

# 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)

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### 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

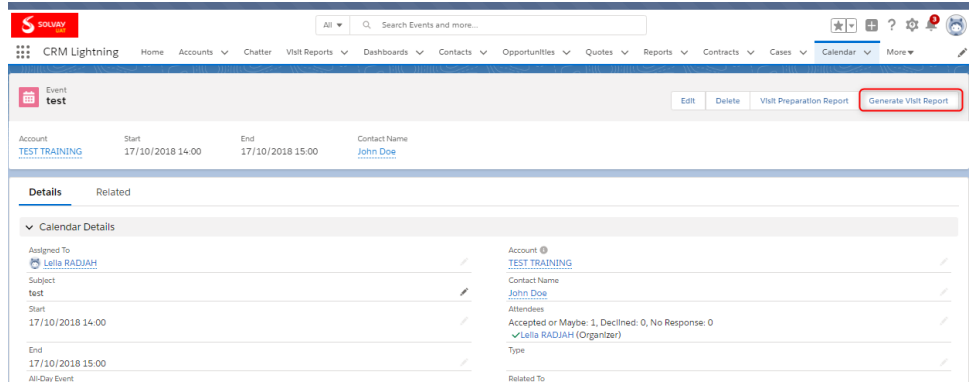
- [Are created from an activity "Customer Visit" or from scratch.](#)
- [A Visit report can only be linked to 1 activity.](#)

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

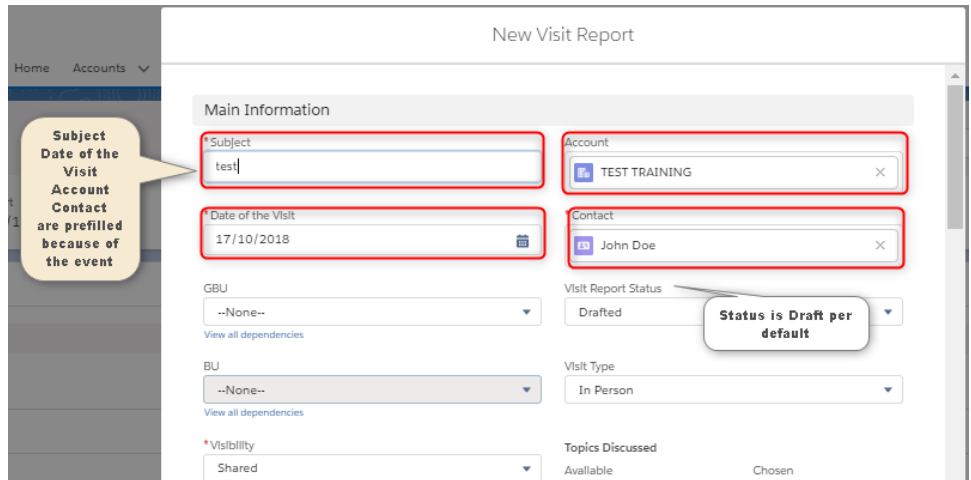
- [Subject of the activity](#)
- [Date of the activity](#)
- [Account and Contact](#)
- [Attendees: Solvay Participants and Customer Contacts](#)

## Create a visit report

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



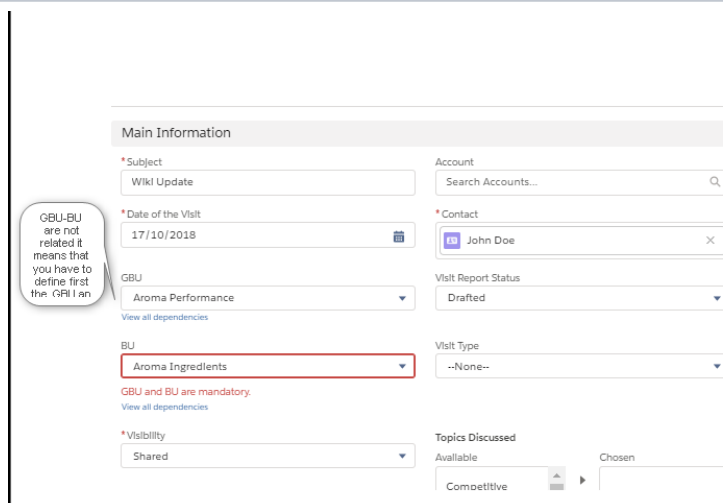
2 As David started from the visit, some information are already filled in. So convenient!



