Veeva CRM

Content Creation Guide

November 2013

What is CLM?

Veeva's closed loop marketing module (CLM) puts rich media into your sales team's hands so they can engage with physicians and key opinion leaders using the most compelling visuals available. CLM allows marketing materials to be displayed from the same application that sales reps are already familiar with to record calls. This marketing material showcases the important information that sales reps want to convey to their targets. As such, integration with the accounts and schedule of the sales rep is seamless. As content is viewed, key message information, duration of viewing, and additional customer defined click-streams are tracked to provide valuable statistics so marketers can gain insight into their targets, and the content can be continuously improved for maximum effectiveness. Veeva CLM also streamlines the process for managing and distributing the digital content to end users, ensuring they have access to the most current and relevant information on their device.

CLM consists of 3 main objects:

- CLM_Presentation_vod_c
- CLM_Presentation_Slide_vod_c
- Key_Message_vod_c

Each piece of content is associated to a Key Message record. Content is uploaded in industry standard formats and can include images, pdfs, videos, and HTML presentations. Multiple Key Messages are grouped together using CLM Presentation Slide records to link them to a CLM Presentation. Content files are downloaded to users' devices during sync.

Setting Up the CLM Content Server

For new orgs in CLM, do the following to set-up FTP credentials:

1. Log into your Veeva CRM org as an administrator.
2. Navigate to page layouts for the user's object.
3. Ensure the Content_Admin_vod__c field is on the layout.
4. Click **Save**.
5. Edit the user record of the user who you wish to have FTP credentials (as in Step 2) and select the box for Content Admin.
6. Click **Save**.
7. Clear Veeva Cache.
8. Login to the FTP server with the following credentials.
    - FTP Host server: FTP Server info from Veeva Common Settings
        - Go to Setup -> Develop -> Custom Settings -> Manage (Veeva Common)
    - User: Veeva CRM User name
    - Password: Veeva CRM Password

This should create the required folder structure for CLM.

Note: This step must be done before attempting to upload any files.

Initial Configuration

To configure CLM in an org, the following steps are required or recommended (as noted):

1. Modify the profile of the Content Loading user to provide permission to create Key Message, CLM Presentation, and CLM Presentation Slide records.
2. Modify the profile of the Content Viewing users to provide permission to read Key Message, CLM Presentation, and CLM Presentation Slide objects.
3. Create My Setup Product entries for at least one product for any Content Viewing user.
    - Media that specifies a product where the user does not have matching my setup products will not be downloaded or displayed for that user.
4. Modify the layout of Key Message:
    - Add the CLM Presentation Slides related list to the layout
    - Create a separate page layout section and add the Media File Visualforce Page to it
5. Modify the call report page layout to add a section with zvod_CLMDetails to display the slides shown during an e-Detailing session.
    - In Windows 8, the section signal--ded can be utilized to control whether or not the user is able to delete a Call Key message from this section on the Call Report.
7. Modify the page layout of CLM Presentation to show the Presentation_ID_vod (an external ID) field and add the CLM Presentation Slides related list (with Key Message, Display Order, and CLM Presentation Slide Name as columns).
8. Modify the page layout of CLM Presentation Slide to show at least CLM Presentation, Key Message, and Display Order.
9. Optionally, add a formula field "Key Message Product" on the CLM Presentation Slide Object, with value "Key_Message_vod__r.Product_vod__r.Name", which makes it easier to review what's included in a presentation from the related list.
10. Modify the page layout of the User object to add the Content_Admin_voc__c field for the profiles used by Content Administrators.
11. Clear the Veeva Cache.

Relinking to the Content Server after a Sandbox Refresh

Before performing the sandbox refresh, make sure to capture the original ORG ID of the sandbox. Perform the sandbox refresh as usual and then complete the steps for setting up CLM. Find the ORG ID for the sandbox after the refresh. Then log a support case to Relink CLM from <old ORG ID> to <new ORG ID>. This ensures that all content files are associated with the new ORG ID.

Data Model

Within Veeva, content metadata is stored in three objects:

- CLM_Presentation_vod__c
- CLM_Presentation_Slide_vod__C
- Key_Message_vod__c

Each piece of media loaded into Veeva CRM is represented as a Key Message, which describes information about that file, such as the media file name, file size, the description that should be displayed to a user when they view a thumbnail of that file, and the associated product. The following table outlines the required Key Message fields for managing content:

Field	Description
Media_File_ Name_vod__c	Automatically populated when a media file is added. A unique external ID for the media file. Provides the ability to easily update a piece of media by uploading content with the same unique external ID.
Media_File_CRC_ vod__c	Automatically populated when media file is added.
Slide_Version_ vod__c	Used to manage the media file version.
Media_File_Size_ vod__c	Automatically populated when media file is added

As with the standard Key Messages, users have access to CLM Key Messages based on their My Setup Products configuration. More granular access can be given by utilizing Salesforce sharing rules.

In addition, when launching media for a Call/Account, the key messages available for detailing are further filtered by Allowed Products on Call and Territory Field, Restricted Products on Account, and Segmentation on Account. For more information see:

- See Restricted Products in the Call Reporting section of Veeva CRM Documentation
- See Key Messages in the Call Reporting section of Veeva CRM Documentation

Presentations group content together and give users a way to navigate to a given file. CLM Presentations and CLM Presentation Slides are child objects of presentations, which map key messages to a presentation and define a display order and sub presentations.

The Call Key Message Duration for iREP displays in seconds. For VMobile/Exploria it displays in ticks.

Note: See the Media File Formats and Guidelines topic for instructions on building content for the Veeva CLM.

Uploading Content using the Key Message Object

To upload files directly through the SFDC User Interface, perform the following initial configuration steps:

- Modify the page layout for Key Messages to include the Media File visual force page. This visual force page allows uploading of content for users with edit permission to key message and downloading of content for users with at least read permission.
- Optionally, the Media File Name and File Size fields can be removed from the layout – the Visual Force page contains these fields by default.

Note: The Media File Name field is a unique external ID. If content is uploaded via FTP with the same name as an existing record, the existing content is replaced and the record updates with the information from the control file.

An Upload button displays on the Key Message page after the layout is saved. This allows you to upload a zip file into the system. A hyperlink on a Key Message allows for downloading of that zip file.

Note: There is a 50MB file size limit for uploads through the Key Message UI. For larger files, upload through the FTP, as described in Uploading Content using FTP.

The typical process for loading content into the system for testing is as follows:

1. Click the **Key Messages** tab.
2. Click **New** (Key Message).
3. Enter a Key Message Name
4. Fill out any other relevant fields.
5. Click **Save**.
6. Click the **Upload** button to select and upload a zip file into the system

Note: PDF/JPG files must be carefully packaged in a zip file, as described in Media Packaging.

- If an error message is displayed after step 6 (similar to the folder does not exist), then CLM is not enabled for this org. A case needs to be filed with Veeva Customer Support. More details are available in Setting Up the CLM Content Server.
- For a given Key Message, once a media file is uploaded, you cannot overwrite that file with another file of a different name
- If the Description_vod or the CLM_ID_vod are not filled in, on upload, the system will automatically populate the Description with the Media File Name and the CLM ID with "CLM ID".
- Click New CLM Presentation Slide, select a presentation, for example, All or Cholecap, and choose a display order for the slide. This display order determines the order in which the slide displays in the presentation.
- On the iPad, tap the sync button in the bottom left corner to pull down the newly uploaded content to the device

Uploading Content using FTP

Another option to upload content is to use FTP, which allows for bulk load of multiple files at a time. Content can be loaded using any FTP client (such as Filezilla).

If an FTP login account and user name is provided separately for the org by Support, use it to log in to the FTP server. If one was not provided, use the following instructions to allow a user to log in to the FTP server using their Veeva CRM login and password:

1. Log into your Veeva CRM org as an administrator.
2. Navigate to page layouts for the user's object.
3. Ensure the Content_Admin_vod__c field is on the layout.
4. Click **Save**.

5. Edit the user record of the user who you want to have FTP credentials and select the box for Content Admin.
6. Click **Save**.
7. Clear Veeva Cache.
8. Log in to the FTP server (using the FTP client) with that users' credentials, from step 5:
    - FTP Host server: FTP Server info from Veeva Common Settings
        - Go to Setup -> Develop -> Custom Settings -> Manage (Veeva Common)
    - User: Veeva CRM User name
    - Password: Veeva CRM Password

When set-up is complete:

Create a control file for every piece of content that is being uploaded. The format of the control file is as follows:

- USER=<Veeva CRM User name >
- PASSWORD=<Veeva CRM Password>
- FILENAME= <Filename.zip>

The control file should be created using one of the following encodings:

- ASCII
- ISO-8859-1
- UTF-8
- UTF-16
- UTF-32

Additional fields on the Key Message object can be added. Each field should be entered in a separate line in the following format: <Field API Name>=<value>.

- Name the control file with the exact name of the associated file, with an extension of ctl. For example, a control file for the Cholecap-Intro-1.zip slide should be named: Cholecap-Intro-1.ctl.
- Upload the file and the associated content through FTP.

The content itself (zip file) is loaded to the content directory of the FTP server. The content folder may be your root directory, in which case you will not see a content folder.

- The control file should be uploaded to the ctlfile directory
- Always upload the zip file first, and then upload the control file

When found, the ctl file is removed from that directory and then processed. After opening the ctl file directory on the right, you can right click and select Refresh to see when the file was removed.

If the control file was processed successfully, the zip file is also removed. After clicking the / directory on the right, you can right click and select Refresh to see when that file has been removed.

Note: The Media File Name field is a unique external ID. If content is uploaded via FTP with the same name as an existing record, the existing content is replaced and the record updates with the information from the control file.

