

GAS 2.2 Enhancements

Veeva Professional Services

GAS 2.2 New Features

- 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)
- Trim spaces in the search



Account Summary



Account Summary View

- 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

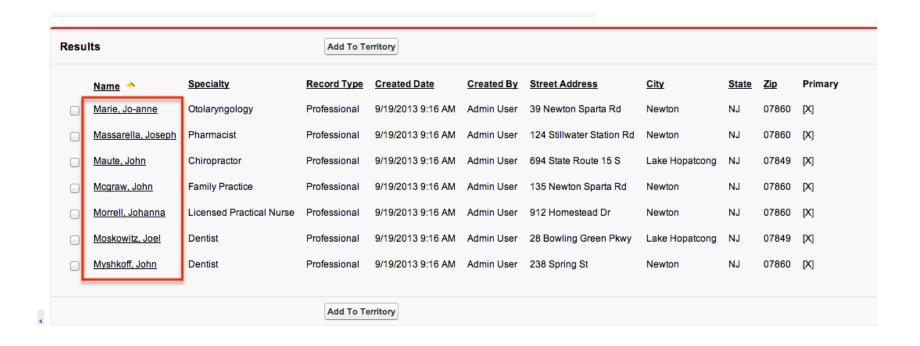


Account Summary View

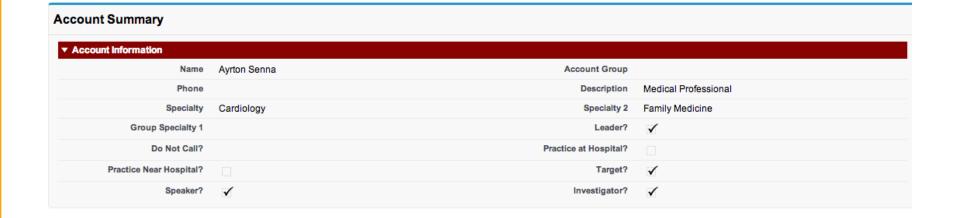
- Fieldset Label Naming convention in the Custom setting attribute by default is @@RecTypeDevName@@<optionaltext>. For eg: @@Professional_vod@@VPROF Default Account Summary
- ▶ In combination with Profile/User specific Custom settings and Rectype naming conventions, the field sets can be assigned similar 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



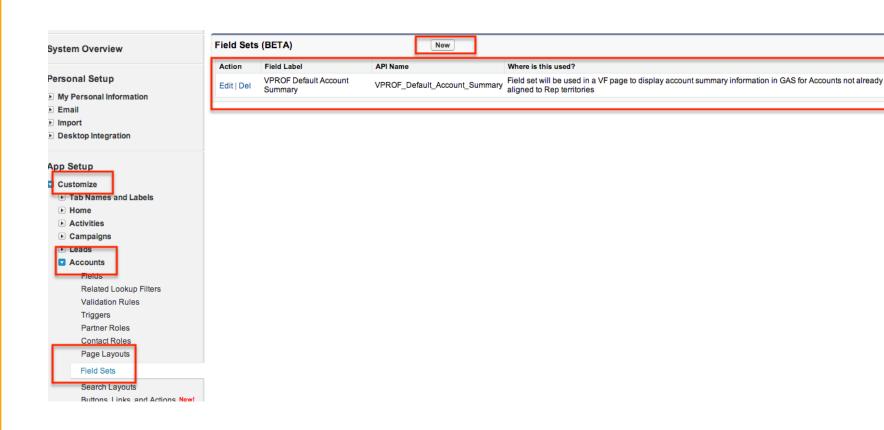
GAS Results with Hyperlinked "Name" field



Default Account Summary page



Defining/Locating Account Field Sets





Editing Field Sets – very similar to Page layouts



Drag any of the fields above into the list below.





Other 2.2 Updates



Contains Search, Search Result Size and housekeeping item

- ➤ 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 <u>Starts With</u> for Starts With search and <u>Contains</u> for Contains for Contains search
 - GAS Message Accnt SWorContains <u>Value</u> This can only have one of two values – <u>Starts With</u> OR <u>Contains</u>
- ➤ A new custom setting attribute <u>MAX Allowed Distinct Accounts</u> 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 (<u>GAS Message TOO MANY</u>)
- Search criteria is now trimmed so trailing spaces are not impactful



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

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

- Enable_Summary_View__c
- GAS Message Accnt 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

- 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: <u>Global Account Search</u>
- Tech Services Website: https://sites.google.com/a/veevasystems.com/ technical-services/