3 Before writing the feedback, David *defines* the Visit Report **visibili ty** 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 GBU. 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.

#### Internal Report (Shared Internally)

Objectives Of The Visit

Executive Summary

Rich text editor with toolbar (B, I, U, etc.) and content area containing "..."

Internal Visit Report

Rich text editor with toolbar (B, I, U, etc.) and empty content area

#### Visit Report (Shared with Customer)

Visit Report shared with Customer

Rich text editor with toolbar (B, I, U, etc.) and content area containing "Review the price"

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**. Novacare use the **Unmet Needs** to give guidance to R&D

End Use

Safety Visit

Unmet Needs

#### Visit Report (Shared with Customer)

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.

Notification\_completed

Visit Report Detail

Owner	Lella RADJAH (Changes)	Account	ACCOUNT TEST
Subject	Notification_completed	Contact	JDS Test
Date of the visit	8/01/2018	Activity	NO Activity
GBU	Aroma Performance	Account Plan	
BU	Aroma Ingredients	Case	
Visibility	Shared	Contact	
Visit Report Status	Completed	WEGO ID	
Visit Report Type		GBU Customer Classification	

Activity History

Action	Subject	Name	Task/Event Record Type	Task Due Date	Status	Status	Assigned To
Edit   Del	Email: ACCOUNT TEST - Visit Report - 2018-01-08 - (Internal Report - Notification_completed)	JDS Test	Other	8/01/2018	Completed	Completed	Lella RADJAH

7

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

### Visit Report (Shared with Customer)

Visit Report shared with Customer

Rich text editor toolbar with options: Bold (B), Italic (I), Underline (U), Undo, Bulleted List, Numbered List, Decrease Indent, Increase Indent, Link, Image, Text Color.

Text content: Review the price

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).

Visit Report Details Page

Subject: Link contract

Account / Country: TEST LEILA / Argentina

Contact: Anne GILLES

GBU / BU: Aroma Performance / Aroma Ingredients

Date of the Visit: 12/10/2018

Visit Report Status: Completed

Visibility: Shared

Chatter Details: Main Information

Field	Value
Subject	Link contract
Date of the Visit	12/10/2018
GBU	Aroma Performance
BU	Aroma Ingredients
Visibility	Shared
Owner	Leila RADJAH
Account	TEST LEILA
Contact	Anne GILLES
GBU Customer Classification	GBU Customer Classification not defined for this Account
Visit Report Status	Completed
Visit Type	
Topics Discussed	

RELATED CONTACT LIST (1)

NAME	DPT	FUNCTION	ROLE
Anne GILLES	Production	Assistant	Participant

VISIT REPORT TEAM

NAME	ROLE
Leila RADJAH	Participant

## Optional Visit Report Information

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.

Account: AALCHEM

Hide Feed | Click to add topic: ?

Post | File | Link | More

Write something...

Share | Following (checked) | Followers | Show All (1)

Show All Updates

**Yazan Abbassi**

A new Visit Report has been created on an Account you are following.

[New Visit Report](#)  
/a179E0000000ELjQAM

Comment · Like · Today at 11:54

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 maintained on the account GBU Customer Segmentation (Ship to/Sold to and corporate group), the information will be filled automatically on the Visit Report

**GBU Customer Segmentation : IGBU-208275**

Related **Details**

Information (managed by Sales Rep)

Account	MATHESON TRI GAS	GBU	Technology Solutions
GBU Account Sub-Type			
End-User			

Account Information

General Account Information

Information (managed by GBU Commercial Excellence)

GBU Customer Classification		GBU Account Type	Standard Account
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System Information