An example control file looks like the following:

```
USER=datasteward@customer.com.sandbox
PASSWORD=mypassword
FILENAME=Cholecap-1-Intro.zip
CLM_ID_vod__c=VeevaCLM
Name=Cholecap - Events
Product_vod__c=a00S0000002i4oO
Slide_Version_vod__c=1.0.0
Description_vod__c=Cholecap - 5 53% Fewer Adverse Events
```

If no media is available on the iPad, see instructions in Setting Up the CLM Content Server. If other media is available, but the new content does not display, the following steps may be helpful in troubleshooting:

1. Find a presentation Online that the user can see on the device. Add your new key message as a presentation slide within that presentation and see if that fixes the issue.
2. View the newly created key message online, and test that you can download the file by clicking on the file name. If you cannot, upload the file again.
3. Check the Options – Media list on the iPad and confirm that the new key message is listed as downloaded to the device. If it is not present, try Syncing again to ensure the local data is up to date.
4. Verify that the presentation and slide is visible from the Media tab. If you do not see a presentation here, it could be that it the presentation is missing a slide. Presentations are only shown if the user has all the slides required to show that presentation.

Integration with Vault PromoMats

Veeva CRM can integrate with Vault PromoMats. Customers can manage their CLM content lifecycle through Vault PromoMats, from creation and reviews to publishing and withdrawal.The integration will streamline and simplify the CLM content creation process, saving customers and media agencies time and resources. For more information, see About iRep Integration in Vault help at http://vaulthelp2.-vod309.com/wordpress/applications/promotional-materials-edition/about-irep-integration/.

Key features include:

- Creation of Presentations (Binders in Vault)
- Mapping Key Messages (Documents in Vault) to Presentations.
- Sending Key Messages to CLM - creates the Key Message record and uploads the content zip file from Vault
- Sending CLM presentations to CLM - creates all Key Messages, CLM presentation slides, and the CLM presentation record. Corresponding media content is also uploaded from Vault.
- Withdrawal of Key Messages - inactivates the Key Message record in Veeva CRM

To setup the Vault integration, ensure you have a Content Administrator profile in your Veeva CRM org. This profile mush have Create and Update permissions to all CLM related objects, as described in the iRep guide. No additional configuration or setup is needed on the Veeva CRM side.

For information on configuration of Vault for the integration, see http://vaulthelp2.-vod309.com/wordpress/applications/promotional-materials-edition/about-irep-integration/.

Sample Content

To make uploading content easier for content creators, or to verify the configuration, the following steps allow quick creation of sample content:

1. Create a new key message, specify a key message name and product, and click save.
2. Upload the sample Cholecap-1-Intro.zip file, or any other sample zip file (then download the file to verify the upload was successful).
3. Create a new presentation, specifying a name and presentation ID and click save.
4. Create a new presentation slide, specifying the presentation name and key message name and click save.
5. For the Content Viewing user, confirm the user has My Setup Products entries for that product, and that, online, the user can see at least one account, but not all of them (like an administrator can).

On the iPad you can:

- Log in as the content viewing user
- Sync
- View an account
- Record a call
- Click the media button
- View the media
- Return to the call report
- Record a reaction to the slide
- Click submit
- Sync
- Online, verify the call report correctly shows the slides displayed

Troubleshooting and Tips

A few tips on metadata:

- Media associated with Key Messages that are not marked active are not displayed
- For media, the Display Order field on Key Messages is ignored. This field is used to determine the order textual (as opposed to CLM) Key Messages display on the Call Report in the Key Messages section.
- You can delete a Key Message or mark it inactive to remove a piece of media. Once users have saved calls with a piece of media, you can only mark it as inactive as the system uses that key message to properly display information about the call.
- It is best practice to delete all CLM Presentation Slide Records which are associated to an inactive Key Message
- A media file can be in multiple presentations – this allows updating a piece of content once, and have the changes reflected in multiple presentations

- If the Description_vod or the CLM_ID_vod are not filled in, on upload, the system will automatically populate the Description with the Media File Name and the CLM ID with "CLM ID".
- Populating the Presentation ID field on each presentation is recommended, as it makes the data much easier to move between testing and production
- If you forget to upload the media for a key message but include it as a presentation slide, the entire presentation is hidden to prevent accidental display of partial presentations. The entire presentation is also hidden if a user does not have access to one of the key messages inside the presentation.

Presentation Cloning

Presentation records and their associated slides can be cloned within the same org. This will save administration time and resources when a new presentation, which has a similar structure (number and order of slides) to an existing presentation, needs to be created quickly. Clicking the Clone button creates an exact copy of the presentation and all its associated CLM_Presentation_Slide_vod records. You have the option of creating cloned key messages or linking to the existing ones. The content file for the cloned key messages is not copied. Any sub-presentations that a slide is associated to will automatically be referenced in the new presentation. If, within the new presentation, the sub-presentation is no longer required or a different sub presentation is required, the Sub_Presentation_vod field needs to be updated to reflect this adjustment.

To enable this feature, place the Clone_Presentation_vod button on the page layout of the CLM_Presentation_vod object. It is recommended to remove the standard Clone button from the layout to avoid confusion. Additionally, give the appropriate user profiles access to the Clone_Presentation_vod VisualForce page.

Presentation Migration

Moving presentations from org to org can be achieved using the Migrate button, which transfers entire presentations from one org to another. When an agency completes development of a presentation in a development sandbox, that presentation can be copied to the customer's test environment for Medical, Legal, and Regulatory review at the push of a button. Similarly, once the presentation is reviewed and ready for migration to production, the same process can take place, promoting the presentation and all its components to production.

To enable this feature, place the Migrate_vod button on the page layout for CLM_Presentation_vod. Content Administrators need access to the Migrate_CLM_Presentation_vod VisualForce page, and read access to the Veeva Message object. Users performing presentation migrations need valid login credentials to the target org and the following object permissions:

- CLM_Presentation_vod - Read, Create, Edit
- CLM_Presentation_Slide_vod - Read, Create, Edit, Delete
- Key_Message_vod - Read, Create, Edit
- Product_Catalog_vod – Read, View All (can be limited to the External_ID_vod field) -
- Message_vod__c - Read

- Survey_vod - Read, View All (can be limited to the External_ID_vod field) - If the Surveys module is utilized with CLM

For every CLM Presentation record, any associated CLM Presentation Slide records, Key Messages and their associated records are migrated to the destination org. If any of the objects exist in the target org, they are overwritten. Duplicates will be identified using each record's External ID field – an External ID field is required to be populated on each of the source records for the migration to succeed. Either Veeva delivered or custom External ID fields can be used for uniquely identifying these records. Additionally, the Key Message object contains a field, Product_vod, which is a lookup to the product catalog. In order to make sure the correct product is associated to the Key Message in the target org, this product's External ID field must be populated on the source org and must match the value populated in the target org. Similarly, External IDs must also be populated on Survey records if the Survey_vod field on CLM Presentation if it is being used.

Note:In order to ensure data integrity, the fields (for all three objects) on the source org should not be a subset of the fields on the target org. If there are more fields in the source org, the migration will produce a warning that there is no place to put the values of the extraneous fields in the target org.

Note: Users may decide to Continue or Cancel when a migration warning displays. If there is an error, the user must fix the error in order to migrate.

Content Sync

Content is synced to users' iPad after the standard CRM data sync is complete. As content syncs can often contain multiple files that may take some time to download, several options and indications are available to users so that they are aware of the progression of the content sync process:

- Optional Content Sync - The synchronization of CLM content can be configured to allow reps to deny a content sync if they are in an area with a slow, poor connection, or if they simply do not have time to sync content. To enable this optional sync, set the Content_Sync_Confirm Veeva Setting (labeled MEDIA_SYNC_CONFIRM) to True. If set to False, Content Sync will begin immediately after CRM Sync is complete with no option to delay it.
- The number of days a user can refuse a content sync can be defined in the Content_Sync_Interval Veeva Setting (labeled MEDIA_SYNC_INTERVAL). Once users pass this threshold without syncing content, they will be reminded to sync every time they log in to iRep.Synchronization Progress As content is downloaded, users get three visual indications on its progress:
- The name of the file currently being downloaded
- A file counter, showing the number files already downloaded and the number of total files to be downloaded
- A continuously updating progress bar
- Cancel Content Sync – Users will be able to cancel their content sync while slides are downloaded. Any slide that was completed successfully before the sync cancel will not need to be re-downloaded when the user syncs content again.

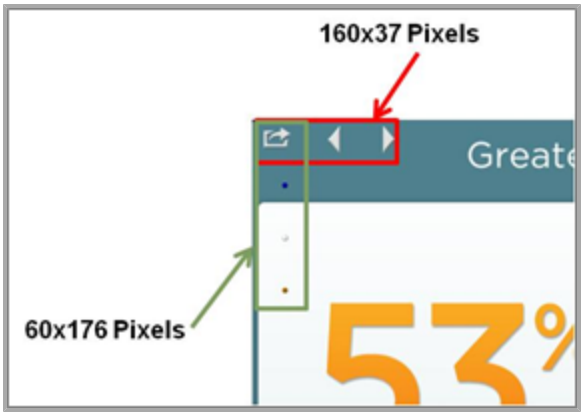
Media Display

iRep:

Veeva CLM utilizes the iOS UIWebView class, a standard Apple control.

While Veeva CLM supports most media playable on the iPad, the following guidelines help obtain the highest quality media. In general, all media must be playable in Safari on the iPad, as described in the TV and Video section of the iPad Specs page on the Apple website: http://www.apple.com/ipad/specs. Once in Veeva CLM, the media displays according to these guidelines:

- Media displays full-screen, with a resolution of 1024 x 768.
- Media displays in landscape mode only, rotating 180 degrees based on device orientation
- Users swipe left and right to advance to the next piece of media



- Veeva CLM navigation controls (e.g. the built-in menu and buttons) are contained within semi-transparent controls as follows:
  - Action button is 54x36 pixels – when clicked a drop down menu displays. See the Action Sheet for Media topic for more information.
  - Each Reaction button is 60x38 pixels (These buttons only display if configured). See the Inline Feedback for Media section for more information.
- History buttons to the right of the Action button extend out to 160 pixels.
- Veeva also provides a dynamic navigation bar at the bottom of the Media Viewer
- The navigation bar displays when users click the icon on the bottom left corner of the slide. See the Enhanced Navigation Paradigm section for more information.
- The navigation bar is 250 pixels in height
- The icon on the bottom left hand corner is 61x30 pixels

Windows 8 :

- The top left corner (60 x 176) is reserved, much like on iRep. The additional portion in the red box shown in the picture above is not reserved in Windows 8 .
- The command bar and navigation bar are displayed by swiping up or down from the top or bottom of the device
- The resolutions of the supported devices are:
  - Surface display: 10.6" 1366 x 768

    - Helix display: 11.6" 1920 x 1080
- Content is rendered using the Windows WebView class, which is similar to IE10

Note: The various buttons and controls mentioned above cannot be reskinned or disabled. The exception is the Reaction buttons, which can be disabled via configuration in the online application.

