Account Object Configuration

Veeva Professional Services

Module Objectives

- **Define Veeva Account record types**
  - Business Account
  - Person Accounts
- **Define custom Accounts fields**
  - Place custom fields on specific account page layout(s)
- **Create custom page layout and record types**
- **Create a custom Account button**
- **Display the View User Territory custom link**

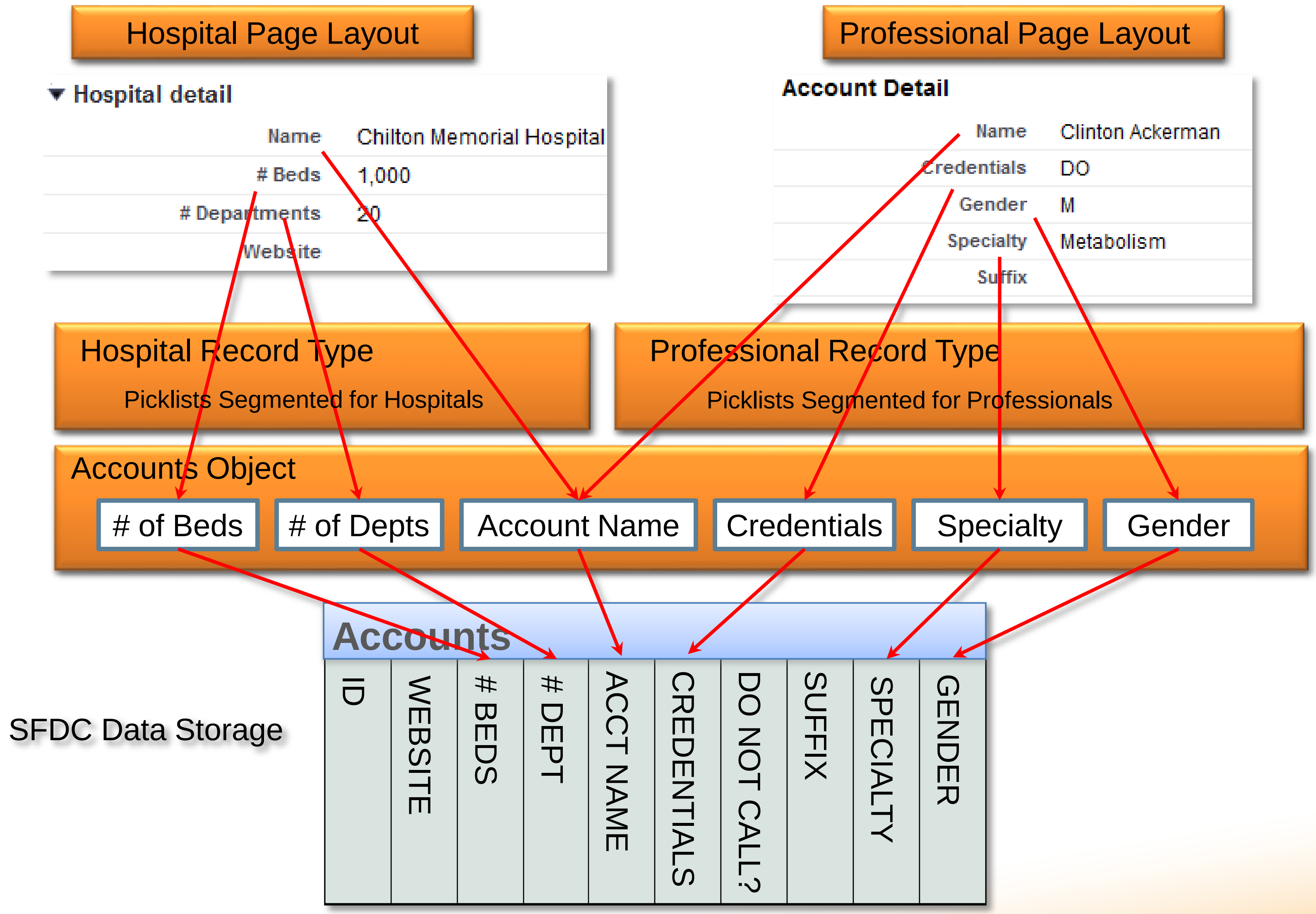
Veeva Account Record Types

Account Record Types

- **Business Accounts:**
  - Hospital
  - Pharmacy
  - MCO
  - Practice
  - Wholesaler

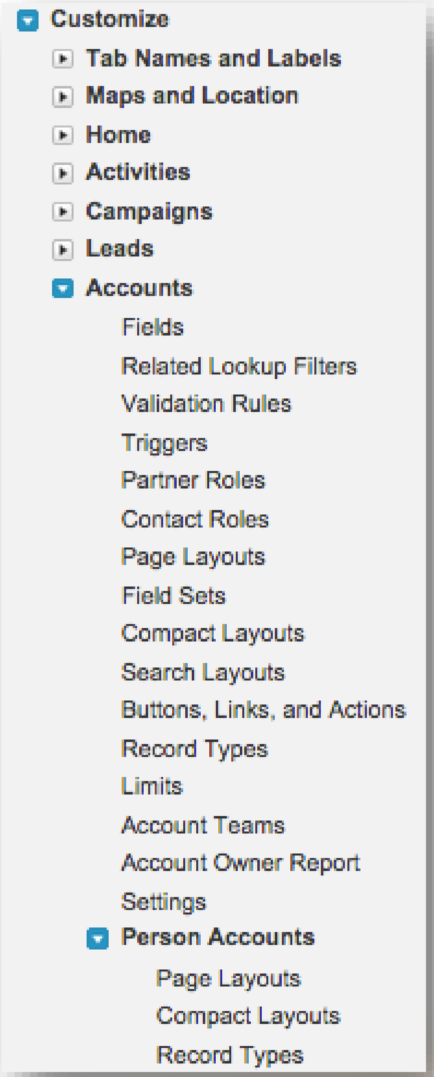
- **Person Accounts:**
  - Professional
  - MD, RN
  - KOL
  - Staff

