



My Accounts Configuration

Veeva Professional Services

Module Objectives

- **Define the My Accounts**
- **Create Views**
- **Create Lists**
- **Configure the My Accounts tab**
 - Hide the Mass Update button
 - Configure the Schedule a Call button
- **Configure the New button**
 - Enable New Account Wizard
 - Enable Parent Account Wizard
- **Use the Veeva Global Account Search**
- **My Accounts on CRM (iPad)**



Veeva Account Overview

**Include both
Business
and Person
Accounts**



**People are
classified as
Person
Accounts in
Veeva rather
than Contacts**



**Managed via
the Accounts
SFDC
standard
object**



**Includes
fields from
both
Accounts and
Contacts**



My Accounts Tab

- Custom Veeva page based on an s-control
- Displays accounts assigned to a user's territory

Veeva Train

Home **My Accounts** My Schedule My Samples Medical Inquiries Cycle Plans Speaker Evaluations Me

Search

Search All Go!

☐ Limit to items I own

[Advanced Search...](#)

Veeva CRM Help

[Veeva CRM Documentation](#)

Messages and Alerts

Welcome to Veeva!

My Accounts Home

View My Accounts

Territory 101

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Download: [CSV](#) | [Excel](#)

| <input type="checkbox"/> Name | Record Type ID | Street Address | City | Phone 1 | State |
|---|---------------------|----------------------|----------------|----------------|-------|
| <input type="checkbox"/> Ackerman, Clinton | Professional | 967 Millbrook Rd | Newton | | NJ |
| <input type="checkbox"/> Adler, Kathleen | Professional | 42 Van Horn Rd | Newton | | NJ |
| <input type="checkbox"/> Allen, Henry | Professional | 97 W Parkway | Pompton Plains | (973) 831-5000 | NJ |
| <input type="checkbox"/> Alonso Barbar, Lourdes | Professional | 250 West 17th Street | New York | (212) 255-5555 | NY |
| <input type="checkbox"/> Chilton Emergency Department | Hospital Department | 250 West 19th Street | New York | | NY |



My Accounts – Views

- Views are saved queries that filter the Accounts displayed
 - Typically created by Administrators or power users and made available to end-users

My Accounts Home

>> View **My Accounts** [Edit](#) | [Create New View](#) Territory **101**

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Download

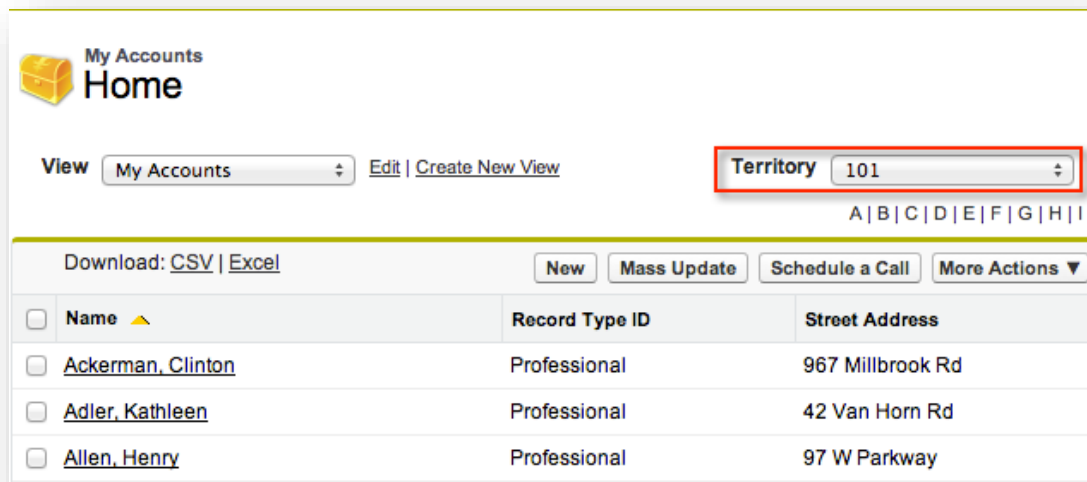
| | Name | Target? | Street Address | City |
|--------------------------|-----------------------------------|-------------------------------------|------------------|----------------|
| <input type="checkbox"/> | Ackerman, Clinton | <input checked="" type="checkbox"/> | 967 Millbrook Rd | Newton |
| <input type="checkbox"/> | Adler, Kathleen | <input type="checkbox"/> | 42 Van Horn Rd | Newton |
| <input type="checkbox"/> | Allen, Henry | <input type="checkbox"/> | 97 W Parkway | Pompton Plains |

Buttons: New, Mass Update, Schedule a Call, More Actions ▼

Callout: Only users who have permission to create and edit Views will see these links

My Accounts – Territory Filter

- Filters the Accounts list and displays only accounts aligned to the selected territory
- For a manager level territory:
 - Territory picklist display all of the territories that directly roll-up to the selected territory in the Territory Hierarchy



The screenshot shows the 'My Accounts Home' interface. At the top, there's a 'View' dropdown set to 'My Accounts' and a 'Territory' dropdown set to '101', which is highlighted with a red box. Below the dropdowns are links for 'Edit' and 'Create New View'. A table of accounts is displayed with columns for Name, Record Type ID, and Street Address. The table contains three rows of data.

| <input type="checkbox"/> | Name ▲ | Record Type ID | Street Address |
|--------------------------|-----------------------------------|----------------|------------------|
| <input type="checkbox"/> | Ackerman, Clinton | Professional | 967 Millbrook Rd |
| <input type="checkbox"/> | Adler, Kathleen | Professional | 42 Van Horn Rd |
| <input type="checkbox"/> | Allen, Henry | Professional | 97 W Parkway |

My Accounts Requirements

- **My Accounts tab requires user profiles to have at least read access to the following objects:**
 - Account
 - Address
 - Product Metrics
 - Territory Fields
 - Preferences
 - Views
- **For Accounts to display:**
 - Territory Hierarchy must be set up
 - Users must be assigned to Territories
 - Accounts must be assigned to Territories