Note: It's best practice to understand what devices are utilized by the sales reps in order to determine how content should be coded. Using responsive design to ensure that content shows appropriately in all different devices is recommended.

Action Sheet for Media

Users have access to action menu options directly from media, allowing for increased rep efficiency during media calls. The actions available to the users are:

- Done – exits the Media Player and returns the user directly to the Call Report page
- Slides – returns to the slide view page of the presentation currently being displayed
- Sign – if the rep previously indicated which samples were disbursed on the call, the Sign button is available. Tapping on it launches the iRep signature page.
- Specialist (only available on iRep) – if iRep's integration with Facetime is configured for your org, this button is available. Tapping it launches the Facetime application and enables an interactive discussion between your organization's representative and the end user or target HCP.

For iRep, the menu options is opened by tapping on the icon on the top left corner of the device. On Windows 8 , the controls are on the command bar which are brought up by swiping up from the bottom of the screen.

Enhanced Navigation Paradigm

Veeva CLM gives users streamlined navigation between slides and presentations. By clicking an icon on the bottom left hand side of the screen, a slide sorter displays, allowing the user to scroll through the slides within the presentation. Tapping one of those slides loads it in the main window and hides the slide sorter. Additionally, users can tap on the Presentation Selector button – this displays the list of available presentations for that user. Tapping one of the presentations loads the first slide of that presentation and hides the slide sorter.

This feature makes the development of a custom slide navigator within content redundant, allowing content creators to focus on other features of their interactive media presentations.

History Buttons

As users progress through slides within a presentation, a browser like history is retained. Users can utilize the forward and backward icons to go back and review slides shown previously. Tapping the icon transitions

back/forward one slide in the history of displayed slides. Holding down either of these icons displays a list of slides (up to a maximum of 10) from which users can tap to jump to that slide.

For iRep, these controls are at the top left hand corner of the display. For Windows 8 , these controls are on the left hand side of the command bar displayed by swiping up from the bottom of the screen.

Navigation Bar

Veeva CLM gives users streamlined navigation between slides and presentations. A slide sorter displays, allowing the user to scroll through the slides within the presentation. Tapping one of those slides loads it in the main window and hides the slide sorter. Additionally, users can tap on the Presentation Selector button – this displays the list of available presentations for that user. Tapping one of the presentations loads the first slide of that presentation and hides the slide sorter.

This feature makes the development of a custom slide navigator within content redundant, allowing content creators to focus on other features of their interactive media presentations.

The navigation bar automatically hides if no user activity is detected for five seconds. This is to prevent the navigation bar from hiding vital messaging that may be placed behind it on the slide. No configuration is required for this feature.

For iRep, these controls are displayed by clicking the arrow icon on the bottom left hand side of the screen. For Windows 8 , the controls are displayed by swiping down from the top of the screen.

Fade out of content when Navigation Bar is displayed

When the Navigation Bar displays during a CLM Presentation, the content above the navigation bar can be hidden. This is in case compliance or regulations require the full slide to display at all times. The content is fully displayed again once the navigation bar is hidden.

To use this feature, enable the CLM_NAV_BAR_HIDE_CONTENT_vod Veeva Setting.

Training Mode

Content that is still in development or created for training purposes can be marked as Training. This content cannot be included as part of a call report. When viewing regular presentations, training presentations are not visible, and when viewing training presentations, regular presentations are not visible. The Training Presentations option is only visible if the user has one or more Training presentations assigned to them.

To mark a presentation as Training, enable the Training_vod check box on CLM_Presentation_vod.

For iRep, Training Presentations are viewed by selecting the Action Menu on the top right corner of the CLM Presentations list page.

For Windows 8 , Training Presentations are viewed by utilizing the drop-down shown below.

Watermark for Training Content

In order for sales reps to distinguish between a training presentation and a published presentation, Veeva provides the ability to add a watermark to CLM key messages.

Configuration

Administrators need to select the Veeva message called WATERMARK_TRAINING and edit the message to include the appropriate text for the watermark. The maximum text length for a watermark is 60 characters. By default, the text of this Veeva Message is blank. No watermark will display until this message is populated by an administrator.

If you have access to a presentation and it is marked as Training Content, when you view the presentation, the watermark will display over the content.

To access training content:

1. Log into.
2. Tap **Media** from the Home page.
3. Tap the **Action Sheet** button in the top right. A menu pops up.
4. Select .
5. Select the appropriate presentation to view.

Note: Only presentations marked as Training Content will have the watermark.

Functionality for Interactive Media

Veeva provides a number of JavaScript functions that allow for display of interactive information, access to the Veeva CRM mobile database, and streamlined navigation between CLM Key Messages and Presentations.

Tracking of CLM Key Messages

Each time a key message is viewed via CLM, a new Call Key Message record is created. In addition to the standard fields which are captured for a regular Key Message, the following fields are written to the Call Key Message record:

- CLM_ID_vod - stamped Media File name from the Key Message record
- Display_Order_vod - the display order of the CLM Key Messages that the key message is shown

- Duration_vod - in seconds (Note: On VMobile tablet, this field is saved in ticks, where 10,000,000 ticks = 1 second.)
- Presentation_ID_vod - stamped Salesforce record ID of the presentation
- Start_Time_vod - Date/time that the slide was shown
- Slide_version_vod - stamped from Key Message record (Note: not done in iRep)
- Reaction _vod - based on what was selected by the user
- Key_Message_vod - lookup to the Key Message that was displayed

Note: A view is captured when either of these occurs: 1) the user displays the slide for more than 2 seconds OR 2) the user selects a reaction button

Note: Category_vod and Vehicle_vod on the Key Message record are not utilized for CLM Call Key Messages

In addition, Call Detail records are created or updated for the product which was detailed via CLM, where Type_vod__c = EDetail_vod and the Call record has CLM_vod = TRUE when the user is done viewing media.

Inline Feedback for Media

Feedback for media presented to HCPs can be captured while content is displayed. Three reaction buttons display underneath the menu button, at the top left hand corner of the media player. The top button represents a positive reaction, the middle a neutral one, and the bottom button indicates the HCP had a negative reaction to the slide. Tapping one of the buttons records the reaction for that slide. To disable the reaction buttons, remove visibility to the Reaction_vod field on Call Key Message.

Note: The buttons do not display properly if the Reaction_vod out-of-the-box picklist values on Call Key Message are modified. To change the values that are recorded when the user taps one of the buttons, use the Translation Workbench. It is also important to note if custom reactions are added to the Custom_reaction_vod field on the Key Message record, the buttons do not display for that specific Key Message.

Note: Reaction buttons are not currently available on Windows 8 . Reactions may be selected by the sales rep from the Call Report.

Presentation Grouping

Content Administrators can define attributes by which presentations can be grouped on the Media Launch page. Reps have the ability to select the attribute from which to group their presentations, dependent on the grouping attributes defined by the administrators. Clicking Display By in the Action Sheet on the Media Launch page displays the list of available grouping attributes. Once the grouping attribute is selected, each group of presentations displays in its own row within the Media Launch page.

Each row is horizontally scrollable, independent of other groupings. Any presentations that do not have a value for the selected grouping attribute are grouped into the Unassociated group. When no grouping is selected, presentations are listed alphabetically. Drilling into presentations continues to function as before, regardless of the selected grouping attribute.

To enable this feature, populate the CLM_Presentation_Grouping_vod__c Veeva Message with a comma delimited list of Field API Names from the CLM_Presentation_vod object. Ensure that end users have visibility to the fields that are being used to group by. The following fields types are supported: Text, Number, Lookup, Picklist, Multi-select Picklist, Check box.

Required Slides

CLM Presentations can contain a sub-presentation of a required set of slides that must be shown prior to displaying a certain slide or slides within the main presentation.

To define a set of required slides, create a CLM Presentation containing those slides. This presentation is the sub-presentation. Then, in the main presentation, for every slide that needs to be preceded by the required slides, populate the Sub_Presentation_vod lookup on CLM _Presentation_Slide_vod. When a user attempts to view the dependent slide before viewing the Required Slides that precede it, they are automatically taken to the first slide in the Sub Presentation. Once they have viewed all required slides, they can continue to display the remainder of the slides in the main presentation. While the user is still within the media player, required slides need to be shown only once.

Note: A view is captured when either of these occurs: 1) the user displays the slide for more than 2 seconds OR 2) the user selects a reaction button. The duration timer is reset for each swipe.

Hidden Presentations

By setting the Hidden_vod field on CLM Presentation, that presentation does not displayed in the CLM Presentations view or in the Presentation picker in the navigation bar. To reach the slide(s) within a hidden presentation, place a link utilizing the gotoSlide JavaScript function to the hidden presentation within an HTML5 slide. See Appendix A for more information on the JavaScript function. Once the user navigates to and reaches the hidden presentation, its slides are visible in the Navigation bar. This is to allow for navigation within the hidden presentation. Once the user exits the hidden presentation, it or its slides are longer be visible.

Specifying an Account from Preview Mode

On occasion, a user may view media from the Media Previewer (and no account is selected) on the iRep home page when a HCP becomes available. The user can quickly specify the account for the presentation directly from the Media Previewer. Any calls made before the Account is specified will not be properly executed if an Account was required by the API. Administrators can enable this feature by selecting the CLM_Select_Account_Preview_Mode Veeva Setting.

Disable Swipe and Pinch to Exit in CLM Presentations

You have the ability to disable the swipe motion for slide navigation in a CLM presentation to allow for more creativity and flexibility by adding interactive controls. For example, dragging or dropping elements within a slide, or adding horizontal sliders.

You also have the ability to disable the pinch to exit a presentation. This function allows the user to zoom in and out of a presentation without exiting the presentation.

Note: Both functions are specific to individual key messages, not an entire presentation. All other key messages continue to function normally.

