ Schedule Visit

No Visit scheduled in the future

BUSINESS

+ ▼

SERVICE

+ ▼

Opportunities

1 Account

0 Linked

Sample Req.

Quotes

2 Account

0 Linked

0

Complaints

0

VOC

Customer Req.

0

0

You can also link your Visit Report to an existing opportunity by going in the tab Business and clicking on "New" button.

Using the Opportunity lookup, search the opportunity you want to link to your Visit Report

Visit Report

Link contract

+ Follow

Send Report Internat

Account / Country

TEST LEILA / Argentina

Contact

Anne GILLES

Chatter

Details

Business

Products (0)

Opportunity Links (0)

Quote Links (0)

New Link Opportunity VisitReport

Information

Link Name

* Visit Report

Link contract

* Opportunity

Search Opportunities...

Cancel

Save & New

Save

When a GBU classification is maintained on the account GBU Customer Segmentation (Ship to/Sold to and corporate group), the information will be filled automatically on the Visit Report

GBU Customer Segmentation : IGBU-208275

Related

Details

Information (managed by Sales Rep)

Account

MATHESON TRI GAS

GBU Account Sub-Type

End-User

GBU

Technology Solutions

Account Information

General Account Information

Information (managed by GBU Commercial Excellence)

GBU Customer Classification

GBU Account Type

Standard Account

System Information

Visit Report update (incl. adding products, contacts and users)

Associate a Product to the Visit Report

1 David opens the visit report for which he wants to associate a product discussed

Visit Report

New Product Presentation

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

Show Feed

Back to List: Contacts

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)

Visit Report Detail

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

Information

Owner

Amoud Denewet (Change)

Account

BAYER CROPSCIENCE

Subject

New Product Presentation

Opportunity

Date of the Visit

03/03/2016

Contact

Thomas O'Malley

GBU

Periodides

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

2 He hoo
vers the Pro
duct link and clicks
on New
Associated
Product.

In order to
be able to
add/edit a
product, the
current user
needs to be
part of the V
isit Report
Team.

Otherwise
the
following
error will be
displayed: "
You need to
be part of
the Visit
Report
Team to be
able to add
or edit a
product."

Visit Report
New Product Presentation

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

Show Feed

Back to List: Contacts

Competitive Insights (0) | Cross-BU Leads (0) | Customer Contacts (1) | Solvey Contacts (1) | Open Activities (0) | Opportunities (0) | Products (0) | Activity History (0) | Visit Report History (0)

Products

New Associated Products

No records to display

Owner: Amund Denevet (Change)

Subject: New Product Presentation

Date of the Visit: 03/03/2016

GBU: Peroides

BU: shared

Visit Report Status: Drafted

Account: BAYER CROPSCIENCE

Opportunity: Thomas O'Malley

Activity: View Activity

Account Plan: Case

WEGO ID: 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 Once
in the
Associate
Product
screen, he c
licks on the
look icon to
search the p
roduct in
the system.
He can choi
ce between
a product
(level 4) or
a material
(level 5)

Associated Products Edit

New Associated Products

Help for this Page

Associated Products Edit

Save Save & New Cancel

Information

Product (level4)

Material (level 5)

Visit Report: solids

Save Save & New Cancel

4 In the
new search
windows,
David selects
the product
discussed

Lookup

Search... Go!

Filter by: --None-- Filter by: --None--

You can use "*" as a wildcard next to other characters to improve your search results.

Search Results

Product Name	Product Code	Product Description	Product Family
AA Product not known yet		AA Product not known yet	test
AA Product to be developed		AA Product to be developed	test
Dumms layer			test
H2O2 Distilled grades	180		
H2O2 DS 35	21-29840		
H2O2 DS 35	000000000000049375		

Look!
In the
new
window

, you can use filters to limit the results. Filter on the GBU, on the Product family, etc. are available.