Account Record Types



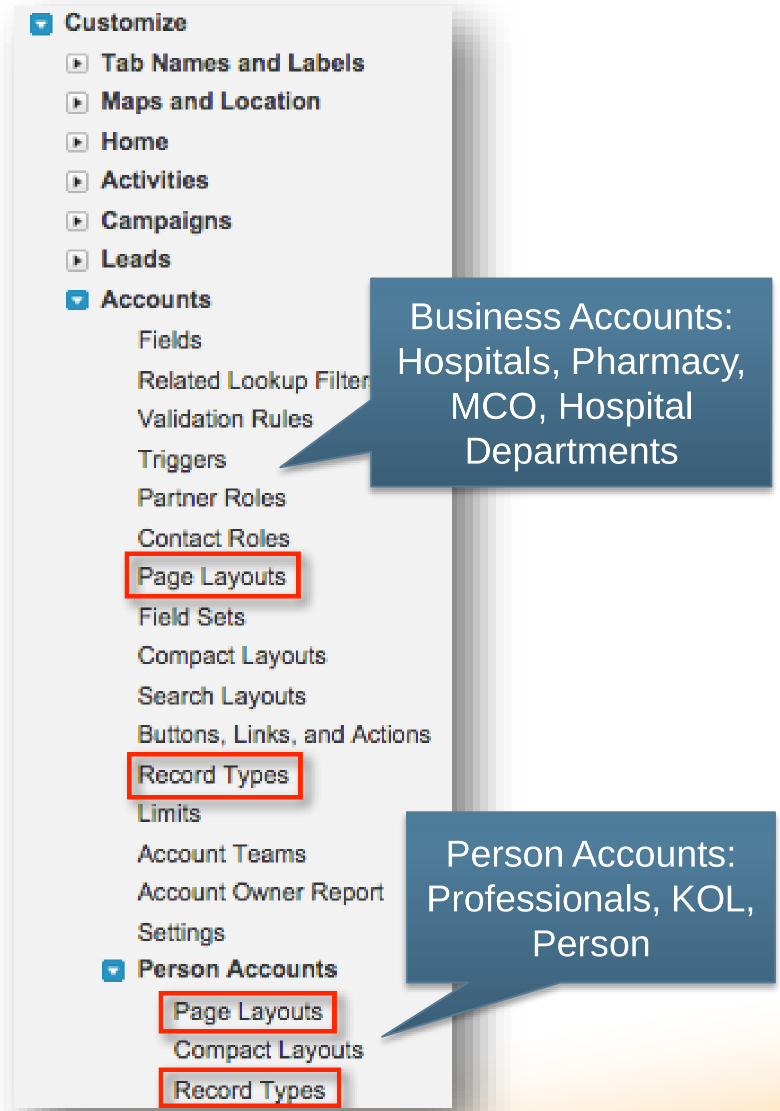
Account Object Configuration

- **To access the Accounts object:**
  - Setup → Customize → Accounts
- **Common configuration:**
  - Add custom Account fields
  - Add related lists to page layouts
  - Add Veeva s-controls to page layouts
- **Create custom record types and corresponding page layouts**
- **Best Practice**
  - Add Record Type field to Account page layouts



Accounts Page Layouts and Record Types

- **To access the Business Accounts object page layouts and record types:**
  - Setup → Customize → Accounts → Page Layout / Record Types
- **To access the Person Accounts object page layouts and record types:**
  - Setup → Customize → Accounts → Person Accounts → Page Layout / Record Types