## 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

Visit Report **New Product Presentation**

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Back to List: Contacts

Competitive Insights (0) | Cross BU Leads (0) | Customer Contacts (1) | Solvay Contacts (1) | Open Activities (0) | Opportunities (0) | Products (0) | Activity History (0) | Visit Report History (2) | Google Docs, Notes, & Attachments (0)

**Visit Report Detail** Edit Delete Clone Sharing Send Report to Customer Send Report Internally Report Wizard

Information

Owner	Amad Deneke (Change)	Account	BAYER CROPSCIENCE
Subject	New Product Presentation	Opportunity	
Date of the Visit	03/03/2016	Contact	Thomas O'Malley
GBU	Peroides	Activity	View Activity
BU		Account Plan	
Visibility	Shared	Case	
Visit Report Status	Drafted	WEGO ID	

Internal Report

Executive Summary Visit has been very positive. Interest in our product and first contact taken for potential opp.

Objectives Of The Visit

Additional Notes

End Use SOLVENT FOR FORMULATION OF UREASE INHIBITOR

Safety Visit

Visit Report (Shared with Customer)

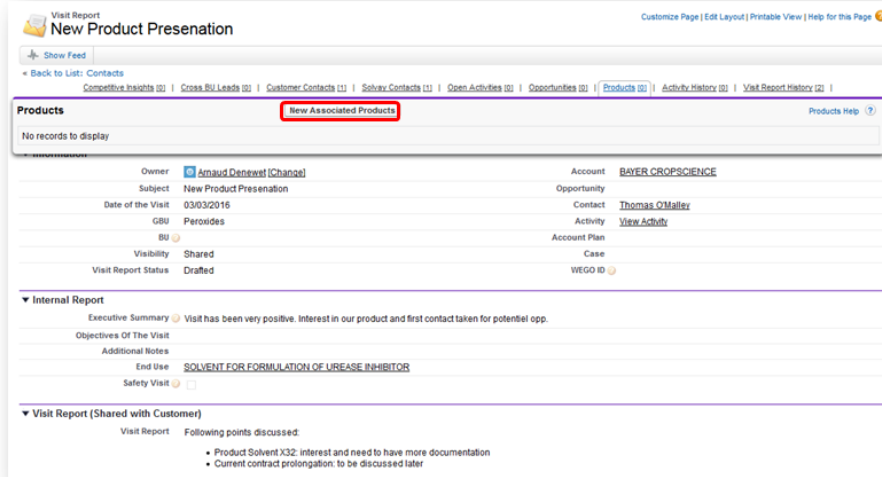
Visit Report Following points discussed:

- Product Solvent X32: interest and need to have more documentation
- Current contract prongation: to be discussed later

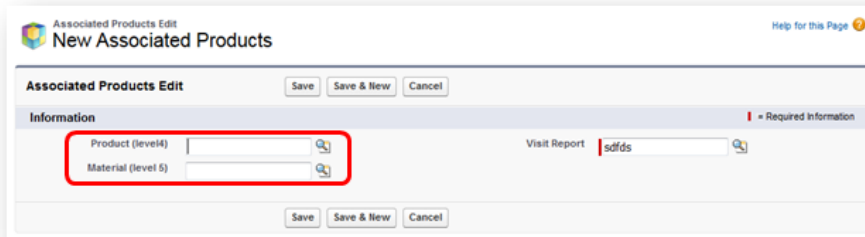
2 He hovers the Product link and clicks on New Associated Product.

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

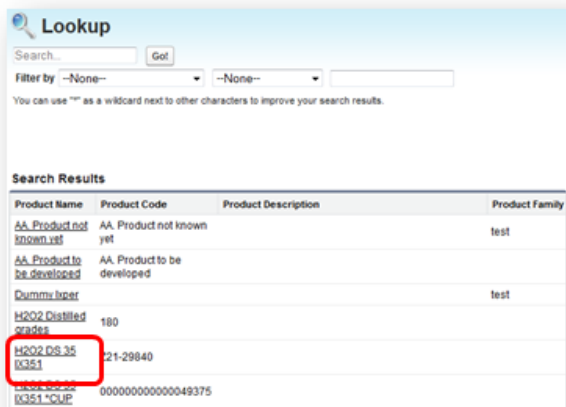
Otherwise the following error will be displayed: "You need to be part of the Visit Report Team to be able to add or edit a product."



