



# Products and My Setup

Veeva Professional Services

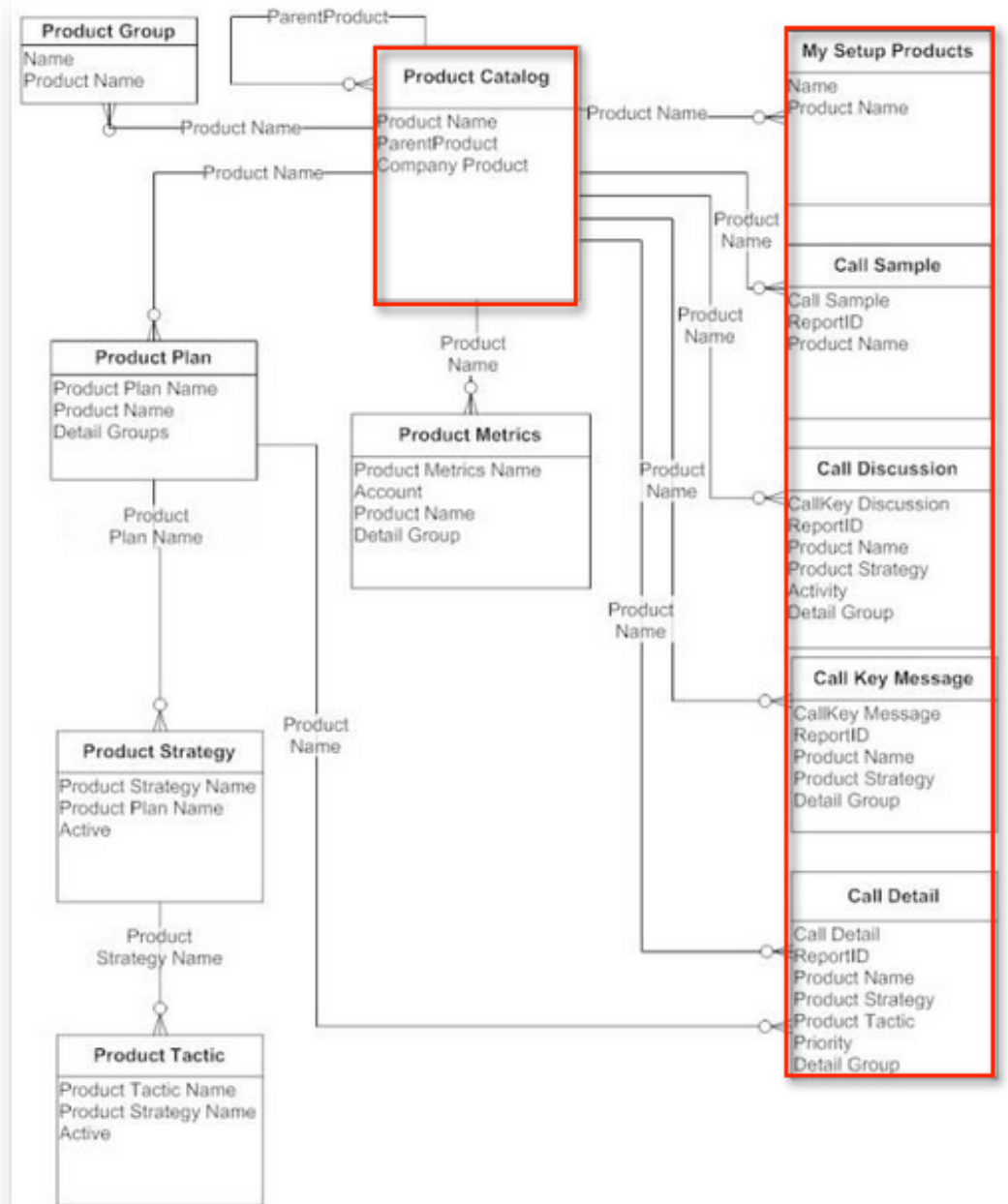
# Module Objectives

- **Overview of Products Data Model**
- **Create and Configure Products**
  - Product Catalog
  - My Setup
  - Detail Favorites
  - Detail Groups
  - Detail Topics