Create Views



Creating New Views For Users

- **Create a new view called Target Professionals**

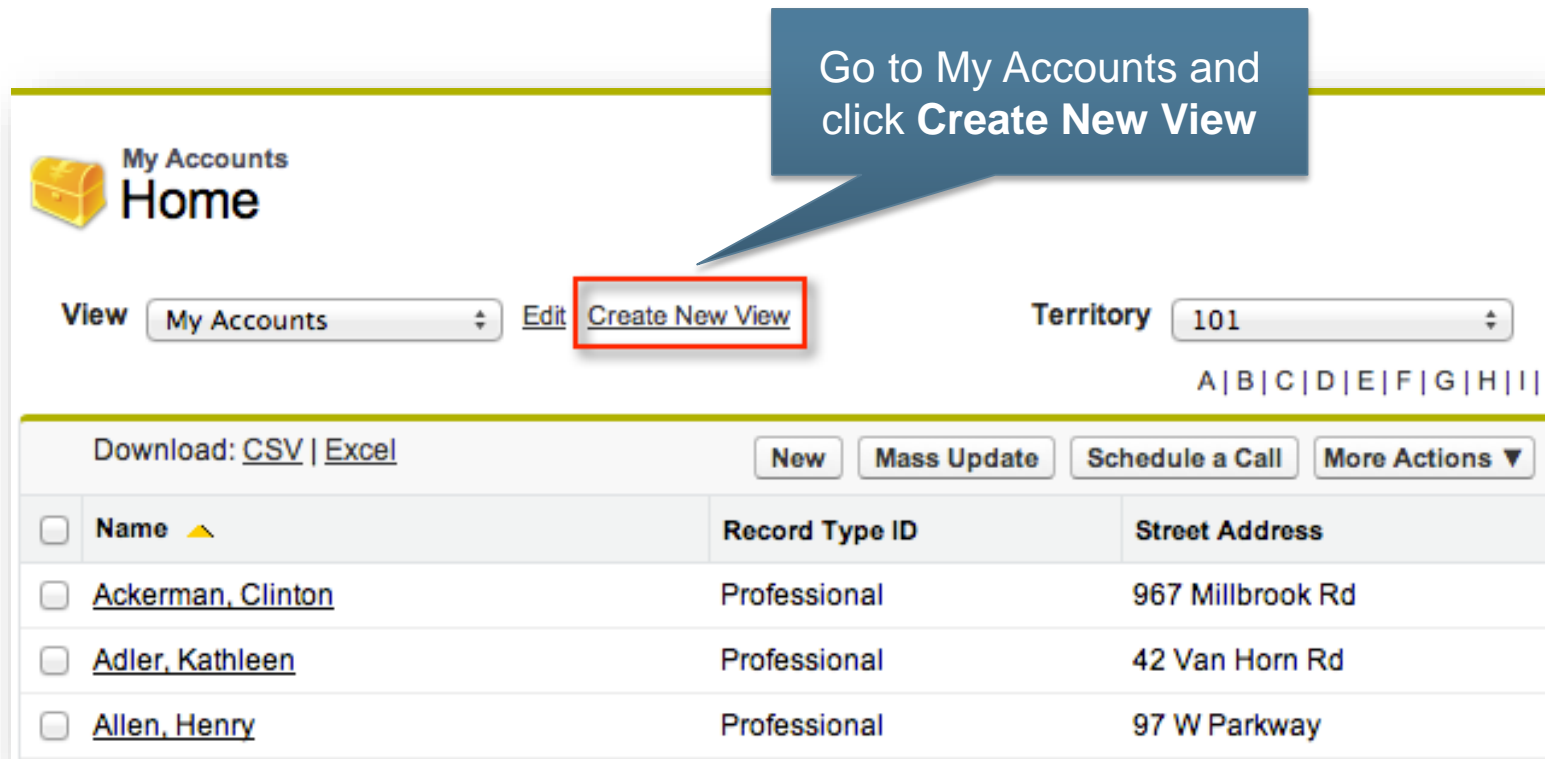
- Click the Create New View link
- Specify what to search in
- Specify search criteria to filter the records
- Select the information to display in each column of the list
- Control who can see the view

The screenshot shows the 'My Accounts' home page. A blue callout box labeled 'Views' points to the 'View' dropdown menu. The dropdown menu is open, showing a list of views: 'All Accounts', 'All Pharmacies', 'All Target Hospitals', 'Hospitals', 'My Accounts' (highlighted in blue), 'My Hospital Departments', and 'My Target Accounts'. Below the dropdown, there are buttons for 'New', 'Mass Update', 'Schedule a Call', and 'More Actions'. The main table displays a list of accounts with columns for 'Name', 'Target?', 'Street Address', and 'City'. The first row shows 'Ackerman, Clinton' with a checked 'Target?' box, '967 Millbrook Rd' as the street address, and 'Newton' as the city.

| Name | Target? | Street Address | City |
|-------------------|-------------------------------------|------------------|--------|
| Ackerman, Clinton | <input checked="" type="checkbox"/> | 967 Millbrook Rd | Newton |

Click Create New View

Go to My Accounts and click **Create New View**



My Accounts Home

View: My Accounts Edit Create New View Territory: 101

Download: [CSV](#) | [Excel](#) New Mass Update Schedule a Call More Actions ▼

| <input type="checkbox"/> | Name ▲ | Record Type ID | Street Address |
|--------------------------|-----------------------------------|----------------|------------------|
| <input type="checkbox"/> | Ackerman, Clinton | Professional | 967 Millbrook Rd |
| <input type="checkbox"/> | Adler, Kathleen | Professional | 42 Van Horn Rd |
| <input type="checkbox"/> | Allen, Henry | Professional | 97 W Parkway |

Select Account Type(s)

Step 1. View Name

Edit the name of this view

Name:

Enter view name

Step 2. What to search in

Select the account record types you want included in the list.

Select All Clear All



☐ KOL

☐ Person Account

☒ Professional



☐ Employer

☐ Extended Care

☐ Hospital

☐ Hospital Department

☐ MCO

☐ MCO Plan

☐ Organization

☐ Pharmacy

Restrict the set of information being searched.

