

Visit Report Creation & Update

Table of content

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](#)
 - [How to create a visit report](#)
 - [Optional Visit Report Information](#)
 - [Visit Report update \(incl. adding products, contacts and users\)](#)
 - [Associate a Product to the Visit Report](#)
 - [Relate existing Quotes or create new one related to the Visit Report](#)
 - [Associate a Customer Contact to the Visit Report](#)
 - [Associate a Solvay Contact to the Visit Report](#)
 - [Attach a document to the Visit Report](#)
- [Related articles](#)
- [Need help?](#)

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**

The screenshot shows the Salesforce CRM Lightning interface. At the top, there's a navigation bar with various tabs like Home, Accounts, Chatter, Visit Reports, Dashboards, Contacts, Opportunities, Quotes, Reports, Contracts, Cases, Calendar, and More. Below this, the 'Event test' details are displayed. The 'Generate Visit Report' button is highlighted in red in the top right corner of the event details section.

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

The screenshot shows the 'New Visit Report' form in Salesforce. The form is pre-filled with information from the event. A callout box on the left states: 'Subject Date of the Visit Account Contact are prefilled because of the event'. Another callout box on the right states: 'Status is Draft per default'. The form fields include: Subject (test), Date of the Visit (17/10/2018), Account (TEST TRAINING), Contact (John Doe), GBU (None), BU (None), Visit Report Status (Draft), and Visit Type (In Person). There are also links for 'View all dependencies' and 'Topics Discussed'.

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 GBUs. For R4.0, this is only activated for AROMA Performance.

The screenshot shows the 'New Visit Report' form in Salesforce, focusing on the 'Main Information' section. A callout box on the left states: 'GBU-BU are not related it means that you have to define first the GBU then the BU'. The form fields include: Subject (Wiki Update), Date of the Visit (17/10/2018), Account (Search Accounts...), Contact (John Doe), GBU (Aroma Performance), BU (Aroma Ingredients), Visit Report Status (Draft), and Visit Type (None). There are also links for 'View all dependencies' and 'Topics Discussed'.

The GBU and BU are mandatories fields



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

Visit Report (Shared with Customer)

Visit Report shared with Customer

Review the price|

End Use

Visit Report (Shared with Customer)

6

Visit Report Notification_completed

Customize Page | Printable View | Help for This Page

Show Feed

Back to List: Email Templates

Customer Contacts (2) | Products (2) | Opportunity Leads (2) | Guest Links (2) | Visit Report Tours (2) | Gross GBU Leads (2) | Activity History (1) | Open Activities (2) | Visit Report History (2) | Files (2)

Visit Report Detail [Edit] [Delete] [Clone] [Sharing] [Send Report Internally] [Send Report to Customers] [Update Competitive Insights]

Information

Owner	Lela RAJAN [Change]	Account	ACCOUNT TEST
Subject	Notification_completed	Contact	JDS Test
Date of the Visit	8/01/2018	Activity	No Activity
GBU	Aroma Performance	Account Plan	Care
BBI	Aroma Ingredients	Contract	WEGO ID
Visibility	Shared		GBU Customer Classification
Visit Report Status	Completed		
Visit Report Type			

[Previous] [Refresh] [More]

Unread 1 - 46 of 46

[Add] [Star] [Flag] me Sandbox: ACCOUNT TEST - Visit Report - 2018-01-08 - (Internal Report - Notification_com... - Account , 10:25 am

Activity History [Log a Call] [Mail Merge] [Send an Email] [View All] Activity History Help

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

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



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
Link contract

+ Follow Send Report Internally Send Report to Customer Edit Close

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 Business Service Competitive Insights Related

▼ Main Information

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

RELATED CONTACT

RELATED CONTACT LIST (1)

NAME	DPT	FUNCTION	ROLE
Anne GILLES	Production	Assistant	Participant

VISIT REPORT TEAM

TEAM MEMBER LIST (1)

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

Followers Show All (1)

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

CUSTOMER VISIT

+ Schedule Visit

No Visit scheduled in the future

BUSINESS

+ ▼

SERVICE

+ ▼

Opportunities

1 Account

0 Linked

Sample Req.