Pre-requisites:

- The Disable Actions field on Key Message must be visible to the user's profile
- The Disable Actions field on Key Message must be on the page layout for the Content Administrator's profile

To disable these functions:

1. Navigate to the key message in the CLM presentation.
2. Click **Edit**.

3. Scroll to **Disable Actions**.
4. Move Swipe_vod to the Chosen list to disable the swipe motion for this key message.
5. Move Pinch_to_Exit_vod to the Chosen list to prevent the pinch motion from exiting the presentation.
6. Click **Save**.

Code for adding Next/Prev Text Links

If the swipe action for slide navigation is disabled for a key message, you can add the nextSlide and prevSlide JavaScript functions to the HTML5 code in order to navigate back and forward between slides.

Note: Reference the associated sections in Appendix A - JavaScript Library for CLM to understand how to implement them as content being developed. Also reference the sections in Appendix B Legacy API Calls.

Video Auto-play

To optimize time and prevent errors, automatic playback of videos aids reps when they are presenting in front of HCPs. When a user swipes to a key message with a video, the video begins to play immediately.

This feature is enabled by default if content creators decide to include the autoplay attribute in the video tag of their HTML/JavaScript code.

For Video Key Messages, this feature is enabled by selecting the CLM_VIDEO_AUTOPLAY_vod Veeva Setting.

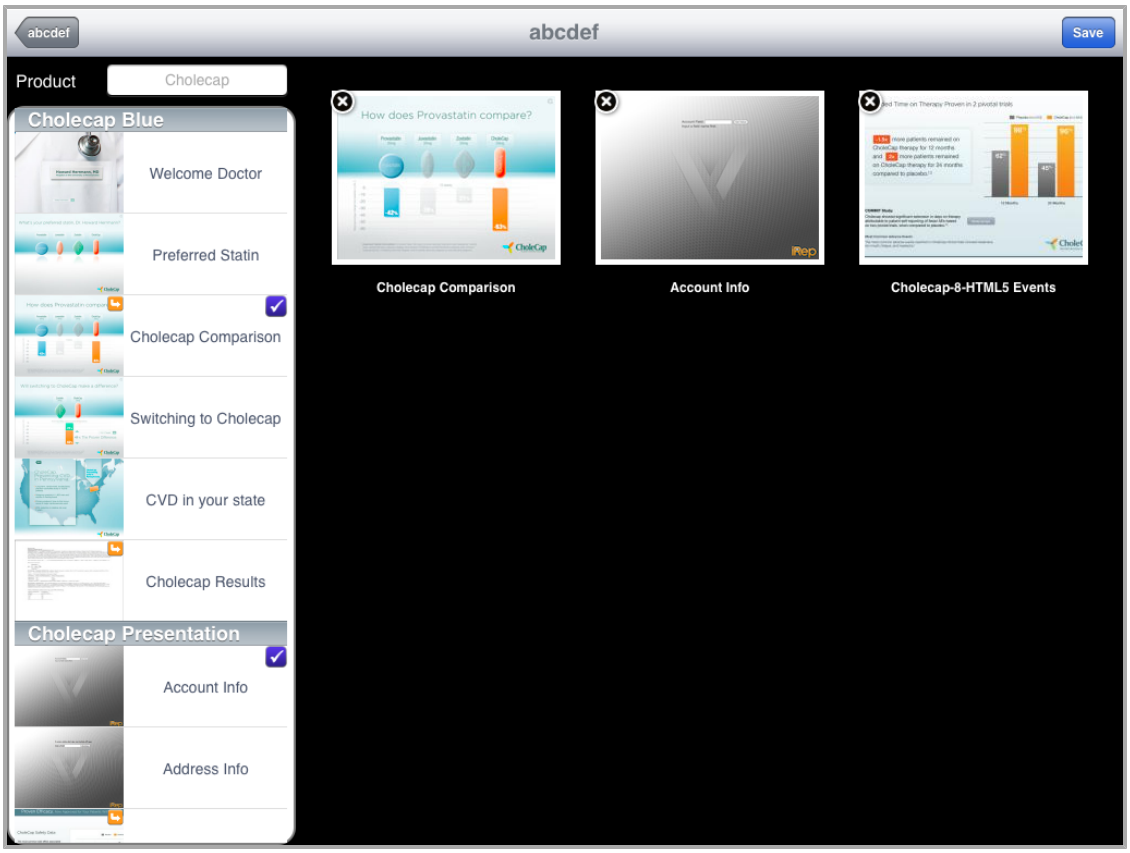
If this feature is not enabled, the user must tap the screen or the play button to play the video.

User-Defined Presentations

Veeva CLM provides users the ability to create their own customized presentations so they can deliver specifically tailored messages to their targeted accounts. These presentations are saved for later use with other interactive calls. From the media launch page, users can navigate to the new 'Manage My Presentations' page (available as an item on the action sheet), where they can create new presentations and edit or delete existing ones. Users will not be allowed to modify presentations created by the home office or by other users. Users will not be able to modify the content itself in any way.

To create their own presentations, users will be prompted to enter in any information about their new presentation (all required fields on the CLM_Presentation_vod object must be populated before proceeding). Subsequently, users will have access to their "Slide Library", consisting of all slides that are available to them within iRep.

They can select the slides they wish to include within that presentation by tapping on its thumbnail image. If a slide has a pre-requisite sub-presentation defined, those slides will also be automatically pulled over to the custom presentation. They can reorder the slides within the presentation by dragging and dropping the thumbnail image.



Deleting slides from a custom presentation is accomplished by tapping the delete icon on the top left corner of each thumbnail. Note cross-product presentations are not permitted at this time – the first slide selected for a new presentation determines which product the Presentation is aligned to. The list of slides available for selection is automatically filtered to show slides aligned to the selected product only.

A user defined presentation is identified by the value 'Custom' in the Type_vod picklist on the CLM_Presentation_vod object. This value gets set automatically by the application and should not be modified otherwise. For non-admin users, this field should never be placed on the page layout of the CLM_Presentation_vod object.

This feature is enabled by providing users with the following permissions:

- Full permissions on the CLM_Presentation_vod and CLM_Presentation_Slide_vod objects.
- Security settings on CLM_Presentation_vod must be set to Private (to prevent users from receiving custom presentations created by other users)
- Set Grant Access Using Hierarchies to false on the CLM Presentation and CLM Presentation Slides objects to prevent managers from synching their subordinates' custom presentations
- Create a sharing rule to provide users access to presentations created by Content Administrators (e.g. Type_vod NOT EQUAL to 'Custom')
- Read/Write access to the Mobile_ID_vod field on CLM_Presentation_vod and CLM_Presentation_Slide_vod objects
- Read/Write access to the Type_vod field on CLM_Presentation_vod

Presentations across Multiple Products

Reps need to talk about multiple products in a very short period of time. This feature allows users to add key messages with multiple products to a presentation.

When a user selects a slide to add to a custom presentation, products selected via the product filter will stay the same. Users can tap the Product filter to change Products, add more Products, or select none and then add the slides to the presentation.

To enable this feature, select the MULTI_PROD_USER_DEFINED_PRESENTATION_vod Veeva Setting check box.

FaceTime Integration

Users are able to initiate a FaceTime video call directly from the iRep CLM media player in order to conduct a real time interaction with a product expert or specialist.

FaceTime integration is enabled by setting the Enable Specialist Lookup Custom Setting to TRUE. This will display a Specialist button in the iRep Media Player that opens a wizard which guides the user to select the right specialist. It first prompts the user to select a product and then shows the available users who have the selected product listed in their expertise. Next the user taps on the desired user to see their personal details and can initiate a FaceTime video call through the user's email address and/or phone number.

There are new fields on the User object that store the user's product expertise, FaceTime preferences, and availability:

- Product_Expertise_vod is a multi-select picklist that indicates which products the user can speak about
- Available_vod is a picklist field that indicates the user's current availability. Only users where Available_vod equals Available_vod will display in the list of users. This field can be updated manually by the user or by integration.
- Facetime_Email_vod stores the email address where the user is registered to receive Face-time calls. This typically corresponds to an iPad 2 or Mac desktop or laptop.
- Facetime_Phone_vod stores the phone number where the user can receive Facetime calls. This typically corresponds to an iPhone.

Note: FaceTime is only available on an iPad 2 while connected to Wi-Fi. FaceTime calls can only be placed to other iOS or MacOS devices that support FaceTime.

Support for Custom URLs

The CLM Media Player supports custom URLs to other applications. The links described are standard iPad applications that can be included within HTML5 content. Additionally, you can launch any application with a properly registered URL directly from iRep. Tapping the control containing the link will launch the respect-ive external application:

- mailto:// - Launches the Mail application
- maps:// - Launches the Maps application

- facetime:// - Launches FaceTime (for iPad2 only)
- http:// and https:// - Launches the Safari browser

Custom URL supported by iRep

Veeva supports two custom URLs that allow external iPad applications to launch iRep by calling a specific URL. The custom URLs that iRep supports are:

- veeva://
- irep://

Calling either of these URLs launches the iRep application. If the user is already signed in, iRep will launch to the last screen the user was viewing. If the user is not signed in, the user is taken to the login screen.

Dynamic Display of Information

Note: Reference the associated sections in Appendix A - JavaScript Library for CLM. Also reference the sections in Appendix B Legacy API Calls.

In order to display dynamic content to your targets, content can include personalized information pulled from the Veeva CRM database, such that the content is tailored for each HCP. Veeva provides the getDataForCurrentObject JavaScript function and the getDataForObject JavaScript function to enable content creators to read from the Veeva CRM database. Possible uses of these include:

- Displaying the HCP's name and specialty
- Displaying the HCP's parent organization name
- Changing the information displayed on the content based on the physican's segment
- Reading which survey is associated to the presentation being displayed

Dynamic Presentations: Go to Slide

Links to other slides within a presentation or to slides in other presentations can be included within HTML5 content. To enable this feature, utilize the gotoSlide JavaScript function within an HTML <a> tag, as the href parameter, or update the document location attribute within your JavaScript code.