☒ My Preferred Addresses ☐ All Addresses

☒ All Accounts ☐ Accounts That I Own

Select **My Preferred
Addresses** and **All Accounts**

Select the type of accounts to display in the view and inactivate record types the org is not using

Important: Selecting My Preferred Addresses will prevent accounts with multiple addresses from being displayed more than once. The address that will be used is the last address used on a call. If no address has been used, then the primary address will be used.



Specify Search Criteria

- Select criteria based on fields in the 4 objects:
 - Account
 - Address
 - Territory Field
 - Product Metrics

Step 3. Search Criteria

Set the search conditions to further restrict the list.

| Record | Field | Operator | Value | |
|-------------|------------|------------|--------|-----|
| X Account ▼ | Target? ▼ | equals ▼ | true ▼ | AND |
| --None-- ▼ | --None-- ▼ | --None-- ▼ | | AND |
| --None-- ▼ | --None-- ▼ | --None-- ▼ | | AND |
| --None-- ▼ | --None-- ▼ | --None-- ▼ | | AND |

Enter criteria to filter records

Select Columns to Display

- Select the columns to display on the new view
- Profiles must have at least Read FLS access to fields used in Search Criteria and Selected Columns

Use arrows to
change the order

Step 4. Select Columns

Select the information to display in each column of the list.

| | Record | Field |
|-----|-----------------|--------------------|
| x | Account | Name |
| ↑ x | Account | Target? |
| ↑ x | Address | Street Address |
| ↑ x | Address | City |
| ↑ x | Territory Field | Last Activity Date |
| ↑ x | Product Metrics | Cholecap-Awareness |
| | --None-- | --None-- |

Control Who Can See the View

Step 5. Visibility

Control who can see this view.

- ☐ This view is hidden from all users
☐ This view is accessible by all users
☒ This view is accessible by profile

[Select All](#) [Clear All](#)

Select who can see the view

- | | | | |
|--|---|---|--|
| <input type="checkbox"/> Chatter Free User | <input type="checkbox"/> Chatter Moderator User | <input type="checkbox"/> Contract Manager | <input type="checkbox"/> EMEA - Managed Markets Sales - Platform |
| <input type="checkbox"/> EMEA - Primary Care Sales - Platform | <input type="checkbox"/> EMEA System Administrator | <input type="checkbox"/> Managed Markets Director | <input type="checkbox"/> Managed Markets Director - Platform |
| <input type="checkbox"/> Managed Markets Sales | <input type="checkbox"/> Managed Markets Sales - Platform | <input type="checkbox"/> Marketing User | <input type="checkbox"/> MSL |
| <input type="checkbox"/> MSL - Platform | <input type="checkbox"/> MSL Director | <input type="checkbox"/> MSL Director - Platform | <input type="checkbox"/> OtherStandard |
| <input type="checkbox"/> Package License Manager | <input type="checkbox"/> Package License Manager | <input type="checkbox"/> Read Only | <input type="checkbox"/> Solution Manager |
| <input type="checkbox"/> Specialty Sales | <input checked="" type="checkbox"/> Specialty Sales - Platform | <input type="checkbox"/> Specialty Sales Management | <input type="checkbox"/> Specialty Sales Manager - Platform |
| <input type="checkbox"/> Standard Platform One App User | <input type="checkbox"/> Standard Platform User | <input type="checkbox"/> Standard User | <input checked="" type="checkbox"/> System Administrator |
| <input checked="" type="checkbox"/> VExample Primary Care Sales - Platform | <input checked="" type="checkbox"/> VExample Primary Care Sales Management - Platform | | |



Create Lists



What are Account Lists?

- **Users can organize their Accounts into lists that are meaningful and valuable to them**
 - Easily schedule calls for the Accounts in the list
- **Similar to Playlists in iTunes**
- **Seamlessly integrated into the My Accounts tab**
 - Each list is available for selection in the Views dropdown
- **Lists are static but views are dynamic**



Account Lists Functionality

- Associate a color to each list for visual representation
- To add/remove an account to/from a list:
 - Select account(s) and use More Actions to create new list

The screenshot displays the 'My Accounts' interface. At the top, there's a 'Home' header with a treasure chest icon. Below it, a navigation bar includes a 'View' dropdown set to 'My Accounts', an 'Edit | Create New View' link, and a 'Territory' dropdown set to '101'. A alphabetical index bar (A-Z) is visible. The main area features a table with columns: 'Name', 'Target?', and 'Street Address'. The first four rows of the table are highlighted with a red box, indicating they are selected. The first row is 'Ackerman, Clinton' with a checked checkbox and address '967 Millbrook Rd, Newton, Aware'. The second row is 'Adler, Kathleen' with an unchecked checkbox and address '42 Van Horn Rd, Newton, Prefer'. The third row is 'Allen, Henry' with an unchecked checkbox and address '97 W Parkway, Pompton Plains'. The fourth row is 'ALMOGUERA, JORGE' with an unchecked checkbox and address 'PASEO DE LA CASTELLANA, 261, MADRID'. The fifth row is 'ALONSO, NATALIA' with an unchecked checkbox and address 'CARRETERA DE COLMENAR, KM 9,1, MADRID'. Above the table, there are buttons for 'Download to Excel', 'New', 'Mass Update', and 'Schedule a Call'. A 'More Actions' dropdown menu is open, showing an 'Add to List...' option, which is also highlighted with a red box.

| <input type="checkbox"/> | Name | Target? | Street Address |
|-------------------------------------|-------------------|-------------------------------------|---|
| <input checked="" type="checkbox"/> | Ackerman, Clinton | <input checked="" type="checkbox"/> | 967 Millbrook Rd Newton Aware |
| <input checked="" type="checkbox"/> | Adler, Kathleen | <input type="checkbox"/> | 42 Van Horn Rd Newton Prefer |
| <input type="checkbox"/> | Allen, Henry | <input type="checkbox"/> | 97 W Parkway Pompton Plains |
| <input checked="" type="checkbox"/> | ALMOGUERA, JORGE | <input type="checkbox"/> | PASEO DE LA CASTELLANA, 261 MADRID |
| <input type="checkbox"/> | ALONSO, NATALIA | <input type="checkbox"/> | CARRETERA DE COLMENAR, KM 9,1 MADRID |

