

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 light blue cards with the following details:

- Visit Name:** First visit
- Visitreport No:** (empty field)
- 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

An orange 'EDIT' button with a pencil icon is positioned to the right of the 'Time created' and 'Modified Time' cards. At the bottom of the screen is a navigation bar with icons for home, a grid of squares (7), chat (1), mail (24), and a menu icon.

Visit Reports detail

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

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