# FD - P18. Visit Report Management



## 1. Functional Process

### Process Overview

A visit report captures the outcomes 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.

## Definition & use cases

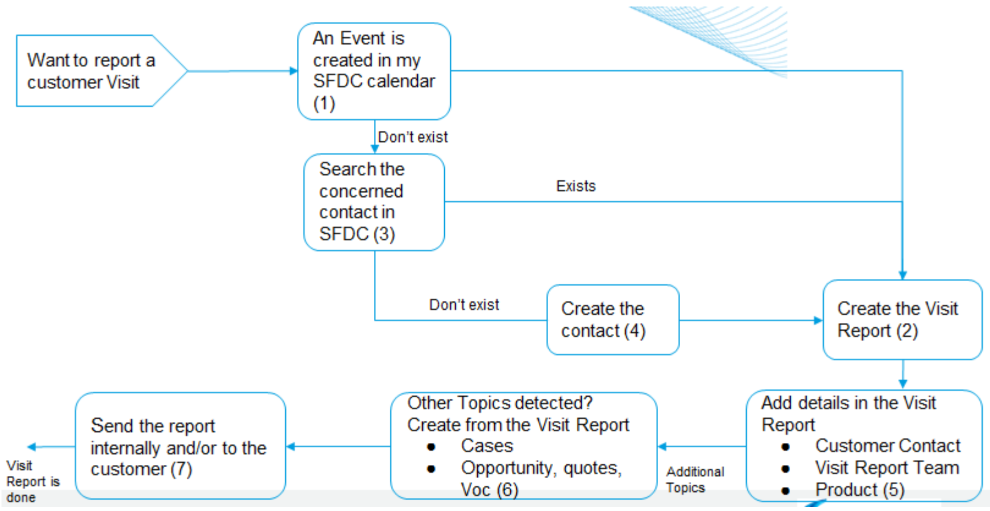
### Definition

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.

### Use cases

- A Sales Rep just visited a customer and wants to keep track of the outcomes and share it internally with its management and externally with his customer.

#### Visit Report creation




**A Visit Report can be created either created from an Event Customer Visit (see details below) or from a Contact or from scratch (see details below).**

# 2. Data Model & security

## Main object

1. **Visit Report object** is centralizing the information on the Visit Report.
2. **Visit Report object** is composed of:
    a. Main Information: this section contains the general information like the Subject, the Date of the Visit, the GBU/BU, the Status, the Topics Discussed, the Visibility and potential links with related objects (Account, Contact, Opportunity, Account Plan...)
    b. Internal Report (Shared Internally): this section includes the executive summary, the objectives of the visit (copied from the visit), the Internal Visit Report and the End-Use [R-0224] are listed in this section. An additional checkbox field "Safety Visit" allows the user to inform that the visit report is related to a safety visit, and attachments as well as additional information are then required.
    c. Visit Report (Shared with Customer): this section includes the field "Visit Report shared with Customer", field that will be used for sharing visit report with the customer through an email

## Related Objects

- **Competitive Insights:** displays all Competitive Insights linked with this Visit Report
- **Related Contacts:** displays all Contacts associated with this Visit Report (on the customer side)
    - Those Contacts can be contacts who participated to the visit, or contact to be notified. Contact to be notified are contacts not present in the visit, but who will need to receive the email with the visit report.
- **Products:** displays all Products (level 4 or level 5) associated with this Visit Report
- **Opportunity Links:** displays all Opportunities associated with this Visit Report and allows to relate existing to this Visit Report
- **Visit Report Team:** displays all Users associated with this Visit Report (on Solvay's side)
    - Those users might be participants of the visit or users to be informed (a sales manager, a product manager, key account manager)
- **Cross BU lead**: displays all Cross BU Leads associated with this Visit Report
- **Activity History**: display all Activities (Tasks, Events) associated with this Visit Report
- **Open Activities**: allow to log activities (Tasks, Events)
- **Visit Report History**: displays fields updates with history tracking
- **Quotes**: create a new Quote related to the Visit Report or relate existing ones
- **Google Docs, Notes & Attachments (and Files)**: allow to attach documents to the Visit Report, also from the camera of a mobile device using Salesforce1

