Online Application UI Settings

Veeva Professional Services

Module Objectives

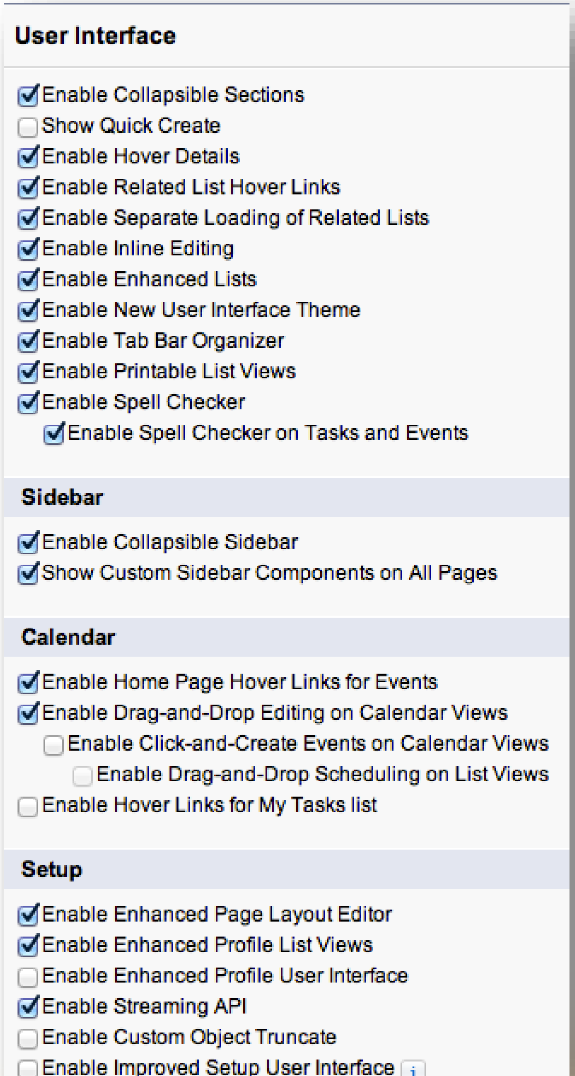
- **Explore User Interface Settings**
- **Discuss Searching**
- **Configure the Home Tab**
- **Introduce the Translation Workbench**

Online Application User Interface Settings

User Interface Settings

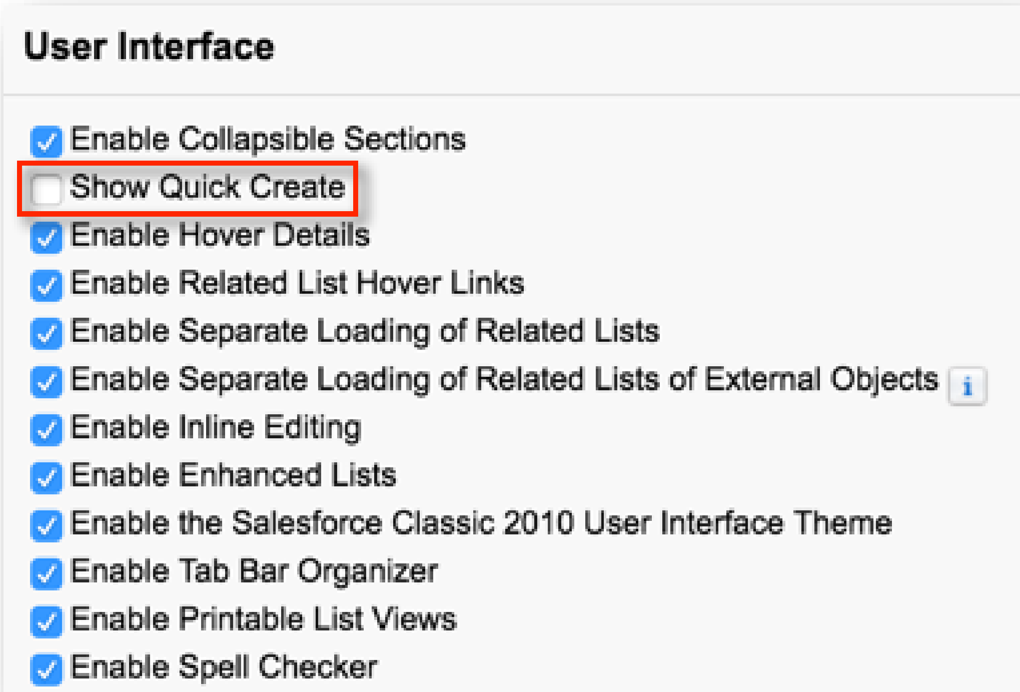
- **To access User Interface settings:**
  - Setup → Customize → User Interface
- **Customize user interface by enabling or disabling features:**
  - Enable Collapsible Sections
  - Show Quick Create
  - Enable Hover Details
  - Enable Related List Hover Links
  - Enable Inline Editing
  - Enable Printable List Views
  - Enable New User Interface Theme

