

P18. Visit Report Management

Presentation

As a Sales Rep is supposed to develop a close relationship with its customers, he needs to visit them often. Logging Visit Report in Salesforce allows him to keep track of the outcomes of those visits and to share it both with its management and his customer.

Training Materials

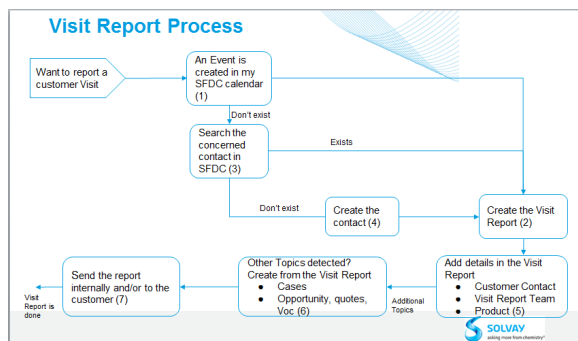
- [Training presentation](#)
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Definitions & Objectives

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.

Learn more by using the **Interactive guides**

Process Overview

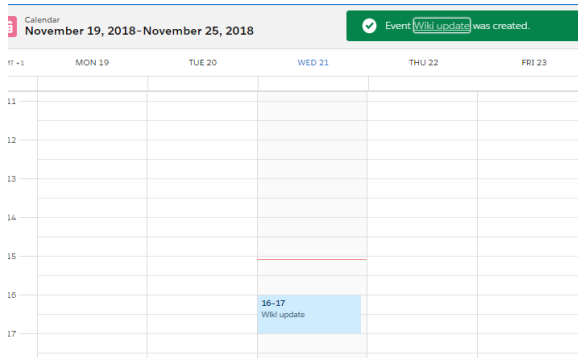


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Types Visit Reports

A Visit Report can be created created from :

1- An Event Customer Visit :



Wiki Update Edit Delete Visit Reservation Report Clickwork Tool Record

Account: TEST LEILA | Start: 21/11/2018 16:00 | End: 21/11/2018 17:00 | Contact Name: Josiane Peytraud

Details Related

Calendar Details

Account ID	TEST LEILA	Account ID	TEST LEILA
Subject	Josiane Peytraud	Contact Name	Josiane Peytraud
Wiki Update		Wiki Update	
Start	21/11/2018 16:00	End	21/11/2018 17:00
End	21/11/2018 17:00	Wiki Update	
Wiki Update		Wiki Update	
Location		Status	

2- A Contact :

Contact TEST LEILA

Account Name: TEST LEILA | Phone: 0437257645 | Email: josiane.peytraud@solvay.com | Job Department: General Management | Function: Agent

Visit Reports (6) New

SUBJECT	DATE OF THE VISIT	ACCOUNT	OWNER FIRST NAME
JRA 1846	16/11/2018	TEST LEILA	Leila
test jra 1170	14/11/2018	TEST LEILA	Leila
Copy of test jra 1170	14/11/2018	TEST LEILA	Leila
Copy of Copy of test jra 1170 s...	14/11/2018	TEST LEILA	Leila
Copy of Copy of Copy of test jra...	14/11/2018	TEST LEILA	Leila
test notification	12/11/2018	TEST LEILA	Leila

3- An Account :

Account TEST LEILA

Record Type: Non SAP Customer | Corporate Group: CHEVRON | Partner Type: Prospect | Partner Sub-Type: Sold-to & Ship-to | Country / City: Argentina / BUENOS AIRES | Account Name (loc):

Visit Reports (6+) New

SUBJECT	DATE OF THE VISIT	CONTACT	OWNER FIRST NAME
jra 1793	20/11/2018	Ricardo Diaz	Leila
JRA 1846	16/11/2018	Josiane Peytraud	Leila
test jra 1170	14/11/2018	Josiane Peytraud	Leila

4- A Contract :

Contract C-000000265

Record Type: Sales of goods / Services | BU: Anoma Ingredients | Account Name: BOLDEN HARJAVALTA OY | Annual value: | Contract end date: 30/09/2018 | Contract:

Visit Reports (0) New

5- A Complaint :

Open Complaint 00069178 + Follow Edit Send Acknowledgement Mail

Activity: Email Re. Invitation Technical... Completed View All

Case History (2)

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
22/10/2018 17:27	Created	Nuo Yang		
22/10/2018 17:27	Case Record Type	Nuo Yang	Complaint	Open Complaint

Visit Reports (0) New

Case Comments (0) New

6- From Scratch :