## Visit Report security model

| | |
|---|---|
| **Who can create?** | Any sales can create a visit report and link it to any account he has visibility on |

| | |
|---|---|
| **Who can see?** | 3 rules have been set up based on a field called “Visibility”:<br><br>1) If **Visibility** = “***Shared***” any user can see the visit report,<br><br>2) If **Visibility** = “***GBU Restricted***” only users having the same GBU in their user details than the GBU defined in the visit report can see the visit report. Users above these users in the role hierarchy inherit the rights. Users in the Visit Report Team can also see the Visit Report,<br><br>3) If **Visibility** = “***Visit Report Team restricted***” only the Owner and the users in the “Visit Report Team” related lists can see the visit report. Users above these users in the role hierarchy inherit the rights.<br><br>By default, a visit report will be created in “***Shared***” visibility mode. For confidential accounts, the visit report owner will manage the visibility manually.<br><br>Depending on their content, to fit European Anti-Trust Laws, some Visit Report cannot be set as “***Shared***” and will automatically switch to “***GBU Restricted***”. Criteria leading to this behavior are based on Keywords and Products that can be configured for each GBU.<br><br>To be able to add/edit a Product, the current user needs to be part of Visit Report Team or the following error friendly error will be displayed: "You need to be part of the Visit Report Team to be able to add or edit a product." |
| **Who can update?** | The Visit Report Owner, the users above him in the role hierarchy, the system administrator and finally the Users added in the Visit Report Team related list (and the Users above them in the Role Hierarchy) |
| **Who can delete?** | Only the System Administrators can delete a visit report |

# 3. Opportunity custom buttons & features

## Visit Report buttons

### Visit Report Creation from a Contact or from scratch

Any user can create a visit report in Salesforce.

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

### Visit Report Creation from an Event Customer Visit

It is possible to create a Visit Report from an Event Customer Visit by clicking on the button Generate Visit Report on the event.

The Event Customer Visit can be created directly in Salesforce, or coming from an integration with Google (see details below).

In this case, many data are copied in the Visit Report:

| | |
|---|---|
| Visit Report | Event |
| Subject | Subject |
| Date of Visit | Start Date |
| Objectives of the Visit | Objectives |
| Customer Contacts | Every contacts in the “Contact Name” Field |
| Visit Report Team<br>:<br>• Participant<br>• To be notified<br>• Account Manager restricted | All the internal Attendees of the Event :<br>• Attendees who did Accept<br>• Other Attendees (Decline or no answer)<br>• If user belongs to restricted group, this user should get access to GBU related Opportunities, Visit Reports and Complaints |

If the Visit Report is not created from an Event, Date of the visit, Contact, Objective of the Visit are blank and must be filled in manually.

If the Visit Report is created from an Opportunity, the Account of the Opportunity is automatically copied within the Visit Report.

# 4. Specific rules & automation

### Default visibility for AROMA Visit Reports

To manage Anti-Trust confidentiality the Default Visibility for some Visit Reports need to be automatically changed from “Shared” to “GBU Restricted”.

Text fields to consider are :

- **Subject**
- **Executive Summary**
- **Objectives Of The Visit**
- **Additional Notes**
- **Visit Report**

**This is managed using a custom setting in Salesforce :**

The application of this rule is to manage Anti-Trust confidentiality between AROMA and PEROXIDES the Default Visibility for the Visit Reports created by AROMA can be automatically changed based on the following rule:

**IF GBU** = "Aroma Performance"
**AND Visibility** = "Shared"
**AND**
**(Product** IN a list of *products Level 4*

**OR**

**Text fields contains** a *keyword*)
**THEN Visibility** = "GBU Restricted"

With those criterias :

**Product list:**

CATECHOL FLAKES
CATECHOL MOLTEN
CATECHOL XP FLAKES
HYDROQUINONE EXTRA PURE
HYDROQUINONE PREMIUM
HYDROQUINONE PREMIUM FLAKES
PARAMETHOXYPHENOL FLAKES
PARAMETHOXYPHENOL MOLTEN

**Keyword list:**

CATECHOL

HYDROQUINONE

PARAMETHOXYPHENOL

PMP

HQ

PC

MEHQ

### *Mandatory fields for Visit Report creation*

The following fields are mandatory at Visit Report creation:

- Owner (by default the creator)
- Subject
- Visibility
- Date of the Visit
- Contact
- Executive Summary

The GBU field is not mandatory when creating a Visit Report. If a User saves a Visit Report and if he has a GBU and/or BU on his Profile (in Additional SF Access Settings) they will be automatically filled in after the save.