IMPORTANT: UI Settings only apply to online application (not iPad or Windows)



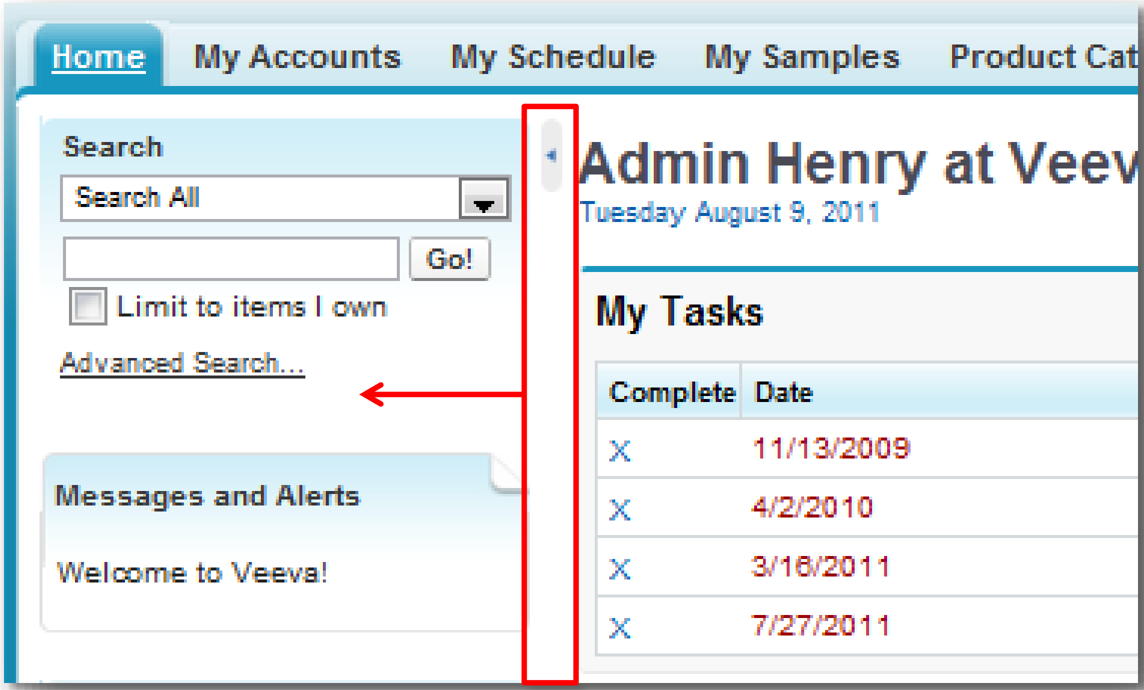
Show Quick Create

- **Do not enable this setting because doing so will allow users to create new Accounts while bypassing the New Account Wizard**