Account Lists Setup

- **User profiles need full CRUD permissions on the following objects:**
 - Account List object
 - Account List Item object

| Custom Object Permissions | | | | | | |
|---------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| | Basic Access | | | | Data Administration | |
| | Read | Create | Edit | Delete | View All | Modify All |
| Account Lists | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Account List Items | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



Account Lists Setup

- **Modify ACCOUNT_LIST_COLS Veeva Message to display Account and Address columns in Account Lists**

- Syntax: Address_vod__c.Zip_vod__c

Object API Name Field API Name

The screenshot displays the 'VoD Message Edit' interface. At the top, it says 'VoD Message Edit' and 'New VoD Message'. Below this is a header bar with 'VoD Message Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. The main content is divided into two sections: 'Verticals onDemand Information - Do Not Change' and 'Customer Editable Information'. In the first section, 'Message Name' is 'ACCOUNT_LIST_COLS', 'Description' is 'List of columns to display for an Account List', 'Category' is 'TABLET', and 'External ID' is 'TRAIN_TABLET-ACCOUN'. In the second section, 'Active' is checked, 'Language' is 'en_US', and 'Text' contains the syntax 'Account.Name,Address_vod__c.Name,Address_vod__c.City_vod__c,Address_vod__c.Zip_vod__c'.

VoD Message Edit

New VoD Message

VoD Message Edit Save Save & New Cancel

Verticals onDemand Information - Do Not Change

| | | | |
|--------------|--|-------------|---------------------|
| Message Name | ACCOUNT_LIST_COLS | Category | TABLET |
| Description | List of columns to display for an Account List | External ID | TRAIN_TABLET-ACCOUN |

Customer Editable Information

| | |
|----------|---|
| Active | <input checked="" type="checkbox"/> |
| Language | en_US |
| Text | Account.Name,Address_vod__c.Name,Address_vod__c.City_vod__c,Address_vod__c.Zip_vod__c |

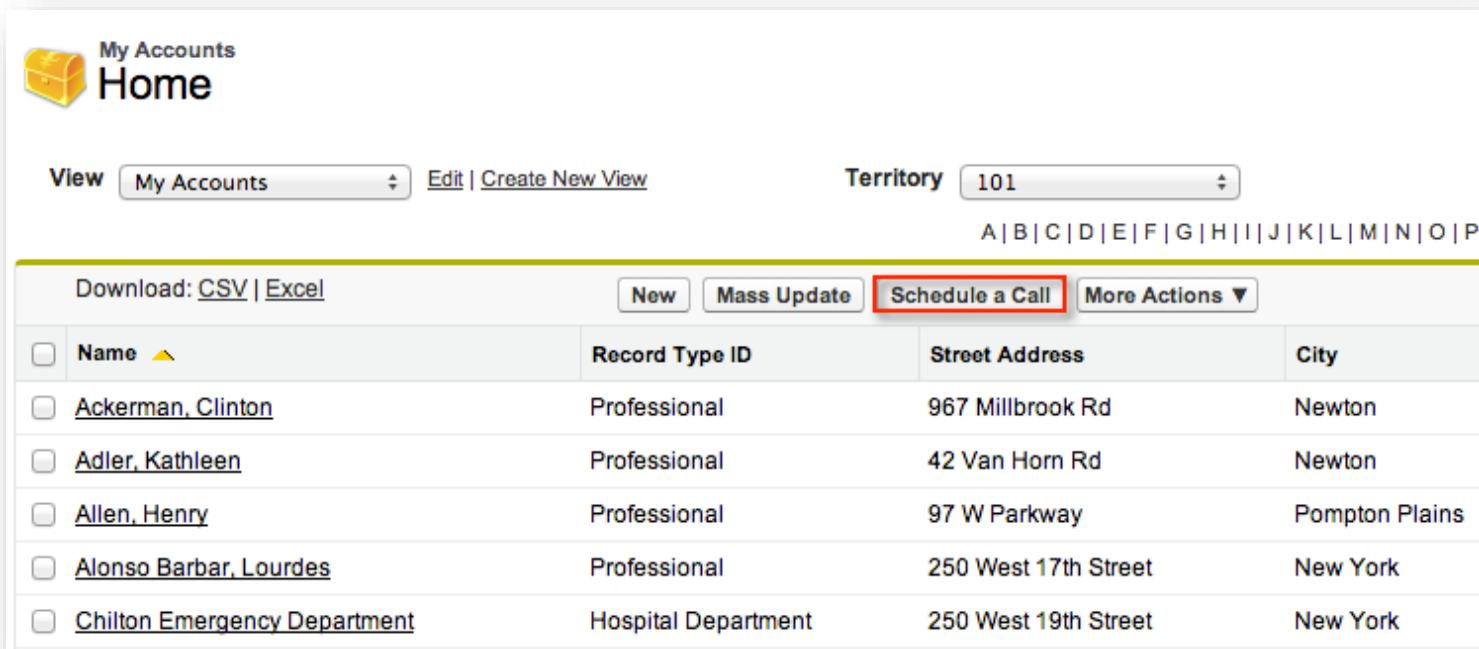
Configure My Accounts



Schedule a Call Button

- Only displayed if:

- User has access to the My Schedule tab in user profile
- My Schedule tab set to default on



The screenshot shows the 'My Accounts Home' interface. At the top, there's a 'View' dropdown set to 'My Accounts' and a 'Territory' dropdown set to '101'. Below these are links for 'Edit' and 'Create New View'. A navigation bar contains 'Download: CSV | Excel', 'New', 'Mass Update', 'Schedule a Call' (highlighted with a red box), and 'More Actions'. The main table lists accounts with columns for Name, Record Type ID, Street Address, and City.

| <input type="checkbox"/> Name ▲ | Record Type ID | Street Address | City |
|---|---------------------|----------------------|----------------|
| <input type="checkbox"/> Ackerman, Clinton | Professional | 967 Millbrook Rd | Newton |
| <input type="checkbox"/> Adler, Kathleen | Professional | 42 Van Horn Rd | Newton |
| <input type="checkbox"/> Allen, Henry | Professional | 97 W Parkway | Pompton Plains |
| <input type="checkbox"/> Alonso Barbar, Lourdes | Professional | 250 West 17th Street | New York |
| <input type="checkbox"/> Chilton Emergency Department | Hospital Department | 250 West 19th Street | New York |