If a User does not have any GBU on his Profile (MBU, SBS, Corporate S&M), its means that he can create a Visit Report without any specific GBU.

In this case, the Visit Report will concern all GBUs and the sharing (Visibility field) cannot be set to GBU Restricted.

## Visit Report Attachments

In the visit report, sales reps have the possibility to upload one or multiple attachments. These attachments are available in the email template, allowing the user to select one or multiple attachments to be included in the email sent.

The selection is made through checkboxes, which ease up the user experience.

## Visit Report Preparation

1- Before meeting his customer, the Sales Rep can go to its Account to prepare the Visit by clicking on Visit Preparation Report button.

Sales Rep can access to a summary view for a specific corporate group / account to prepare customer visit :

- Account summary: volume, sales, CM
- Open Orders
- Order History

- Opportunities
- Samples ordered
- Customer Request
- Open Complaints
- Visit Reports – executive summary (last 3 visit reports)

For further details on this feature, please refer to the Reporting Functional Design.

2- If an event is created before the visit the sales rep can have access to the button Visit Preparation Report from the event.

## Send Report to Customer button

Please note that to be able to send the Report Internally, the User need to be part of the Visit Report Team or he will get an error message.

Product name displayed is only the level 4 product name, even if a product at level 5 is selected in the Products related list.

The email automatically populates the names of users and contacts linked to the visit as follow:

- To: Customer Contact(s)
- CC: Visit Report Team Contact(s)

This template will be proposed in multiple languages and adequate language will be selected based on the main contact language. The user has still the possibility to select another Template.

This list of templates by languages is ordered alphabetically, with the default language, based on the contact language, as first choice.

Before submission, the user has still the possibility to:

- Manually add additional email addresses
- Edit the text filled in automatically in the template email
- Add/remove attachments using the checkboxes

**Send Report Internally button**

Please note that to be able to send the Report Internally, the User need to be part of the Visit Report Team or he will get an error message.

Products name displayed is only the level 4 product name, even if a product at level 5 is selected in the Products related list.

The email automatically populates the names of users linked to the visit as follow:

- To: Visit Report Team Contact(s)

This template will be proposed in English. The template is unique and will be selected automatically. Regarding the actions, only the open tasks (the ones planned in the future) will be listed.

Before submission, the user has still the possibility to:

- Manually add additional email addresses
- Edit the text filled in automatically in the template email
- Add/remove attachments using the checkboxes

To be consistent with what exists when generating the Quote PDF document, the displayed Product(s) Name(s) is now using the **Product Translated Name** if any (according to the email template language selected by the user).

Otherwise the **Product Commercial Name** will be used if any.

Otherwise the **Product Name** will be used.

When a Visit Report is Sent, an Internal Distribution list based on different criterias (Region Corporate Group, Country, BU, product family level 3) is automatically added to the email sent. These added email addresses are visible (not removable) in the **Additional CC** field displayed on the “Send Visit Report Internally” form.

Criterias to consider corresponding to each columns are :

- **GBU** ==> VisitReport.GBU
- **BU** ==> VisitReport.BU
- **Region** ==> VisitReport.Account.Region
- **Corporate group** ==> VisitReport.Account.CorporateGroup
- **Country** ==> VisitReport.Account.Country
- **Product Level 3** ==> VisitReport.Product.Level3 (more than 1 product in a Visit Report and for each, products set in level 4 and level 5 fields should be taken in consideration)

These Rules are GBU Specific and it can be configured in the **Email Mapping Rules** tab :

For each rule, a line must be created with all the Criteria knowing that :

- All set Criteria must fit the Visit Report to trigger the Rule. For example, Line 6 in the Screenshot will only Trigger if the BU is Aroma Ingredients AND the Product belongs to the VANIFOLIA Level3.
- The recipient is not necessarily a Salesforce User as the configuration requests an email

As Email Mapping Rules are used when the Visit Report is sent internally, email can only be Solvay people (using Solvay.com domain).

### Visit Report Email Signature

User has the possibility to define his/her email signature on his/her settings in Salesforce. By doing this, the signature will be automatically copied in the visit report email templates.

