

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.

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.

Training Materials

- [Training presentation](#)
- [Tutorial videos](#)

Learn more by using the **Interactive guides**

Process Overview

```
graph TD
    A[Want to report a customer Visit] --> B[An Event is created in my SFDC calendar (1)]
    B --> C{Search the concerned contact in SFDC (3)}
    C -- "Don't exist" --> D[Create the contact (4)]
    C -- "Exists" --> E[Create the Visit Report (2)]
    D --> E
    E --> F[Add details in the Visit Report  
• Customer Contact  
• Visit Report Team  
• Product (5)]
    F --> G[Other Topics detected? Create from the Visit Report  
• Cases  
• Opportunity, quotes, Vsc (6)]
    G --> H[Send the report internally and/or to the customer (7)]
    H --> I[Visit Report is done]
```

Interactive Guides

- [Account Navigation](#)
- [Create Account](#)
- [Create Contact & Team Member](#)

Opportunity

- [Opportunity Navigation](#)
- [Create Opportunity](#)

Quote

- [Create Quote + Line Item & Generate PDF](#)

Visit Report

- [Create Visit Report + Add Contact & Team Member](#)

Cases

- [Create Complaint](#)
- [Create Sample](#)
- [Create Customer Request](#)
- [Create Customer Specific Requirement](#)

Lead

- [Lead Scoring & Navigation](#)

Types Visit Reports

A Visit Report can be created created from :

1- An Event Customer Visit :

The screenshot shows a Salesforce calendar for the week of November 19, 2018, to November 25, 2018. A green notification bar at the top states "Event 'Wiki update' was created." The calendar grid shows a blue event titled "16-17 Wiki update" scheduled for Wednesday, November 14, 2018, from 11:00 AM to 12:00 PM. The event is highlighted in blue.

2- A Contact :

3- An Account :

4- A Contract :

5- A Complaint :

6- From Scratch :