Quotes

2 Account

0 Linked

0

Complaints

0

VOC

Customer Req.

0

0

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

Visit Report

Link contract

+ Follow

Send Report Internally

Account / Country

TEST LEILA / Argentina

Contact

Anne GILLES

Chatter

Details

Business

Products (0)

Opportunity Links (0)

Quote Links (0)

New Link Opportunity VisitReport

Information

Link Name

* Visit Report

Link contract

* Opportunity

Search Opportunities...

Cancel

Save & New

Save

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 Account Sub-Type

End-User

GBU

Technology Solutions

Account Information

General Account Information

Information (managed by GBU Commercial Excellence)

GBU Customer Classification

GBU Account Type

Standard Account

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 (2)

Cross-BU Leads (2)

Customer Contacts (1)

Solvay Contacts (1)

Open Activities (2)

Opportunities (2)

Products (2)

Activity History (2)

Visit Report History (2)

Google Docs, Notes, & Attachments (2)

Visit Report Detail

Edit | Delete | Clone | Sharing | Send Report to Customer | Send Report Internally | Report Wizard

Information

Owner

Amoud Denewet (Change)

Account

BAYER CROPSCIENCE

Subject

New Product Presentation

Opportunity

Date of the Visit

03/03/2016

Contact

Thomas O'Malley

GBU

Periodides

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

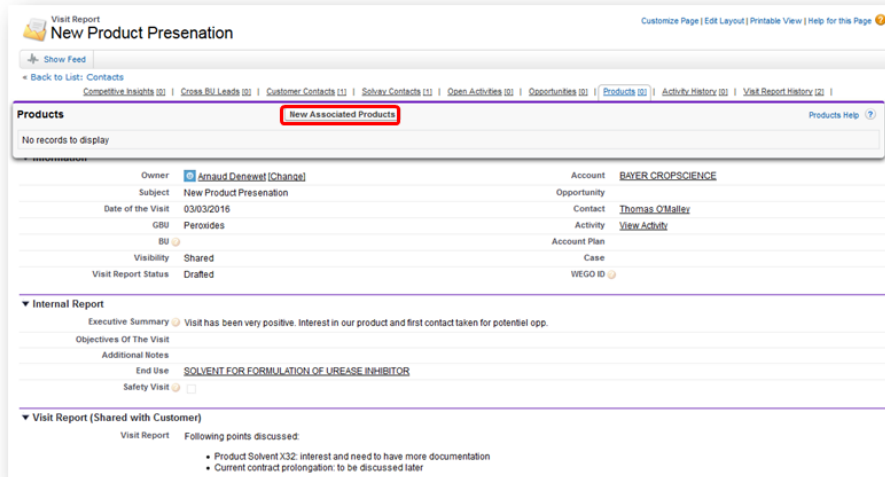
Following points discussed:

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

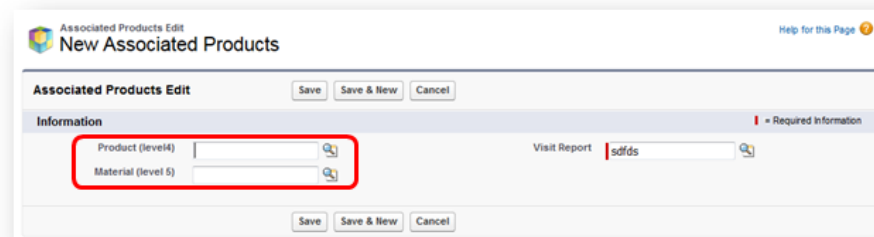
2 He hoo
vers the Pro
duct link and clicks
on New
Associated
Product.