When users click the link or control that contains this underlying function, the media player jumps to the slide defined in the function. Navigation from the slide that was reached by the gotoSlide functionality is identical to navigation had that slide been reached through traditional navigation (i.e., swiping left will display the slide before that slide in the presentation, not the slide from which the user jumped). Tracking of CLM Key Messages also continues normally.

gotoSlide respects My Setup, Restricted Products on Account, and Allowed Products on Call and on TSF when media is launched from a Call or an Account. gotoSlide does not respect Restricted Products or Allowed Products when media is launched from the home page.

Data Capture from Content

Note: Reference the associated sections in Appendix A - JavaScript Library for CLM Also reference the sections in Appendix B Legacy API Calls.

Call Clickstream Object

To support analysis of detailed user activity within CLM content, it is possible to capture specific user actions performed on HTML5 content. These actions can include capture of actions such as button clicks or certain gestures (clickstream data), or generic data capture, such as updating of a HCP's email address on the Account object.

To enable, give Create permissions to the Call_Clickstream_vod object for the appropriate user profiles, if capturing clickstream data. If saving data into a specific object, ensure the user has Edit permissions on the object and on the field the data is being saved to.

Within HTML5 content slides, wherever it is required to capture user activity or data entry, utilize the createRecord JavaScript function.

Clickstream data can be used to capture custom information. By building a control within your HTML5 content, responses can be captured and later displayed directly on the call report. When calling Veeva's saveObject function, specify the questions posed in the Question_vod field and specify the responses in the Answers_vod field.

Additionally, the Call Clickstream object has special code to automatically fill in the following fields each time a new record is created for a Call. Any user provided value for the fields is overwritten.

- Call_vod__c - set to the current Call record ID
- Product_vod__c - copied from Product_vod__c of corresponding Key_Message_vod__c object
- Key_Message_vod__c - set to the record ID of corresponding Key_Message_vod__c object
- CLM_ID_vod__c - copied from CLM_ID_vod__c of corresponding Key_Message_vod__c object
- Presentation_ID_vod__c - copied from the Presentation_ID_vod of Clm_Presentation_vod__c object

To display the Call Clickstream information captured on the call report, place the zvod_Surveys marker field on a separate section on the appropriate Call Report page layouts. This section displays a table of responses. The following five fields from the Clickstream object are included in this table:

- Presentation ID
- Product
- Key Message Name
- Track Element Description
- Answer

The fields displayed in this table are currently not configurable.

Note: When implementing clickstream capture, it is imperative to be mindful of the potential amount of data captured as a part of each slide and/or presentation. Creating a large amount of records on each slide will increase sync times for users, and cause performance degradation on the Reporting module in the online application.

Saving to Other Objects

The createRecord and updateRecord JavaScript functions can also be used to capture data to other objects within Veeva CRM besides Call Clickstream. As application logic and validation are not executed when utilizing these functions, all content should be rigorously tested before putting it into production.

Media File Formats and Guidelines

The iRep and Veeva CLM content viewer has been optimized for electronic detailing with HTML5 media and various other digital assets. The content viewer also supports images, video, and PDF allowing for reuse of existing media libraries.

When creating media, it is important to consider both the quantity and image quality of the media to ensure the application responds quickly and the user isn't kept waiting for long periods while media downloads. Larger files are supported, but longer sync times will ensue and there is a risk of poorer performance when displaying the media within the media player.

Type	Ext	Display	Additional Guidelines
HTML5	.html .htm	Displayed full screen and in landscape view	Can be multiple files, of type HTML, CSS, images, video and PDF and can be stored in multiple folders Media included with the HTML should be referenced using relative paths, like "/css/styles.css" rather than "http://server.com/css/styles.css". Any media not referenced in this way will not be available when the rep is out of network coverage Swiping left or right navigates to other pieces of media, but dragging left, right, and taps are allowed for in-page navigation. Overriding the swipe gesture is supported. (See Disable Swipe and Pinch to Exit in the CLM Presentations section for more information.)
Video	.mp4 .m4v .mov .avi	Displayed full screen and in landscape view Small videos will stretch to fill the screen	Large files increase the battery use of the device during syncing: using the highest level of video compression that creates the desired effect is strongly recommended iRep: Videos must be playable in the iPad video player (http://www.apple.com/ipad/specs/) H.264 MPEG4 is recommended The TV and Video section of the iPad Specs page on the Apple website provides more detail: http://www.apple.com/ipad/specs Windows 8 : only displays .mp4
Images	.jpg .png	Displayed full screen and in landscape view If the resolution of the image is larger than the displays, pinch zooming is allowed	Images should be the smallest resolution and compressed as much as possible without impacting quality
PDF	.pdf	Displayed full screen	Multi-page PDFs are supported

Type	Ext	Display	Additional Guidelines
		and in landscape view. Stretched to fill the screen width Scroll vertically	For presentations, using HTML5 or images is recommended instead of PDF as those formats can be presented more easily PDF resolution should be 150 dpi with medium quality for image compression

Content Compatibility iRep vs Win 8

CLM uses open web standards, HTML, CSS, and JavaScript, to create and deploy content because there is a wealth of knowledge in our agencies. Unfortunately, today's web browsers (IE, Chrome, Safari, etc..) are not always consistent or accurate interpreting these open standards. As a result, web content publishers spend significant time testing content and creating workarounds for incompatibilities across the browsers.

CLM was introduced only on iRep for iPad so there was only Mobile Safari to support on the iOS platform. Agencies were able to take advantage of specific capabilities available on Safari which limited their testing to this browser. As a result, content created for iRep is not likely to run on CLM for Windows 8 without re-work and testing.

Creating New Content

To help reduce the amount of re-work, testing, and workarounds, follow the guidelines below when creating new HTML content for CLM:

- Use web design best practices to create content to work on both iRep and Windows 8
- Build and design content that can be deployed across
  - different screen resolutions - this is the primary challenge between iOS and Windows 8 devices
  - two different web browsers (Internet Explorer 11 and Mobile Safari) The primary challenge is the different screen resolutions on iOS and Windows 8 devices
- Be familiar with responsive design best practices. Responsive design is when a website scales in response to the screen size viewing the content
- Do not use fixed width designs if the goal is to deploy content on both iRep and Windows 8 devices

Migrating Content from iRep to Windows 8

Existing CLM content re usability varies based on the content type. In general, most HTML content requires re-work to render properly. Many agencies that created iRep content used a fixed width design that will not scale to the different screen resolutions found on Windows 8 devices.

The following is a summary of compatibility by supported content types:

- HTML - re-work is required if agencies used a fixed width 4:3 aspect ratio or any webkit (Mobile Safari) specific HTML code. Additionally, the legacy CLM API functions will not work on Windows 8. The most current version of the CLM Javascript library, which Veeva provides, works with both iRep and Windows 8 CLM content.

- Images - all current CLM image types are supported on Windows 8. Typically, they are created using a 4:3 aspect ratio on iRep. Windows 8 devices typically use a 16:9 aspect ratio. Images in 4:3 aspect ratio display with black bars on the right and left side. No changes required.
- Videos - All current CLM video types are supported on Windows 8. Typically they are created using a 4:3 aspect ratio on iRep. Windows 8 devices typically use a 16:9 aspect ratio. Videos in 4:3 aspect ratio will display with black bars on the right and left side. No changes required.
- PDFs - PDF documents will scroll and zoom in/zoom out similarly to how they do in iRep. No changes required.

Media Size Recommendations

While the iPad can hold 16 GB of files or more, downloading that amount of content over 3G/4G (or even WiFi) would take many hours. For the best end user experience, total sync should not take over an hour. In internal testing, over a 3G connection on an iPad 1 (the slowest device/connectivity combination possible), we found that content sync of 360 MB of data took between 20 - 40 minutes to download .

Data	Size / unit
HTML5	2MB
Video	10 MB
Images	0.25 MB

For HTML5 pages, if they are created without using transparent PNG files, the size can often be reduced to 25% of the size from 2 MB to 0.5 MB by using JPG instead of PNG. This also improves the load time of the page, making the transitions between pages more attractive.

While it is possible to load much larger files into HTML5, if those files use up all the memory on the device, the application may crash on displaying the content or soon after returning to the rest of the application. During testing, it is important to test displaying and interacting with HTML5 content repeatedly to ensure memory issues will not occur. Memory warnings may appear in the log on the device to identify possible memory issues, although a warning may not always appear and a warning may not always indicate an impending crash. XML parsing within HTML5, complicated JavaScript references, non-default fonts, CSS 3D transformations etc, while all it may be technically possible, haves been known to use up a lot of or sometimes even all the memory.

Note: The newer iPad and iPad 2 devices provide slightly more memory, which may allow them to display slightly more complex content. It is important to test thoroughly with the oldest model and lowest OS version combination deployed to the field and to imitate real world situations (other apps running besides Veeva CRM) to ensure compatibility across versions.

For images, providing them at a larger resolution allows the sales representative to zoom in on parts of the media, which adds a level of interactivity and appeal to the media. Complex images can be compressed to about 250kb without visibly impacting quality. If images are significantly larger than 100kb, changing the quality settings or using a different tool to create the jpgs can reduce their size.

PDFs are best used for long-format media, like reports and articles, as a representative wouldn't typically show every page from a PDF document. For shorter media and presentations, images or HTML5 will provide better navigation experience and more accurate reporting.

With Microsoft Powerpoint 2007 or newer, entire presentation can easily be exported to images. When viewing the presentation within Powerpoint, click the office button, then click Save As. Select "Other Formats", and from the "Save as type" dropdown, select jpeg (or png). Powerpoint will display a pop-up asking whether to export the current slide or every slide in the presentation. Once the selection is made, the image(s) will be created and ready for use.

Total Content Size

While the iPad can hold 16 GB of files or more, downloading that amount of content over 3G/4G (or even WiFi) would take many hours. For the best end user experience, sync should not take over an hour. In internal testing, over an excellent 3G connection on an iPad 1, we found 360 MB of data took an average of 20 minutes to download.

While there is no technical limitation for larger media libraries, longer sync times and degraded performance of media might offset the advantages of having larger, more complex files.

An estimated download time is provided in the tables below using the basic formula of file size / avg. download speed .