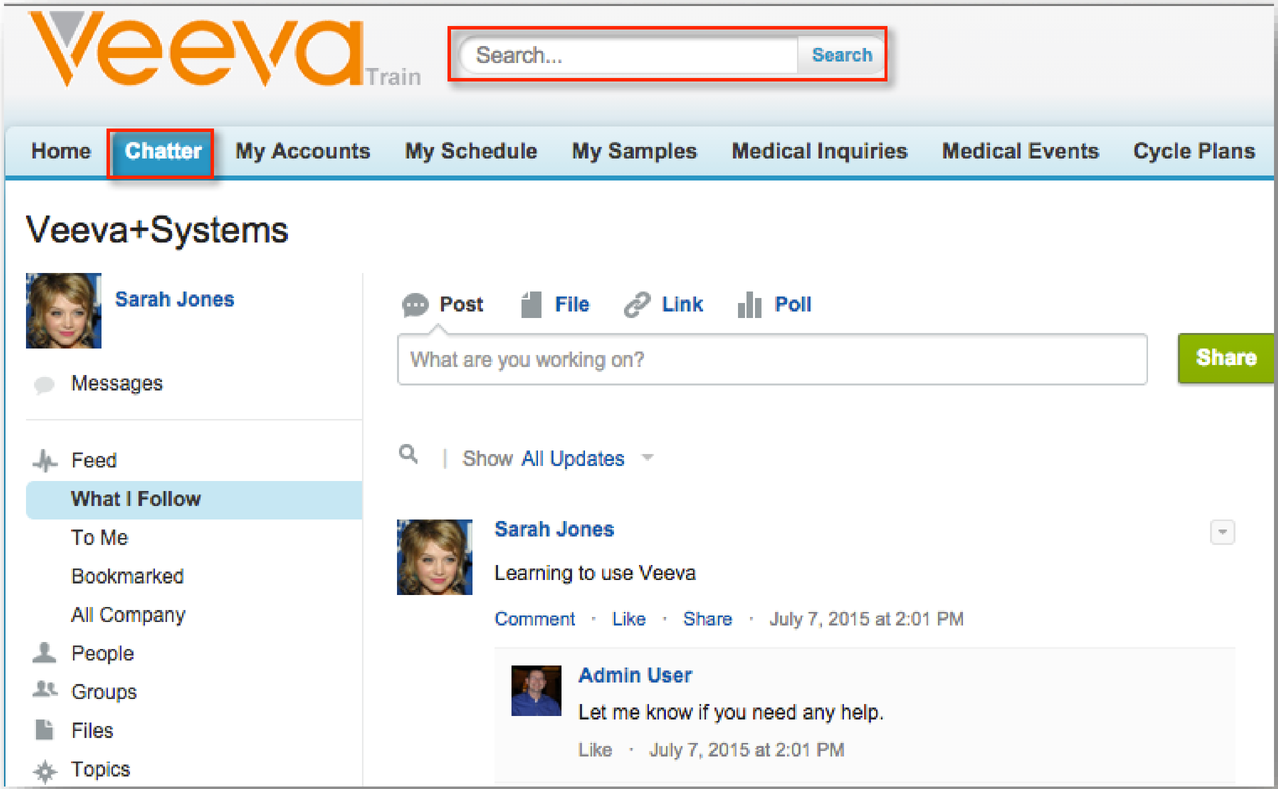
Enable Collapsible Sidebar

- **Allows users to show or hide the sidebar**



Chatter

- **To turn on Chatter and use it to collaborate and share information within organization:**
  - Setup→ Customize→ Chatter→ Settings→ Enable



Searching

Search

- **Salesforce.com provides three search types:**
  - Sidebar Search
  - Advanced Search
  - Global Search

- **Refer to SFDC Help for more details on search:**

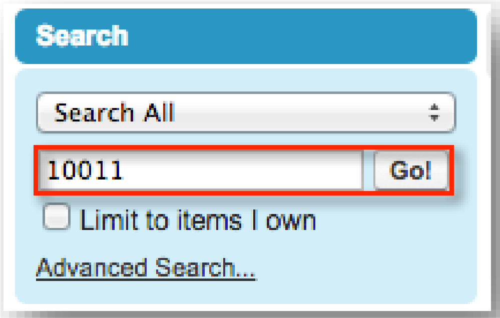
  https://help.salesforce.com/apex/HTViewHelpDoc?id=search_fields_cex.htm&language=en_US

Business Account Fields

Field Searched	Search Type: Sidebar	Search Type: Advanced	Search Type: Global
Account Name	✓	✓	✓
Account Name (Local)	✓	✓	✓
Account Number	✓	✓	✓
Account Site	✓	✓	✓
Billing Address		✓	✓
Description		✓	✓
Fax	✓	✓	✓
Phone	✓	✓	✓
Shipping Address		✓	✓
Ticker Symbol	✓	✓	✓
Website	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

Search – Sidebar Search

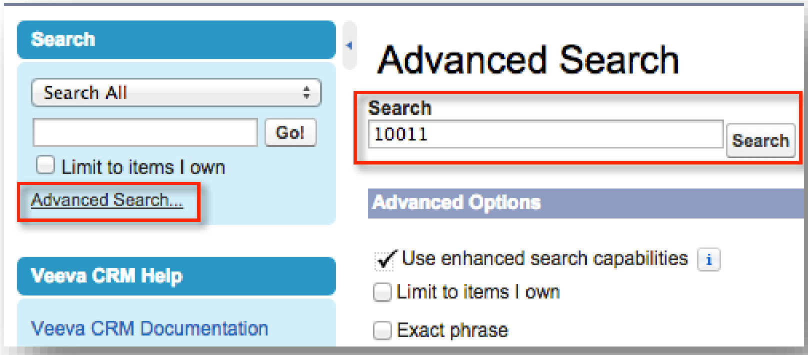
- **Searches a small set of fields including:**
  - Name, phone, email, and external ID
- **Searches conducted as phrase searches**
  - Searching for “Bob Jones” returns items with “Bob Jones” but not “Bobby Jones” or “Bob T Jones”
- **Use the * (asterisk) and ? (question mark) wildcard to refine results**
  - “*” is automatically appended to search value



