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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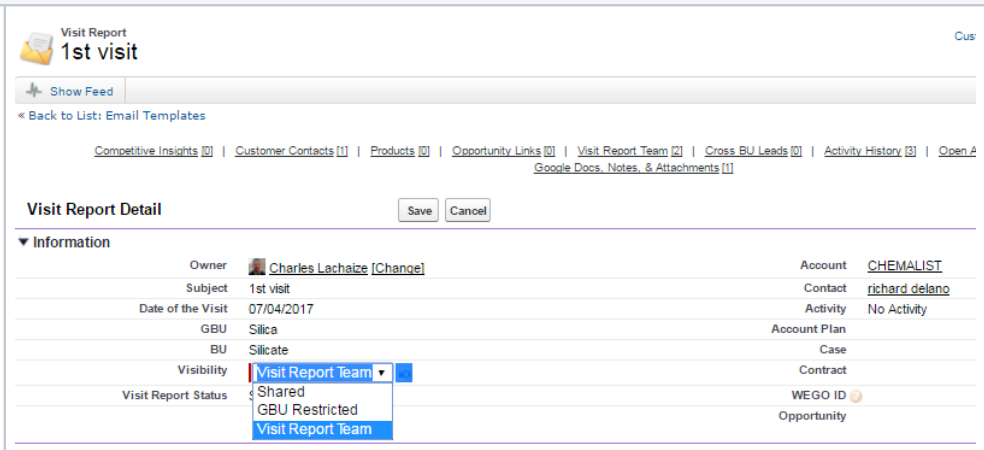
Step By Step

Confidentiality

A visit report can have different levels of confidentiality



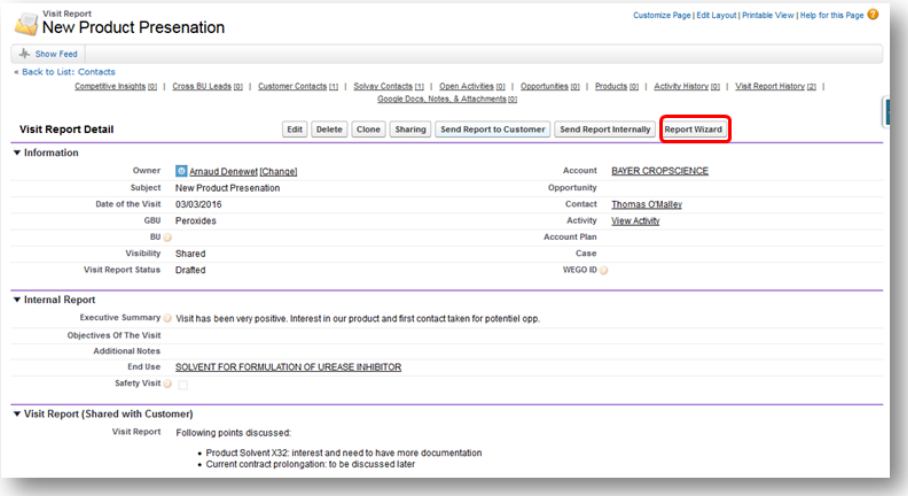
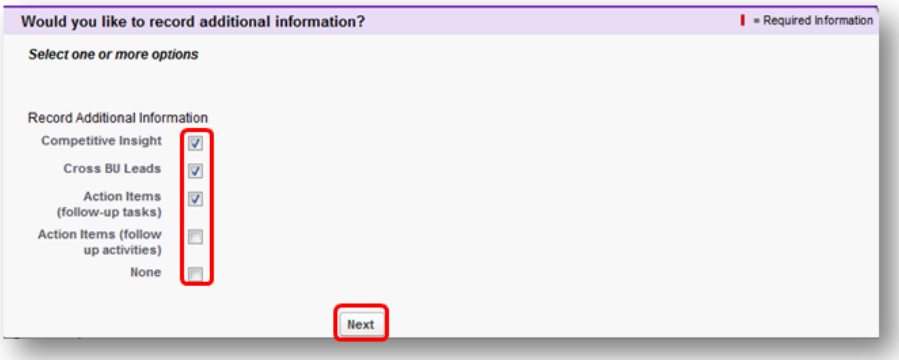
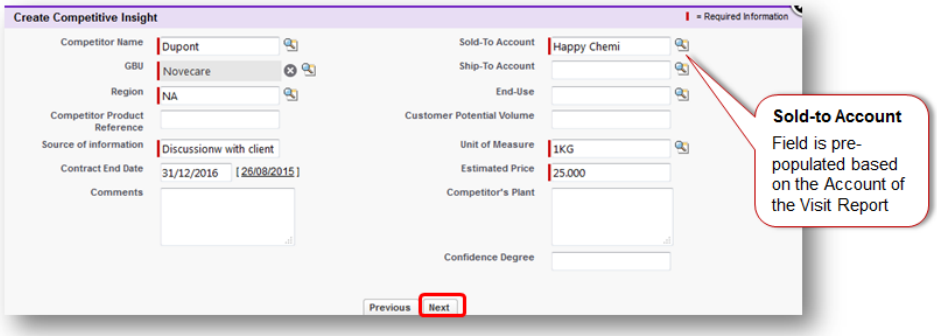
- **Shared**: All CRM users will have visibility on your Visit report

