Visit Report Creation & Update

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Overview

In this section, you will find information about how to create a visit report in Salesforce and how to update a visit report, including:

- Associate a product to the visit report
- Associate a customer contact or a Solvay contact to the visit report
- Attach a document to the visit report

Concerned profiles:

Sales - Customer Service Representatives (all except Strategic Marketing)

Step By Step

Definition & Objectives

Sales Planning is the process supporting the planning, preparation, execution, and restitution of a **Customer Visit**. It supports the development of an Opportunity, the execution of a defined Account Plan, the collection of Leads of interest for other BU, or even the continuous management of Competitive.

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.

How to create a visit report

Visit reports created from an activity

Activities

- Select activities "Customer Visit" to allow creating a visit report from it

Visit Report

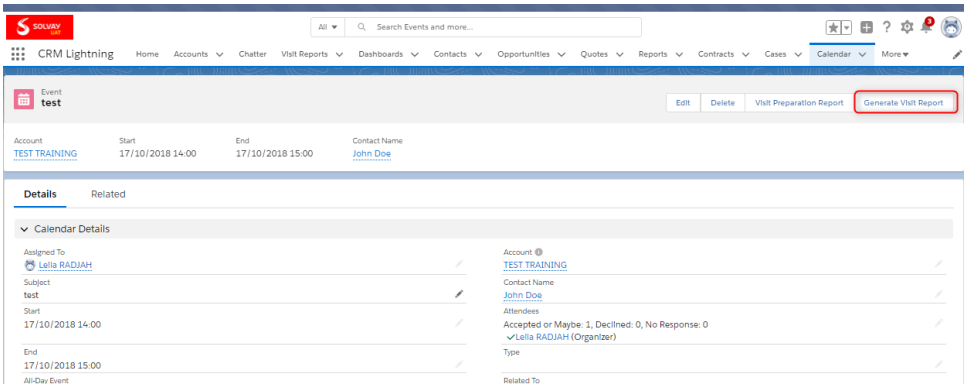
- Are created from an activity "Customer Visit" or from scratch.
- A Visit report can only be linked to 1 activity.

When created from an activity, a visit report will be pre-filled with:

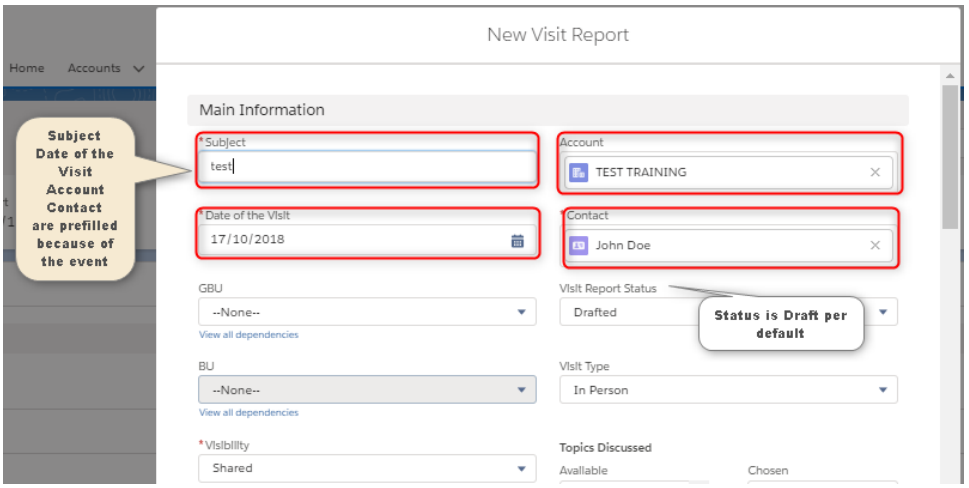
- Subject of the activity
- Date of the activity
- Account and Contact
- Attendees: Solvay Participants and Customer Contacts

Create a visit report

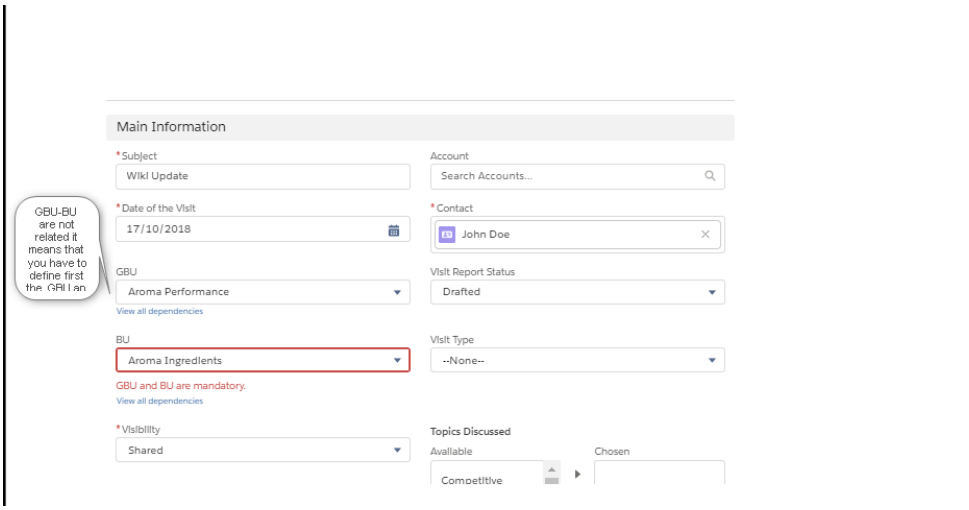
1 David wants now create a visit report. For this, he *opens* the event and *clicks* on **Generate Visit Report**



2 As David started from the visit, some information are already filled in. So convenient!



3 Before writing the feedback, David *defines* the Visit Report **visibility** and the GBU. He has 3 options:
•"**Shared**": it means the VR is visible by all the users in Salesforce
•"**GBU restricted**": it means only the users in the GBU defined below are able to see the VR
•"**Visit Report Team** ": only the colleagues added in the "Visit Report Team " will be able to view the VR
Due to Legal Anti-trust constraints, a Visit Report can be automatically forced to « **GBU Restricted** » instead if « **Shared** ». It happens if the Visit Report concerns some specific products or contains some keywords that are confidential for some other GBUs. For R4.0, this is only activated for AROMA Performance.