To enable Sidebar Search, must disable Chatter

Search – Advanced Search

- **Searches in almost all fields including:**
  - Custom fields and attachments
  - Long text fields such as notes, descriptions, and comments



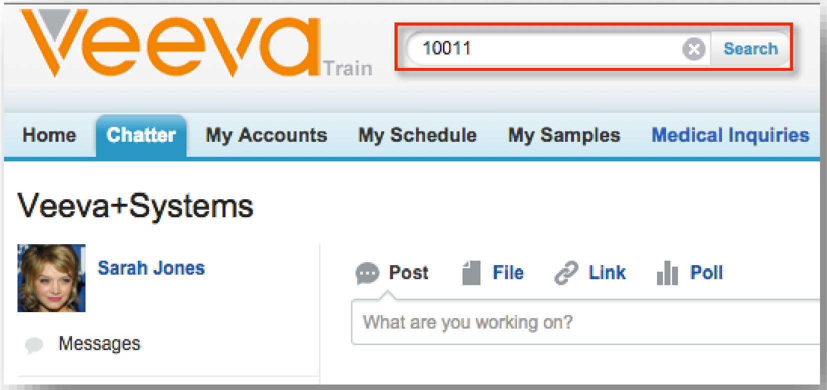
- **Search terms are treated as separate words**
  - “Bob Jones” returns records with “Bob Jones” as well as records named “Bob Smith” whose email address is “bsmith@jones.com“

- **Supports wildcards * and ? as well as operators such as AND, OR, and NOT**

To enable Advanced Search, must also enable Sidebar Search

Search – Global Search

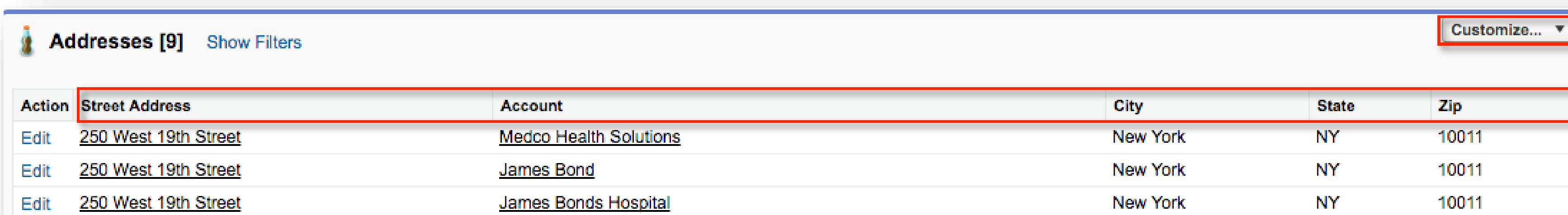
- **Enabled when Chatter is enabled**
- **Similar to Advanced Search**
- **Can search in more objects and fields than the Advanced Search including**
    - Chatter Feed and Chatter Group



If Chatter is enabled, Global Search is the only option (Sidebar Search not available)

Search Results Layouts

- **Search results page layouts are configured per object**
- **To configure a search results page layout:**
  - Setup → Create → Objects → [Object] → Search Layouts section
  - In the Search Results page layout, add fields to display



Home Tab Page Layout

Home Tab Configuration

- **Configure Home tab page layouts to include useful components**
  - Custom Links
  - Dashboard Snapshot
  - Items to Approve
- **Create Home tab components when needed**
- **Assign different Home tab page layouts to different profiles**

IMPORTANT: Home Tab Configuration only apply to online application (not iPad or Windows)

Configure Home Tab Components

- **To configure Home tab components**
  - Setup → Customize → Home → Home Page Components
- **Click the Edit link for the standard components that can be modified**
  - Messages and Alerts
  - Custom Links
- **Click the New button to define custom components**