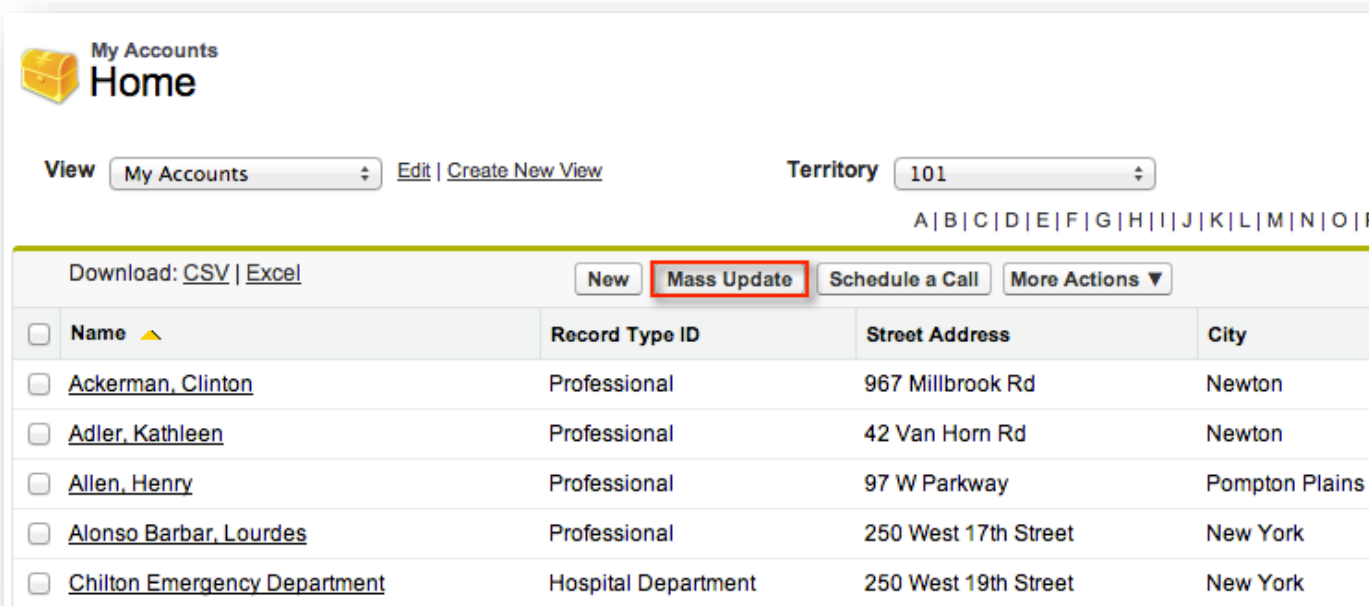
Mass Update Button

- **To remove from the page:**

- Set the Veeva custom setting DISABLE_MASS_UPDATE to true at either the company or profile level

- **To change the button label:**

- Change MASS_UPDATE Veeva Message



The screenshot shows the Veeva My Accounts Home page. At the top, there's a 'My Accounts' header with a yellow box icon. Below it, there's a 'View' dropdown set to 'My Accounts' and a 'Territory' dropdown set to '101'. A navigation bar contains links for 'A|B|C|D|E|F|G|H|I|J|K|L|M|N|O|P'. Below the navigation bar, there's a table of accounts. The table has columns for 'Name', 'Record Type ID', 'Street Address', and 'City'. The 'Name' column has a dropdown arrow. The table contains five rows of data. Above the table, there are buttons for 'Download: CSV | Excel', 'New', 'Mass Update' (highlighted with a red box), 'Schedule a Call', and 'More Actions' with a dropdown arrow.

| <input type="checkbox"/> Name ▾ | Record Type ID | Street Address | City |
|---|---------------------|----------------------|----------------|
| <input type="checkbox"/> Ackerman, Clinton | Professional | 967 Millbrook Rd | Newton |
| <input type="checkbox"/> Adler, Kathleen | Professional | 42 Van Horn Rd | Newton |
| <input type="checkbox"/> Allen, Henry | Professional | 97 W Parkway | Pompton Plains |
| <input type="checkbox"/> Alonso Barbar, Lourdes | Professional | 250 West 17th Street | New York |
| <input type="checkbox"/> Chilton Emergency Department | Hospital Department | 250 West 19th Street | New York |

New Account



New Account Configuration

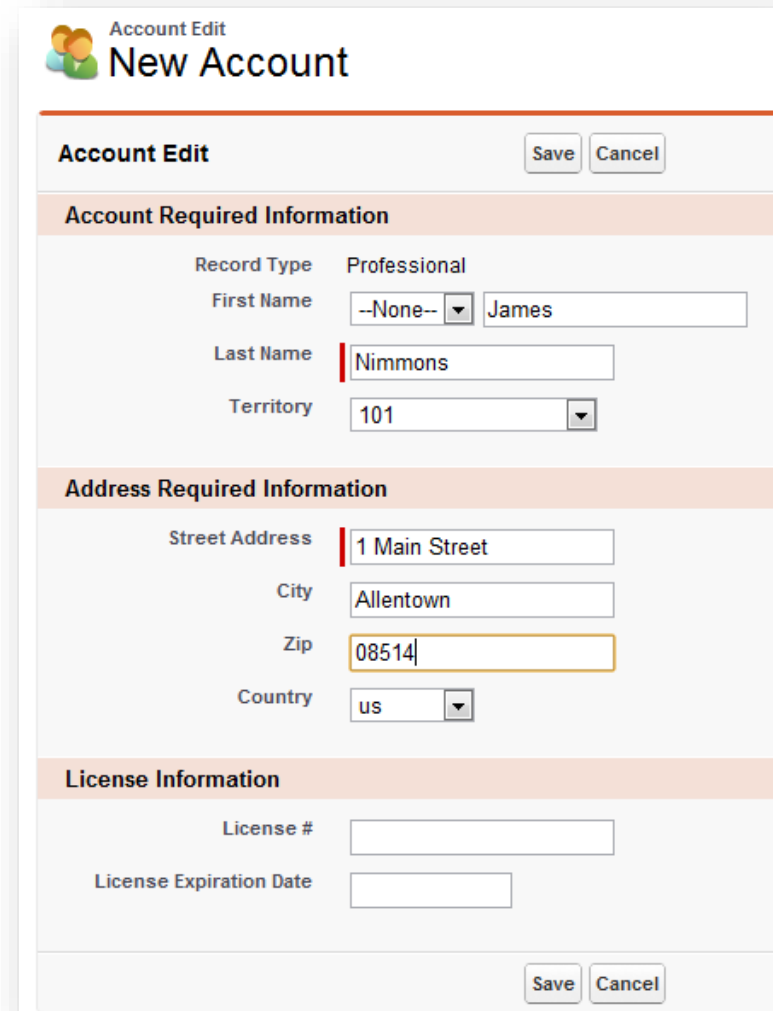
- **Three ways to create a new account:**