5 David has selected the product in the search window. He now saves his relationship by clicking on **Save**.

The screenshot shows a software window titled "Associated Products Edit" with a subtitle "New Associated Products". In the top right corner, there is a link "Help for this Page" with a question mark icon. Below the title bar, there is a section labeled "Associated Products Edit" containing three buttons: "Save", "Save & New", and "Cancel". The "Save" button is highlighted with a red rectangular box. Below this is an "Information" section with a red icon and the text "= Required Information". This section contains two rows: "Product (level4)" with the value "(RR) METHYL DUPHOS" and a search icon, and "Material (level 5)" with an empty field and a search icon. To the right of these fields are the labels "Visit Report" and "aw Product Presentation" with a search icon. At the bottom of the dialog, there are three buttons: "Save", "Save & New", and "Cancel". A red callout bubble points from the "Save" button in the top bar to the "Save & New" section.

Save & New:

If you need to associate multiple products at once, you can use the "Search & New" functionality and quickly associate an additional product



Users can record either a product (level 4) or a material (level 5) depending on the situation. That's flexible!



Product name displayed when the V is it Report will be sent is only the level 4 product name, even if a product attribute

vel
5
is
s
el
e
ct
e
d.

6 Great!
David has
associated
the product
to the VR.

Visit Report
New Product Presentation

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

Show Feed

Back to List: Contacts

Competitive Insights | Cross BU Leads | Customer Contacts | Sales Contacts | Open Activities | Opportunities | Products | Activity History | Visit Report History

Products

Action	Associated Products Name	Material (level 5)	Product (level 4)	Level 3	Level 2	Level 1
Edit Del	SP-0128		IBS METHYL OUPHOS		PHOSPHORUS	Novicare

Subject: New Product Presentation
Date of the Visit: 03/03/2016
GBU: Peroides
BU:
Visibility: Shared
Visit Report Status: Drafted

Opportunity:
Contact: Thomas O'Malley
Activity: View Activity
Account Plan:
Case:
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

Relate existing Quotes or create new one related to the Visit Report

It is now
possible to
relate existi
ng Quotes
to a Visit
Report and
/or create
new
Quotes
that will be
related to
the Visit
Report
directly
from the
record itself.

This is
done done
from the
Quote
related list
on the Visit
Report
record.

Visit Report
Eo in IGepal F 40

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

Show Feed

Back to List: Visit Reports

Customer Contacts | Products | Opportunity Links | Quote Links | Visit Report Team | Cross BU Leads | Activity History | Open Activities | Visit Report History

Quote Links

New Link Quote VisitReport | New Quote

Quote Links Help

No records to display

Associate a Customer Contact to the Visit Report

1 David opens the visit report for which he wants to associate a Customer Contact

Visit Report
New Product Presentation

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

Show Feed

Back to List: Contacts

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)

Visit Report Detail

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

▼ Information

Owner	Amud Denewat (Change)	Account	BAYER CROPSCIENCE
Subject	New Product Presentation	Opportunity	
Date of the Visit	03/03/2016	Contact	Thomas O'Malley
GBU	Periodes	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

2 He hovers the Customer Contact link and... Look! John Smith is already linked! That's because David started his visit report from the visit. That was easy!

Visit Report
New Product Presentation

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

Back to List: Activities

Products (1) | Customer Contacts (1) | Solvay Contacts (1) | Open Activities (0) | Competitive Insights (0) | Cross BU Leads (0) | Opportunities (0) | Google Docs, Notes, & Attachments (0) |

Customer Contacts

New Customer Participant

Customer Contacts Help

Action	Contact Name	Account	Phone	Email	Role
☐ Edit Del	John Smith	BAYER CROPSCIENCE	+3345678231	chhavi.x.gupta@accenture.com	Participant

▼ Internal Report

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

Additional Notes /

End Use

▼ Visit Report (Shared with Customer)

Visit Report Dear John,

3 David will now associate Michael Baltani to the visit report. He clicks on New Customer Participant.

Visit Report
New Product Presentation

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

Back to List: Activities

Products (1) | Customer Contacts (1) | Solvay Contacts (1) | Open Activities (0) | Competitive Insights (0) | Cross BU Leads (0) | Opportunities (0) | Google Docs, Notes, & Attachments (0) |

Customer Contacts

New Customer Participant

Customer Contacts Help

Action	Contact Name	Account	Phone	Email	Role
☐ Edit Del	John Smith	BAYER CROPSCIENCE	+3345678231	chhavi.x.gupta@accenture.com	Participant