Type	Description
Links	One or more custom links (Example: a link to your company intranet, or to relevant industry news sites)
Image/Logo	An image that will be displayed in the sidebar (Example: your company logo)
HTML Area	A free-form area displaying any custom HTML content desired
Visualforce Area	An area displaying content from a Visualforce page

Configure Home Tab Page Layouts

- **After creating the components, configure Home tab page layouts:**
  - Setup → Customize → Home → Home Page Layouts

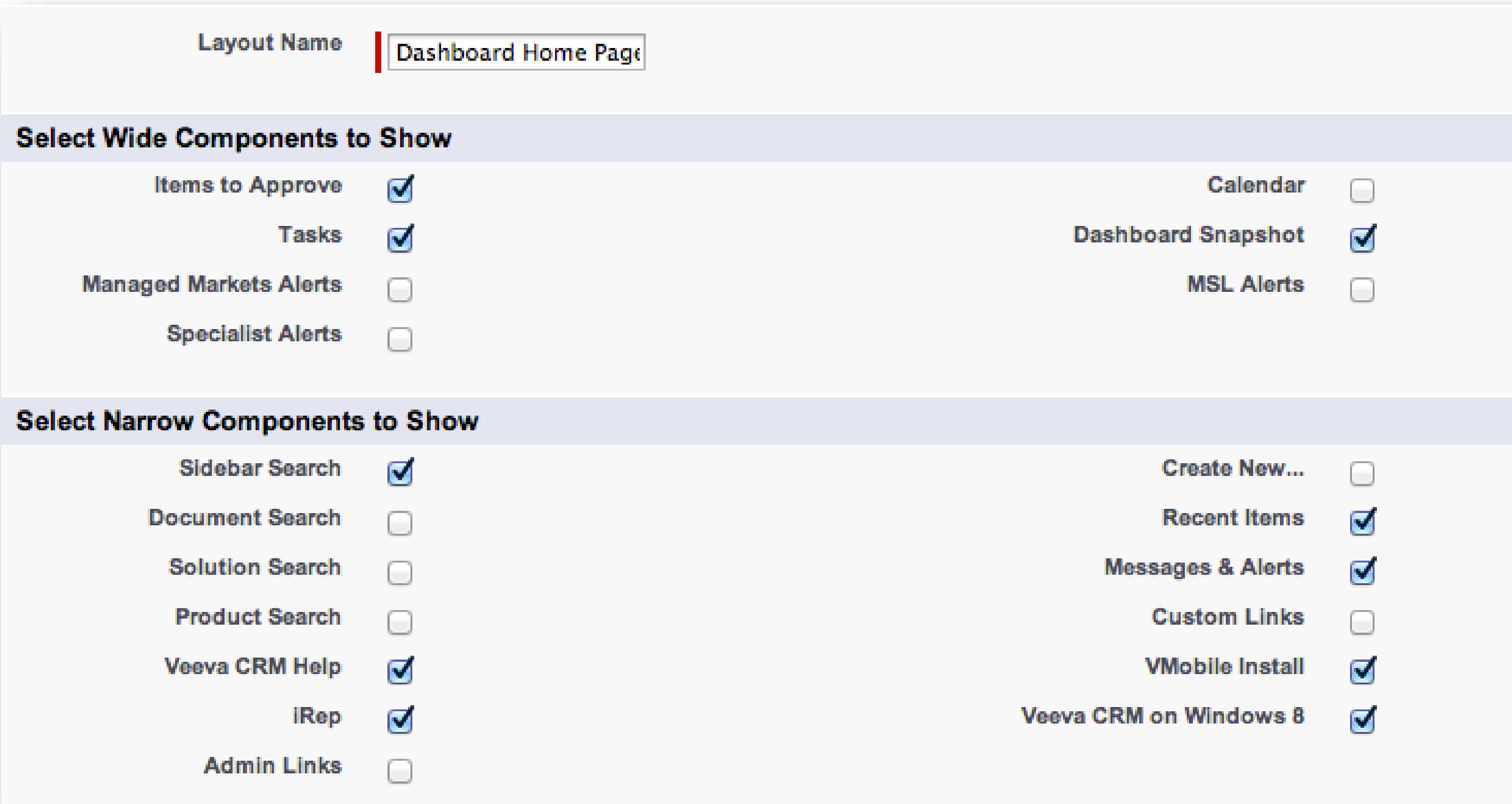
- **Click Edit to configure an existing home page layout or create new ones**