Custom Account Fields

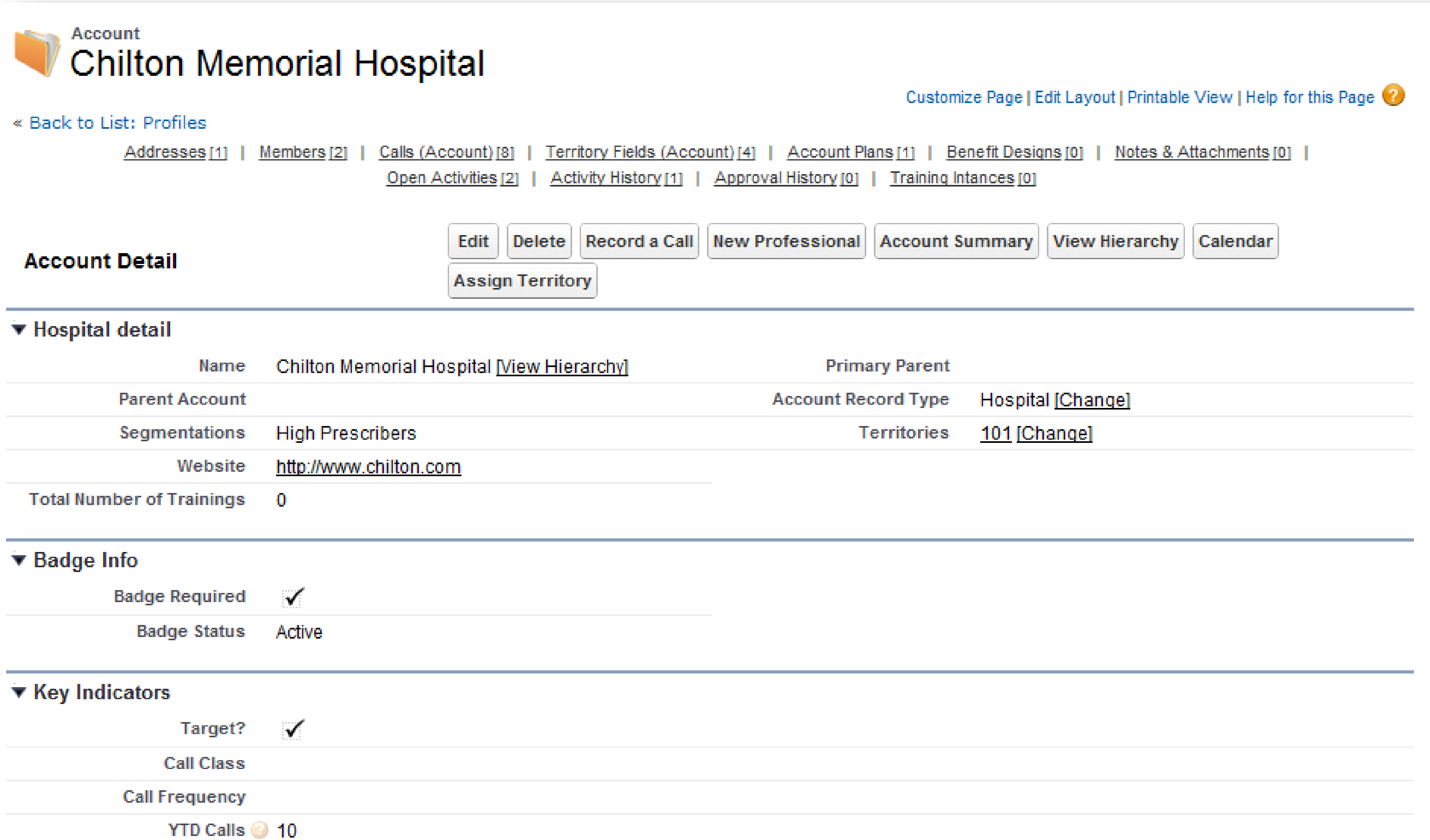
Scenario: Create New Custom Fields

- **Users may be required to show a badge when they visit doctors in hospitals**
- **Display on the Hospital page layout:**
  - Whether a badge is required for a specific hospital
  - If the users have a valid badge
- **Since the Accounts object does not have fields which can be used for this purpose:**
  - Create the new custom fields
  - Place them on the page layout for hospital accounts

Custom Account Fields

- **To create custom fields for the Accounts object:**
  - Setup→ Customize→ Accounts→ Fields
- **Create the needed custom fields:**
  - Badge Required – Checkbox
  - Badge Status – Picklist (Needed, Active, Expired)
    - **Note**: If Accounts are aligned to multiple territories, this field would need to be created in the TSF object instead
- **Specify which user profile(s) will have access to the custom fields:**
  - Ex: Only System Administrator and VExample Primary Care Sales – Platform profiles should have access
- **Place the custom fields on only the hospital page layout:**
  - Create a section on the page layout called Badge Info
  - Place the badge fields in the Badge Info section

Hospital Accounts Custom Fields



Custom Page Layouts and Record Types

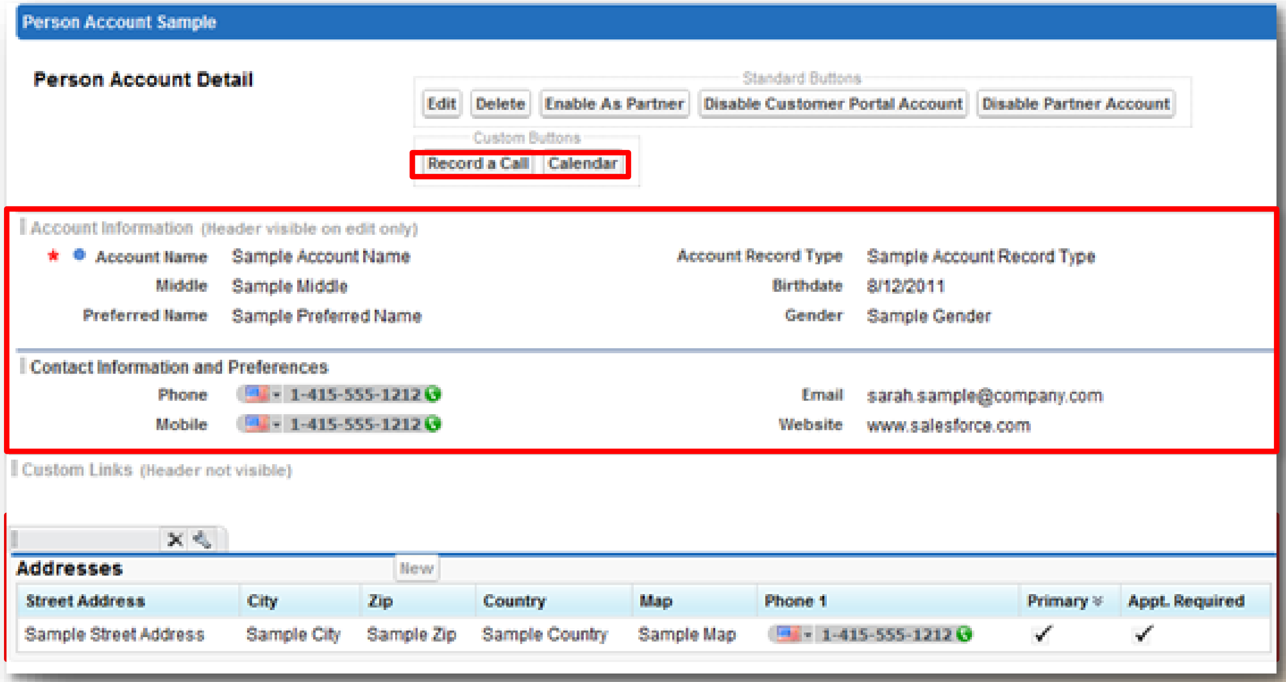
Scenario: Create a New Record Type

- **The Organization needs to keep track of interactions users have with staff members such as receptionists for business accounts**
- **Since Veeva does not have a “Staff” record type and page layout out-of-the-box:**
  - Create a “Staff” record type and “Staff” page layout

