

Sales planning & Account Development Plan

The visit report should be created after the visit to a customer to make sure you capture relevant information to be shared within the group or send the meeting minutes to the customer.

ALL objects as activities are related to all objects in salesforce.

The visit report must be created from the contact, thus bringing the information on account to the report.

Yes, it's possible to log a visit report without logging a visit. Just click directly on New Visit Report from the Contact page. However, it is strongly recommended to log your visits in Salesforce (directly or through Lightning For Gmail) to keep track of them

Choose 'Solvay Contacts restricted' in the Visibility drop down list of the visit report page.

No. In the visit report, there are two separate section:

- one called "Internal Report" which will be sent only to those who, from Solvay, participated or are involved in the visit report,
- and another one called "Visit Report (shared with customer)" that will be sent to the customer's participant(s). Note that when sending the report to the customer, you can still edit the email.

The report wizard is a Salesforce functionality which can be used to report not only the visit itself, but also Competitive Insights and Cross BU Leads, and assign tasks or activities that are linked to the customer you visited.

You should use the Clone button, which creates a duplicate of your visit report. Then you just need to update it with new information. By doing so, you avoid losing time entering account and contact information all over again.

Yes, it will, if you have installed the Lightning For Gmail application.

In the Activities tab, there is a view named: "My Delegated Activities".

This field has been added for Soda Ash and Peroxides.

It's to indicate that the visit report corresponds to a Safety visit. This allow to count and filter on this criteria which is very important for them as they have to do a minimum of visit by year.