Page Layout Assignment | New

Action	Name ↑	Created By
Edit | Del	Dashboard Home Page Default	Admin User, 2/29/2016 9:44 AM
Edit | Del	Managed Markets Director Home Page Layout	demo user0, 2/29/2016 9:44 AM
Edit | Del	Managed Markets Sales Home Page Layout	demo user0, 2/29/2016 9:44 AM
Edit | Del	MSL Director Home Page Layout	demo user0, 2/29/2016 9:44 AM
Edit | Del	MSL Home Page Layout	demo user0, 2/29/2016 9:44 AM
Edit | Del	Specialty Sales Home Page Layout	demo user0, 2/29/2016 9:44 AM
Edit | Del	Specialty Sales Manager Home Page Layout	demo user0, 2/29/2016 9:44 AM

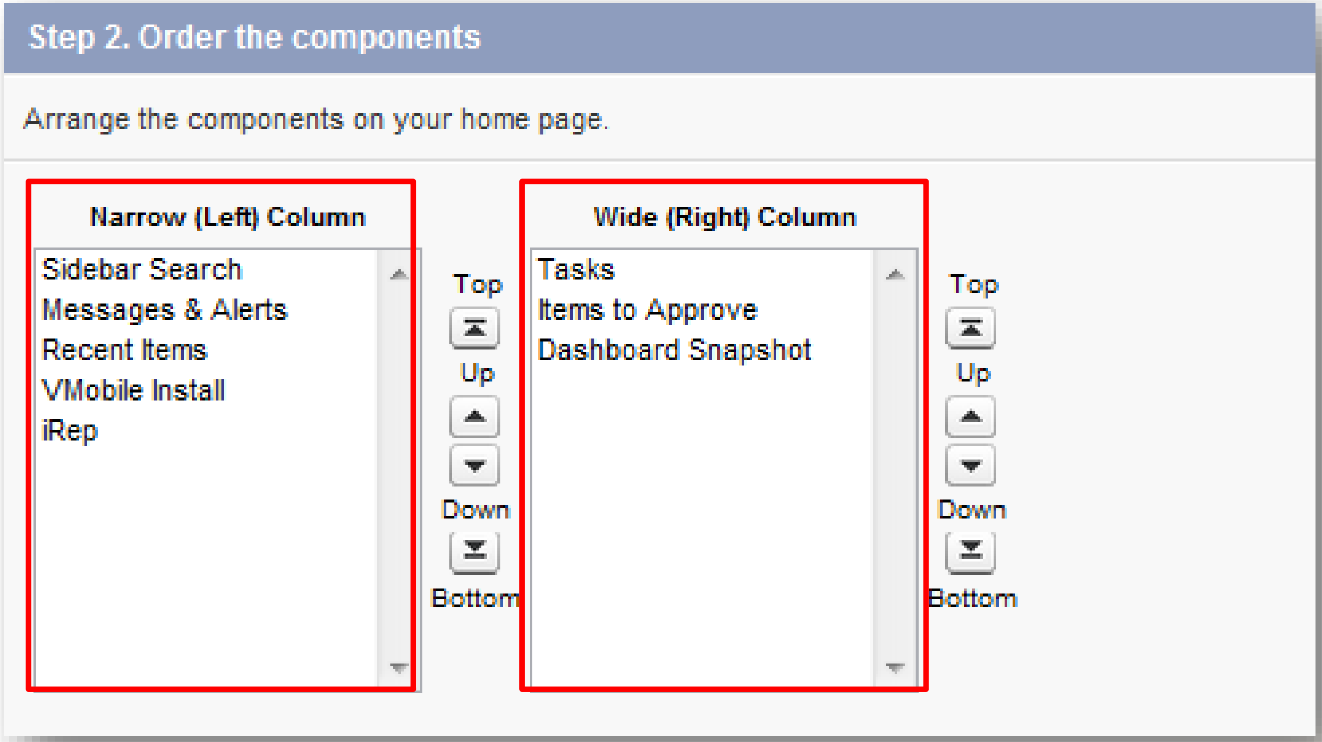
Customize Home Tab Page Layouts

- Select the components to display on the Home tab



Customize Home Tab Page Layouts

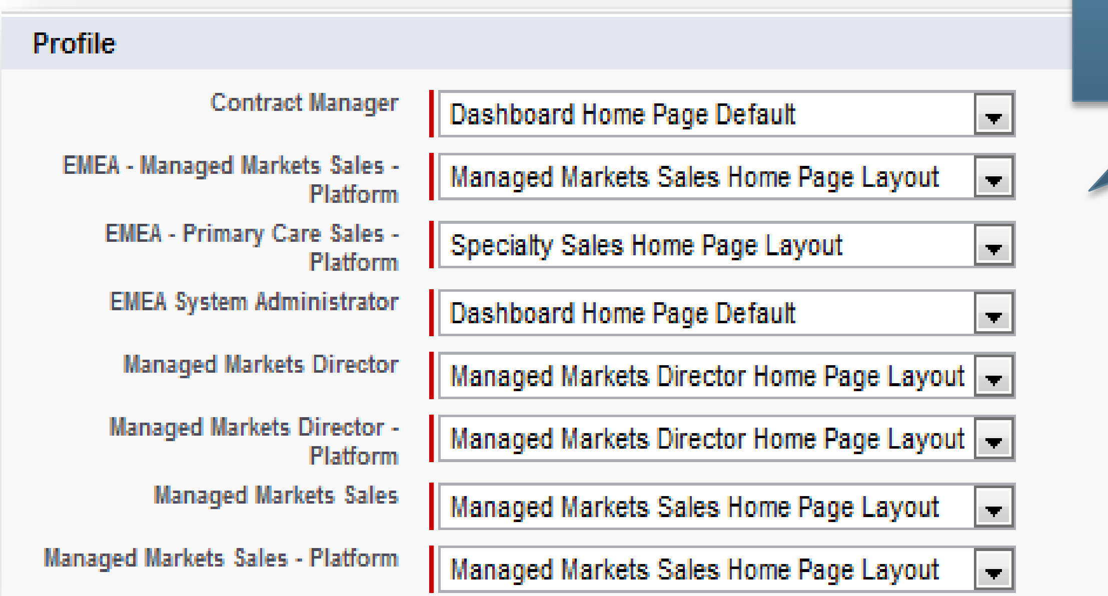
- **Arrange the order of the components that appear both on the narrow and wide sides of the Home tab page layout**



Assign Home Tab Page Layouts

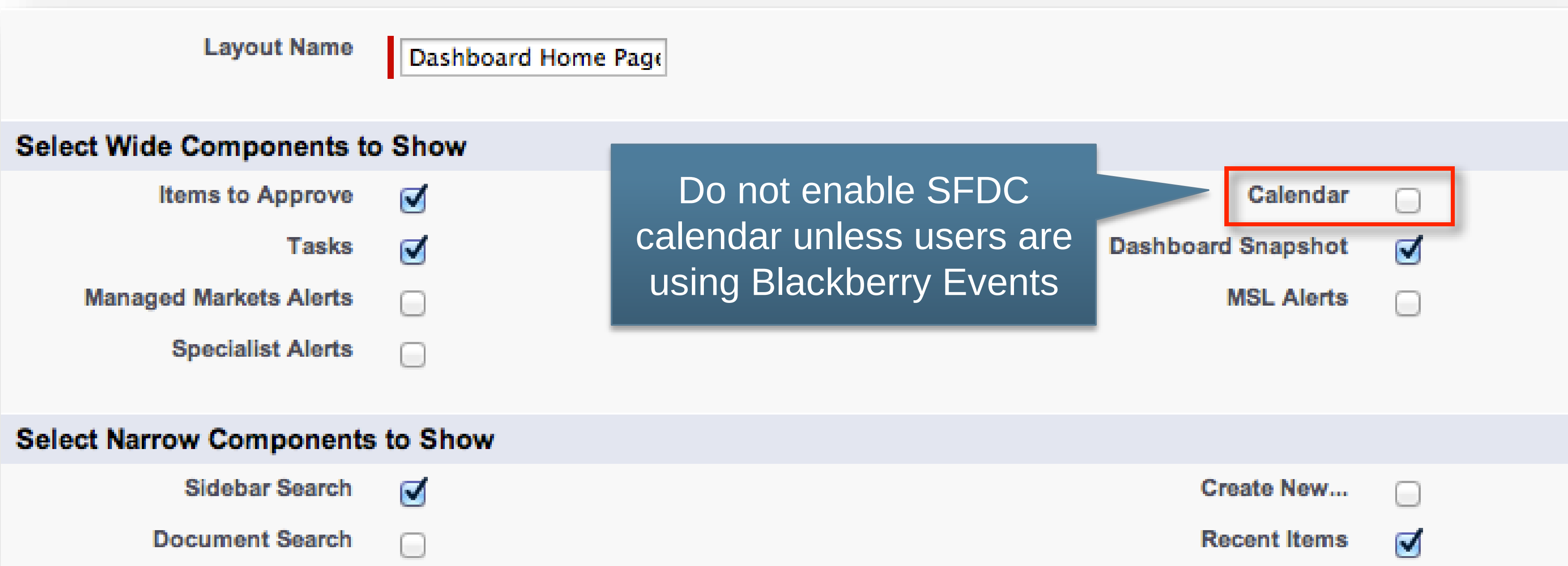
- **To assign home tab page layouts to user profiles:**
  - Setup → Customize → Home → Home Page Layout
  - Click the Page Layout Assignment button → Click the Edit Assignment button