- New Account Wizard (standard)
 - Allows users to create an account and corresponding address at the same time
- Standard Salesforce
 - If New Account wizard is disabled, the SFDC record creation page will be used
 - Does not do global search
 - Enter address separately
- Parent Account Wizard
 - Allows users to create an account and associate a parent account and address(es) at the same time



Veeva New Account Wizard

- **Stream-lined account creation wizard**
 - Create account with license information and corresponding address simultaneously
 - Soundex search is performed to identify a possible duplicate
 - Searches only for accounts in the user's territory



The screenshot displays the 'New Account' form within the 'Account Edit' interface. The form is organized into four main sections: 'Account Required Information', 'Address Required Information', 'License Information', and a final 'Save/Cancel' section. The 'Account Required Information' section includes fields for 'Record Type' (set to 'Professional'), 'First Name' (set to 'James'), 'Last Name' (set to 'Nimmons'), and 'Territory' (set to '101'). The 'Address Required Information' section includes fields for 'Street Address' (set to '1 Main Street'), 'City' (set to 'Allentown'), 'Zip' (set to '08514'), and 'Country' (set to 'us'). The 'License Information' section includes fields for 'License #' and 'License Expiration Date'. The form features 'Save' and 'Cancel' buttons at the top right and bottom right.

Account Edit

New Account

Account Edit Save Cancel

Account Required Information

Record Type Professional

First Name --None-- James

Last Name Nimmons

Territory 101

Address Required Information

Street Address 1 Main Street

City Allentown

Zip 08514

Country us

License Information

License #

License Expiration Date

Save Cancel

Enabling New Account Wizard


- Set the Veeva custom setting **NEW_ACCOUNT_WIZARD** to True at either company or profile level



- Required fields on the Account and Address page layouts are included in the wizard
- The wizard can also be configured to capture:
 - Account license information
 - Applicable to person accounts

Parent Account Wizard

- Creates the hierarchy relationship with Parent account for the new account
- Automatically copies existing address(es) of the parent account to the child account

 Account Edit

New Account

Account Edit

Save Cancel

Account Required Information

Record Type

Hospital Department

Name

Chilton Cardiology Depart

Territory


;101;MSL;

Parent Account and Address Information

Select a primary parent for the new account.

Primary Parent

Chilton Memorial Hospital



Add an address from the list. At least one address must be selected.

| Select | Address | Address Type | Primary |
|-------------------------------------|--|--------------|-----------------------|
| <input checked="" type="checkbox"/> | 250 West 19th Street New York 10011 | | <input type="radio"/> |

Save Cancel

Enabling Parent Account Wizard

- To enable the Parent Account Wizard, set the following Veeva custom settings to True:

ENABLE_PARENT_ACCOUNT_WIZARD  

NEW_ACCOUNT_WIZARD 

Optional Parent Account Wizard

- **Support for optional Parent Account Wizard**

- Allows user to choose whether or not to use the Parent Account Wizard

- **In the Veeva message**

ENABLE_PARENT_WIZARD_OPT_ACCT_TYPES

- List the label for the Account record types for which you would like to make the parent account wizard optional
- Displays a checkbox in the New Account Wizard that allows users to either pick a parent account or create a stand alone account

Parent Account and Address Information

Create from existing parent account? ☒

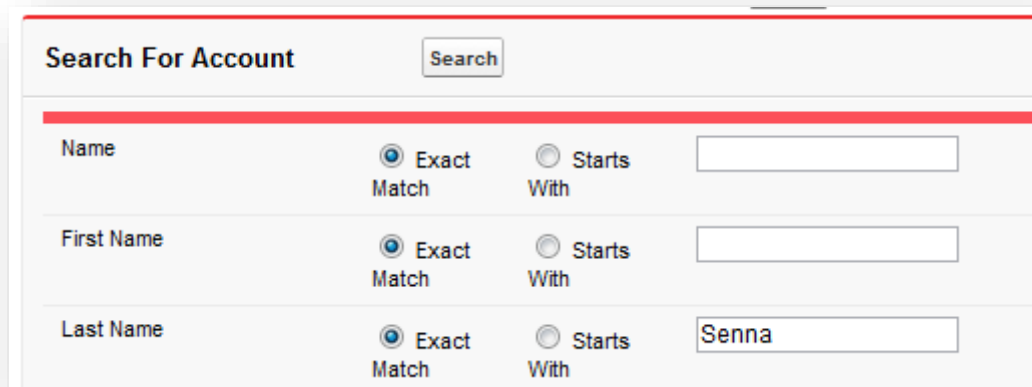
Select a primary parent for the new account.

