

Simple Visit Reports – Setup Guide

Installation

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

Install complete

[Help for this Page](#) ?

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.
8. Deploy the package by clicking Deploy Now below. You can also do this at any time in the future from the package detail page.

Deploy Now

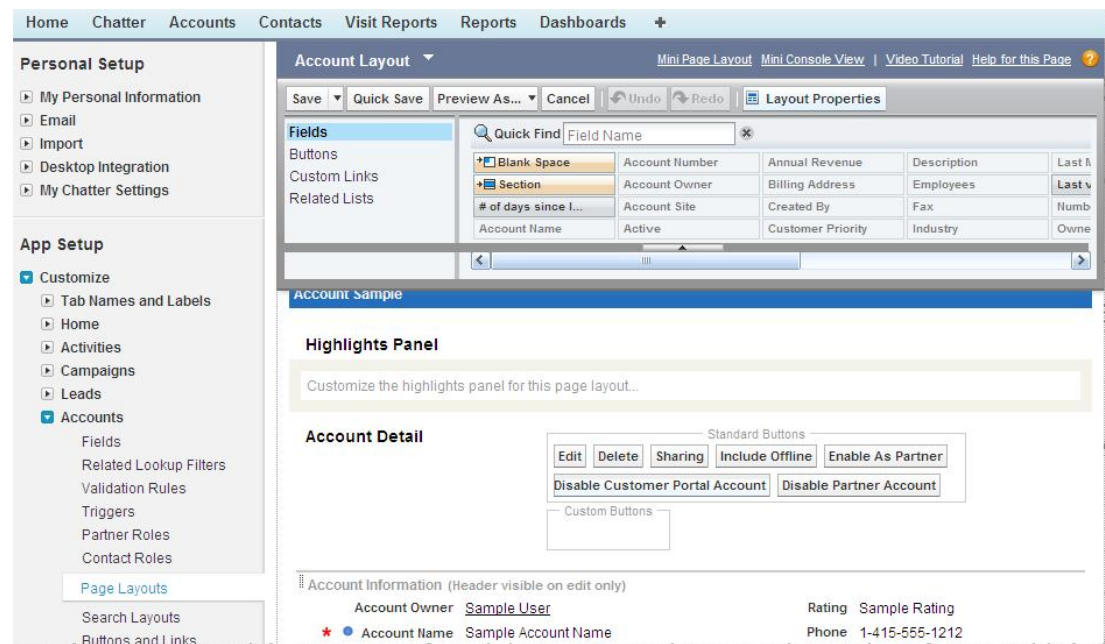
Deploy Later

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

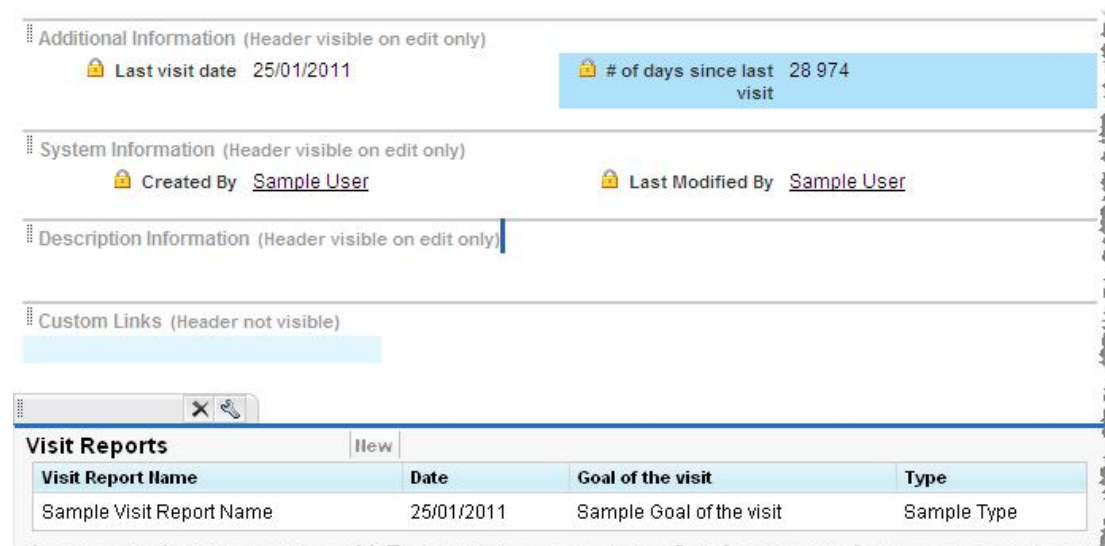
The screenshot shows the Salesforce 'All Tabs' page. At the top, there is a navigation bar with 'Contacts', 'Reports', 'Dashboards', and a '+' icon. Below this, the 'All Tabs' section is visible, with a 'View: All Tabs' dropdown and a 'Customize My Tabs' button circled in red. The page lists various tabs in two columns, each with an icon and a 'Tell me more!' link. The tabs include: Accounts, Campaigns, Cases, Chatter, Console, Contacts, Contracts, Dashboards, Documents, Files, Forecasts, Home, Ideas, Leads, Opportunities, People, Products, Profile, Reports, Solutions, Start Here, and Visit Reports.

Tab Name	Icon	Link
Accounts	Folder icon	Tell me more!
Campaigns	Target icon	Tell me more!
Cases	Document icon	Tell me more!
Chatter	Speech bubble icon	Tell me more!
Console	Dashboard icon	Tell me more!
Contacts	Person icon	Tell me more!
Contracts	Document icon	Tell me more!
Dashboards	Chart icon	Tell me more!
Documents	Document icon	Tell me more!
Files	Folder icon	Tell me more!
Forecasts	Bar chart icon	Tell me more!
Home	Home icon	Tell me more!
Ideas	Lightbulb icon	Tell me more!
Leads	Person icon	Tell me more!
Opportunities	Document icon	Tell me more!
People	Person icon	Tell me more!
Products	Product icon	Tell me more!
Profile	Person icon	Tell me more!
Reports	Chart icon	Tell me more!
Solutions	Lightbulb icon	Tell me more!
Start Here	Home icon	Tell me more!
Visit Reports	Document icon	Tell me more!

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.