Data		File Size	Data	
Average download Speed		200 MB	500 MB	1GB
	512 kbps	53 minutes	2.2 hours	4.6 hours
	1Mbps	27 minutes	67 minutes	2.3 hours
	5Mbps	5 minutes	13 minutes	27 minutes
	10Mbps	3 minutes	7 minutes	14 minutes
	20Mbps	1 minute	3 minutes	7 minutes

Note: These times represent download time in perfect conditions. However, because many factors affect actual download time, download speeds may vary dramatically. Special care should be taken to determine the download speeds which are actually available to sales reps. Veeva recommends that content sync be performed over a fast WiFi connection.

Since the system records detailed statistics about every piece of media shown, unused media should be reviewed regularly and removed to ensure that sales representatives can quickly find the current and most important media and maintain fast download performance.

Thumbnails and Full-Screen Images

As the sales representative is scanning through media, they are shown a full-screen preview image rather than the full HTML, PDF, or video, so the system can switch more rapidly through the media. When the preview image is tapped, the full page, PDF, or video opens. When on a call, a customer never sees the preview image, and would only see the full HTML, PDF or video.

When the sales representative is viewing a list of media, small thumbnail images are shown. These smaller images are also generated before loading into the system in order to maximize the performance of the application.

To support these two features, each piece of media in the system (including an image file) needs to be packaged with two images: one for the small thumbnail and one for the full screen preview. Both of these

images should be highly compressed JPGs to minimize download time. Setting the JPG quality to 75% resulted in the sizes below for a piece of media named Media1.jpg.

Type	Name	iPad Resolution	Windows 8 Resolution	Typical Size
Original Media	Media1.jpg	2048 x 1536	1920 x 1080	250 kb
Preview Image	Media1-full.jpg	1024 x 768	1600:900	70 kb
Thumbnail	Media1-thumb.jpg	200 x 150	195 x 110	7 kb

Select the resolution which matches the majority of the devices that your salesforce is using. On Windows 8, images which are in the 4:3 aspect ratio display centered with black borders on the sides.

To quickly generate preview images, a screen capture application[1] may be helpful. Once installed, one can set the computer's screen resolution to 1024 x 768, view the media full screen, and capture the preview images quickly.

To quickly generate thumbnails, an imaging editing application[2] may be helpful. The Batch Conversion, Output Format, Advanced, Resize function of some programs can make all the required thumbnails in one go. Similarly, Adobe Photoshop™'s scripting capability can automate this process.

When creating thumbnails, they should be visually distinguishable. If resizing the preview image does not achieve this, manually creating a thumbnail which displays something unique about a piece of media is recommended.

Media Packaging

After creating a piece of media, some preparation of that media must be done before it can be loaded into the system. Overall, the process involves creating lower resolution versions of the media, putting all files into a folder, and compressing the folder into a zip file. Each piece of media in the system is encapsulated into a separate zip file before loading.

Each piece of media is loaded into the system as a zip file containing the media, thumbnails, and supporting files.

Zip file requirements:

- Each piece of media must be packaged in a zip file
- Each zip file name in the system must be unique
- Uploading the same zip file name twice will overwrite the first one
- The zip file name, excluding the .zip extension is the name of the media in the system

Media Structure:

[1] Wisdomsoft ScreenHunter is an example of this kind of application.

[2] IrfanView is an example of this kind of application.

- The files stored inside the zip file need to be contained in a folder with the same name as the zip file. File names are case sensitive
- The file to be opened when the rep selects a piece of media needs to have the same name as the zip, except for the extension. For example, inside media1.zip is a folder media1 containing a file media1.jpg
- Multiple files with this name (but with different extensions) within a zip file are not supported, as the system will not know which one to open

Supporting Files:

- Additional files, like images and style sheets, should be included inside the folder or subfolders and referenced using relative paths
- The thumbnail and full-screen preview are required for each piece of media

Examples

A simple example, describing how to package Cholecap1.jpg:

1. Create a folder named Cholecap1.
2. Place Cholecap1.jpg, Cholecap1-full.jpg, and Cholecap1-thumb.jpg in that folder.
3. Right-click on that folder and select Send to and Compressed (zipped) folder. The resulting zip file will be named Cholecap1.zip

An example of how to package a video file, called CholecapVideo.mp4:

1. Create a folder named CholecapVideo.
2. Prepare preview and thumbnail images for the media package – for example, capture a screen shot of the first frame of the video, then resize the two images to conform to the guidelines.
3. Place CholecapVideo.mp4, CholecapVideo -full.jpg, and CholecapVideo -thumb.jpg in that folder.
4. Right-click on that folder and select Send to and Compressed (zipped) folder. The resulting zip file will be named CholecapVideo.zip.

A simple example, describing how to package Cholecap1.pdf:

1. Create a folder named Cholecap1.
2. Place Cholecap1.pdf, Cholecap1-full.jpg, and Cholecap1-thumb.jpg in that folder.
3. Right-click on that folder and select Send to and Compressed (zipped) folder. The resulting zip file will be named Cholecap1.zip.

An HTML5 file, called Cholecap3.html, with accompanying css style sheets, images and JavaScript files, require these steps:

1. Create a folder called Cholecap3.
2. Place thumbnail and full images of the html file, called Cholecap3-full.jpg and Cholecap3-thumb.jpg in the folder.
3. Ensure that within the Cholecap3.html file, all references to supporting files are relative.
4. Place the Cholecap3.html file in the same folder as the thumbnail and full images.
5. Place the supporting folders (images, css, js, etc.) in the Cholecap3 folder.
6. Right-click on the Cholecap3 folder and select Send to and Compressed (zipped) folder. The resulting zip file will be named Cholecap3.zip.

In order to upload a PowerPoint presentation, you must convert it to image files. This example describes how to convert a two-page PowerPoint document, Cholecap2.pptx, to images and to zip files:

1. Open the PowerPoint file.
2. Click **Save As**.
3. Select .jpg as the Save as type.
4. Click.

5. Click **Every Slide** at the prompt Do you want to export ever slide in the presentation or only the current slide?
6. Click **OK**.
7. Navigate to the specified folder location and rename the .jpg files to Cholecap2-slide1.jpg and Cholecap2-slide2.jpg.
8. Create preview and thumbnail images for each slide.
9. Create a folder named Cholecap2-slide1 and a folder named Cholecap2-slide2.
10. Add the image, preview, and thumbnail to each folder.
11. Right-click the folder and select **Send to** and **Compressed** (zipped) folder. The resulting zip files will be named Cholecap2-slide1.zip and Cholecap2-slide2.zip.

Support for Media File Names with non-ASCII Characters

Zip file packages containing interactive media for CLM can be named using non-ASCII characters, eliminating the need to translate file names into Latin-based languages. For example, Chinese or Japanese file names can be uploaded as is, either through FTP or through the Key Message UI.

This feature is enabled by default and does not require configuration, however files must be zipped using UTF-8 encoding.

CLM Platforms

Feature	Online	iPad	Tablet	Windows 8
Content Administration	✓	X	X	X
Media Sync Confirmation	X	✓	X	✓
Media Sync Interval	X	✓	X	✓
CLM Presentation List - Group By	X	✓	X	✓
Presentation Quickstart	X	✓	X	✓
Video Autoplay	X	✓	X	✓
Training Presentations	X	✓	X	✓
Watermark for Training Presentations	X	✓	X	✓
User Defined Presentations	X	✓	X	X
Multi product user defined presentations	X	✓	X	X
Thumbnail Navigation Bar	X	✓	X	✓
Hide Content when displaying navigation bar	X	✓	X	✓
Sign for samples	X	✓	X	X
Facetime Integration	X	✓	X	X
Inline Reaction Buttons	X	✓	X	✓
Required Slides (Sub Presentations)	X	✓	X	✓
Hidden Presentations	X	✓	X	✓
Specifying an Account from Media Preview	X	✓	X	X

Feature	Online	iPad	Tablet	Windows 8
Disable Swipe and Pinch to Exit	X	✓	X	✓
Support for Custom URLs	X	✓	X	X
zvod_CLMDetails marker field	✓	✓	✓	✓
Edetail denotation on Product Detail section	✓	X	✓	X
zvod_Surveys marker field	✓	✓	✓	X
JavaScript Library for CLM	X	✓	X	✓

Appendix A - JavaScript Library for CLM

Veeva publishes a JavaScript Library for iRep CLM. This is to assist our customers and their agencies with developing personalized and dynamic HTML5 content that interacts with the iRep Veeva CRM database.

Similar to how patch notifications and patch release notes are communicated and distributed, the JavaScript Library for iRep CLM will have its own discussion topic that is updated any time there is a new version. The post will include a link to the downloadable file on the Veeva CRM Customer Support Portal.

The initial functionality supported by the JavaScript Library includes Surveys, Order Management, and replacing existing API calls.

The com.veeva.clm namespace should be utilized when calling the JavaScript functions. For example, com.veeva.clm.getDataForCurrentObject("Account","ID",myAccountID);""

The JavaScript library will return in the following format:

```
{success:true, obj_name:[{"Id":"0001929312"}, {record2}, ...]}
```

or

```
{success:false, code:####, message:"message_text"}
```

- denotes the specific error code (1000 is from the underlying API, 2000 is from the JavaScript Library)

- 2000 - Callback function is missing
- 2001 - Callback is not a JavaScript function
- 2002 - <parameter_name> is empty
- 2100 - Request (%@) failed: %@
- message_text - begins with the JavaScript library function name and a ":". If the error comes from the underlying API, the full message from the API is appended to the message_text

Except for gotoSlide, the JavaScript functions respect My Setup, Restricted Products on Account, and Allowed Products on Call and on TSF. gotoSlide respects all of the above when media is launched from a Call or an Account. gotoSlide does not respect Restricted Products or Allowed Products when media is launched from the home page.

Use the JavaScript functions in a chain, for example, call the second JavaScript function only in the first function's callback function or after the callback of the first function is finished.

Because the underlying API calls are asynchronous, this may result in unexpected return values if the JavaScript functions are not properly chained.