Global Account Search



Global Account Search

- **Allows users to search the entire account universe**
 - Includes business and person accounts outside the user's territory



Search For Account

| | | | |
|------------|--|-----------------------------------|------------------------------------|
| Name | <input checked="" type="radio"/> Exact Match | <input type="radio"/> Starts With | <input type="text"/> |
| First Name | <input checked="" type="radio"/> Exact Match | <input type="radio"/> Starts With | <input type="text"/> |
| Last Name | <input checked="" type="radio"/> Exact Match | <input type="radio"/> Starts With | <input type="text" value="Senna"/> |

- **Once the account is located**
 - Perform an action, such as add the account to the user's territory
- **Decreases the creation of duplicate accounts when a user needs to record a call for a Doctor not in his/her territory.**
- **Available Online Only**

Using Global Account Search

- Click the Global Account Search tab

Search For Account

Name ☒ Exact Match ☐ Starts With

First Name ☒ Exact Match ☐ Starts With

Last Name ☒ Exact Match ☐ Starts With

Specialty

Record Type

Created By

Primary Parent

Street Address ☒ Starts With ☐ Contains

City

State

Zip

Phone 1

Record Type

Must have a value in at least one search field

Cannot have a value for First/Last Name and Name

Using Global Account Search

- Use GASSettings to modify the search field set and the result field set

GASSettings Detail

Help for this Page ?

[Back to List](#)

Edit

| | | | |
|--------------------------|--|--------------------------|---|
| Name | Main | Account Search Field Set | Name,FirstName,LastName,Specialty_1_vod__c,RecordTypeId,CreatedById,Primary_Parent_vod__c |
| Address Search Field Set | Name,City_vod__c,State_vod__c,Zip_vod__c,Phone_vod__c,RecordTypeId | Result Field Set | Name,Specialty_1_vod__c,CreatedDate,ADD.Name,ADD.City_vod__c,ADD.State_vod__c,ADD.Zip_vod__c,ADD.Primary_vod__c |
| Show_All_Addresses | <input type="checkbox"/> | | |



Using Global Account Search

- **A maximum of 20 Accounts will be returned by default**
 - Number of maximum search results can be changed
 - Be sure to change the corresponding error message (GAS_TOOMANY) if exceeds maximum
- **Once the Account(s) is located**
 - Select the needed Account(s) and click the Add To Territory button
 - The Account(s) is added to the user's territory

| Results | | | | | | | | | | |
|-------------------------------------|---------------|------------------|--------------------|---------------------|-------------------|-----------------------|-------------|--------------|------------|----------------|
| <div>Add To Territory</div> | | | | | | | | | | |
| | <u>Name</u> ▲ | <u>Specialty</u> | <u>Record Type</u> | <u>Created Date</u> | <u>Created By</u> | <u>Street Address</u> | <u>City</u> | <u>State</u> | <u>Zip</u> | <u>Primary</u> |
| <input checked="" type="checkbox"/> | Senna, Ayrton | Cardiology | Professional | 6/13/2012 7:30 PM | Global student1 | 100 Matsonford Rd. | Radnor | PA | 19087 | [X] |

- **It is also possible to build custom actions to be performed for the selected account(s)**

Global Account Search Deployment

- **The Global Account Search is not available in the base Veeva orgs by default**
 - Veeva consultant must deploy the GAS application components into an org
 - Use Eclipse with the Force.com plugin to deploy it
- **Obtain the Global Account Search installer.zip file from Veeva**
- **Follow instructions to create the Eclipse project and deploy the application components to an org**



My Accounts on CRM (iPad)



My Accounts

- Users can view all the accounts they have access to
- Displays the account name and primary address
- Users can scroll or search for accounts

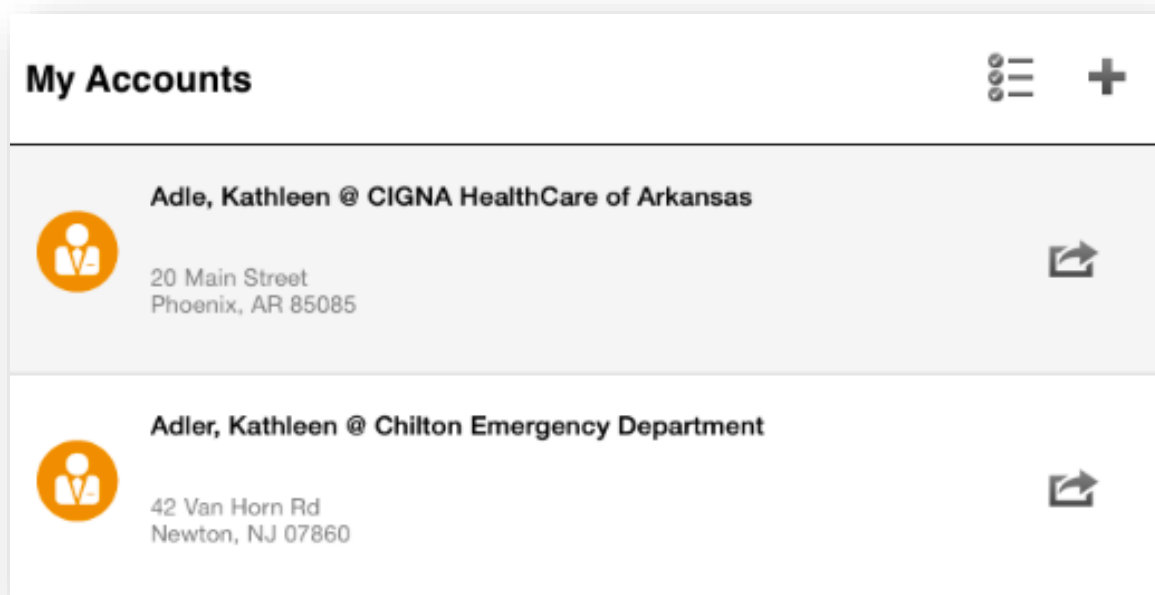
The screenshot displays the Veeva CRM 'My Accounts' page. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar includes a search bar at the top, followed by a list of account types: Business Accounts, Person Accounts, Views, Account Lists, Hospital Departments, Hospitals, My Accounts, and Professionals. The 'Views' and 'Account Lists' tabs are highlighted. The main content area shows a list of accounts with details such as name, address, and a share icon. A vertical alphabetical index is visible on the right side of the main content area.