Custom Page Layout

- **To create custom person Account page layout:**
  - Setup→ Customize→ Accounts→ Person Accounts→ Page Layouts

- **Create a page layout called Staff based on the Professional page layout and display the following info:**

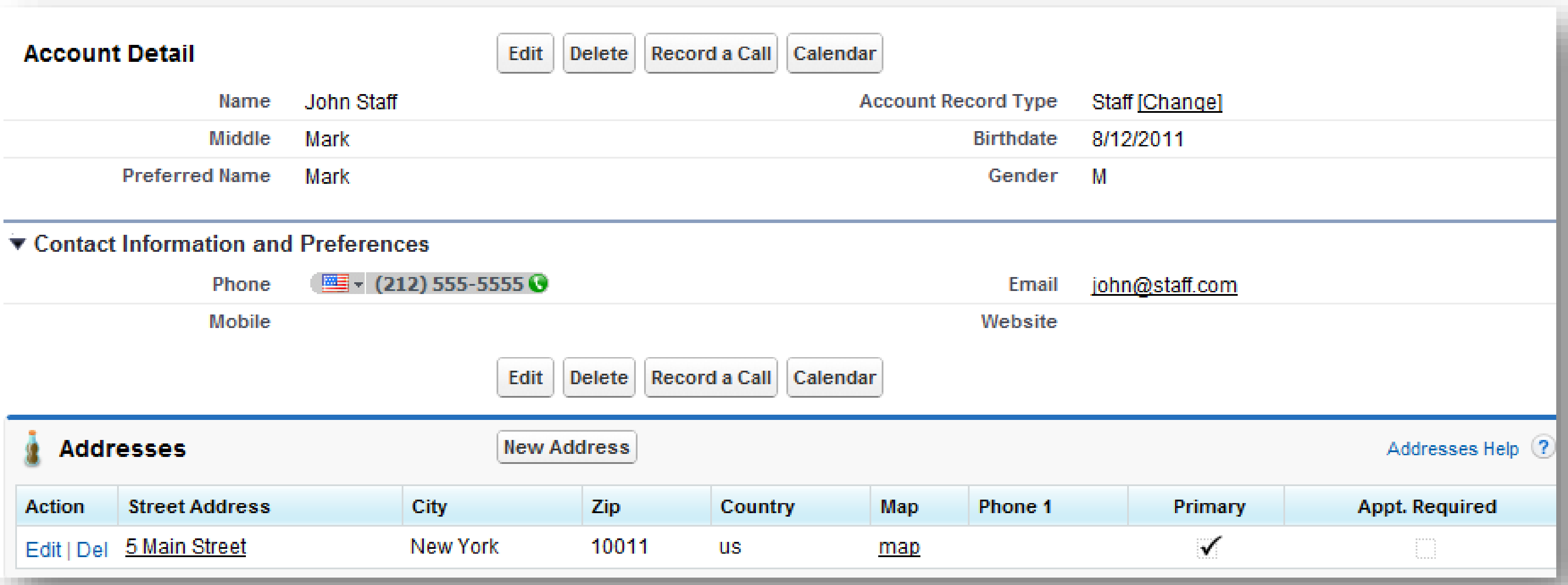


Custom Record Type

- **To create custom person Account record type:**
  - Setup→ Customize→ Accounts→ Person Accounts→ Record Type
- **Create a new record type called Staff based on the Professional_vod record type:**
  - Enable it only for the System Administrator and the VExample Primary Care Sales – Platform