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



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

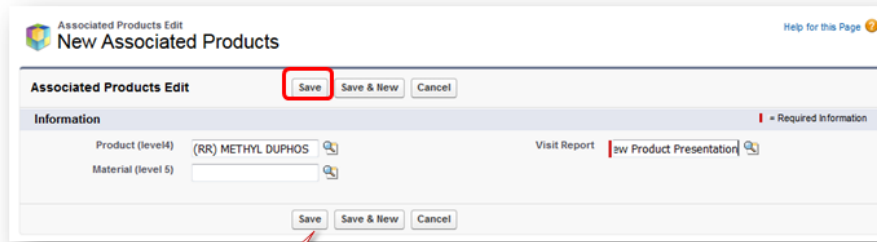


Look! In this new window

, y o u c a n u s e f i l t e r s t o l i m i t t h e r e s u l t s . F i l t e r s o n t h e G B U , o n t h e P r o d u c t f a m i l y , e t c . a r e a v a i l a b l e .

5

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



The screenshot shows a web interface titled "Associated Products Edit" with a sub-header "New Associated Products". At the top right, there is a "Help for this Page" link. Below the header, there are three buttons: "Save", "Save & New", and "Cancel". The "Save" button is highlighted with a red box. The main content area is titled "Information" and includes a "Required Information" indicator. It contains two input fields: "Product (level 4)" with the value "(RR) METHYL DUPHOS" and "Material (level 5)" which is empty. To the right, there is a "Visit Report" section with a dropdown menu showing "sw Product Presentation". At the bottom of the form, there are three buttons: "Save", "Save & New", and "Cancel".

**Save & New:**

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



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

Action	Associated Products Name	Material (level 5)	Product (level 4)	Level 3	Level 2	Level 1
Edit   Del	SP-0128		METHYL DIPHOS		PHOSPHORUS	Novicare

## 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.

Quote Links

No records to display

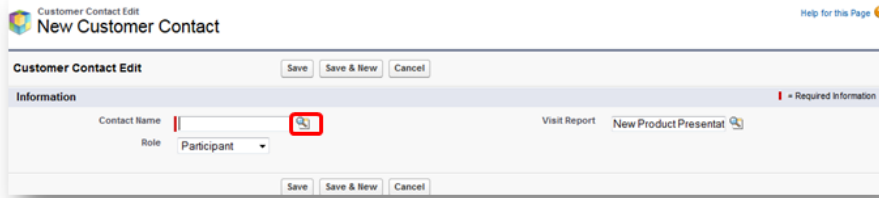
## Associate a Customer Contact to the Visit Report

1 David opens the visit report for which he wants to associate a Customer Contact

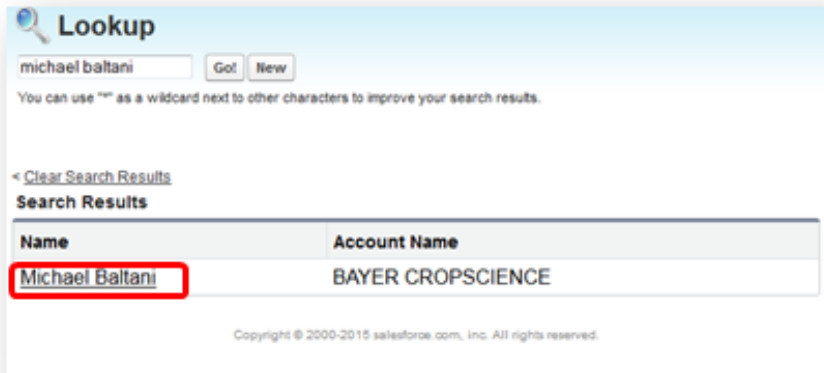
2 He hovers the Customer Contact link and... Look! John Smith is already linked! That's because David started his visit report from the visit. That was easy!