Veeva recommends caution when retrieving/saving data using the following field types and to always perform rigorous testing:

- Long Text Area
- Rich Text Area
- Encrypted Text Area

Addresses

- getAddresses_Account(account, callback) - Returns an array of record IDs of all addresses (Address_vod__c) for a particular account (Account)
  - account - specifies the record ID of the account of which to get all related addresses
  - callback - call back function that is used to return the information
- getAddressFields(record, fields, callback) - Returns the values of the specified fields for the specified Address (Address_vod__c) record
  - record - specifies the record ID of the Address to get fields from
  - fields - array of field API names to return a value for
  - callback - call back function which that is will be used to return the information

Products

- getProduct_MySetup(type, callback) - Returns an array of record IDs of all products (Product_vod__c) of a specified type that the User has access to.
  - Type - the Product Type (Product_Type_vod__c field on Product_vod__c)
  - Callback - call back function that is used to return the information

Record Type Support

getRecordType(object, callback) - Returns an array of record IDs of all RecordType records (RecordType) for a particular object

- object - specifies the API name of the object of which to get all active RecordTypes
- Callback - call back function that is used to return the information

Surveys

For additional information about using CLM with the Surveys module, see the Surveys section and Appendix C Integrating CLM with CRM.

- getSurveyQuestions_Survey(survey, callback) - Returns an array of record IDs of all Survey Questions (Survey_Question_vod__c) for a specific Survey (Survey_vod__c). Results are returned in ascending order based on the Order_vod__c field on Survey_Question_vod__c.
  - survey - specifies the record ID of the Survey to get all related Survey Questions from
  - callback - call back function that is used to return the information
- getQuestionResponse_SurveyTarget(surveytarget, callback) - Returns an array of record IDs of all Questions Responses (Question_Response_vod__c object) for a specific Survey

Target (Survey_Target_vod__c). Results are returned in ascending order based on the Order_vod__c field on Question_Response_vod__c.

- surveytarget - specifies the record ID of the Survey Target to get all related Question Responses from
- callback - call back function that is used to return the information

- getSurveyTarget_Account (account, survey, callback) - Returns an array of record IDs of all Survey Targets (Survey_Target_vod__c) for a specific account (Account), for a specific Survey (Survey_vod__c)
  - account - specifies the record ID of the Account to get all related Survey Targets from
  - survey - specifies the record ID of the Survey to get all related Survey Targets from. Can be made optional by putting in "".
  - callback - call back function that is used to return the information

Order Management

* Campaign and Contract based Pricing Rules are not supported by the JavaScript Library for CLM Order Management functions

For additional information about using CLM with the Order Management module, see the Order Management Overview section in the Veeva CRM Documentation and Appendix C Integrating CLM with CRM.

- getProduct_OrderActive_Account(account or account group, callback) - Returns an array of record IDs of all products (Product_vod__c) of type Order that have valid list prices. Valid list price = Pricing Rule (Pricing_Rule_vod__c) of record type List Price (List_Price_Rule_vod) where current date is between Start Date (Start_Date_vod__c) and End Date (End_Date_vod__c).
  - Valid list price = Pricing Rule (Pricing_Rule_vod__c) of record type List Price (List_Price_Rule_vod) where current date is
  - between Start Date (Start_Date_vod__c) and End Date (End_Date_vod__c)
  - callback - call back function that is used to return the information
  - account/account group - specifies the record ID of an Account or the matching text for the Account Group. Can be made optional by putting in "". When utilized, returns an array of record IDs of all products (Product_vod__c) of type Order that have valid list price records with specify the Account or Account Group
- getProduct_KitComponents(product, callback) - Returns an array of record IDs of all products (Product_vod__c) of type Kit Component (Product_Type_vod__c field) who have parent product (Parent_Product_vod__c) = product
  - product - specifies the record ID of the product of which to get all related Kit Components from
  - callback - call back function that is used to return the information
- getProductGroup_Product(product, callback) - Returns an array of record IDs of Product Groups (Product_Group_vod__c) that the specified product (Product_vod__c) is part of
  - product - specifies the record ID of the product of which to get all related Product Groups from
  - callback - call back function that is used to return the information

- getLastTenOrders_Account(account, callback) - Returns an array of record IDs of the last 10 Orders (Order_vod__c) for a particular account (Account). The order of last ten orders is based on the field Order_Date_vod__c, descending.
  - account - specifies the record ID of the account of which to get all related orders
  - callback - call back function that is used to return the information
- getOrderLines_Order(order, callback)- Returns an array of record IDs of all Order Lines (Order_Line_vod__c) for a particular order (Order_vod__c)
  - order - specifies the record ID of the order of which to get all related order lines
  - callback - call back function that is used to return the information

DEPRECATED - Please use getListPrice_Product_Account

- getListPrice_Product(product, callback) - Returns an array of record IDs for the currently valid List Price (Pricing_Rule_vod__c) for a specific product (Product_vod__c). Valid list price = Pricing Rule (Pricing_Rule_vod__c) of record type List Price (List_Price_Rule_vod) where current date is between Start Date (Start_Date_vod__c) and End Date (End_Date_vod__c).
  - product - specifies the record ID of the product of which to get the List Price for
  - callback - call back function that is used to return the information
- getListPrice_Product_Account(product, account, callback) - Requires that an Account be specified in order for any result to be returned. Returns the record ID for the currently valid List Price (Pricing_Rule_vod__c) for a specific product (Product_vod__c) and Account combination. Respects the Account and Account Group List Price hierarchy. Valid list price = Pricing Rule (Pricing_Rule_vod__c) of record type List Price (List_Price_Rule_vod) where current date is between Start Date (Start_Date_vod__c) and End Date (End_Date_vod__c).
  - product - specifies the record ID of the product of which to get the List Price for
  - account - specifies the Account for which to select List Prices for
  - callback - call back function that is used to return the information

Functions to replace existing API calls

- getDataForCurrentObject(object, field, callback) - Returns the value of a field for a specific record related to the current call. Replaces the 3 parameter veeva:getDataForObject API call
  - object - Limited to the following keywords:
    - Account
    - TSF
    - User
    - Address
    - Call,
    - Presentation
    - KeyMessage
  - Field - field api name to return a value for
  - callback - call back function that is used to return the information

- getDataForObject(object, record, field, callback) - Returns the value of a field for a specific record. Replaces the 4 parameter veeva:getDataForObject API call
  - object - specifies the object api name (object keywords used in getDataForCurrentObject are not valid, except for Account and User)
  - record - specifies the record id
  - field- field api name to return a value for
  - callback - call back function that is used to return the information
- getUTCdatetime(object, record, field, callback) - Returns the value of the field in UTC format. Only works with field of type Date or Datetime.
  - object - specifies the object api name (object keywords used in getDataForCurrentObject are not valid, except for Account)
  - record - specifies the record id
  - field- field api name to return a value for
  - callback - call back function that is used to return the information
- createRecord(object, values, callback) - Creates a new record for the specified object. Replaces the veeva:saveObject API call
  - object - specifies the object api name
  - values - json object with the fields and values to be written to the new record
  - callback - call back function that is used to return the information

Note: This function returns success: true as long as the user has access to the object. If the user does not have access to one of the fields specified, success: true and an error code and message specifying which fields are not accessible are returned, however, the fields the user does have access to are still updated. Account creation is not supported.

- updateRecord(object, record, values, callback) - Updates a specified record. Replaces the veeva:saveObject API call
  - object - specifies the object api name
  - record - specifies the record id to be updated
  - values - json object with the fields and values updated on the record
  - callback - call back function that is used to return the information

Note: This function returns success: true as long as the user has access to the object. If the user does not have access to one of the fields specified, success: true and an error code and message specifying which fields are not accessible are is still returned, however, and the fields the user does have access to are still updated. Account creation is not supported.

- gotoSlide(keymessage, presentation) - Navigates to the specified key message (Key_Message_vod__c). Replaces the veeva:gotoSlide API call
  - key message - external ID field of the key message to jump to. Usually is Media_File_Name_vod__c, but does not have to be
  - clm presentation - external ID of the CLM Presentation if the key message is in a different CLM Presentation. Usually is Presentation_Id_vod__c, but does not have to be. Can be made optional by putting in "".

- nextSlide() - Navigates to the next slide based on the CLM Presentation Slide display order. Replaces the veeva:nextSlide API call
- prevSlide() - Navigates to the previous slide based on the CLM Presentation Slide display order. Replaces the veeva:prevSlide API call

Sample Code

The following is an example of how to use the JavaScript library functions to retrieve the Survey_vod__c lookup field on CLM_Presentation_vod__c object and then use the result to retrieve all of the Survey_Question_vod__c records for that Survey.

```
//Retrieves the Survey_vod__c lookup, which is the Survey Record ID

function getSurveyID(){

com.veeva.clm.getDataForCurrentObject("Presentation", "Survey_vod__c", getSurveyQs);

}

//Uses the Survey Record ID from above to retrieve all the Survey Question

// Record IDs of the for the Survey

function getSurveyQs(result){

com.veeva.clm.getSurveyQuestions_Survey(result.Presentation.Survey_vod__c, mySur-
veyQuestions);

}

//Displays the result from above to the HTML element named "returned_result"

function mySurveyQuestions(result){

    divEle = document.getElementById("returned_result");

    divEle.innerHTML += "<br/>" + (JSON.stringify(result));

}
```

The following is an example of how to use the JavaScript library functions to save to the Preferred_Statin__c custom field on Account. (When utilizing a custom field, make sure it exists in the sandbox, test, and production orgs.)

```
<!-- HTML to input Preferred Statin -->

<form name="form1" id="form1">

Input Preferred Statin: <input type="text" name="surveyId1">

<input type="button" value="Save Preferred Statin"

onclick="saveStatin(this.form)">

</form>

// Global variable to save preferred statin information

var pref_statin;

// Saves the input text to the global variable and retrieves current Account

// record ID
```

```
function saveStatin(frm){
pref_statin = frm.surveyId1.value;
com.veeva.clm.getDataForCurrentObject("Account", "ID", mySaveObject);
}
// Updates the Account record with the preferred statin value
function mySaveObject(result){
var myString = {};
myString.Preferred_Statin__c = pref_statin;
com.veeva.clm.updateRecord("Account", result.Account.ID, myString,
printSaveResults)
}
//Displays the result from above to the HTML element named "returned_result"
function printSaveResults(result){
divEle = document.getElementById("returned_result");
      divEle.innerHTML += "<br/>" + (JSON.stringify(result));
}
```

The following is an example of how to use the JavaScript library functions to code custom next and previous navigation actions.

```
function JSnextSlide(){
  com.veeva.clm.nextSlide();
}
function JSprevSlide(){
  com.veeva.clm.prevSlide();
}
<!--Within the HTML-->
<a href="JavaScript:void(0)" onclick="JSprevSlide()">Prev</a>
<a href="JavaScript:void(0)" onclick="JSnextSlide()">Next</a>
```

Appendix B Legacy API Calls

Below is the documentation for the deprecated CLM API calls that Veeva CLM supports. Veeva recommends that all new content utilizes the JavaScript Library for CLM in Appendix A - JavaScript Library for CLM.

getDataForObject

```
veeva:getDataForObject(<Object_Name>), fieldName(<Name>),<getResult>(<Result>)
```

- <Object_Name> can be Account, Address, Call, TSF, User, Presentation, and Key Message
  - Account refers to the HCP that the media is being displayed to
  - Address refers to the Address on the Call
  - Call refers to the current underlying call
  - TSF refers to the TSF record for the account and logged in user. User refers to the logged in user using iRep
  - Presentation refers to the CLM Presentation which is being displayed
  - KeyMessage refers to the specific CLM Key Message which is being displayed
- <Name> - API Name of the field that you wish to display, for example, Credentials_vod__c

Note: Reference native Salesforce.com fields using the Field Name instead of the API Name.