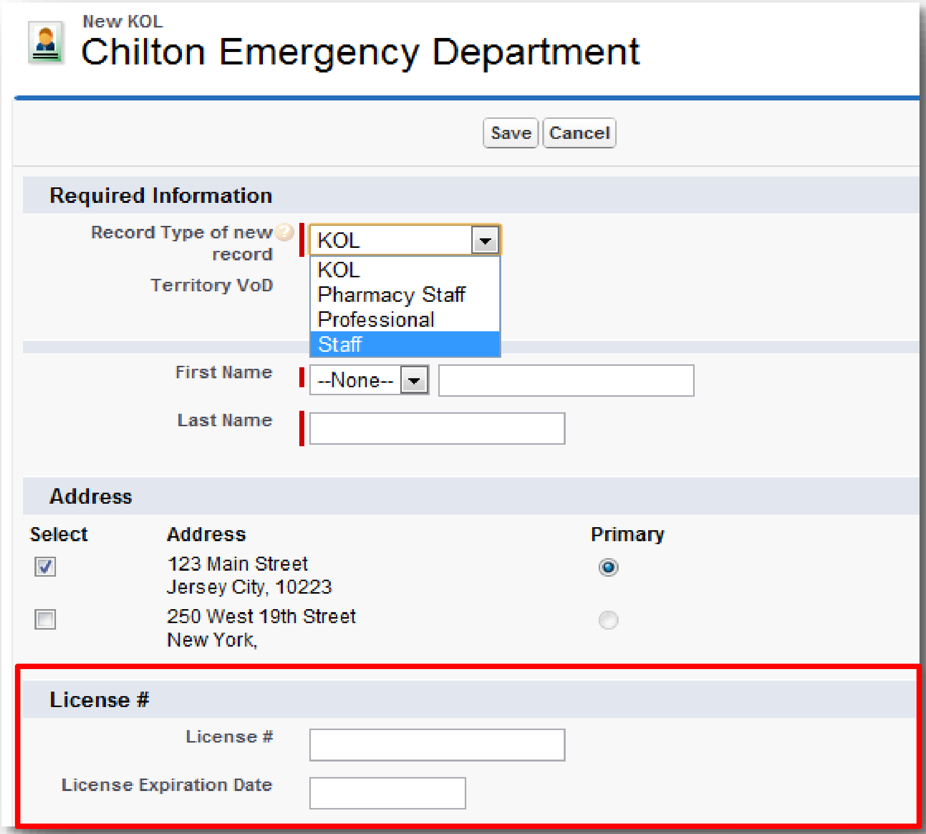
Custom Staff Page Layout

- **From the My Accounts tab, create a new Staff record**
- **The new custom Staff Account page layout should look like the screenshot below:**



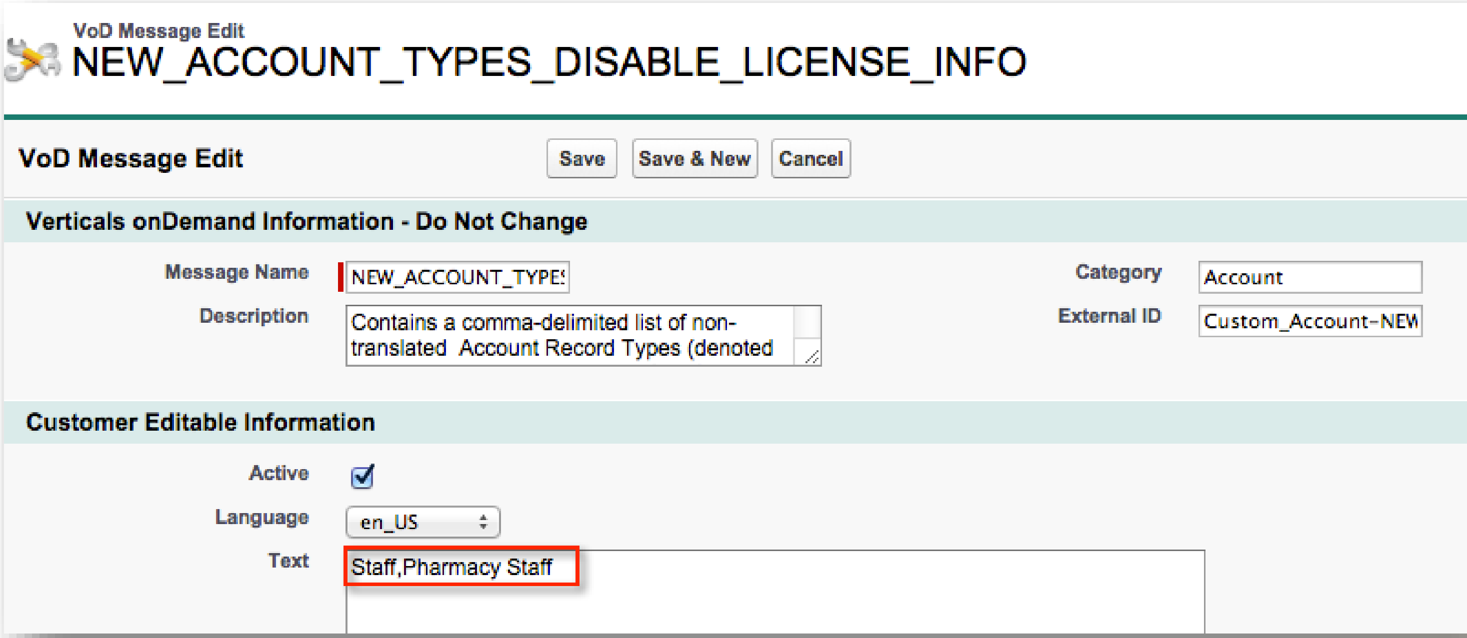
Disable License Number

- **When users create a Staff record, the wizard displays a License # section which does not apply to Staff accounts**