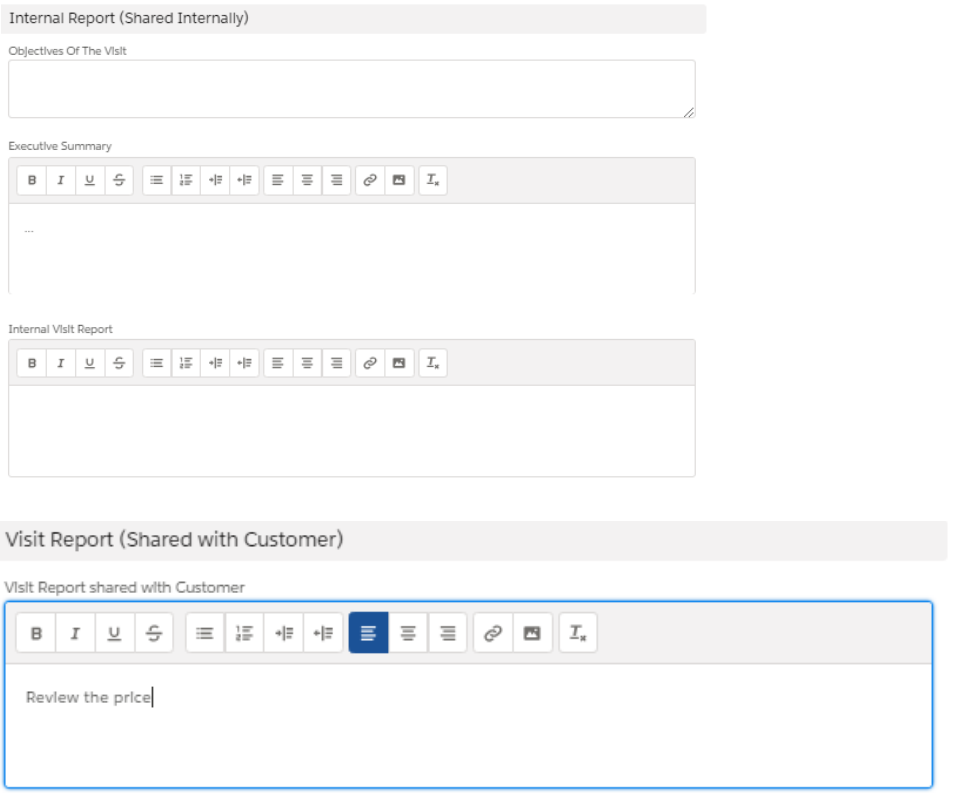


The GBU and BU are mandatories fields

4 Once the visibility and the GBU defined, David *fills* in the **Executive Summary (mandatory)** and adds additional comments in **Internal Visit Report**.

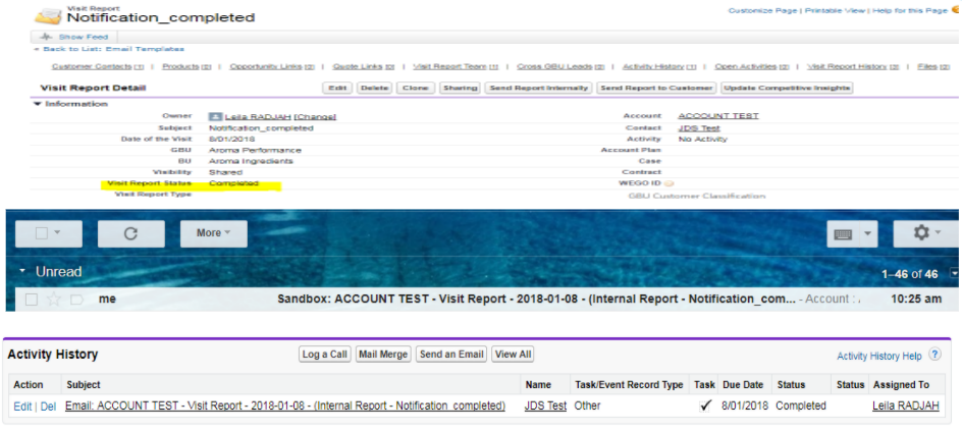
> In “Internal Visit Report”, you can enter rich text like bold, tables, bullets, etc.

He can also shared with the customer some feedback in the dedicated section.



5 David can *mention* in the Visit Report if this concerned a **Safety Visit** or not. Plus as David record all information at once, he *defines* the Visit Report Status as **Completed**. Novecare use the **Unmet Needs** to give guidance to R&D

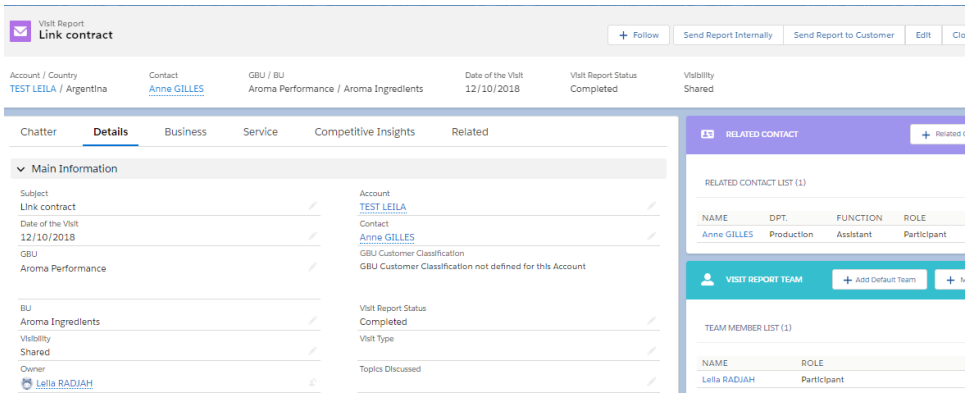
6 For Soda Ash, Coatis, Fibras, Aroma Performance, Pepol, Peroxide and Silica a notification is sent to the Visit Report team, when the status is completed.



7 Finally, David *records* the **Visit Report share with Customer** that will be shared with the customer afterwards.

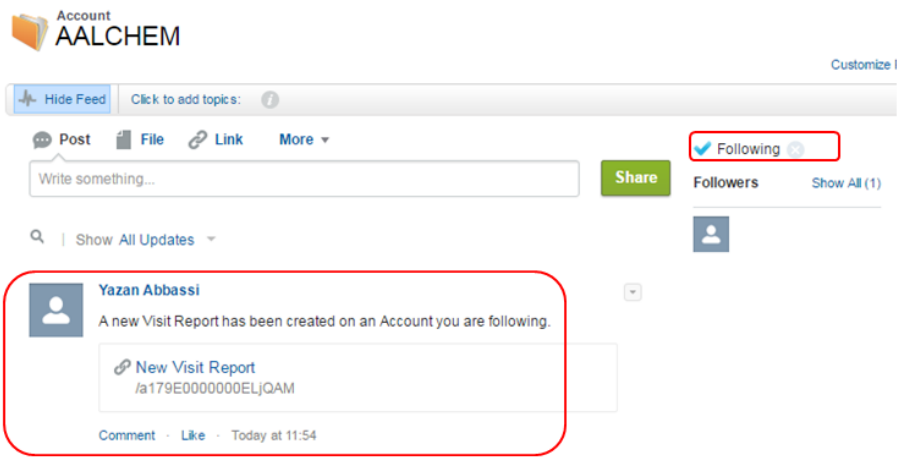
8 That's it! David has created his VR in Salesforce. Well done !