### Visit Report External Recipients

When sending the Visit Report Internally, if some recipients are not internal Solvay people (based on email address domain), the user is warned.

This is only a warning, he can remove cancel and remove or correct the recipient or send it anyway.

### Visit Report History Tracking

The History Tracking has been enabled in order to follow the fields updated. Any update to the following fields will be tracked:

- Subject
- Visibility
- Account
- Contact
- Executive Summary
- Internal Visit Report
- Visit Report Status
- Visit Report shared with Customer

### Sent emails tracking feature

Each email sent internally or to the customer is tracked under the related list “Activity History”. Any user knows like this the communication sent to the customer.

### Integration between Gmail and Salesforce (Lightning For Gmail)

For more information see the user documentation

**Main features:**

- Sync Contacts you own in Salesforce and the one you follow on Chatter in Gmail Contacts in folder "Salesforce Sync" *(Salesforce is the reference data)*
- Create a new contact in Gmail from email sender information and relate it to an existing account or create a new one
- Sync user selected Google Calendar Meetings as Events in Salesforce *(Google is the reference data)*

  Please note that :

    - for Gmail email synchronisation, emails are created as tasks in Salesforce with the recordtype Other,
    - for Google Calendar synchronisation, meetings are created as Event in Salesforce with the recordtype Customer Visit

- Add user-selected emails as Tasks in Salesforce
- See and Search Salesforce records directly in Gmail

**Non-supported features:**
No automatic email sync, you have to choose the ones you want to sync with Salesforce
When you create a contact, only the Name and Email information are prefilled, no other information is pulled from the signature like address and phone number.

### Customer Contact Link Creation

Customer Contact link creation can be done by any sales having edit right on the visit report.

### Visit Report Team Creation

Visit Report Team creation can be done by any sales having edit right on the visit report.

### Default Team

A button “Add default team” is present on the Visit Report Team related list to allow the user to quickly add users in the Team.

When the user clicks on the button, the users from his own Default Account Team (defined on his profile) are copied into the Visit Report Team.

### Event deletion

When a meeting (Customer Visit Event or Other event) is cancelled (deleted by a user) a cancelation email is sent to the invitees to warn them.

The email is only sent to the people who have accepted the invitation and the email triggers only if the event due date is not due yet.

### End Use filtered by GBU

In order to avoid mistakes, End use / Application field selection in Visit Report should be filtered by GBU as it is done in opportunity or Customer GBU segmentation.

### Automatically notify users when a Visit Report is completed

Silica users are not using the Visit Report send internally and externally features, or when they use the send externally (to the customer), they often forgot to sent it also internally.

Email Mapping Rules on Visit Report are currently only used for Aroma and Silica.

For **GBU Silica only** automatically trigger a notification 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)

- Use the same template as for the Send internally feature
- Keep track of the email sending as a closed task (same as Send internally feature)
- Be able to select for which GBUs the rules is applying without modifying the code

**Silica Rules**

| VR status | Notification send |
|---|---|
| Change to completed after creation | to VR Team + CC |
| Created directly as completed | **nobody** to avoid duplicate notification for the cc (e-mail mapping rule is runing when the VR is created directly with the status completed but the owner have to add the VR team in second step). **When the sales rep will add the VR team the notification to VR Team + cc have to be send.** |

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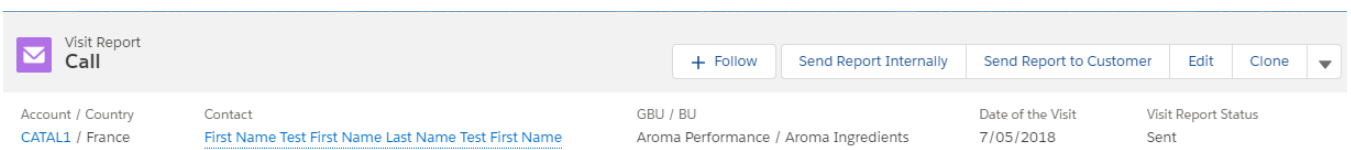
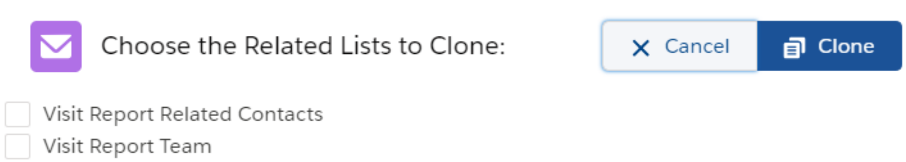
**Lightning**