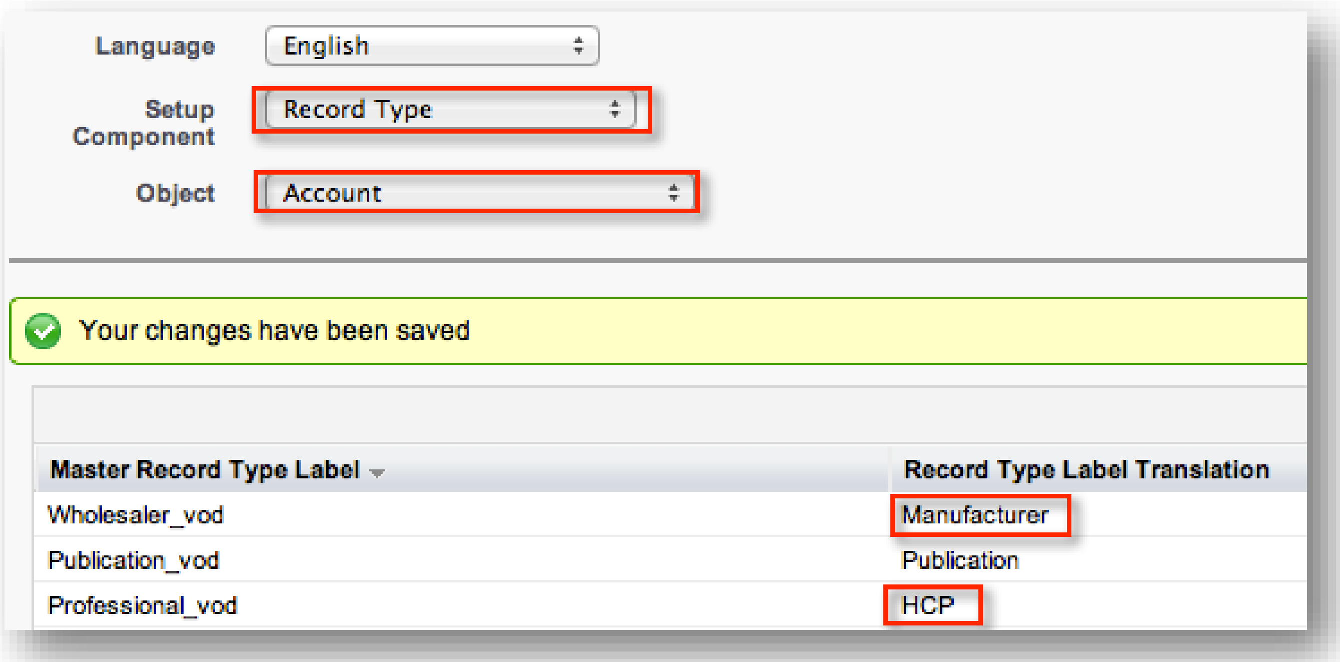
Disable License Number

- **To remove the License # section from the Wizard:**
  - Use custom Veeva Message: NEW_ACCOUNT_TYPES_DISABLE_LICENSE_INFO
  - List record types: Staff,Pharmacy Staff
  - Clear VOD Cache



Account Record Types Best Practice

- **Never change the label of out-of-the-box record types directly in the Account object**
- **Use the Translation Workbench to provide custom values for Account record types labels instead**
  - Go to Setup → Translation Workbench→ Translate



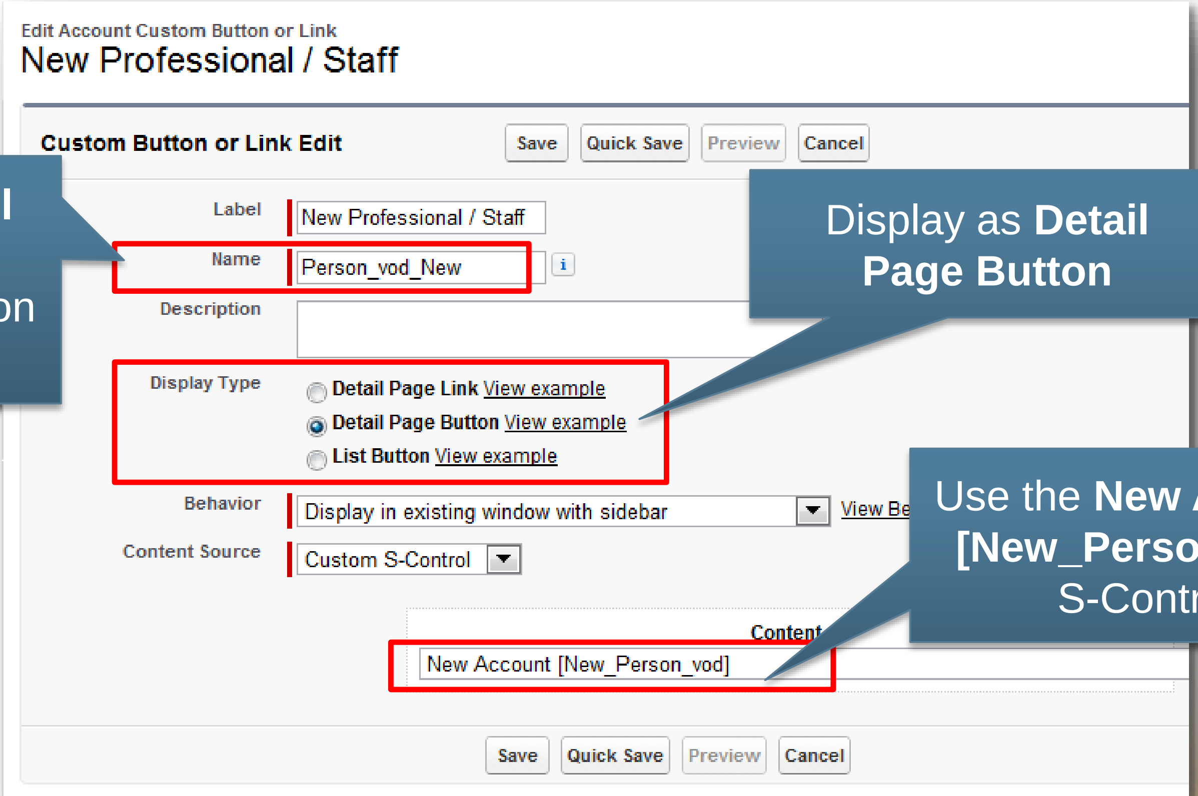
Custom Account Button

Scenario: Create a New Button

- **The Organization needs a button displayed on the Hospital Department page layout to allow users to create either a Staff or a Professional account**
  - The existing New Professional button allows you to create professional but not staff
- **Define a custom New Professional / Staff button and place it on the Hospital Department page layout**

Create a Custom Button

- **To create custom button in the Accounts object:**
  - Setup→ Customize→ Accounts→ Buttons and Links
- **Create a new button with following information:**