3 David will now associate Michael Baltani to the visit report. He clicks on 'New Customer Participant'.

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

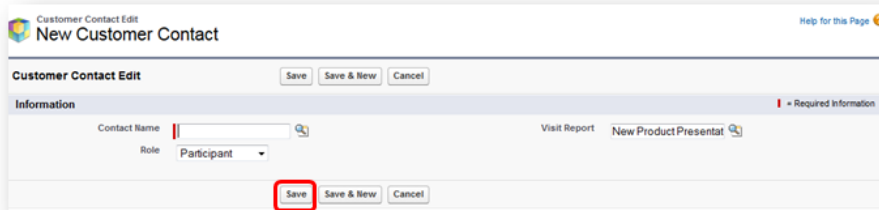


5 In the new search window, David searches for Michael Baltani and then selects the contact

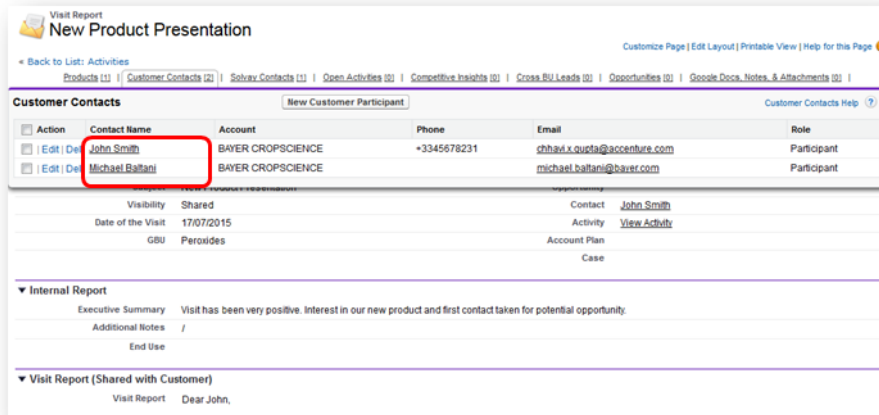


6 David has finished to select the Customer Contact in the search window. As information, he also can define Michael's role:  
•Participants: it means Michael was participating to the meeting  
•To be informed: in some case, David might want to define some contact to be informed of the visit report outcome.