| Account Type | My Accounts |
|----------------------|---|
| Business Accounts ✓ | Zanetich, Lynne 61 Spring St Newton, NJ 07860 |
| Person Accounts ✓ | Zawislak, Heather 97 Mary Jones Rd Newton, NJ 07860 |
| Views | Zdaniewicz, Helane 19 Francisco Dr Newton, NJ 07860 |
| Account Lists | Zicarelli, Diane 61 Yacht Club Dr Lake Hopatcong, NJ 07849 |
| Hospital Departments | Zika, Sylvia 43 Hampton House Rd Newton, NJ 07860 |
| Hospitals | |
| My Accounts | |
| Professionals | |

Last Update: 7/29/2014, 10:29 PM

Additional Account Identification

- Users may have difficulty finding the correct HCP when there are multiple accounts with the same name
 - Display parent account information for HCPs to help quickly identify the correct account on iPad and Windows
- Set the **ENABLE_ACCOUNT_PARENT_DISPLAY** custom setting to True



Account Detail

Right side contains detailed information about the account

Left side contains actions and related lists for the account

My Accounts

Veeva C

Edit

Record a Call

Launch Media

Send Email

Email Opt In

Account Summary

Calendar

Sphere of Influence

Addresses (2)

Affiliations (1)

Survey Targets (1)

Sent Email (4)

Multichannel Consents (2)

Calls (Account) (1)

Segnit, Melany

Name

Dr. Melany Segnit

Account Identifier

Middle

Credentials

MD

Suffix

Account Record Type

Professional

Preferred Name

Restricted Products

Gender

F

PDRP Opt-Out

☒

Segmentations

High Prescribers

PDRP Opt-Out Date

7/29/2014

Preferred Statin

Territory

View

Specialty

Approved Email Info

Approved Email

Explicit Opt In







Language

English

Account Views

- Users can access Account Views offline

Click on the **Views** tab and then select a view

| Account Type | | My Accounts | |
|--|---------------|--|--|
| Business Accounts | ✓ |  Zanetich, Lynne 61 Spring St Newton, NJ 07860 | |
| Person Accounts | ✓ | | |
| Views | Account Lists |  Zawislak, Heather 97 Mary Jones Rd Newton, NJ 07860 | |
|  Hospital Departments | | | |
|  Hospitals | | | |
|  My Accounts | | | |
|  Professionals | | | |

- Views are defined online and synced to offline during regular sync process

Account Lists

- Users can create and manage Account Lists offline

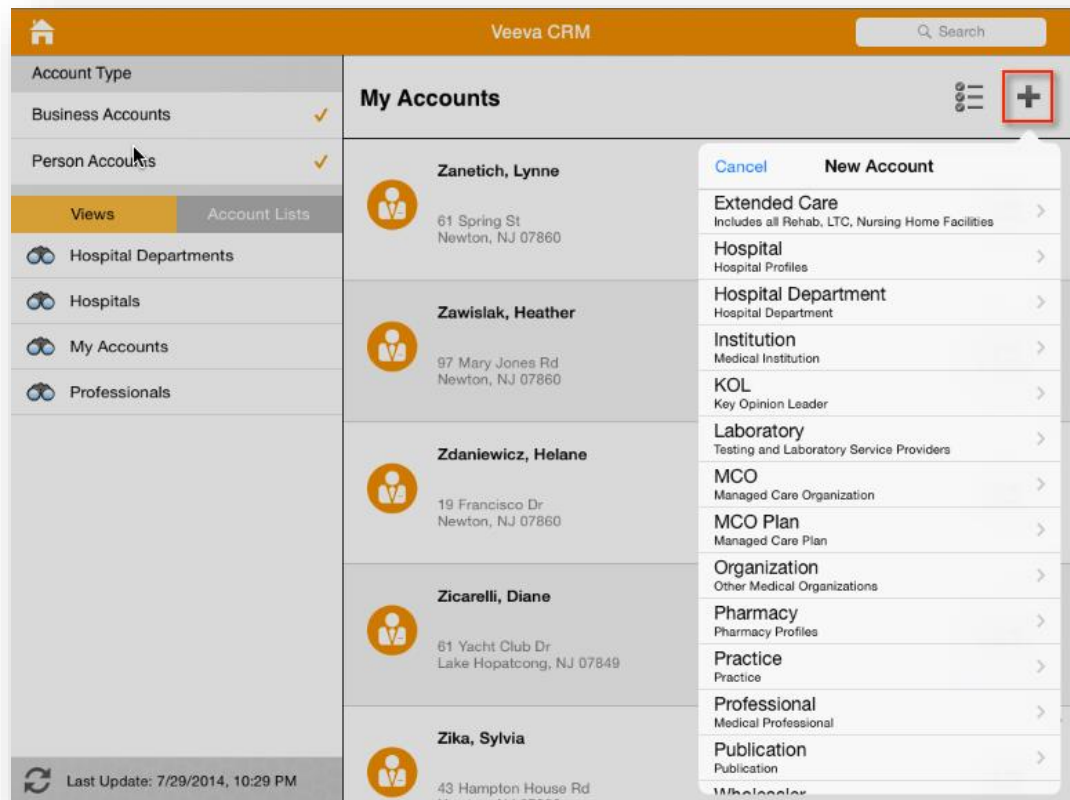
Drag and drop accounts from My Accounts to a target list

| Veeva CRM | |
|---------------------|--|
| Account Type | My Accounts |
| Business Accounts ✓ | |
| Person Accounts ✓ | |
| Views | |
| New List | |
| Account Lists | |
| | Zanetich, Lynne 61 Spring St Newton, NJ 07860 |
| | Zawislak, Heather 97 Mary Jones Rd Newton, NJ 07860 |

- Swipe from left to right to delete a target list or remove an account from the list

New Accounts

- Users can create new accounts offline
 - New Account Wizard works the same way as it does online



Module Summary

- **Defined the My Accounts tab**
- **Created Views**
- **Created Lists**
- **Configured the My Accounts tab**
 - Hid the Mass Update button
 - Configured the Schedule a Call button
- **Configured the New button**
 - Enabled New Account Wizard
 - Enabled Parent Account Wizard
- **Used the Veeva Global Account Search**
- **My Accounts on iPad**



Labs

Create different types of accounts

Create a new View

Create a new List

Global Account Search