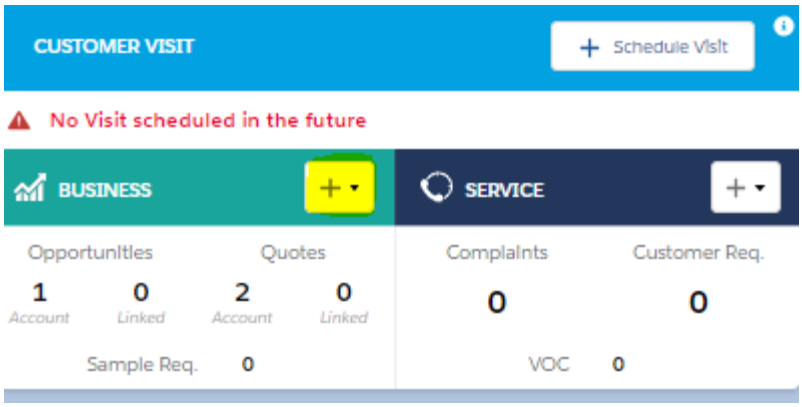
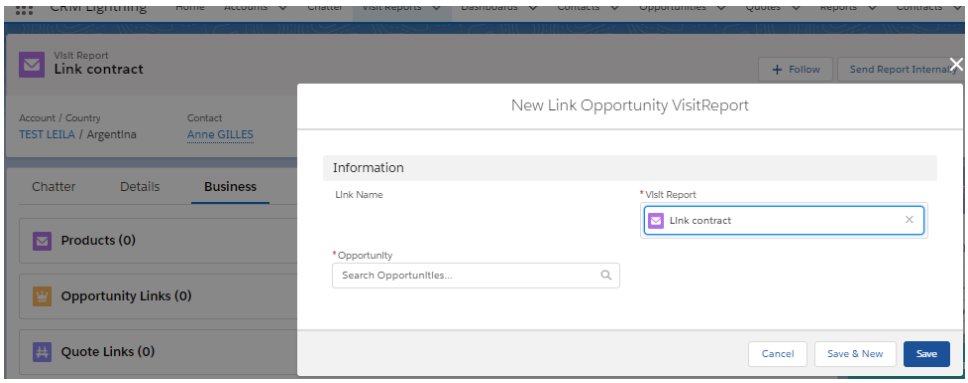
For **GBU Silica** only, a notification is automatically triggered to the users in the Visit Report Team and in Email Mapping Rules matching the Visit Report criterias when a Visit Report status is set to Completed (plus the owner in CC).



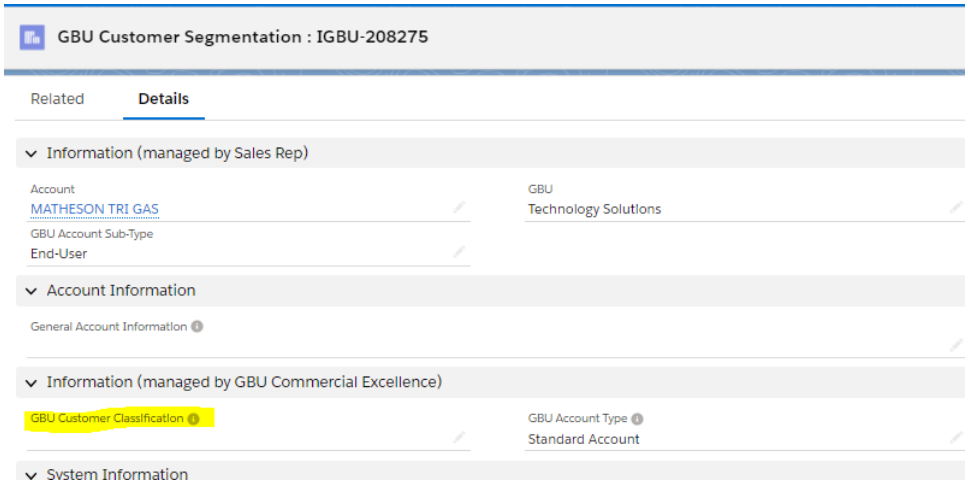
Optional Visit Report Infomation

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



You can create an opportunity directly from your Visit Report. Go in the recommendation component and Click on the button "+", choose opportunity and then creation process begins	
You can also link your Visit Report to an existing opportunity by going in the tab Business and clicking on "New" button. Using the Opportunity lookup, search the opportunity you want to link to your Visit Report	

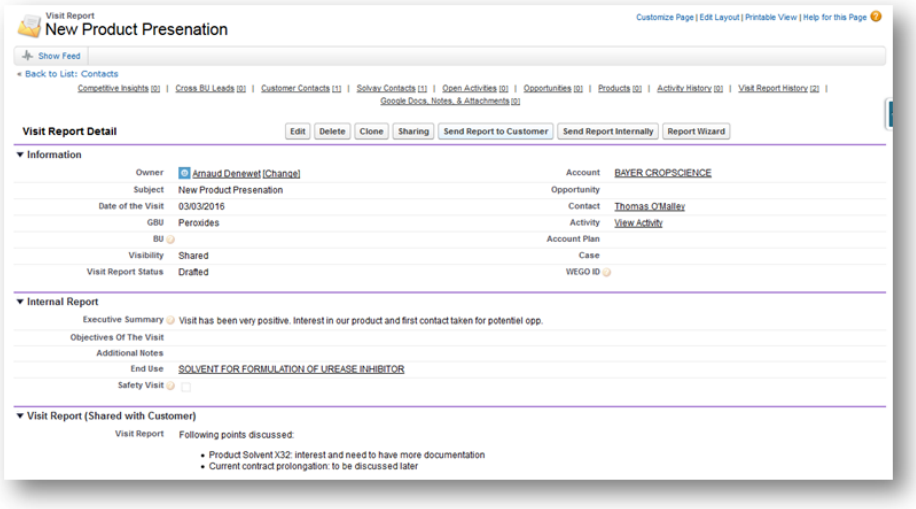
When a GBU classification is maintain on the account GBU Customer Segmentation (Ship to/Sold to and corporate group), the information will be filled automatically on the Visit Report



Visit Report update (incl. adding products, contacts and users)