▼ Internal Report

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

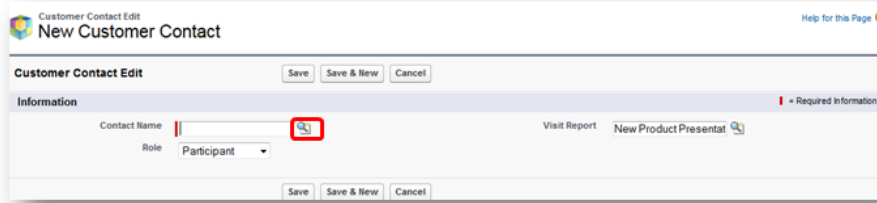
Additional Notes /

End Use

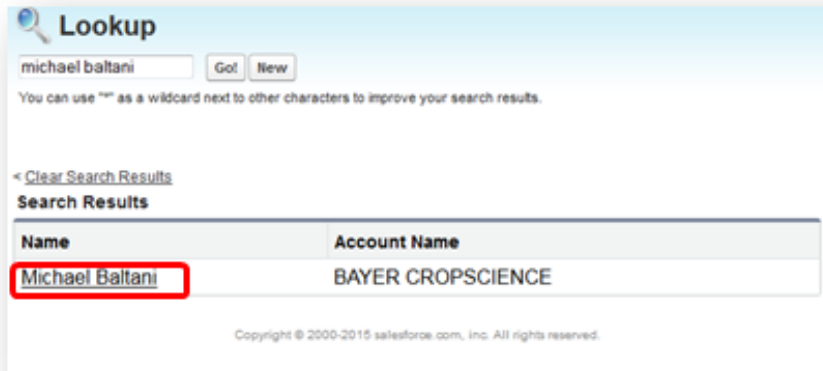
▼ Visit Report (Shared with Customer)

Visit Report Dear John,

4 As he did for the Product, David uses the **look icon** to search the contact in the system.



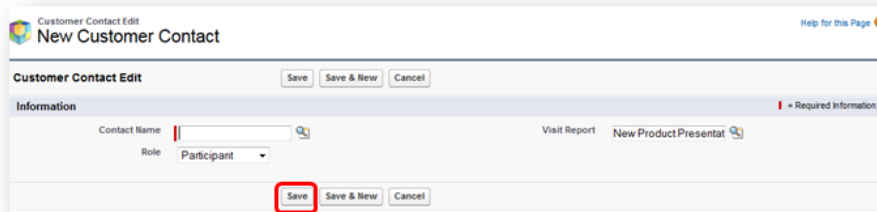
5 In the new search window, David searches for Michael Baltani and then selects the contact



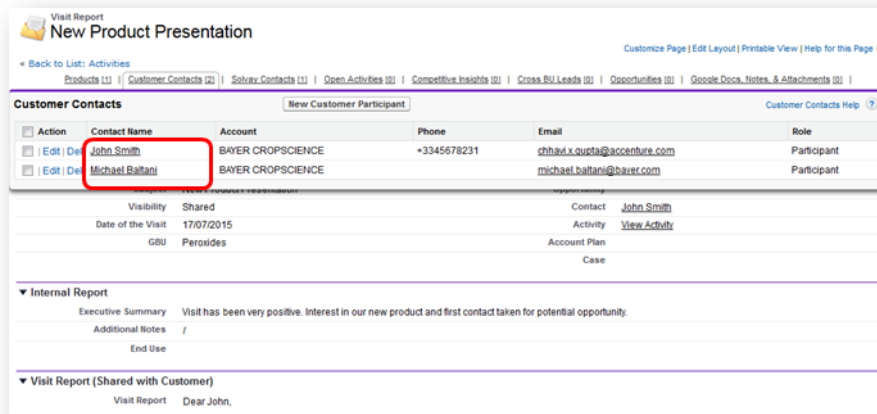
6 David has finished to select the Customer Contact in the search window. As information, he also can define Michael's role:

- Participants: it means Michael was participating to the meeting
- To be informed: in some case, David might want to define some contact to be informed of the visit report outcome.