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

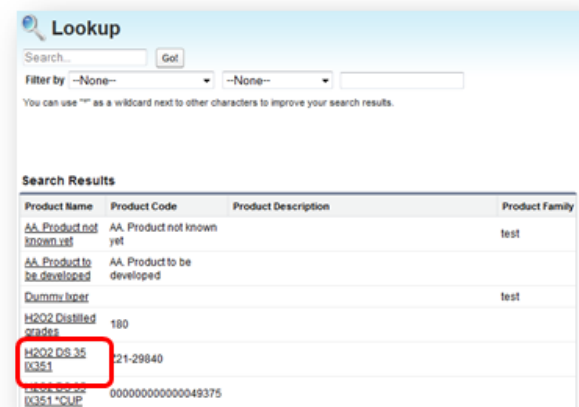
Otherwise
the
following
error will be
displayed: "
You need to
be part of
the Visit
Report
Team to be
able to add
or edit a
product."



3 Once
in the
Associate
Product
screen, he c
licks on the
look icon to
search the p
roduct in
the system.
He can choi
ce between
a product
(level 4) or
a material
(level 5)



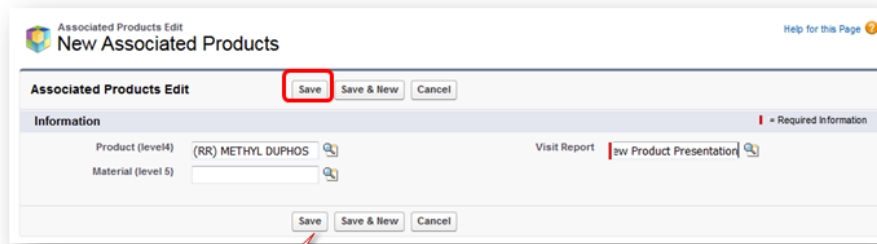
4 In the
new search
windows,
David selects
the product
discussed



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**.



The screenshot shows a software window titled "Associated Products Edit" with a subtitle "New Associated Products". In the top right corner, there is a link "Help for this Page" with a question mark icon. Below the title bar, there is a section labeled "Associated Products Edit" containing three buttons: "Save", "Save & New", and "Cancel". The "Save" button is highlighted with a red rectangular box. Below this is an "Information" section with a red icon and the text "= Required Information". It contains two input fields: "Product (level4)" with the value "(RR) METHYL DUPHOS" and a search icon, and "Material (level 5)" which is empty. To the right of these fields are two more input fields: "Visit Report" and "aw Product Presentation", both with search icons. At the bottom of the dialog, 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



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



Product name displayed when the V is it Report will be sent is only the level 4 product name, even if a product attribute

vel
5
is
s
el
e
ct
e
d.

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

Visit Report
New Product Presentation

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

Show Feed

Back to List: Contacts

Competitive Insights | Cross BU Leads | Customer Contacts | Sales Contacts | Open Activities | Opportunities | Products | Activity History | Visit Report History

Products

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

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 prolongation: to be discussed later

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

It is now
possible to
relate existi
ng 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.

Visit Report
Eo in IGepal F 40

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

Show Feed

Back to List: Visit Reports

Customer Contacts | Products | Opportunity Links | Quote Links | Visit Report Team | Cross BU Leads | Activity History | Open Activities | Visit Report History

Quote Links

New Link Quote VisitReport | New Quote

Quote Links Help

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

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 (0) | Google Docs, Notes, & Attachments (0)

Visit Report Detail

Edit | Delete | Clone | Sharing | Send Report to Customer | Send Report Internally | Report Wizard

▼ Information

Owner	Amud Denewet (Change)	Account	BAYER CROPSCIENCE
Subject	New Product Presentation	Opportunity	
Date of the Visit	03/03/2016	Contact	Thomas O'Malley
GBU	Periodides	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 prolongation to be discussed later

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!