Associate a Product to the Visit Report

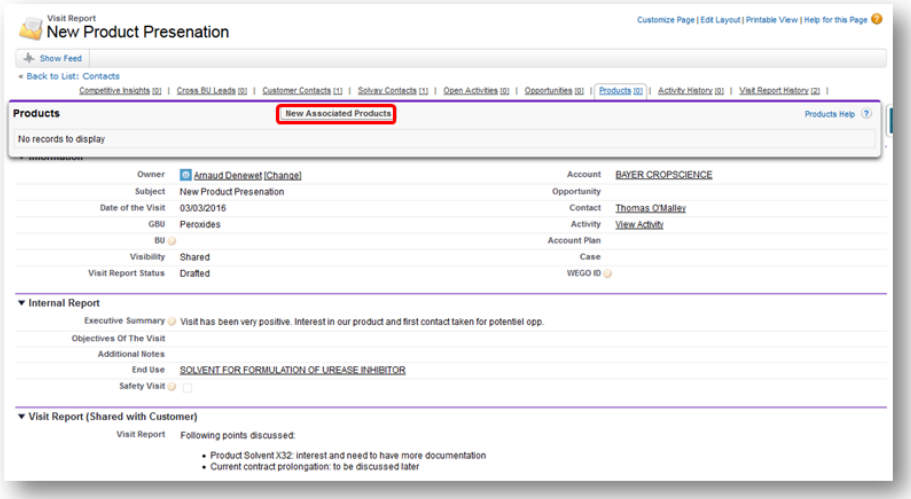
1 David *opens* the **visit report** for which he wants to associate a product discussed



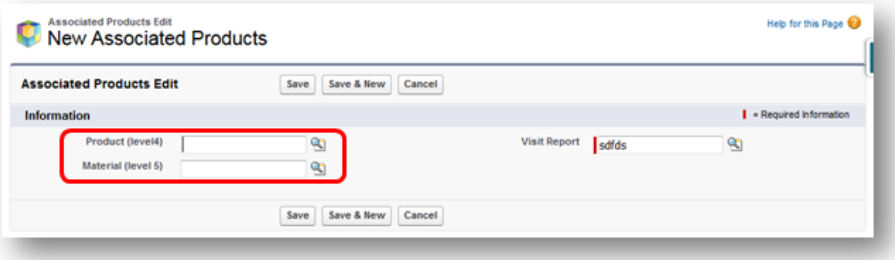
2 He *hoovers* the **Product link** and *clicks* on **New Associated Product.**

In order to be able to add/edit a product, the current user needs to be part of the **Visit Report Team**.

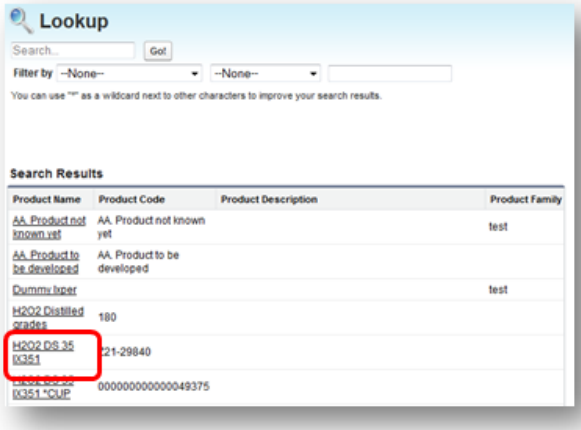
Otherwise the following error will be displayed: " **You need to be part of the Visit Report Team to be able to add or edit a product.**"



3 Once in the Associate Product screen, he *clicks* on the look icon to search the **product** in the system. He can *choice* between a product (level 4) or a **material** (level 5)



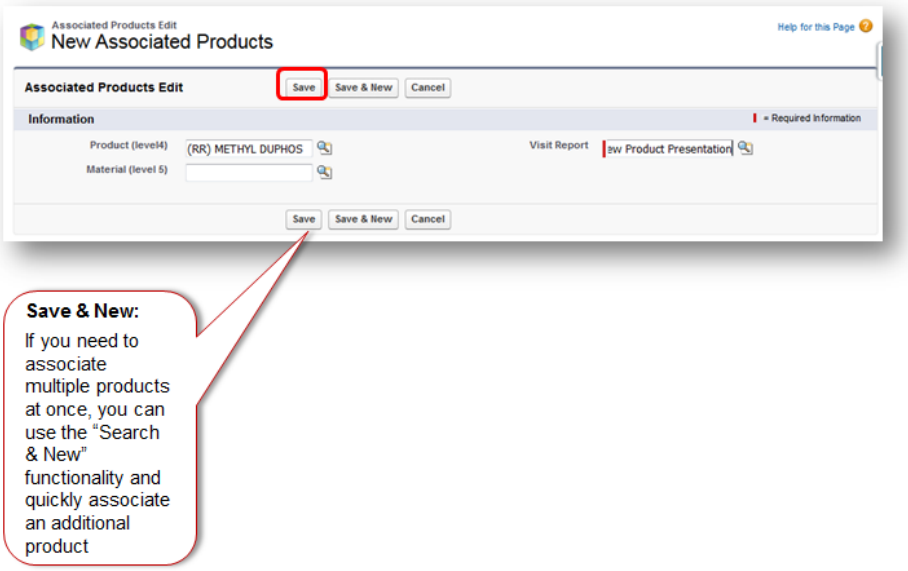
4 In the new search windows, David *selects* the **product** discussed



Look! In the new window

, you can use filters to limit the results. Filters on the GBU, on the Product family, etc. are available.

5 David has selected the product in the search window. He now *saves* his relationship by clicking on **Save**.



Save & New:
If you need to associate multiple products at once, you can use the "Search & New" functionality and quickly associate an additional product

⚠ User can record either a product (level 4) or a material (level 5) depending of the situation. That's flexible!