7 He now saves his relationship by clicking on **Save**.



8 Fantastic! David has associated John and Michael to the visit report



Action	Contact Name	Account	Phone	Email	Role
Edit Delete	John Smith	BAYER CROPSCIENCE	+3345678231	john.smith@accenture.com	Participant
Edit Delete	Michael Baltani	BAYER CROPSCIENCE		michael.baltani@bayer.com	Participant

Associate a Solvay Contact to the Visit Report

1 David opens the visit report for which he wants to associate a Solvay Contact

Visit Report
New Product Presentation

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

Show Feed

Back to List: Contacts

Competitive Insights | Cross BU Leads | Customer Contacts | Solvay Contacts | Open Activities | Opportunities | Products | Activity History | Visit Report History | Google Docs, Notes, & Attachments

Visit Report Detail

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

Information

Owner: Amad Deneux (Change)

Subject: New Product Presentation

Date of the Visit: 03/03/2016

GBU: Peroxides

BU:

Visibility: Shared

Visit Report Status: Drafted

Account: BAYER CROPSCIENCE

Opportunity:

Contact: Thomas O'Malley

Activity: View Activity

Account Plan:

Case:

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

2 He hovers the Visit Report Team link and... Look! People are already linked! That's because David started his visit report from the visit, where he already invited them. That was easy!

Visit Report
New Product Presentation

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

Show Feed

Competitive Insights | Cross BU Leads | Customer Contacts | Visit Report Team | Open Activities | Products | Activity History | Visit Report History

Visit Report Team

New Visit Report Team | Add Default Team

Visit Report Team Help

Action	User	Role
[Edit] [Del]	Nicolas Commeaux	Participant
[Edit] [Del]	Françoise Coussy	Participant
[Edit] [Del]	Ricardo Dias	To Be Notified

GBU: Peroxides

BU:

Activity: View Activity

Account Plan:

3 David will now associate Pedro Pinto, his manager, to the visit report. He clicks on New Visit Report Team.

Visit Report
New Product Presentation

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

Show Feed

Competitive Insights | Cross BU Leads | Customer Contacts | Visit Report Team | Open Activities | Products | Activity History | Visit Report History

Visit Report Team

New Visit Report Team | Add Default Team

Visit Report Team Help

Action	User	Role
[Edit] [Del]	Nicolas Commeaux	Participant
[Edit] [Del]	Françoise Coussy	Participant
[Edit] [Del]	Ricardo Dias	To Be Notified

GBU: Peroxides

BU:

Activity: View Activity

Account Plan:

4 As he did for the Customer Contacts, David uses the look icon to search the contact in the system.

Solvay Contact Edit

Save | Save & New | Cancel

Information

User: [] [Look Icon]

Role: --None--

Visit Report: New Product Presentation [Look Icon]

Save | Save & New | Cancel

Required Information

5 In the new search window, David searches for Pedro Pinto and then selects the contact

The screenshot shows the 'Lookup' search interface in Salesforce. The search term 'Pedro' is entered in the search bar, and the 'Go!' button is visible. Below the search bar, there is a link to 'Clear Search Results'. The 'Search Results' section displays a table with two columns: 'Full Name' and 'Role'. The first row shows 'Pedro Pinto' under 'Full Name' and is highlighted with a red rectangle. The footer of the page indicates 'Copyright © 2000-2015 salesforce.com, inc. All rights reserved.'

6 David has finished to select the Solvay Contact in the search window. As information, he also can define Pedro's role:

- Participants: it means Pedro was participating to the meeting
- To be informed: in some case, David might want to define some colleagues to be informed of the visit report outcome.

7 He now saves his relationship by putting Pedro as **To be Notified** and clicks on **Save**.

The screenshot shows the 'New Solvay Contact' form. The 'User' field is set to 'Pedro Pinto' and the 'Role' dropdown is set to 'To Be Notified'. The 'Save' button is highlighted with a red rectangle. Other buttons visible are 'Save & New' and 'Cancel'.

8 Fantastic! David has associated Christian and Pedro to the visit report

The screenshot shows the 'Visit Report Team' table within the 'New Product Presentation' context. The table has columns for 'Action', 'User', and 'Role'. The following table represents the data shown in the screenshot:

Action	User	Role
[Edit] [Del]	Nicolas Commeaux	Participant
[Edit] [Del]	Françoise Cousy	Participant
[Edit] [Del]	Ricardo Dias	To Be Notified
[Edit] [Del]	Pedro Pinto	To Be Notified

The table is highlighted with a red rectangle. Below the table, there are tabs for 'BU' and 'Account Plan', and a 'Visibility' dropdown set to 'Shared'.