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

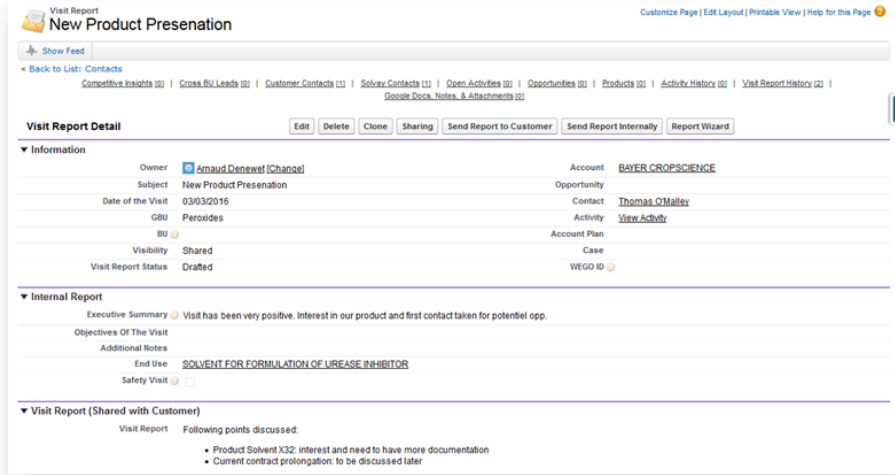


8 Fantastic! David has associated John and Michael to the visit report

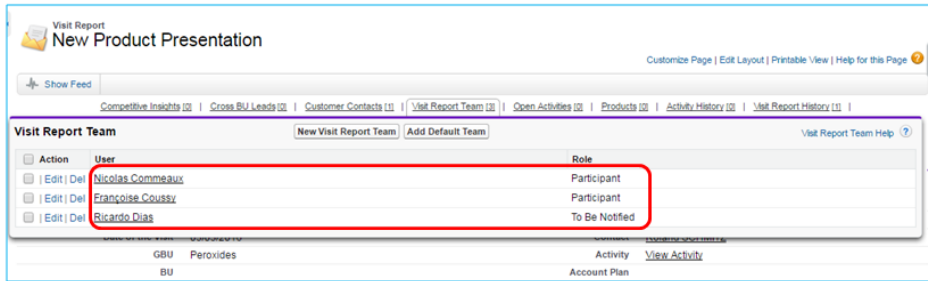


## Associate a Solvay Contact to the Visit Report

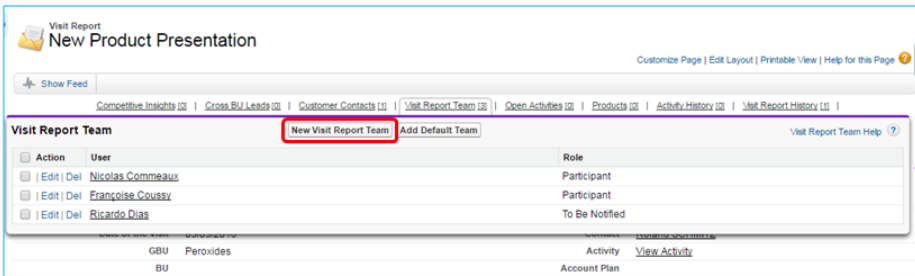
1 David opens the visit report for which he wants to associate a Solvay Contact



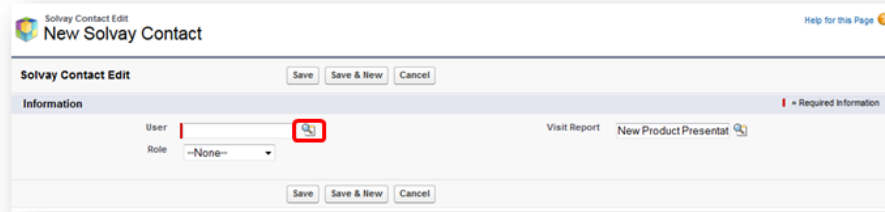
2 He hovers the Visit Report Team link and... Look! People are already linked! That's because David started his visit report from the visit, where he already invited them. That was easy!



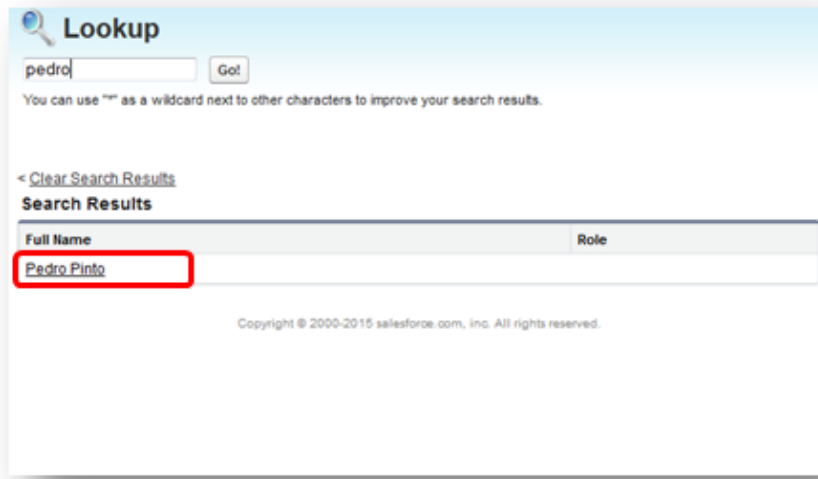
3 David will now associate Pedro Pinto, his manager, to the visit report. He clicks on New Visit Report Team.



