

3.20 Visit Reports

This module is for managing visits to potential or established customers. As usual it is organized with filters and information cards, where it is possible to note down the details of a visit (main information, expenses, etc.).

It is also possible to send a PDF document to a potential customer with details of a completed visit. This provides the customer with a reminder of the visit.

The image shows a mobile application interface for managing visit reports. At the top, there is a dark blue header bar with a back arrow, a folder icon, the title 'First visit Visitreport', a star icon, and a trash icon. Below the header is a light blue bar with icons for chat, document, calendar, checkmark, and expand/collapse. The main content area is titled 'Visit Information' and contains several fields: 'Visit Name' with the value 'First visit', 'Visitreport No' (empty), 'Related To' with the value 'Lead > Pinco Pallo', 'Visit Date' with a calendar icon and the value '02/05/2022', 'Assigned To' with the value 'User > formazione.vtenext' and a blurred profile picture, 'Time created' with a calendar icon and the value '02/05/2022 09:46:38', and 'Modified Time' with a calendar icon and the value '11/07/2022 18:10:52'. An orange 'EDIT' button with a pencil icon is positioned to the right of the 'Time created' field. At the bottom, there is a navigation bar with icons for home, a grid of squares with a '7' badge, a chat bubble with a '1' badge, an envelope with a '24' badge, and a menu icon.

First visit Visitreport

Visit Information

Visit Name
First visit

Visitreport No

Related To
Lead > Pinco Pallo

Visit Date
02/05/2022

Assigned To
User > formazione.vtenext

Time created
02/05/2022 09:46:38

Modified Time
11/07/2022 18:10:52

EDIT

Visit Reports detail

Organizational layout of related modules		
Conversations	Notes	Products
Activities (Calendar)	Tasks (Calendar)	Messages
PDF Maker	Processes	

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