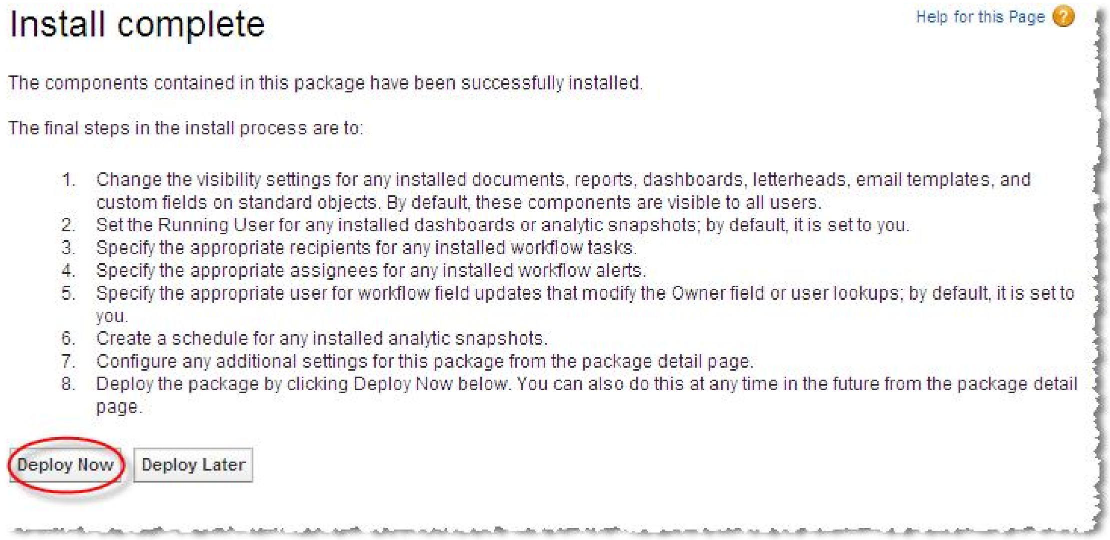
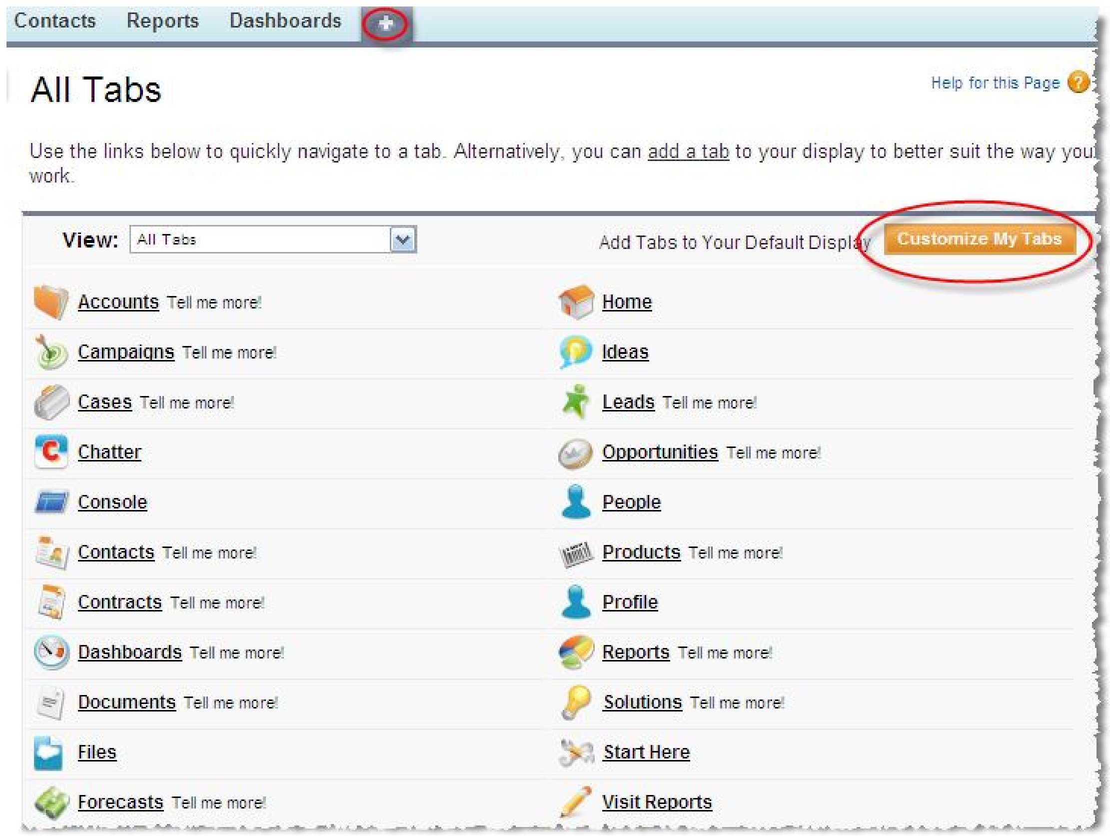
Simple Visit Reports – Setup Guide