Products name displayed when the Visit Report will be sent is only the level 4 product name, even if a product at le

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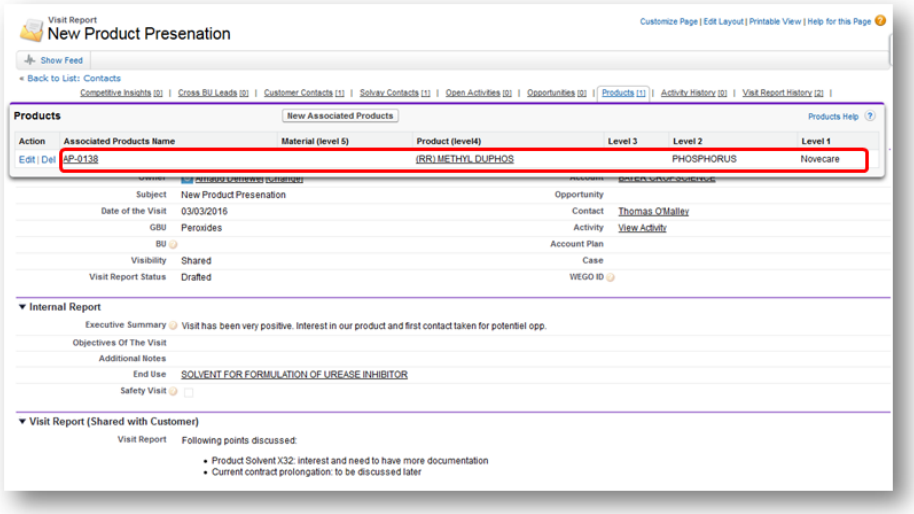
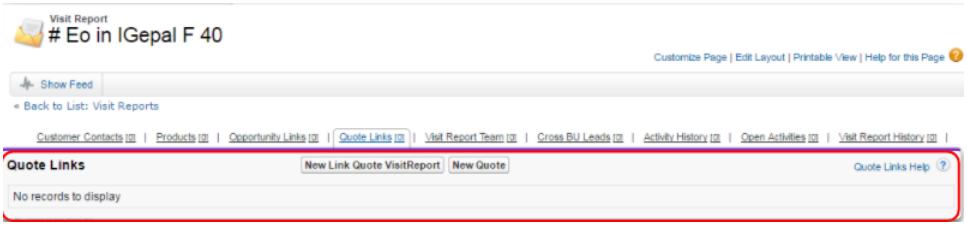
6 Great! David has associated the product to the VR.



Relate existing Quotes or create new one related to the Visit Report

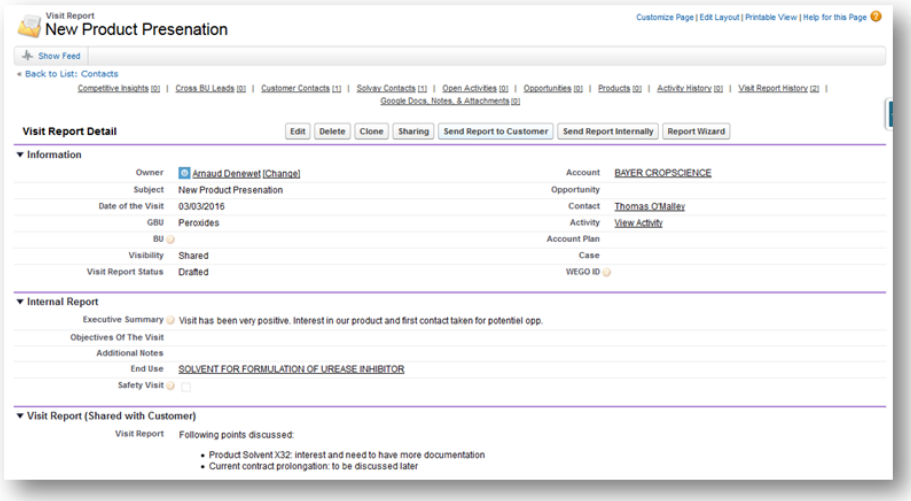
It is now possible to relate **existing Quotes** to a Visit Report and /or **create new Quotes** that will be related to the Visit Report directly from the record itself.

This is done done from the Quote related list on the Visit Report record.

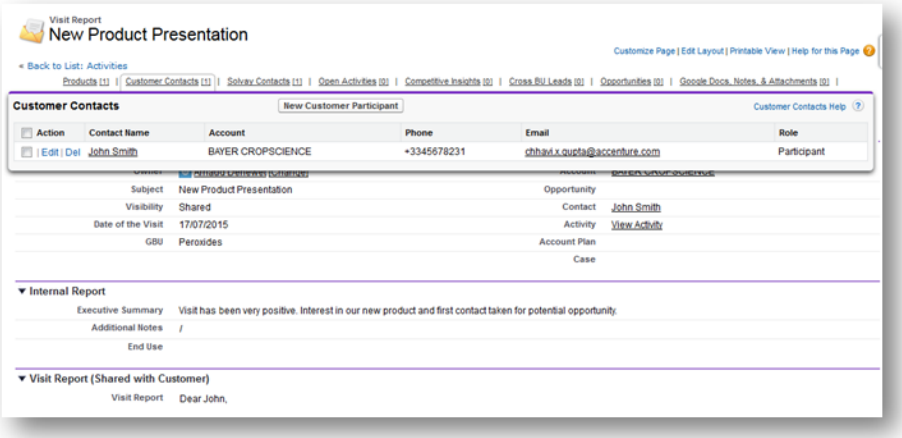


Associate a Customer Contact to the Visit Report

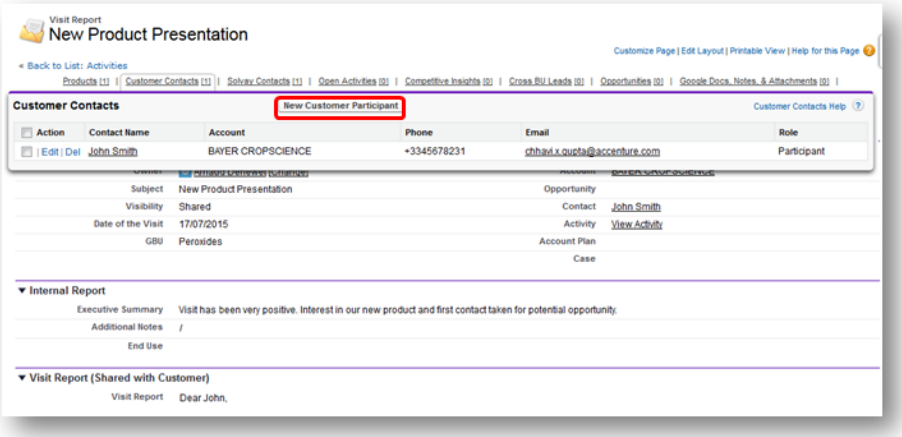
1 David *o pens* the **vis it report** for which he wants to associate a Customer Contact



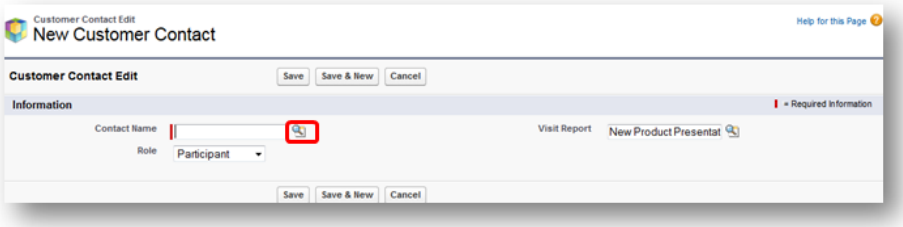
2 He *hoo vers* the **Cu stomer Contact** link and… Look! John Smith is already linked! That' s because David started his visit report from the visit. That was easy!