NEW COMPACT LAYOUT & LAYOUT

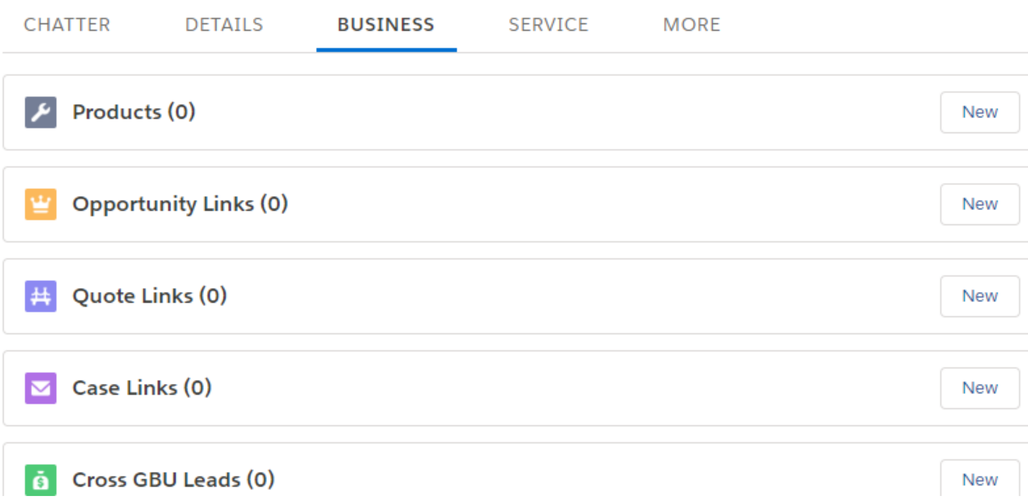



**Clone button** : We can clone the visit reports, with/without the Related Contacts and/or Team.




When we clone the visit report, we have the information that we are in clone mode in the subject : "Copy of 'X' “

Business tab : start per the object product




**Link opportunity, quote, case or cross GBU Leads by clicking on the button New. A list will appear with a hypertext link to display the objects linked.**

//COMPONENT

blocked URL

1. Possibility to create from the component by clicking on **+** an opportunity, quotes, Sample Request, complaints, Customer Request or VOC
2. Number above opportunities account and quotes accounts means **number of open opportunities and quotes for my customer for my GBU**. By clicking on the figures we will have the list and the possibility to display its.
3. Number above Linked opportunties, linked quotes are the **number of quotes and opportunities that the owner linked in the visit report in the tab business**. y clicking on the figures we will have the list and the possibility to display its.
4. Number above complaints, Customer Req, Sample Req or VOc means **number of complaints, Customer Req, Sample Req or VOC created on my customer.**
5. If the owner click on **+ Schedule Visit** he/she will schedule the next customer visit what **will create an event on the owner calendar**

### Visit Report Team:

The component replace the related list. It displays the visit report members and allow to manage the product (add, edit,remove).

### Related Contacts:

The component replace the related list. It allows to link several contacts to the same visit report.

Home page

Rule in my visit report section : 10 oldest items

event = Customer Visit  without visit report with a date >01/02/2018
visit report with status draft (whatever if they are created or not from an event)

### Validation Rule:

Create new validation rule for END use

SLV_End_Use_Required

IF($Permission.Bypass_Validation_Rules, FALSE,( AND(ISBLANK(SLV_End_Use__c),TEXT(SLV5_1_VR_GBU__c)= $Label.SLV3_Peroxides)))

Modify the Validation rule SVL5_BU_Required_Exceptions to include Aroma performance

**Last modifications :**

| User | Last Update |
| --- | --- |
| Emilien GUICHARD | 3169 days ago |
| Leila Radjah | 2904 days ago |
| SONG, Cuie | 321 days ago |
| Laura THEOLIER-EXT | 2727 days ago |
| Laurent Champiot-ext | 3101 days ago |
| ROMAN-CROITORU-ext, Simona | 553 days ago |
| BRAHIM, Walid | |
| KANJA-ext, Zakaria | |
| NWANGWU, Daniel | |