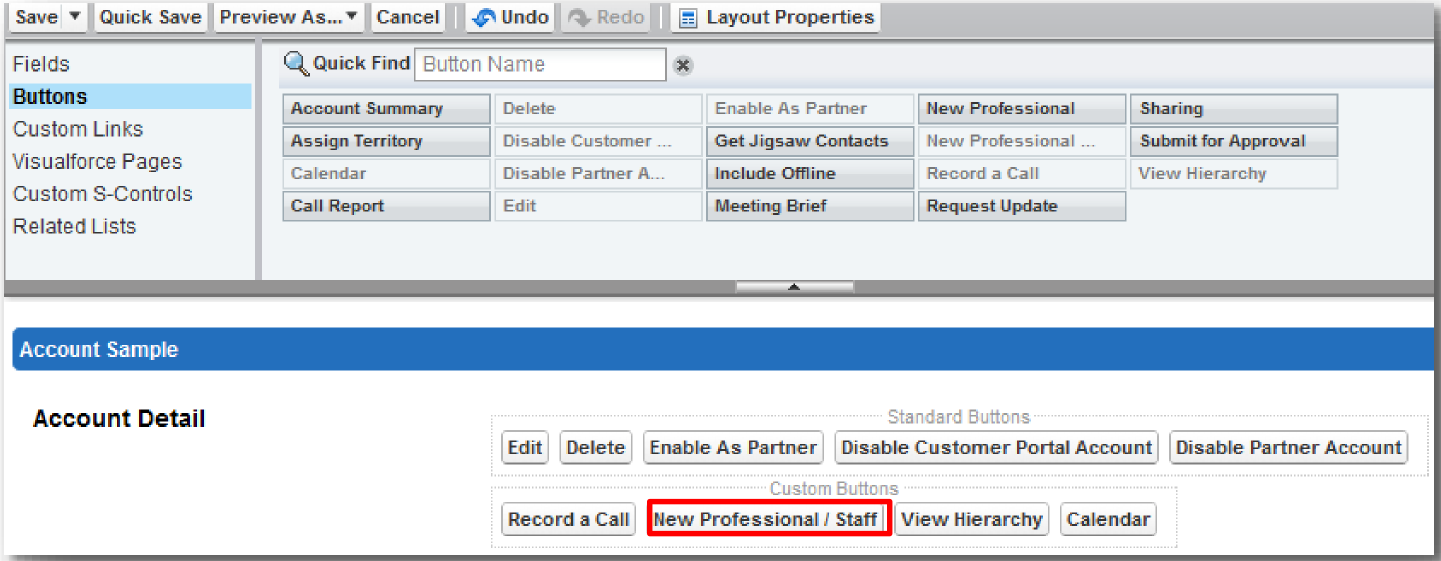
Name must be a **well named** button (see Admin Guide) for button to appear offline

Display as **Detail Page Button**

Use the **New Account [New_Person_vod]** S-Control

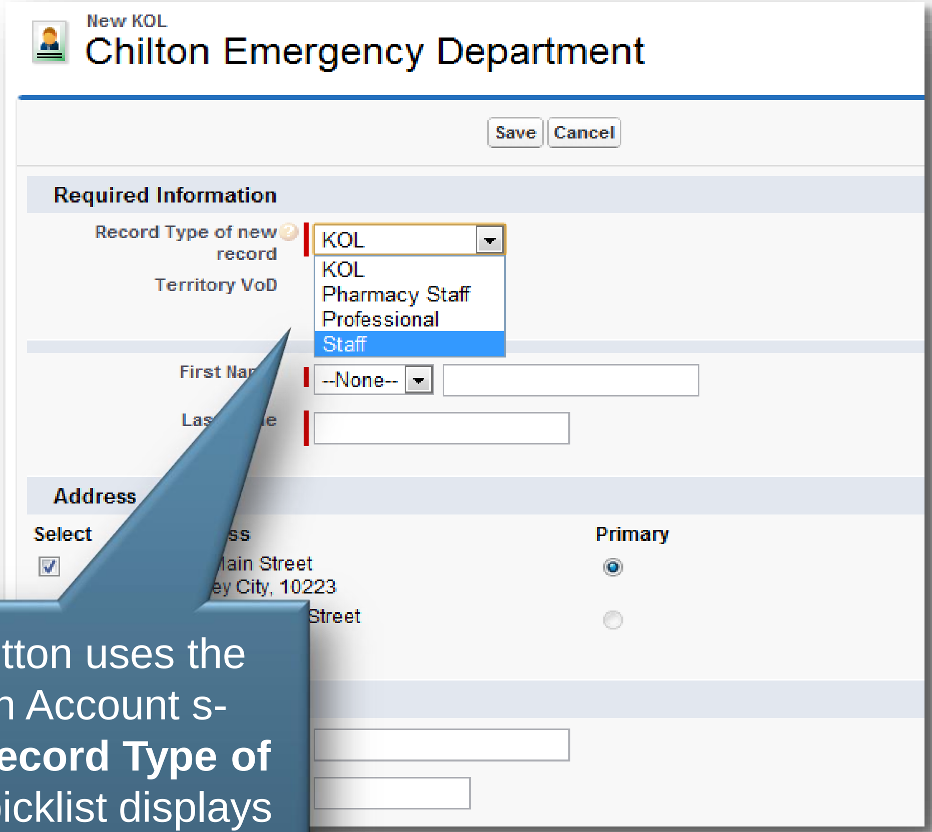
Create a Custom Button

- **To place the custom button on the Hospital Department page layout:**
  - Setup → Customize → Accounts → Page Layouts
  - Edit the Hospital Department page layout
  - Remove the New Professional button from the page layout
  - Place the New Professional / Staff button on the page layout



Create a Custom Button

- **From the My Accounts tab, go into the Chilton Emergency Department account**
- **Click the New Professional / Staff button**