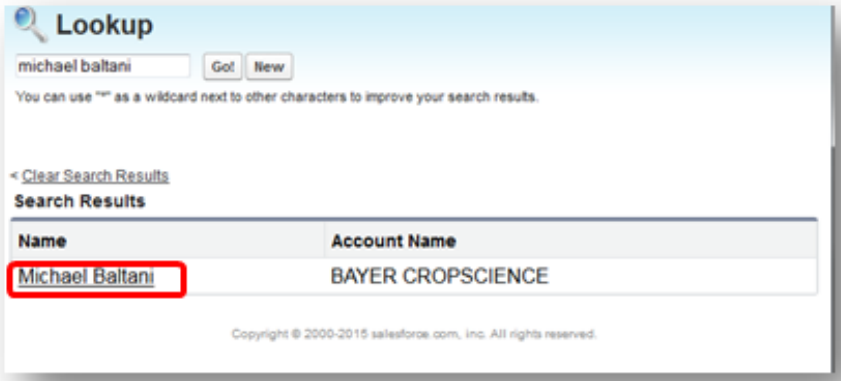
3 David will now associate Michael Baltani to the visit report. He *cl icks* on **New Customer Participant.**



4 As he did for the Product, David *uses* the **look icon** to search the contact in the system.

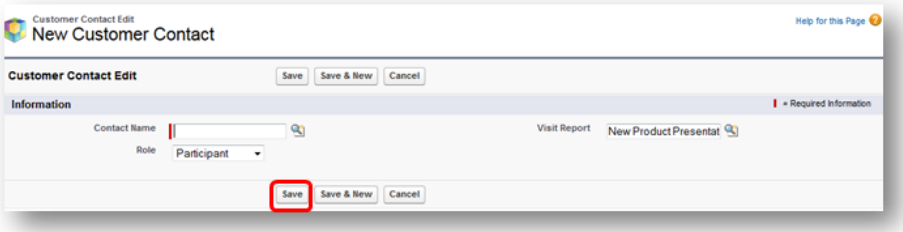


5 In the new search window, David *searc hes* for Michael Baltani and then *selects* the contact

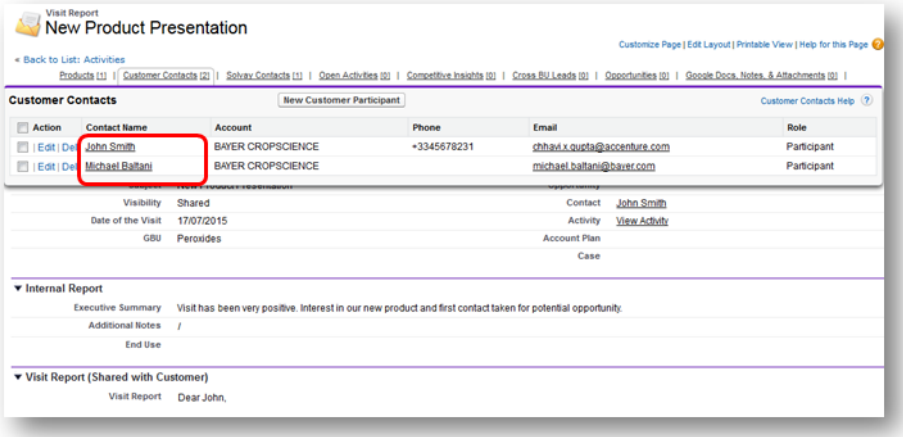


6 David has finished to select the Customer Contact in the search window. As information, he also can define Michael's role:
•Participants: it means Michael was participating to the meeting
•To be informed: in some case, David might want to define some contact to be informed of the visit report outcome.

7 He now *saves* his relationship by clicking on **Save**.

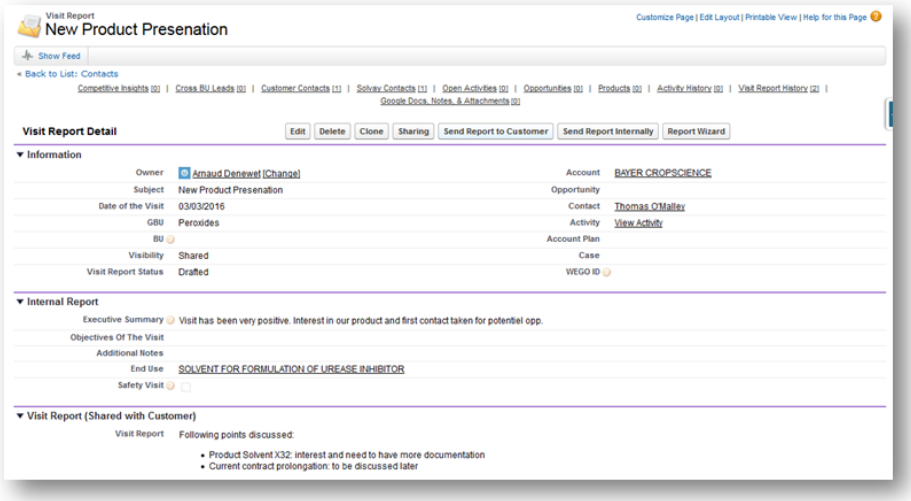


8 Fantasti c! David has associated John and Michael to the visit report

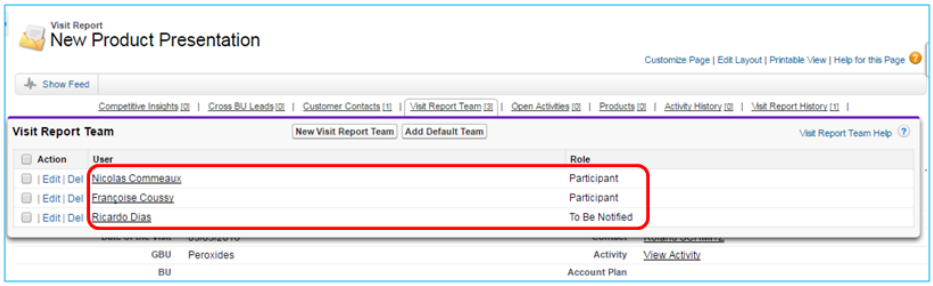


Associate a Solvay Contact to the Visit Report

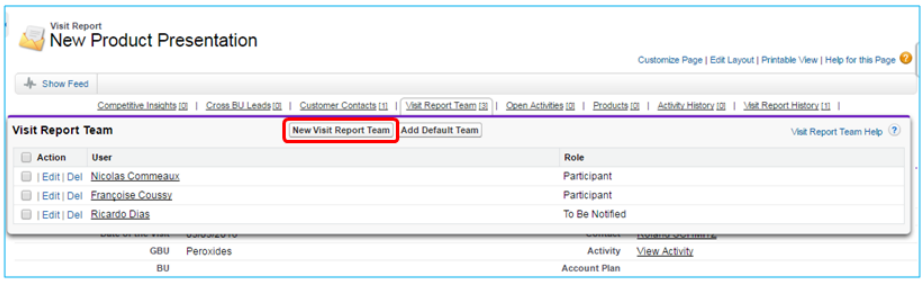
1 David *o pens* the **vis it report** for which he wants to associate a Solvay Contact