# Product ERD

- Products are created in Product Catalog
- Referenced by other objects
  - My Setup
  - Call Sample
  - Call Discussion
  - Call Key Message
  - Call Detail




# Product Catalog



# Product Catalog

- Access the Product Catalog from All Tabs → Product Catalog

 Product Catalog

## Cholecap 10mg

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Product Catalog \[0\]](#) | [Key Messages \[0\]](#) | [Product Plans \[1\]](#) | [Notes & Attachments \[1\]](#) | [Call Details \[0\]](#) | [Product Events \[0\]](#) | [Product Group Maps \[0\]](#)

### Product Catalog Detail

EditDeleteClone

Product Name	Cholecap 10mg	External ID	10011
Parent Product	<a href="#">Cholecap</a>	Manufacturer	Verte BioTech, Inc.
Product Type	Sample	Product info	
Therapeutic Area	Cardiology	Consumer site	
Therapeutic Class	High Cholesterol (Statins)	No Details	<input type="checkbox"/>
Description		User Aligned	<input type="checkbox"/>
Sample Quantity		No Cycle Plans	<input checked="" type="checkbox"/>
Require Key Message On Detail	<input type="checkbox"/>	Distributor	
Display Order		Sample Quantity Bound	<input type="checkbox"/>
No Metrics	<input type="checkbox"/>	Sample U/M	

### ▼ Key Indicators

Controlled Substance	<input type="checkbox"/>
Company Product	<input checked="" type="checkbox"/>

# Product Types

- The Product Type (Product\_Type\_vod\_\_c) determines the use for the product

## For Detailing

- Detail
- Detail Group
- Detail Topic

## For Sampling & Promotional

- Sample
- BRC (Business Reply Card)
- Promotional Item
- High Value Promotional
- Alternative Sample

## For Order Management

- Order
- Kit
- Kit Item

# Adding a Detail Product

**Product Catalog Edit** Cholecap Help for this Page ?

**Product Catalog Edit** Save Save & New Cancel

**Information** = Required Information

Product Name	<input type="text" value="Cholecap"/>	<b>Product Type = Detail</b>	External ID	<input type="text" value="1001"/>
Parent Product	<input type="text"/>		Manufacturer	<input type="text" value="Verteo Biotech, Inc."/>
Product Type	<input type="text" value="Detail"/>		Product info	<input type="text"/>
Therapeutic Area	<input type="text" value="Cardiology"/>	Distributor	<input type="text"/>	<b>No Details: Exclude product on call report</b>
Therapeutic Class	<input type="text" value="High Cholesterol (Statins)"/>	Consumer site	<input type="text"/>	
Description	<input type="text"/>	No Details	<input type="checkbox"/>	
Display Order	<input type="text" value="1"/>	No Metrics	<input type="checkbox"/>	<b>The order to display the product on the call report</b>
Sample Quantity	<input type="text"/>	No Cycle Plans	<input type="checkbox"/>	
Quantity Per Case	<input type="text"/>	User Aligned	<input type="checkbox"/>	
Sample U/M	<input type="text" value="--None--"/>	Restricted	<input type="checkbox"/>	<b>Key Message is required when detailing this product</b>
Sample Quantity Bound	<input type="checkbox"/>	Restricted States	<input type="text"/>	
		Require Key Message On Detail	<input type="checkbox"/>	

**Key Indicators**

Controlled Substance	<input type="checkbox"/>
Company Product	<input checked="" type="checkbox"/>

**Indicates company vs. competitor product**

# Adding a Sample Product

Product Catalog Edit Cholecap 10mg [Help for this Page](#)