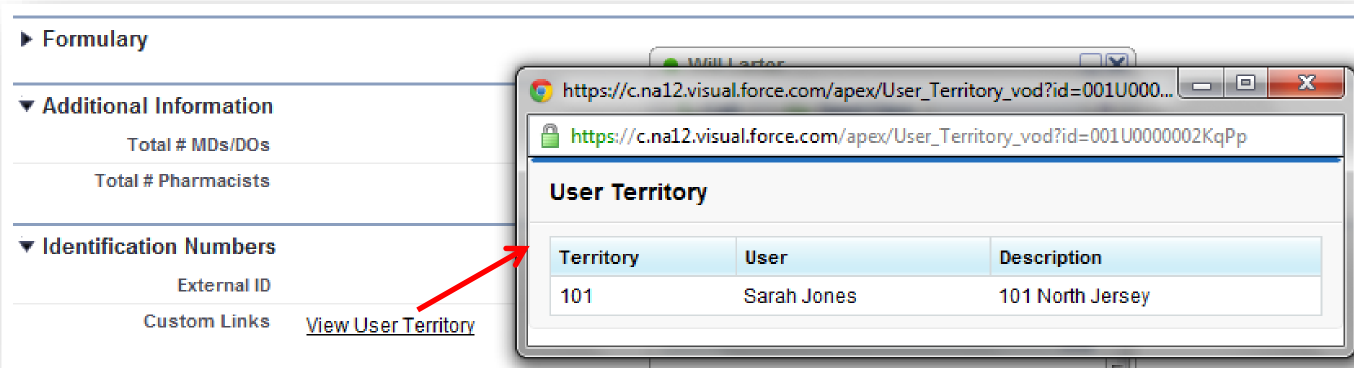


Since the button uses the New Person Account s-control, the **Record Type of new record** picklist displays

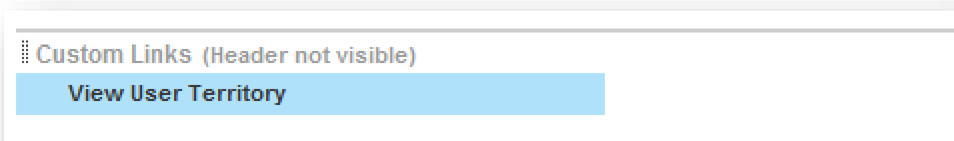
View User Territory Info

View User Territory Custom Link

- **Displays all the users aligned to the territory for the account**



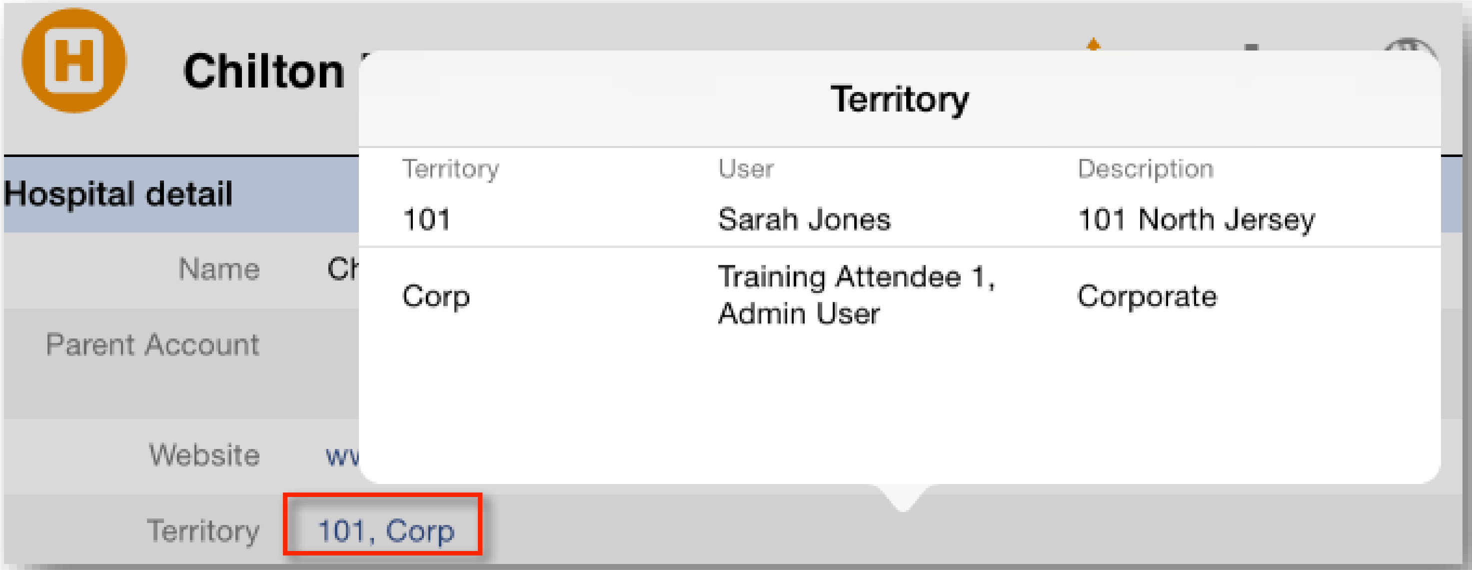
- **Modify the needed Account page layout and add the View User Territory custom link under Custom Links**



- **User Profiles need access to User_Territory__vod Visualforce page**
  - Setup → Develop → Pages → Security

Territory Field - Offline

- **The View User Territory custom link only works online**
- **The Territory field shows territory information for an account offline**



Module Summary

- **Defined Veeva Account record types**
  - Business Account
  - Person Accounts
- **Defined custom Accounts fields**
  - Place custom fields on specific account page layout(s)
- **Created custom page layout and record types**
- **Created a custom Account button**
- **Displayed the View User Territory custom link**

Labs

Create Accounts custom fields

Create custom page layout and record type

Create a custom button