

Visit Report: Send internally

Overview

In this section, you will find information about how to send a visit report internally, to Solvay contacts, through Salesforce.

Concerned profiles:

All except Strategic Marketing

Table of content

- [Step By Step](#)
 - [Share a Visit Report](#)
 - [Share a Visit Report internally](#)
- [Related articles](#)
- [Need help?](#)

Step By Step

Share a Visit Report

1 David has the 2 possibilities for sharing a visit report with participants:

[Send Report to Customer](#)

- David can send the Visit Report to the Customer. It will take the information entered in the field **Visit Report** and send the VR to:
 - To: Customer Contact(s)
 - CC: Solvay Contact(s)

[Send Report Internally](#)

- David can send the Visit Report internally. It will take the information entered in the field **Executive Summary** and **Additional Information** and send the VR to:
 - To: Solvay Contact(s)

•David decides to share the Visit Report in the both ways.

Share a Visit Report internally

1 David wants now to share the VR with internal colleagues

2

He opens the visit report he wants to share

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](#) | [Solvey 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	Arnaud Denevet Change	Account	AYER 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 prolongation: to be discussed later

3

He clicks on the button on Send Report internally

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](#) | [Solvey 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	Arnaud Denevet Change	Account	AYER 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 prolongation: to be discussed later

4

David can now edit the information before definitely send the VR to the customer

Visit Report Preview

To: arnaud.denevet@accenture.com; christian.cano-ex@solvay.com

From: arnaud.denevet@accenture.com


CC:

Select Template: Visit Report in English

Select Attachment	File Name
<input type="checkbox"/>	Product Information.png

Subject: BAYER CROPSCIENCE - Visit Report - 2016-03-03 - (Internal Report - New Product Presentation)

Body



Account : BAYER CROPSCIENCE, BRUSSELS, Belgium
Date : 2016-03-03
Subject : New Product Presentation
Customer Participant(s) : Thomas O'Malley
Solvay Participant(s) :
Product(s) : (RR) METHYL DUPHOS

Dear All,
Please find below the summary and notes from my visit report:

Objectives :

[Send Visit Report Internal](#)

5

David doesn't remember who is accountable for the Product he discussed with the Customer... No problem! He is automatically added to the Internal Report as CC!

Visit Report Preview

To: nicolas.commeaux-ext@solvay.com;francoise.coussy-exterieur@solvay.com;ricardo-brissos.dias-ex@solvay.com;pedro.pinto@solvay.com

From: nicolas.commeaux-ext@solvay.com@example.com

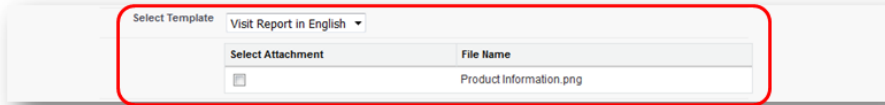
CC: louise.durand@solvay.com

AdditionalCC: rachel.singer@solvay.com

The **Additional CC** field is automatically populated via rules defined by each GBU. Criteria can be Region, Country and, Corporate Group of the Account, BU or Product level 3. Rules can be configured by Data Stewart.

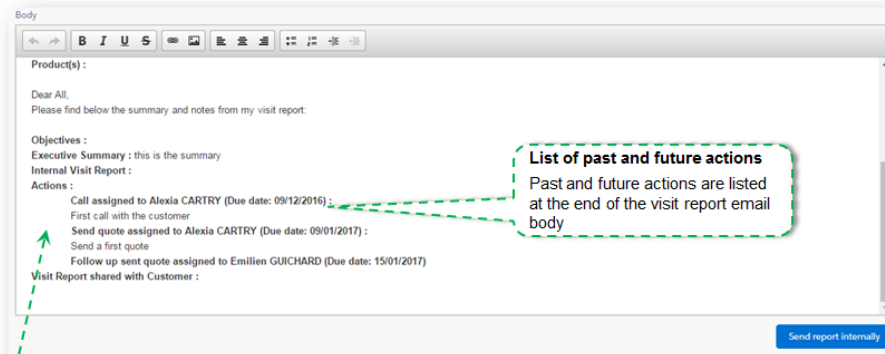
6

David has also the choice of the template language and for the attachments to be included or not.



7

Finally, David verifies the title and content of the email and adapts the text if needed.



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	Status	Assigned To
Edit Del Call		amanda.Adams	Other	✓	09/12/2016	Completed		Alexia CARTRY

Open Activities New Task New Event Open Activities Help ?

Action	Subject	Name	Task/Event Record Type	Task	Due Date	Status	Status	Assigned To
<input type="checkbox"/> Edit Cis Send quote		amanda.Adams	Other	✓	09/01/2017	Not Started		Alexia CARTRY
<input type="checkbox"/> Edit Cis Follow up sent quote		amanda.Adams	Other	✓	15/01/2017	Not Started		Emilien GUICHARD

Account : TEST NOVECARE, CITY, Argentina
 Date : 2016-01-08
 Subject : Winter Release
 Customer Participant(s) : Benjamin VEYRIER TEST
 Solvay Participant(s) : Leila RADJAH
 Product(s) :

Dear All,
Please find below the summary and notes from my visit report:

Objectives :

Executive Summary : For memo winter release

Internal Visit Report :

Unmet Needs: Need a yellow color on Adhesives application

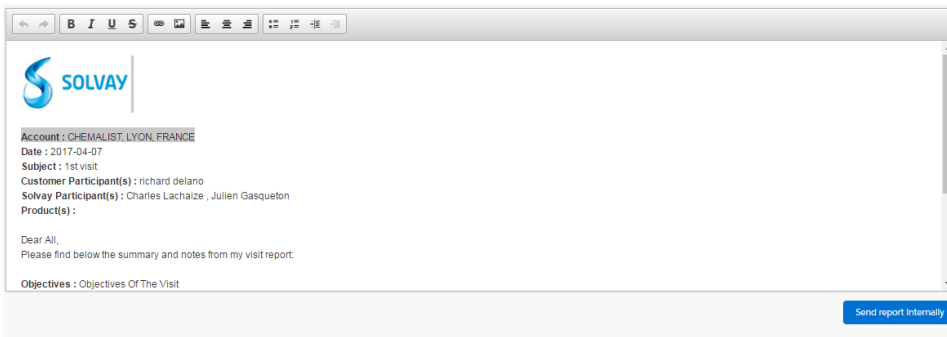
Actions :

No
w,
past
and
futu
re
acti
ons
are
liste
d at
the
end
of
the
visit
rep
ort
ema
il
body

A
new
field
, **Un
met
Nee
ds**
was
add
ed
to e
nter
key
wor
ds
and
des
cript
ion
of
Cus
tom
er
Un
met
Nee
ds.

8

Once the visit report is ok for him, he clicks on **Send Report Internally**



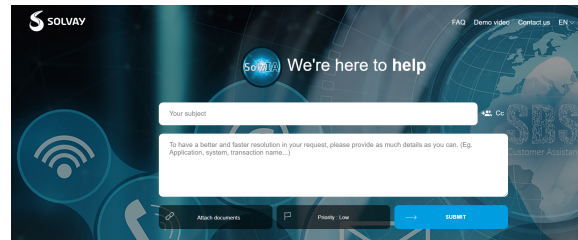
[Back to the top](#)

Related articles

- [Activity: Create a customer visit in Salesforce and from Google Calendar \(Lightning For Gmail\)](#)
- [Visit Report Creation & Update](#)
- [Visit Report Emailing to customer](#)
- [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