**Product Catalog Edit**

**Information** | = Required Information

Product Name	Cholecap 10mg	External ID	10011
Parent Product	Cholecap	Manufacturer	Verteo Biotech, Inc.
Product Type	Sample	Product info	
Therapeutic Area	Cardiology	Distributor	
Class	High Cholesterol (Sta	Consumer site	
Option		No Details	<input type="checkbox"/>
Display Order		No Metrics	<input type="checkbox"/>
Sample Quantity	1,2,3,4,5	No Cycle Plans	<input type="checkbox"/>
Quantity Per Case		User Aligned	<input type="checkbox"/>
Sample U/M	Box	Restricted	<input type="checkbox"/>
Sample Quantity Bound	<input checked="" type="checkbox"/>	Restricted States	
		Require Key Message On Detail	<input type="checkbox"/>

**Key Indicators**

Controlled Substance	<input type="checkbox"/>
Company Product	<input checked="" type="checkbox"/>

**Annotations:**

- Product Type = Sample
- If Product Type is not Detail, it must have a Parent Product of type Detail
- Restricts the sample quantity entered on the call report; On iRep: only values entered here will appear. If no values, will default to 1-20
- Must be checked to enforce Sample Quantity online
- Company distributing BRC samples; displayed when capturing signatures
- If product is a controlled substance, then dr. must have DEA license for sampling



# My Setup



# My Setup

- **Identifies products that users:**

- Are responsible for promoting
- Can include in Call Reports
- Can track in Product Metrics (company and competitor)
- Can View in Cycle Plans
- Can view in VInsights



# Enabling a Product in My Setup Tab

- To add products to users' My Setup go to All Tabs → My Setup
- Users can detail company products that are selected
  - Selected competitor products appear in Product Metrics

**My Setup Edit** Edit

My Setup Products For  Self

Company Products			
<input checked="" type="checkbox"/> AMX <span>★</span>	<input type="checkbox"/> AKK OXHES N4A <span>★</span>	<input type="checkbox"/> AKK OXHES S6A EXH <span>★</span>	<input type="checkbox"/> AKK OXHES S6A OXC <span>★</span>
<input checked="" type="checkbox"/> CABASES <span>★</span>	<input checked="" type="checkbox"/> CEKANCE <span>★</span>	<input checked="" type="checkbox"/> Cholecap <span>★</span>	<input type="checkbox"/> CKASIXYN OXC <span>★</span>
<input type="checkbox"/> DUSOGESIC D XSANS <span>★</span>	<input type="checkbox"/> KAMICXAK <span>★</span>	<input checked="" type="checkbox"/> KAPAKE <span>★</span>	<input type="checkbox"/> KEPPSA <span>★</span>
<input type="checkbox"/> KYSICA <span>★</span>	<input checked="" type="checkbox"/> Labrinone <span>★</span>	<input checked="" type="checkbox"/> MISAPEXIN <span>★</span>	<input type="checkbox"/> NEOCKASIXYN <span>★</span>

Competitor Products	
<input type="checkbox"/> ARO	<input checked="" type="checkbox"/> FEM
<input type="checkbox"/> Narbrax	<input type="checkbox"/> Propoxylar
	<input type="checkbox"/> Amnistatin
	<input type="checkbox"/> Vasorinone
	<input type="checkbox"/> Carbamazal

# How to add Products to My Setup?

- **Manually through the My Setup tab**
  - Preferred if the product mix for each rep changes regularly
- **Apex Data Loader**
  - Preferred for large number of users and/or products
  - My Setup table stores one row per product per user



# Detail Favorites



# Detail Favorites

- Call page filtering mechanism that lets the user select “favorite” products in My Setup
- Useful for field forces with a large number of detail products
  - Products marked as “favorites” will display by default on Call reports
  - Other products in the user’s My Setup can be searched and added to Call reports

**My Setup Edit** Save Cancel

My Setup Products For  Self

Company Products					
<input type="checkbox"/> AMX	☆	<input type="checkbox"/> AKK OXHES N4A	☆	<input type="checkbox"/> AKK OXHES S6A EXH	☆
<input checked="" type="checkbox"/> CABASES	★	<input type="checkbox"/> CEKANCE	☆	<input checked="" type="checkbox"/> Cholecap	★
				<input type="checkbox"/> AKK OXHES S6A OXC	☆
				<input type="checkbox"/> CKASIXYN OXC	☆