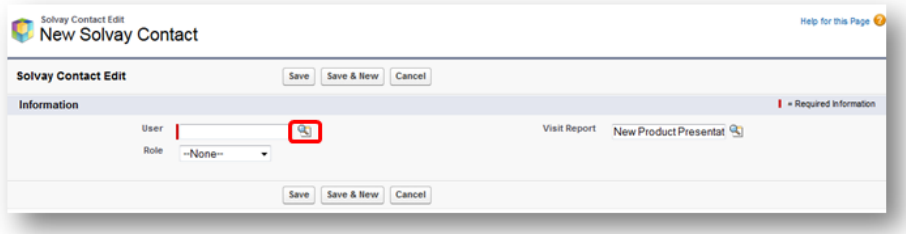
2 He hoovers the **Visit Report Team** link and… Look! People are already linked! That's because David started his visit report from the visit, where he already invited them. That was easy!



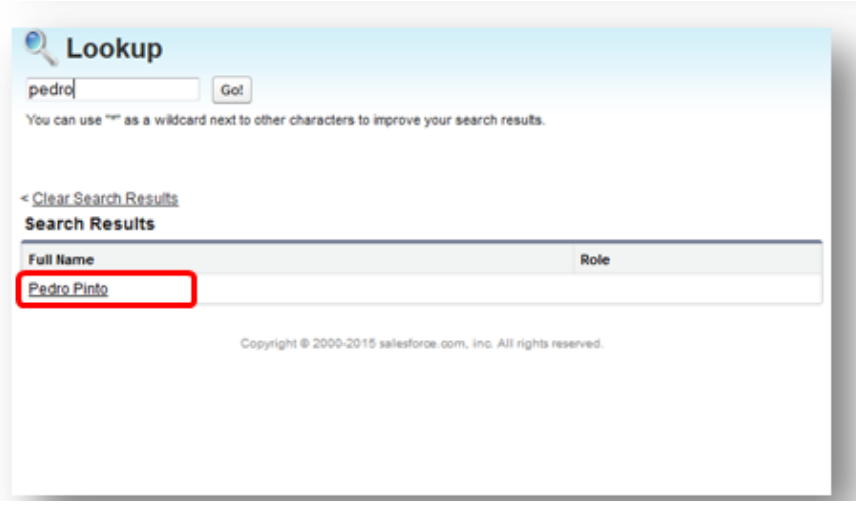
3 David will now associate Pedro Pinto, his manager, to the visit report. He *cl icks* on **New Visit Report Team**.



4 As he did for the Customer Contacts, David *uses* the **look icon** to search the contact in the system.

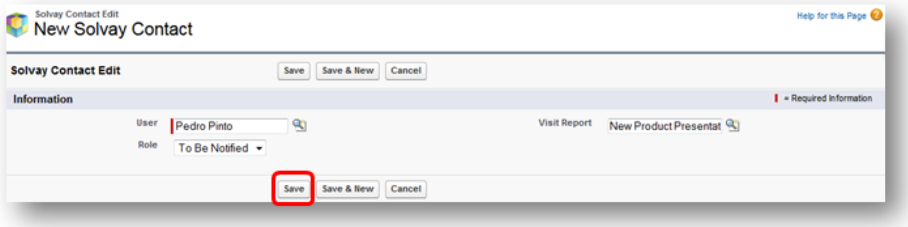


5 In the new search window, David *searc hes* for Pedro Pinto and then *sel ects* the contact

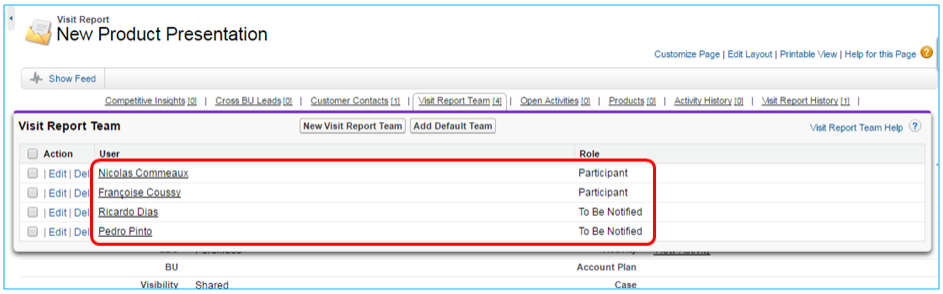


6 David has finished to select the Solvay Contact in the search window. As information, he also can define Pedro's role:
•Participants: it means Pedro was participating to the meeting
•To be informed: in some case, David might want to define some colleagues to be informed of the visit report outcome.