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

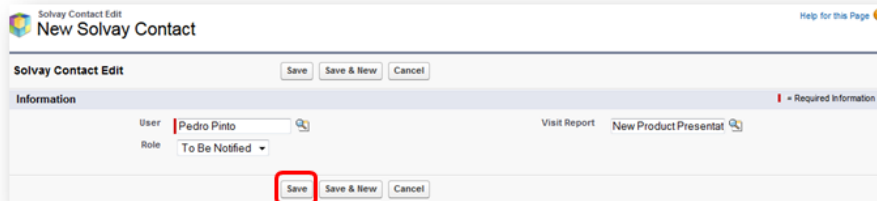


5 In the new search window, David searches for Pedro Pinto and then selects the contact

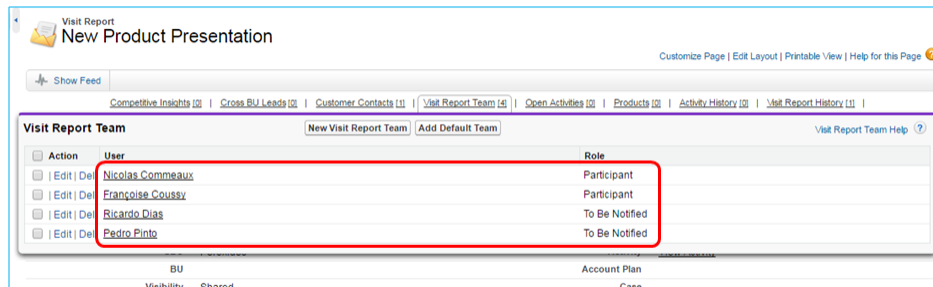


6 David has finished to select the Solvay Contact in the search window. As information, he also can define Pedro's role:  
•Participants: it means Pedro was participating to the meeting  
•To be informed: in some case, David might want to define some colleagues to be informed of the visit report outcome.

