



## **GAS 2.2 Enhancements**

Veeva Professional Services

# GAS 2.2 New Features

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- Account Summary view for Accounts outside rep Territory
- Contains search **enablement** for Account Name fields
- Ability to specify Maximum accounts to display (instead of hard coding to 20)

# Account Summary

# Account Summary View

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- Custom setting attribute needs to be enabled in `GAS_Hierarchical_Setting__c` to enable this functionality
- Account object Field Sets control what fields to show in the summary – either use default provided in package or create your own
- One default Account field set per Hierarchy Custom setting – however you may create Profile specific or User specific settings and use different summary field sets by User/Profile
- Field Sets support Translation
- Record type developer name can be specified in the Field Set Label to map different summaries for different record types

# Account Summary View

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- Fieldset Label Naming convention in the Custom setting attribute by default is @@RecTypeDevName@@<optionaltext>. For eg:  
*@@Professional\_vod@@VPROF Default Account Summary*
- In combination with Profile/User specific Custom settings and Rectype naming conventions, the field sets can be assigned similar to Page layout assignments
- Other Custom setting properties control background color, title etc
- Custom setting property to choose which Account field to choose as hyperlink to the summary
- Related list not supported currently

# GAS Results with Hyperlinked “Name” field

Results

Add To Territory

	Name ▲	Specialty	Record Type	Created Date	Created By	Street Address	City	State	Zip	Primary
<input type="checkbox"/>	<a href="#">Marie, Jo-anne</a>	Otolaryngology	Professional	9/19/2013 9:16 AM	Admin User	39 Newton Sparta Rd	Newton	NJ	07860	[X]
<input type="checkbox"/>	<a href="#">Massarella, Joseph</a>	Pharmacist	Professional	9/19/2013 9:16 AM	Admin User	124 Stillwater Station Rd	Newton	NJ	07860	[X]
<input type="checkbox"/>	<a href="#">Maute, John</a>	Chiropractor	Professional	9/19/2013 9:16 AM	Admin User	694 State Route 15 S	Lake Hopatcong	NJ	07849	[X]
<input type="checkbox"/>	<a href="#">Mcgraw, John</a>	Family Practice	Professional	9/19/2013 9:16 AM	Admin User	135 Newton Sparta Rd	Newton	NJ	07860	[X]
<input type="checkbox"/>	<a href="#">Morrell, Johanna</a>	Licensed Practical Nurse	Professional	9/19/2013 9:16 AM	Admin User	912 Homestead Dr	Newton	NJ	07860	[X]
<input type="checkbox"/>	<a href="#">Moskowitz, Joel</a>	Dentist	Professional	9/19/2013 9:16 AM	Admin User	28 Bowling Green Pkwy	Lake Hopatcong	NJ	07849	[X]
<input type="checkbox"/>	<a href="#">Myshkoff, John</a>	Dentist	Professional	9/19/2013 9:16 AM	Admin User	238 Spring St	Newton	NJ	07860	[X]

Add To Territory

# Default Account Summary page

## Account Summary

### ▼ Account Information

Name	Ayrton Senna	Account Group	
Phone		Description	Medical Professional
Specialty	Cardiology	Specialty 2	Family Medicine
Group Specialty 1		Leader?	<input checked="" type="checkbox"/>
Do Not Call?		Practice at Hospital?	<input type="checkbox"/>
Practice Near Hospital?	<input type="checkbox"/>	Target?	<input checked="" type="checkbox"/>
Speaker?	<input checked="" type="checkbox"/>	Investigator?	<input checked="" type="checkbox"/>

# Defining/Locating Account Field Sets

**System Overview**

**Personal Setup**

- My Personal Information
- Email
- Import
- Desktop Integration

**App Setup**

- Customize**
  - Tab Names and Labels
  - Home
  - Activities
  - Campaigns
  - Leads
  - Accounts**
    - Fields
    - Related Lookup Filters
    - Validation Rules
    - Triggers
    - Partner Roles
    - Contact Roles
    - Page Layouts
    - Field Sets**
    - Search Layouts
    - Buttons, Links, and Actions **New!**

**Field Sets (BETA)** [New](#)

Action	Field Label	API Name	Where is this used?
<a href="#">Edit</a>   <a href="#">Del</a>	VPROF Default Account Summary	VPROF_Default_Account_Summary	Field set will be used in a VF page to display account summary information in GAS for Accounts not already aligned to Rep territories



# Editing Field Sets – very similar to Page layouts

**VPROF Default Account Summary** ▾

Save Cancel Undo Redo Field Set Properties

**Account**

- Business Professional Person
- Created By ID
- Last Modified By ID
- Master Record ID
- Owner ID
- Parent Account ID
- Primary Parent

Quick Find Account Name ✕

# Beds	Account Description	Account Identifier	Account Search Bu...	Account Source	Alternate Nam
# Departments	Account Fax	Account Number	Account Search Fi...	Account Type	Annual Reven
Account	Account Group	Account Phone	Account Search La...	Account Type	Approved Emi
Account Class	Account ID	Account Rating	Account Site	AHA #	Assistant

Drag any of the fields above into the list below.

**In the Field Set** ⓘ

- Name
- Account Type
- Primary Parent > Account Group
- Annual Revenue
- Account Phone
- Asst. Phone
- Other Phone
- Record Type ID > Description
- Home Phone
- Specialty

# Other 2.2 Updates

# Contains Search, Search Result Size

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- There are two custom setting attributes that allow you to control if you would like a Contains or a Starts With search on Account Name fields (Name, First Name, Last Name):
  - ▶ *GAS Msg Acct StrtsWith Contains* **Label** – This can be any value, but usually should be Starts With for *Starts With* search and Contains for *Contains* search
  - ▶ *GAS Message - Acct SWorContains* **Value** – This can only have one of two values – Starts With OR Contains
- A new custom setting attribute MAX Allowed Distinct Accounts now allows users to specify how many maximum results they would like the search results to show (default is 20). Also ensure the legacy message is appropriately updated (GAS Message - TOO MANY)

# New/Updated Custom Settings Attributes in v2.2 (GAS Hierarchical Setting)

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Please note to touch your existing settings so as to grab the default values defined for these new custom settings attributes

- *Enable\_Summary\_View\_\_c*
- *GAS Message - Acct SWorContains Value*
- *GAS Msg Acct StrtsWith Contains Label*
- *MAX Allowed Distinct Accounts*
- *GAS Message - TOO MANY* – The default value of this legacy setting is updated to make it generic

# Support and Resources

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- Murugesh Naidu (Product Manager/Developer for Global Account Search)
- Jeff Kelso (Developer for Global Account Search)
- Wayne Abbott (Tech Services Practice Manager)
- Chatter Group to post feature requests, installation issues, concerns or just plain old comments: [Global Account Search](#)
- Tech Services Website: <https://sites.google.com/a/veevasystems.com/technical-services/>