Visit Report
New Product Presentation

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

Back to List: Activities

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

Customer Contacts

New Customer Participant

Customer Contacts Help

Action	Contact Name	Account	Phone	Email	Role
☐ Edit Del	John Smith	BAYER CROPSCIENCE	+3345678231	chhavi.x.gupta@accenture.com	Participant

▼ Internal Report

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

Additional Notes /

End Use

▼ Visit Report (Shared with Customer)

Visit Report Dear John,

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

Visit Report
New Product Presentation

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

Back to List: Activities

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

Customer Contacts

New Customer Participant

Customer Contacts Help

Action	Contact Name	Account	Phone	Email	Role
☐ Edit Del	John Smith	BAYER CROPSCIENCE	+3345678231	chhavi.x.gupta@accenture.com	Participant

▼ Internal Report

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

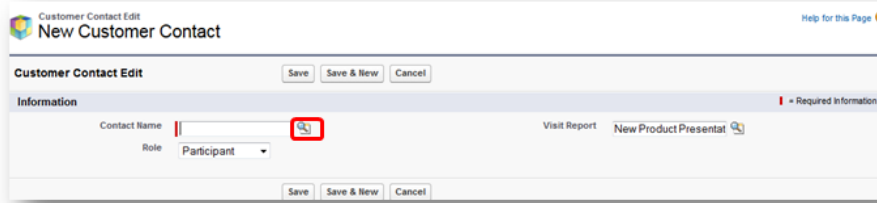
Additional Notes /

End Use

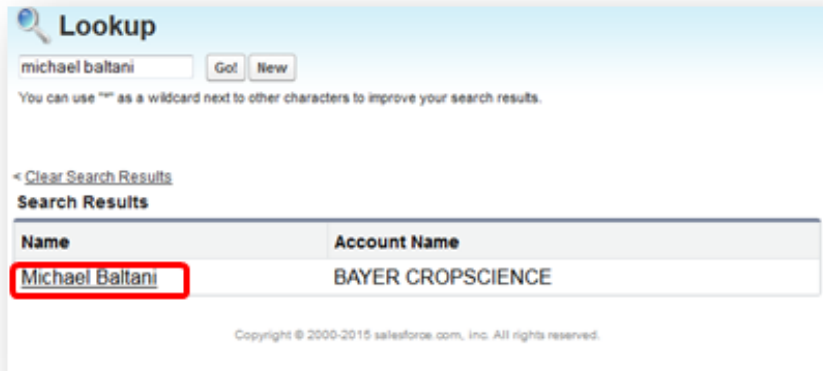
▼ Visit Report (Shared with Customer)

Visit Report Dear John,

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



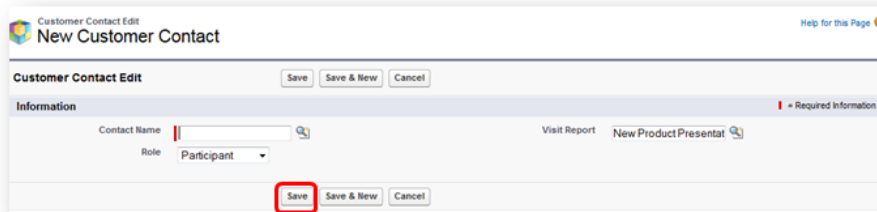
5 In the new search window, David searches for Michael Baltani and then selects the contact



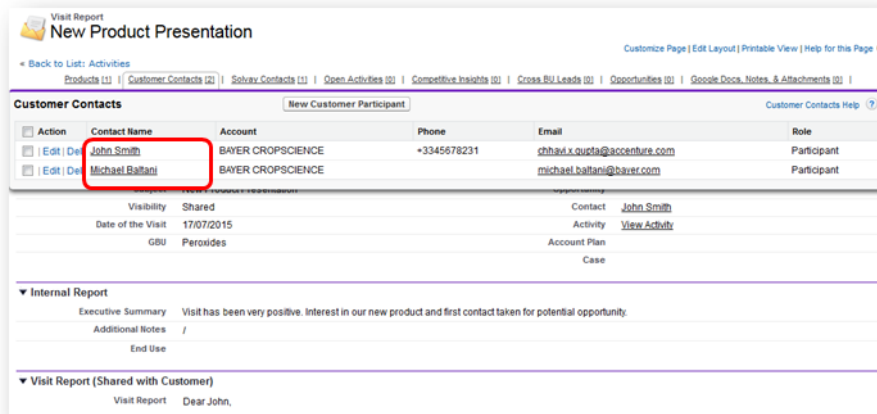
6 David has finished to select the Customer Contact in the search window. As information, he also can define Michael's role:

- 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



Action	Contact Name	Account	Phone	Email	Role
Edit Delete	John Smith	BAYER CROPSCIENCE	+3345678231	john.smith@accenture.com	Participant
Edit Delete	Michael Baltani	BAYER CROPSCIENCE		michael.baltani@bayer.com	Participant

Associate a Solvay Contact to the Visit Report

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

Visit Report
New Product Presentation

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

Show Feed

Back to List: Contacts

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

Visit Report Detail

Edit | Delete | Clone | Sharing | Send Report to Customer | Send Report Internally | Report Wizard

Information

Owner: Amad Deneux (Change)

Subject: New Product Presentation

Date of the Visit: 03/03/2016

GBU: Peroxides

BU: [icon]

Visibility: Shared

Visit Report Status: Drafted

Account: BAYER CROPSCIENCE

Opportunity

Contact: Thomas O'Malley

Activity: View Activity

Account Plan

Case

WEGO ID: [icon]

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: [icon]

Visit Report (Shared with Customer)

Visit Report

Following points discussed:

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

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!

Visit Report
New Product Presentation

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

Show Feed

Competitive Insights | Cross BU Leads | Customer Contacts | Visit Report Team | Open Activities | Products | Activity History | Visit Report History

Visit Report Team

New Visit Report Team | Add Default Team

Visit Report Team Help

Action	User	Role
[icon] Edit Del	Nicolas Commeaux	Participant
[icon] Edit Del	Françoise Coussy	Participant
[icon] Edit Del	Ricardo Dias	To Be Notified

GBU: Peroxides

BU: [icon]

Activity: View Activity

Account Plan

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

Visit Report
New Product Presentation

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

Show Feed

Competitive Insights | Cross BU Leads | Customer Contacts | Visit Report Team | Open Activities | Products | Activity History | Visit Report History

Visit Report Team

New Visit Report Team | Add Default Team

Visit Report Team Help

Action	User	Role
[icon] Edit Del	Nicolas Commeaux	Participant
[icon] Edit Del	Françoise Coussy	Participant
[icon] Edit Del	Ricardo Dias	To Be Notified

GBU: Peroxides

BU: [icon]

Activity: View Activity

Account Plan

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

Solvay Contact Edit

Save | Save & New | Cancel

Information

User: [input field] [look icon]

Role: --None--

Visit Report: New Product Presentation [look icon]

Save | Save & New | Cancel

Required Information

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

The screenshot shows the 'Lookup' search interface in Salesforce. The search term 'Pedro' is entered in the search bar, and the 'Go!' button is visible. Below the search bar, there is a link to '< Clear Search Results'. The 'Search Results' section displays a table with two columns: 'Full Name' and 'Role'. The first row shows 'Pedro Pinto' in the 'Full Name' column, which is highlighted with a red rectangle. The 'Role' column is empty for this entry. At the bottom of the page, there is a copyright notice: 'Copyright © 2000-2015 salesforce.com, inc. All rights reserved.'

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**.

The screenshot shows the 'New Solvay Contact' form in Salesforce. The form has a header with 'Solvay Contact Edit' and 'New Solvay Contact'. Below the header, there are buttons for 'Save', 'Save & New', and 'Cancel'. The 'Information' section contains a 'User' field with 'Pedro Pinto' selected and a 'Role' dropdown menu set to 'To Be Notified'. The 'Save' button is highlighted with a red rectangle. At the bottom of the form, there are buttons for 'Save', 'Save & New', and 'Cancel'.