Installation

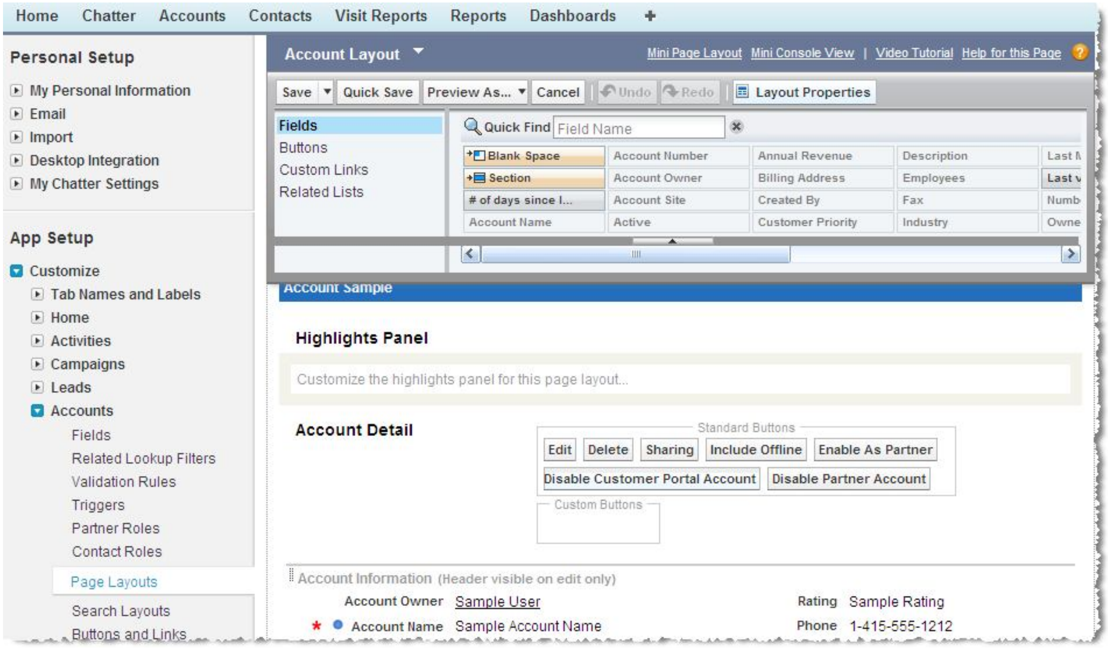
Once the package is installed, do not forget to click on the deploy button



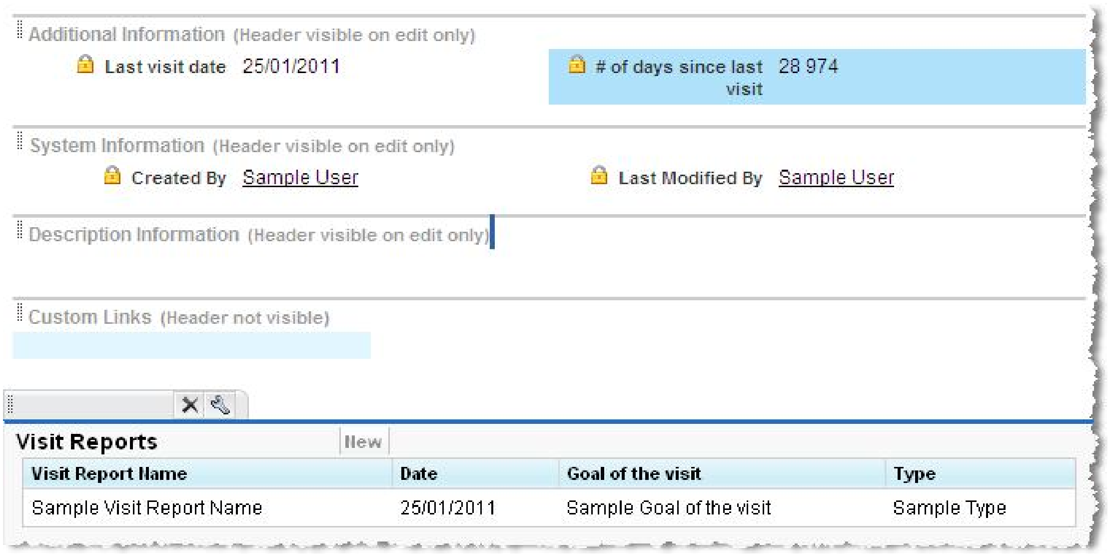
First, you can add the “Visit reports” tab by clicking on the “+” and the button “Customize my tabs”



Then , go the setup and edit the account layout



Add the following fields : “Last visit date” and “# of days since last visit” as well as the “Visit Reports” related list.



You can also setup the sharing settings of the dashboard and the 6 reports which are stored in specific folders.

You are now ready to use the “Simple Visit Reports” application.