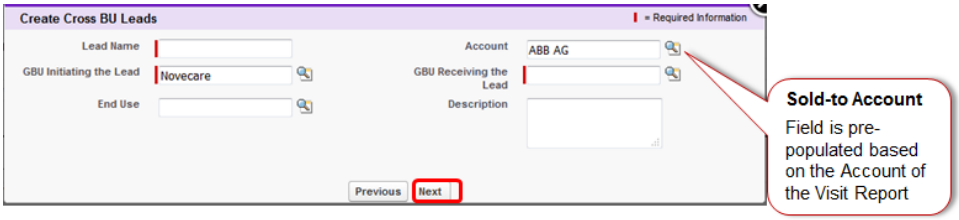
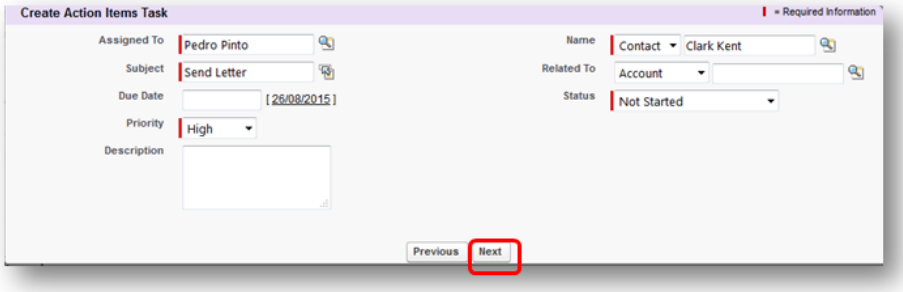
- **GBU Restricted**: Your visit report will be restricted to your GBUCRM users

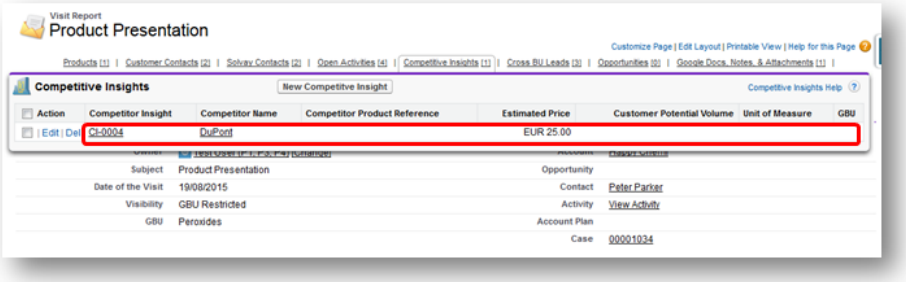
• **Visit Report Team**: Your visit report is limited to the "Solvay Contacts" identified in the visit report	

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 Report Wizard**	
3 David *selects* the **record** he wants to create and *clicks* on **Next**	
4 David is now on the Competitive Insight edit page where he *enters* the **needed information** and then *clicks* on **Next**	

5 David is now on the Cross BU Lead edit page where he *enters* the **needed information** and then *clicks* on **Next**	
6 David is now on the Task edit page where he *enters* the **needed information** and then *clicks* on **Next**.	

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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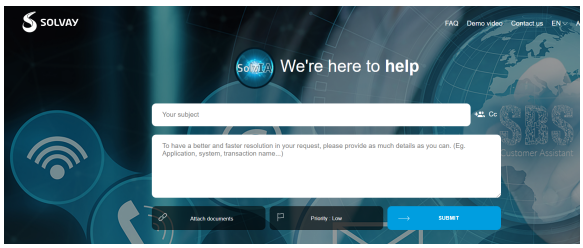
Related articles

- 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