# Enabling Detail Favorites

- **Give user profiles CRUD permissions to My Setup Products**
  - Setup → Manage Users → Profiles and click the link for the desired profile
  - Make sure the profile has Read and Edit permission for the My Setup Products object

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Metric Configurations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My Setup Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# Enabling Detail Favorites

- **Give user profiles access to the Favorite\_vod field in the My Setup Products object**
  - Go to Setup → Create → Objects → My Setup Products
  - Click the link for the Favorite field
  - Click the Set Field-Level Security button
  - Select the Visible checkbox for the profiles that need access to the detail favorite functionality

System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
VExample Order Management - Platform	<input type="checkbox"/>	<input type="checkbox"/>
VExample Primary Care Sales Management - Platform	<input type="checkbox"/>	<input type="checkbox"/>
VExample Primary Care Sales - Platform	<input checked="" type="checkbox"/>	<input type="checkbox"/>





# Detail Favorites Management

- Users can manage their Favorite products but cannot manage the products they have access to in My Setup
  - My Setup products managed by the Administrator
  - Favorite products managed by the User or Administrator

**My Setup Edit** Edit

My Setup Products For  Self

Company Products		
<input checked="" type="checkbox"/> AMX <span>☆</span>	<input type="checkbox"/> AKK OXHES N4A <span>☆</span>	<input type="checkbox"/> AKK OXHES S6A EXH <span>☆</span>
<input checked="" type="checkbox"/> CABASES <span>★</span>	<input type="checkbox"/> CEKANCE <span>☆</span>	<input checked="" type="checkbox"/> Cholecap <span>★</span>
<input type="checkbox"/> DUSOGESIC D XSANS <span>☆</span>	<input type="checkbox"/> KAMICXAK <span>☆</span>	<input type="checkbox"/> KAPAKE <span>☆</span>


# Detail Topics & Detail Groups



# Detail Topics

- **Detail Topic allows field forces to align topics to targeted Accounts, particularly for indication based or animal health**
- **Detail Topic is a product type in the Product Catalog**
  - Behaves similarly to a Detail Product
  - Once created it needs to be assigned to users via My Setup
  - Detail Topics can be used in Call Reports, Call Discussions, Key Messages, Product Plan and Account Plan Tactics

Detail Groups	
<input checked="" type="checkbox"/> Cardiology	<input checked="" type="checkbox"/> Oncology

Detail Topics	
<input checked="" type="checkbox"/> Clinical Trials Cardiology, Oncology	

# Detail Groups

- **Detail Groups** are used to group **Detail Products** and **Detail Topics** based on indication groups, molecules, or species in animal health
  - Behaves as another product type
- When a **Detail group** is selected, the products in the group displays in the list of products in **My Setup**

Detail Groups		
<input checked="" type="checkbox"/> Cardiology	<input checked="" type="checkbox"/> Oncology	

Detail Topics		
<input checked="" type="checkbox"/> Clinical Trials <i>Cardiology, Oncology</i>	★	