7 He now saves his relationship by *putting* Pedro as **To be Notified** and *clicks* o n **Save**.

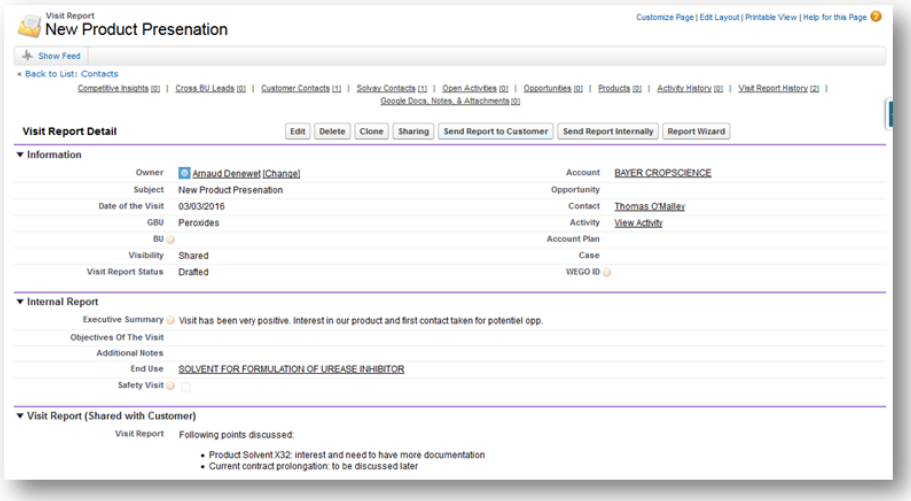


8 Fantasti c! David has associated Christian and Pedro to the visit report



Attach a document to the Visit Report

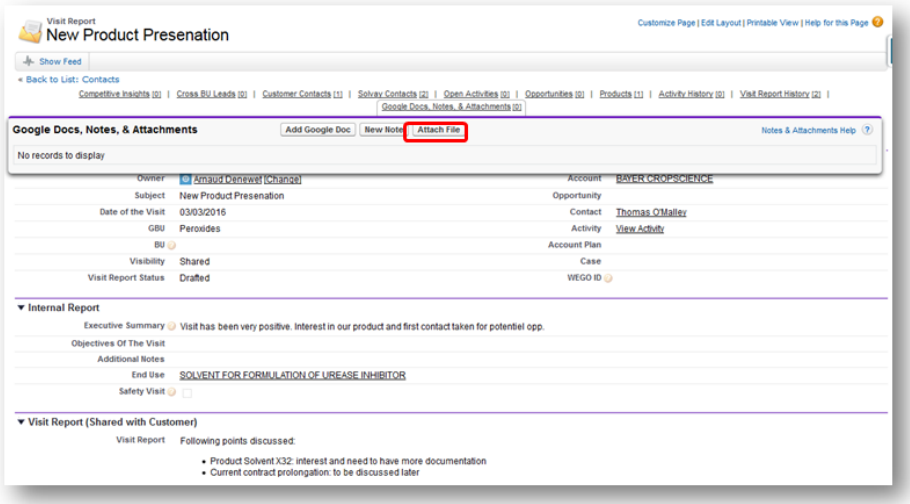
1 David opens the **visit report** for which he wants to attach a document



2 He *hoovers* the **Google Docs, Notes & Attachment** link and *clicks* on **Attach File**.

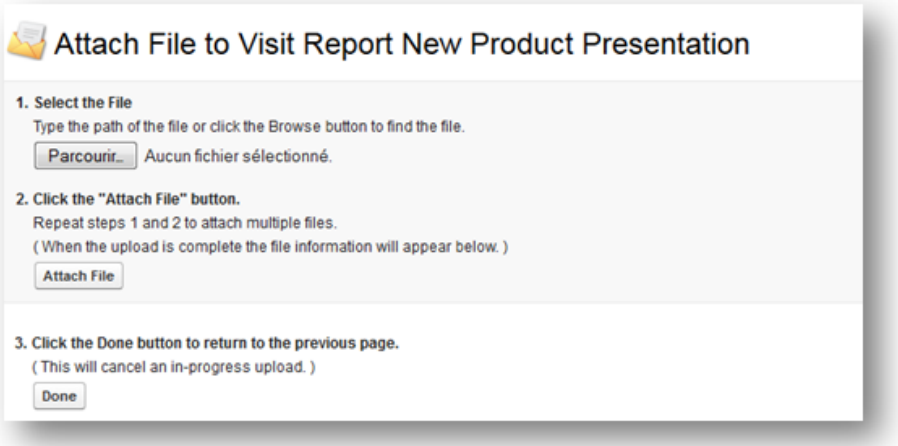
Files are now supported in addition to Attachments.

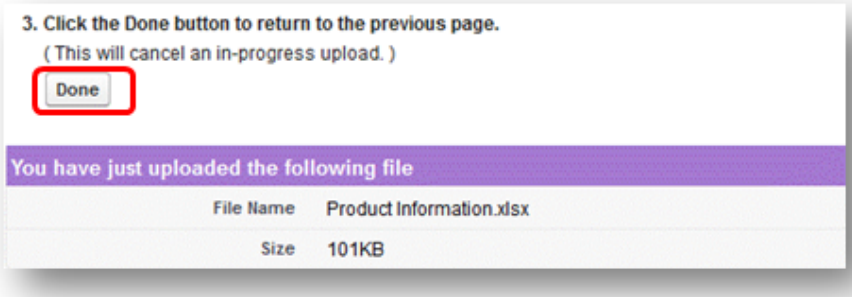
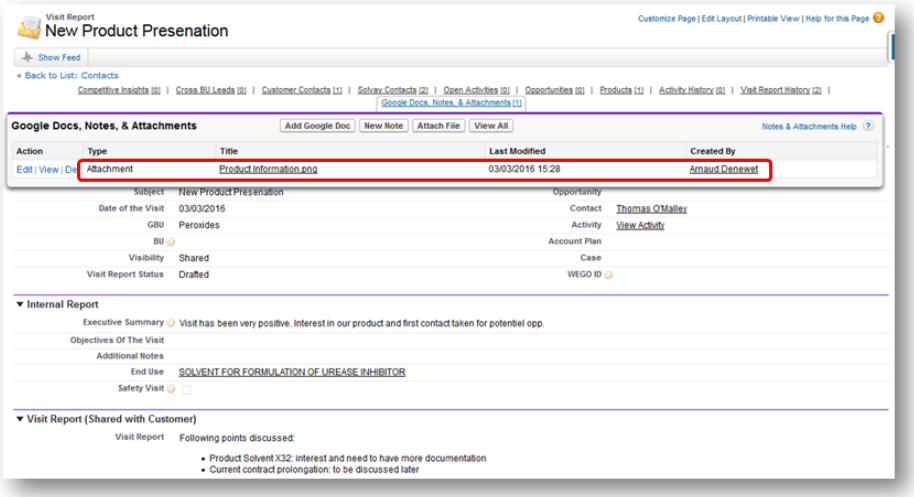
Pictures taken from a mobile device and added to the Visit Report using **Salesforce1** can also be shared both internally and externally.



Don’t use the Google Doc link as your customer won’t be able to or read it.

3 David follow the steps defined at the screen to attach the file



4 Once the file uploaded, he *clicks* on **Done**	
5 Done! David has attached the product documentation to the VR	

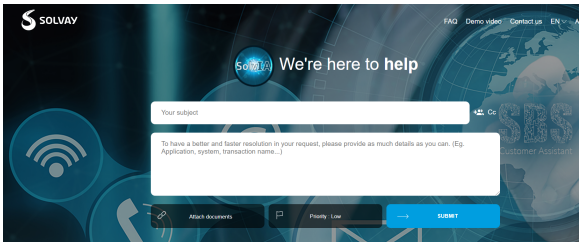
Back to the top

Related articles

- Activity: Create a customer visit in Salesforce and from Google Calendar (Lightning For Gmail Insight)
- Visit Report: Send to the Customer
- Visit Report: Send internally
- Visit Report: Confidentiality management & Visit report wizard

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