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

The screenshot shows the 'Visit Report Team' table in Salesforce. The table has columns for 'Action', 'User', and 'Role'. The 'User' column is highlighted with a red rectangle. The table contains the following data:

Action	User	Role
[Edit] [Del]	Nicolas Commeaux	Participant
[Edit] [Del]	Françoise Coussey	Participant
[Edit] [Del]	Ricardo Dias	To Be Notified
[Edit] [Del]	Pedro Pinto	To Be Notified

Attach a document to the Visit Report

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

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 (0) | Google Docs, Notes, & Attachments (0)

Visit Report Detail

Edit | Delete | Clone | Sharing | Send Report to Customer | Send Report Internally | Report Wizard

▼ Information

Owner	Amad Denev (Change)	Account	AYER CROSCIENCE
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 potentiel 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 prolongation: to be discussed later

2 He hoo vers the Google Docs, Notes & Attachment link and clic ks on Attach File.

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 (2) | Open Activities (0) | Opportunities (0) | Products (1) | Activity History (0) | Visit Report History (0) | Google Docs, Notes, & Attachments (0)

Google Docs, Notes, & Attachments

Add Google Doc | New Note | Attach File

Notes & Attachments Help

No records to display

Owner Amad Denev (Change) Account AYER CROSCIENCE

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 potentiel 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 prolongation: to be discussed later

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 Docs link as your custom email won't be able to read it.

3

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

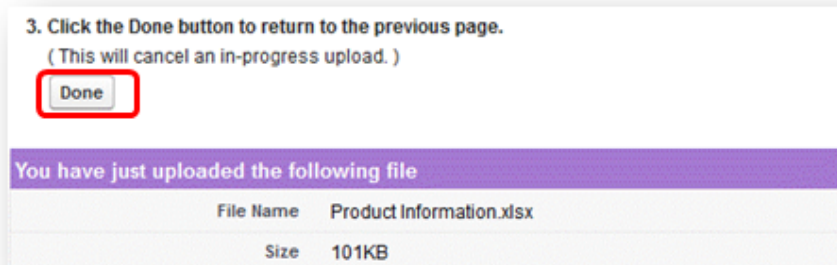
 **Attach File to Visit Report New Product Presentation**

1. Select the File
Type the path of the file or click the Browse button to find the file.
 Aucun fichier sélectionné.

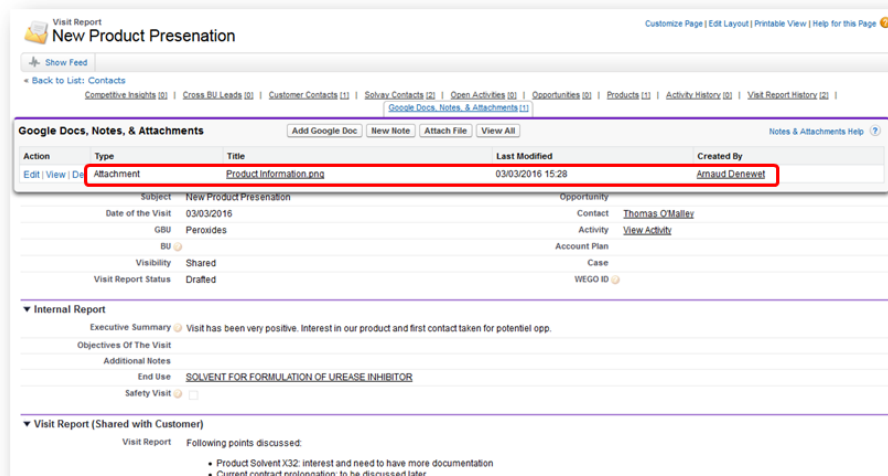
2. Click the "Attach File" button.
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)

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



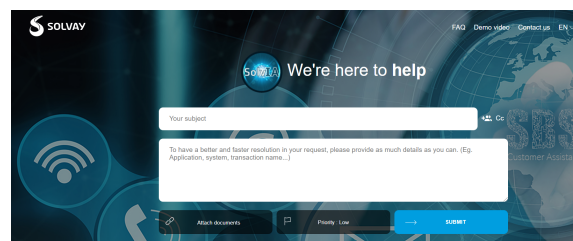
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you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example