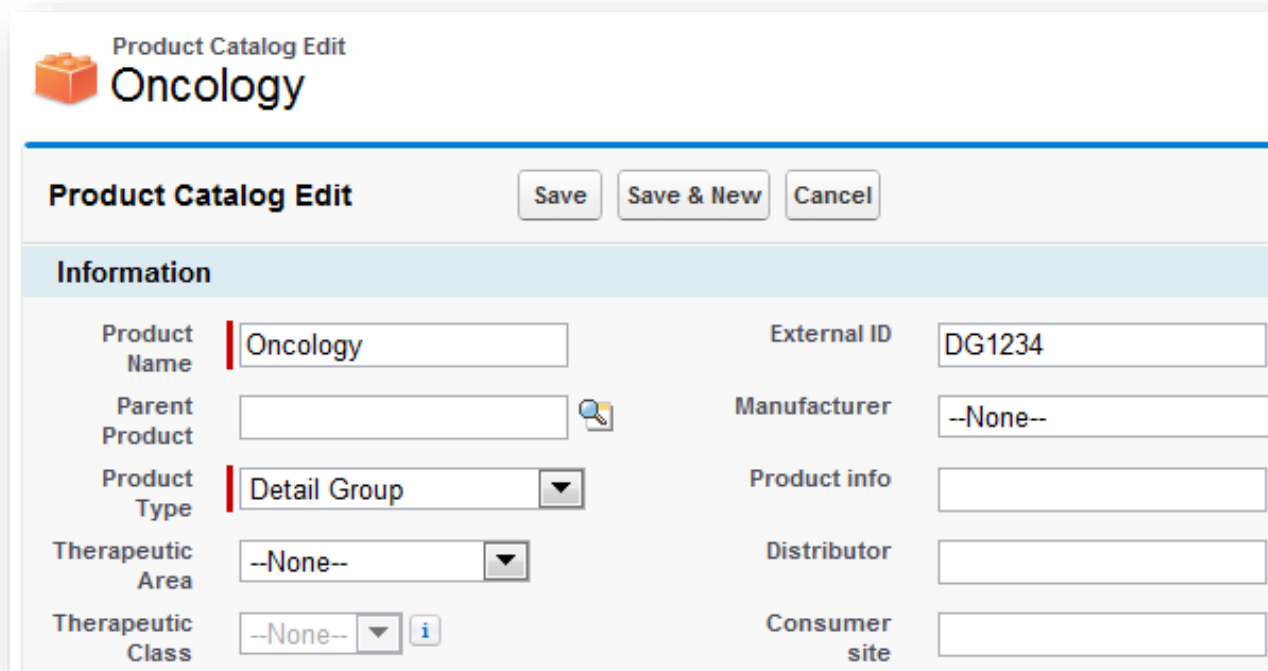
Company Products		
<input checked="" type="checkbox"/> AMX <i>Oncology</i>	★	<input type="checkbox"/> AKK OXHES N4A ★
<input type="checkbox"/> CABASES <i>Oncology</i>	★	<input type="checkbox"/> CEKANCE ★
		<input checked="" type="checkbox"/> Cholecap <i>Cardiology</i>



# Detail Groups

- **To define a Detail Group:**

- Create a new product in the Product Catalog
- Select the Product Type = Detail Group




The screenshot shows a web application window titled "Product Catalog Edit Oncology". The window has a header bar with the title and three buttons: "Save", "Save & New", and "Cancel". Below the header is a section titled "Information" with a light blue background. This section contains two columns of form fields. The left column includes "Product Name" (text input with "Oncology"), "Parent Product" (text input with a magnifying glass icon), "Product Type" (dropdown menu with "Detail Group" selected), "Therapeutic Area" (dropdown menu with "--None--" selected), and "Therapeutic Class" (dropdown menu with "--None--" selected and an information icon). The right column includes "External ID" (text input with "DG1234"), "Manufacturer" (text input with "--None--"), "Product info" (text input), "Distributor" (text input), and "Consumer site" (text input).

Product Catalog Edit	
Product Name	Oncology
Parent Product	
Product Type	Detail Group
Therapeutic Area	--None--
Therapeutic Class	--None--
External ID	DG1234
Manufacturer	--None--
Product info	
Distributor	
Consumer site	

# Detail Groups

- **To assign products and topics to a Detail Group:**
  - Select the Detail Group in the Product Catalog
  - Add a New Product Group in the Product Groups (Product Catalog) related list
  - Enter the Product Group Name
  - Use the Product lookup field and select a product of type Detail Topic or Detail

The screenshot shows a web form titled 'Product Group Edit' for 'Oncology - AMX'. At the top right is a link 'Help for this Page' with a question mark icon. Below the title bar are three buttons: 'Save', 'Save & New', and 'Cancel'. The form is divided into an 'Information' section, indicated by a red vertical bar and the text '= Required Information'. The fields are as follows:

