

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

1st visit

Cus

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 GBU Restricted Visit Report Team	WEGO ID	
		Opportunity	

Account
Visit
Report
Confidentiality

• **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

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) | Google Docs, Notes, & Attachments (0)

Visit Report Detail

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

▼ Information

Owner	Arnaud Denewet (Change)	Account	AYER CROSCIENCE
Subject	New Product Presentation	Opportunity	
Date of the Visit	03/03/2016	Contact	Thomas O'Malley
GBU	Perodes	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	Novecare	Ship-To Account	
Region	NA	End-Use	
Competitor Product Reference		Customer Potential Volume	
Source of information	Discussionw 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

Lead Name

Account ABB AG

GBU Initiating the Lead Novecare

GBU Receiving the Lead

End Use

Description

Previous Next

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

Assigned To Pedro Pinto

Subject Send Letter

Due Date 26/08/2015

Priority High

Description

Name Contact Clark Kent

Related To Account

Status Not Started

Previous Next

7

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

Action	Competitor Insight	Competitor Name	Competitor Product Reference	Estimated Price	Customer Potential Volume	Unit of Measure	GBU
Edit Delete	Ct-0004	DuPont		EUR 25.00			

Subject	Product Presentation	Opportunity	
Date of the Visit	19/08/2015	Contact	Peter Parker
Visibility	GBU Restricted	Activity	View Activity
GBU	Perosides	Account Plan	
		Case	00001034

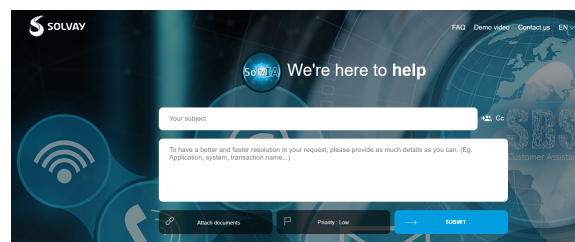
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Related articles

- [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