- <getResult> - JavaScript function that content providers can implement to display the resulting field. You can implement several of these functions to display different types of fields, such as email and website fields.
- <Result> - result object which is passed back to the content for display

For example, to display a link to the website of a HCP, include the following in the content's JavaScript file:

```
veeva:getDataForObject(Account),fieldName(Website),getResult(result)
```

The call itself needs to be made as a URL reference inside JavaScript. The reference can hold multiple API calls, with each call separated by a semi-colon.

Then, within the JavaScript file for that piece of content, include your getResult function:

```
var getResult = function(result)   {

divEle = document.getElementById("leftColumn-id");

divEle.innerHTML = divEle.innerHTML + "<br>site: <a href=\"" + result.Account.Website +
"\">" + result.Account.Website + "</a>";

}
```

It is also possible to retrieve data from any custom object the user has access to, using the same function, with an additional 'objId' parameter:

```
veeva:getDataForObject(<Object_Name>),objId(<Record_Id>),fieldName(<Name>), <getResult>
(<Result>)
```

Note: <Record_Id> is the 18-digit Salesforce.com ID value for the record being retrieved. For this function, the <Object_Name> and <Name> parameters are API names and are case sensitive.

Veeva recommends caution when retrieving data from the following field types and to always perform rigorous testing:

- Long Text Area
- Rich Text Area
- Encrypted Text Area

gotoSlide

Links to other slides within a presentation or to slides in other presentations can be included within HTML5 content. To enable this feature, place either of the following functions within an HTML <a> tag, as the 'href' parameter, or update the document.location attribute within your JavaScript code:

To jump to a different slide within the current presentation:

```
veeva:gotoSlide(Key Message External ID *)
```

To jump to a different slide in a different presentation:

```
veeva:gotoSlide(Key Message External ID, CLM Presentation External ID**)
```

*Media_File_Name_vod can be used, as it is an External ID of Key_Message_vod

**Presentation_ID_vod can be used as an External ID for CLM_Presentation_vod

Example code using the <a> tag:

<a href="veeva:gotoSlide(Cholecap-Intro.zip)">

Example using document.location:

document.location = veeva:gotoSlide(Cholecap-Safety.zip)

When users click the link or control that contains this underlying function, the media player will jump to the slide defined in the function. Navigation from the slide that was reached by the Jump To functionality will be identical to navigation as that slide had been reached through traditional navigation (i.e., swiping left will display the slide before that slide in the presentation, not the slide from which the user jumped). Tracking of CLM Key Messages also continues normally.

saveObject

```
veeva:saveObject(<object API name>),value(<string>),callback(<function>)
```

Note: This function returns success: true as long as the user has access to the object and record specified. If the user does not have access to one of the fields specified, success: true is still returned and the fields the user does have access to are updated.

Below is an example of how this API function can be used within JavaScript:

```
function savedClickstream(result) {

// result is a json object passed in by iRep media player

divEle = document.getElementById("returned_result");

divEle.innerHTML += "<br/> success: " + result.success;

if (!result.success){

divEle.innerHTML += "<br/> error message: " + result.message;

}
```

```
function saveClickStreamData(frm)
{
  var clickStream = {};
  clickStream.Answer_vod__c = frm.fieldName.value
  clickStream.Question_vod__c = "What would make you prescribe Cholecap more often?"
  clickStream.Survey_Type_vod__c = "freetext"
  clickStream.Text_Entered_vod__c = "textarea"

  var myJSONText = JSON.stringify(clickStream);
  divEle = document.getElementById("returned_result");
request = "veeva:saveObject(Call_Clickstream_vod__c),value(" + myJSONText + "),callback
(savedClickstream)";
  divEle.innerHTML += "<br/> Request:<br/>" + request;
  document.location = request;
}
```

nextSlide/prevSlide

Below is an example of code that can be used to add the Next and Previous slide functionality to the HTML5 content:

```
<SCRIPT Language="JavaScript">
<!--//
function nextSlide(){
  document.location = "veeva:nextSlide()";
}
function prevSlide(){
  document.location = "veeva:prevSlide()";
}
//-->
</SCRIPT>
```

To enable the text as an active link, add the following:

- Next - Next
- Prev - Prev

Appendix C Integrating CLM with CRM

Surveys

To display/retrieve survey questions and answers, utilize the following JavaScript functions (see Appendix A - JavaScript Library for CLM for further documentation):

- getSurveyTarget_Account
- getSurveyQuestions_Survey
- getQuestionResponse_Survey

To create a new Survey Target record and corresponding Question Response records, the following information should be carefully adhered to in order to correctly save records for the Surveys module.

Survey Targets (Survey_Target_vod__c) - From CLM, if there isn't already a Survey Target created for the Survey/Account combination, a Survey Target must be created. If there is an existing pending or saved survey target record (based on the Status_vod field), the question response records related to that survey target record can be updated.

Fill in these fields based on the Survey

- Account_vod__c = <account SFDC ID>
- Survey_vod__c = <survey SFDC ID>
- Status_vod__c = Saved_vod
- RecordTypeId (SFDC Id of the Survey Target RecordType that matches the RecordType on the Survey Record)
- No_Autoassign_vod = YES (Unless the customer chooses otherwise)

Copy these fields from the Survey record

- Name (text)
- Territory_vod__c
- Start_Date_vod__c
- End_Date_vod__c
- Region_vod__c
- Language_vod__c
- Channels_vod__c
- Any other custom (non _vod) fields with the same API name on both Survey and Survey Target

The rest of the fields should get filled in during sync, but they can also be filled in via CLM:

- Owner = <user SFDC ID>
- Account_Display_Name_vod__c

If the customer wants to follow the logic which iRep uses for Surveys, implement the following:

- If Open_vod__c is false on the corresponding Survey, then do not create new Survey_Targets
- If Open_vod__c is true, Survey is One Time, and a Survey Target already exist, do not create a new Survey Target

Question Response (Question_Response_vod__c) - From CLM, if there isn't already a Survey Target created for the Survey/Account combination, a Survey Target must be created. If there is an existing pending or saved survey target record (based on the Status_vod field), then the question response records related to that survey target record can be updated.

Fill in these fields based on the Survey

- Account_vod__c = <account SFDC ID>
- Survey_vod__c = <survey SFDC ID>
- Status_vod__c = Saved_vod
- RecordTypeId (SFDC Id of the Survey Target RecordType that matches the RecordType on the Survey Record)
- No_Autoassign_vod = YES (Unless the customer chooses otherwise)

Copy these fields from the Survey record

- Name (text)
- Territory_vod__c
- Start_Date_vod__c
- End_Date_vod__c
- Region_vod__c
- Language_vod__c
- Channels_vod__c
- Any other custom (non _vod) fields with the same API name on both Survey and Survey Target

The rest of the fields should get filled in during sync, but they can also be filled in via CLM

- Owner = <user SFDC ID>
- Account_Display_Name_vod__c

If the customer wants to follow the logic which iRep uses for Surveys then implement the following:

- If Open_vod__c is false on the corresponding Survey, then do not create new Survey_Targets
- If Open_vod__c is true, Survey is One Time, and a Survey Target already exist, do not create a new Survey Target

Order Management

To display/retrieve Order Management related information, utilize the following JavaScript functions (Appendix A - JavaScript Library for CLM):

- getProduct_OrderActive_Account
- getProduct_KitComponents
- getProductGroup_Product

- getLastTenOrders_Account
- getOrderLines_Order
- getListPrice_Product_Account

To create a new Order record and corresponding Order Line records, the following information should be carefully adhered to in order to correctly save records for the Order Management module.

Order (Order_vod__c) - Each time the presentation is displayed and a doctor wants to order at least 1 product, then an Order record should be created.

Fill in these fields based on answers from the CLM Presentation:

- Account_vod__c = SFDC ID of the account for the call
- Call2_vod__c = record id for the call
- Order_Date_vod__c = date of the order
- Status_vod__c = Saved_vod
- RecordType = SFDC ID for Direct_vod
- CurrencyIsoCode = whatever currency the user is set to use

Copied from the Account for the call:

- Account_Group_vod__c
- Account_ID_vod__c
- Account_Name_vod__c

The rest of the fields should get auto-populated after the sales rep reviews the order via iRep and then saves.

Order Line (Order_Line_vod__c) - Create a new order line for each product:

- Slide logic should enforce this check

Fill in these fields based on answers from the CLM Presentation:

- Order_vod__c – SFDC ID of the order header record
- Quantity_vod__c – specified by the doctor
- Product_vod__c – SFDC ID of the product
- Product_Group_vod__c – SFDC ID of the product group if utilized
- List_Price_vod__c – get the price for the product using the getListPrice_Product function

The rest of the fields should get auto-populated after the sales rep reviews the order via iRep and then saves.