Information	
Product Group Name	<input type="text" value="Oncology - AMX"/>
Product Catalog	<input type="text" value="Oncology"/>
Product	<input type="text" value="AMX"/> 
Start Date	<input type="text" value="[ 9/25/2012 ]"/>
End Date	<input type="text" value="[ 9/25/2012 ]"/>
Description	<input type="text"/>

# Detail Groups

- To display products and topics assigned to a Detail Group, go to My Setup and select the Detail Group checkbox
  - Otherwise, product and topics tied to a Detail Group will not display

**My Setup Edit** Save Cancel

My Setup Products For  [Self](#)

Detail Groups	
<input checked="" type="checkbox"/> Cardiology	

↓

Detail Topics	
<input checked="" type="checkbox"/> Clinical Trials Cardiology	★

Company Products							
<input checked="" type="checkbox"/> AMX	★	<input type="checkbox"/> AKK OXHES N4A	★	<input type="checkbox"/> AKK OXHES S6A EXH	★	<input type="checkbox"/> AKK OXHES S6A OXC	★
<input checked="" type="checkbox"/> CABASES	★	<input type="checkbox"/> CEKANCE	★	<input checked="" type="checkbox"/> Cholecap Cardiology	★	<input type="checkbox"/> CKASIXYN OXC	★
<input type="checkbox"/> DUSOGESIC D XSANS	★	<input type="checkbox"/> KAMICXAK	★	<input type="checkbox"/> KAPAKE	★	<input type="checkbox"/> KEPPSA	★

# Module Summary

- **Reviewed the Products ERD**
- **Created and Configured Products**
  - Product Catalog
  - My Setup
  - Detail Favorites
  - Detail Topics
  - Detail Groups





# Labs

## ■ Configure Products

- Create a new detail product
- Enable favorite products
- Create detail groups and detail topics
- Update My Setup
- View new products on the call report page

For more information, see Appendix at the end of this module



# Appendix

Product Alignment



# Product Alignment by Territory and Account

- **Allows control of which products can be detailed by reps (territories) for specific accounts**
  - Example: When a sales rep is recording a call for a certain account, he can only detail certain products
- **Typically managed via data loader, not UI**
- **Supported Online and offline**



# Enabling Product Alignment by Territory and Account

- In the TSF object, add the Allowed Product field to the TSF Layout page layout
- Populate the Allowed Product field with double semi-colon delimited list of Product Names

The screenshot displays two overlapping forms in a Veeva CRM interface. The background form is the 'Territory Field Detail' for 'Territory Field Corp'. It includes fields for 'TSF Name', 'Account', 'My Preferred Address', 'Last Activity Date', 'My Target', 'Route', 'Territory', 'YTD Activity', 'Allowed Product', and 'Created By'. The 'Allowed Product' field is highlighted with a red box and contains the text 'Cholecap;;AMX'. The foreground form is the 'Call Report' for 'Enrico Orlandoni'. It includes fields for 'Account', 'Credentials', 'Address', and 'Sample Card #'. The 'Address' field is a dropdown menu showing '174 Edison Rd, Lake Hopatcong, NJ 07849'. The 'Call Report' form also has a 'Detailing Priority' section with checkboxes for 'AMX' and 'Cholecap', both of which are highlighted with a red box.

**Territory Field Detail**

TSF Name	Corp
Account	Enrico Orlandoni
My Preferred Address	174 Edison Rd
Last Activity Date	7/6/2010
My Target	<input checked="" type="checkbox"/>
Route	Route 1
Territory	Corp
YTD Activity	1
Allowed Product	Cholecap;;AMX
Created By	Admin Henry, 7/27/2011 3:33 AM

**Call Report**

Professional Information

Account	Enrico Orlandoni
Credentials	DO
Address	174 Edison Rd, Lake Hopatcong, NJ 07849
Sample Card #	

Detailing Priority

<input type="checkbox"/> AMX	<input type="checkbox"/> Cholecap
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