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

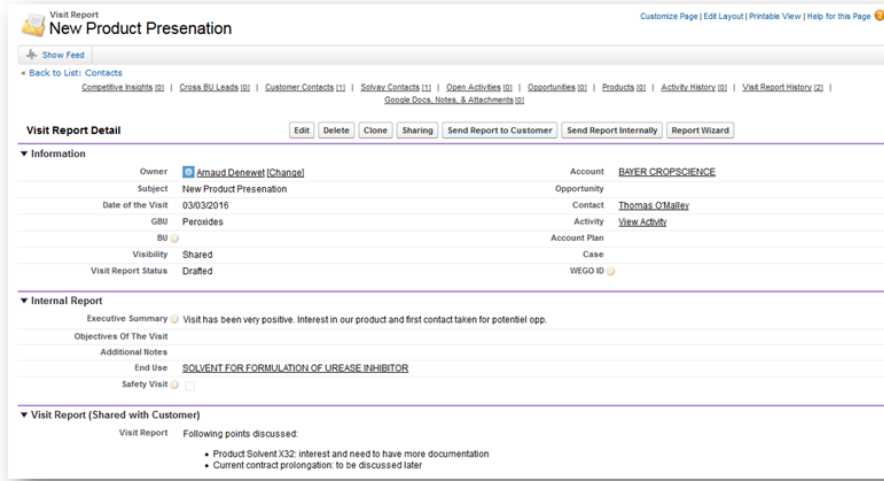


8 Fantastic! David has associated Christian and Pedro to the visit report

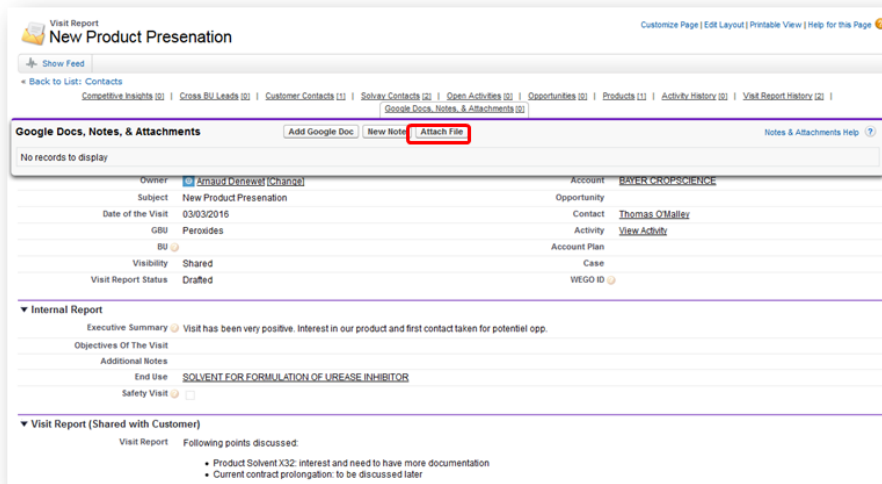


Attach a document to the Visit Report

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



2 He hovers the Google Docs, Notes & Attachments 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 custom error won't be available to read it.

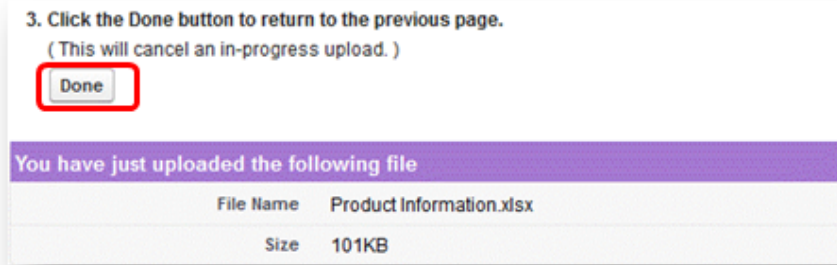
3

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

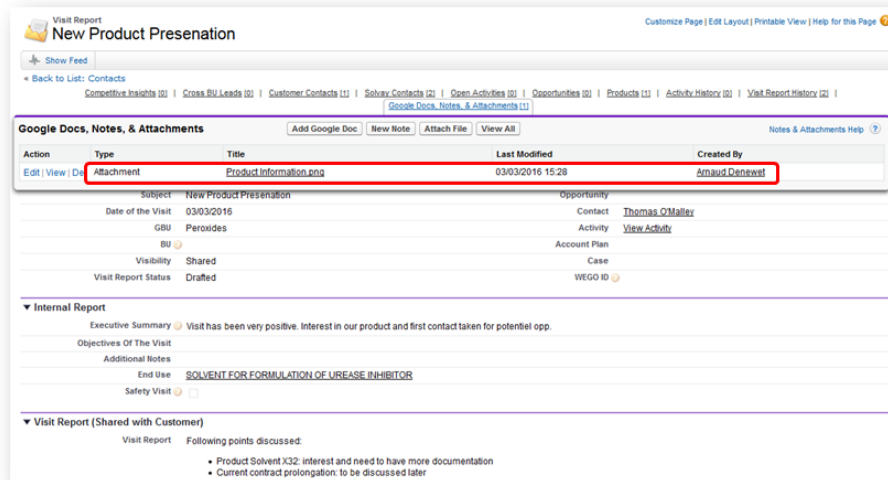
**Attach File to Visit Report New Product Presentation**

- 1. Select the File**  
Type the path of the file or click the Browse button to find the file.  
 Aucun fichier sélectionné.
- 2. Click the "Attach File" button.**  
Repeat steps 1 and 2 to attach multiple files.  
(When the upload is complete the file information will appear below.)
- 3. Click the Done button to return to the previous page.**  
(This will cancel an in-progress upload.)

4 Once the file uploaded, he clicks on Done



5 Done! David has attached the product documentation on the VR



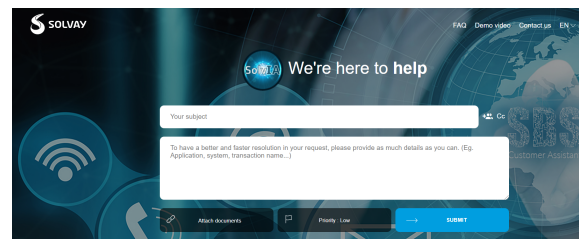
[Back to the top](#)

## 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.solvia.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*