Attach a document to the Visit Report

1 David opens the visit report for which he wants to attach a document

Visit Report
New Product Presentation

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

Show Feed

Back to List: Contacts

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)

Visit Report Detail

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

Information

Owner	Amad Denev (Change)	Account	BAYER CROSCIENCE
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 potentiel 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

2 He hoo vers the Google Docs, Notes & Attachment link and clic ks on Attach File.

Visit Report
New Product Presentation

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

Show Feed

Back to List: Contacts

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

Google Docs, Notes, & Attachments

Add Google Doc | New Note | Attach File

Notes & Attachments Help

No records to display

Owner Amad Denev (Change) Account BAYER CROSCIENCE

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

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Files are now supported in addition to Attachments.

Pictures taken from a mobile device and added to the Visit Report using Salesforce1 can also be shared both internally and externally.



Don't use the Google Docs link as your custom email won't be able to read it.

3

David follow the steps defined at the screen to attach the file

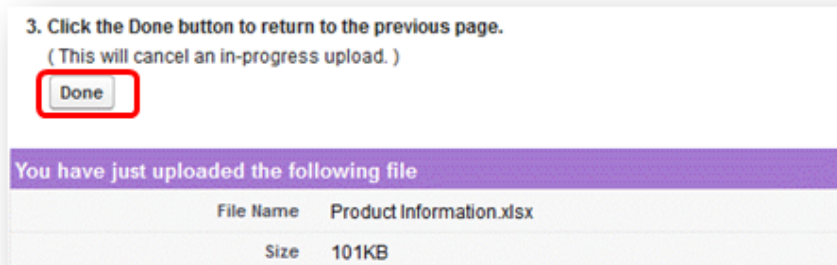
 **Attach File to Visit Report New Product Presentation**

1. Select the File
Type the path of the file or click the Browse button to find the file.
 Aucun fichier sélectionné.

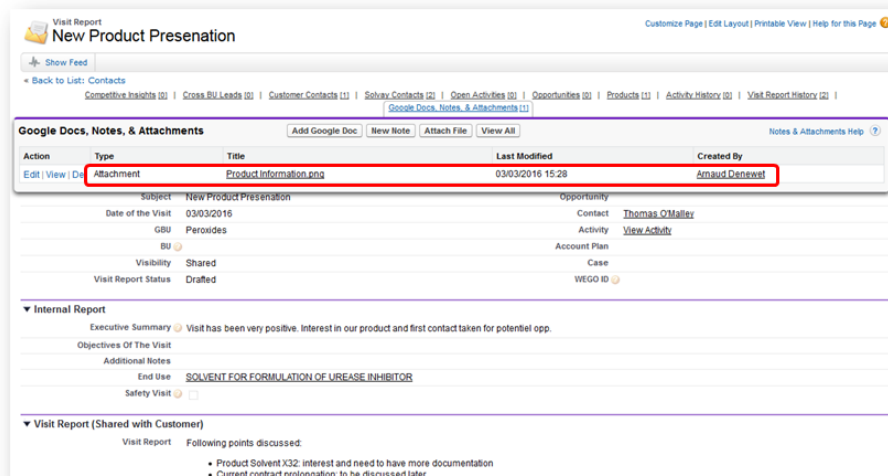
2. Click the "Attach File" button.
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)

3. Click the Done button to return to the previous page.
(This will cancel an in-progress upload.)

4 Once the file uploaded, he clicks on Done



5 Done! David has attached the product documentation on the VR



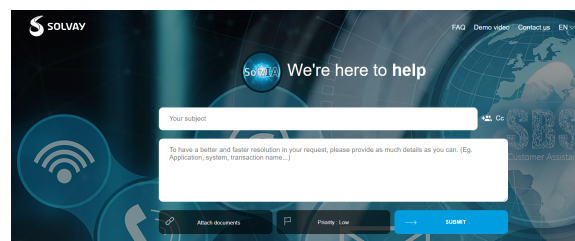
[Back to the top](#)

Related articles

- [Activity: Create a customer visit in Salesforce and from Google Calendar \(Lightning For Gmail Insight\)](#)
- [Visit Report: Send to the Customer](#)
- [Visit Report: Send internally](#)
- [Visit Report: Confidentiality management & Visit report wizard](#)

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