For each profile select a home tab page layout



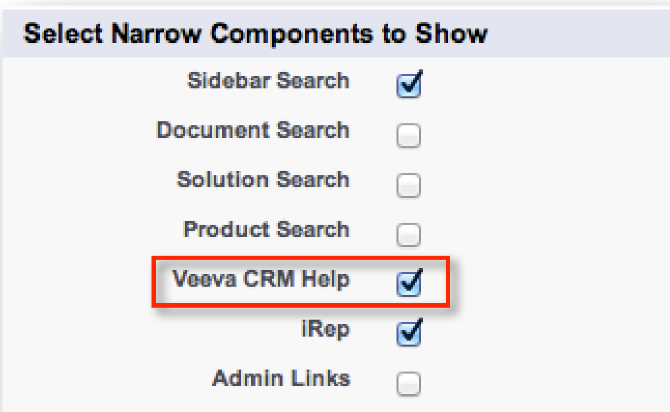
SFDC Calendar

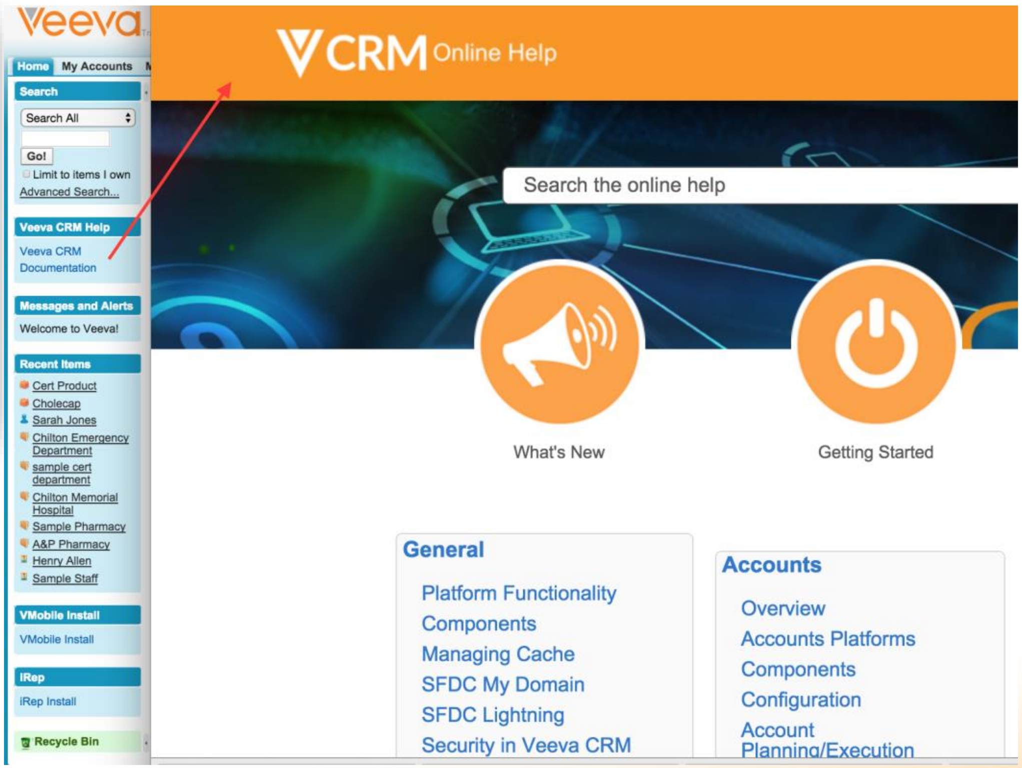
- **Best practice is not to display the Salesforce.com calendar on the home page**
  - Veeva users manage their schedule from the My Schedule tab



Veeva CRM Online Help

- **Enable the Veeva CRM Help online documentation access from the home page**
  - Setup → Customize → Home → Home Page Layout

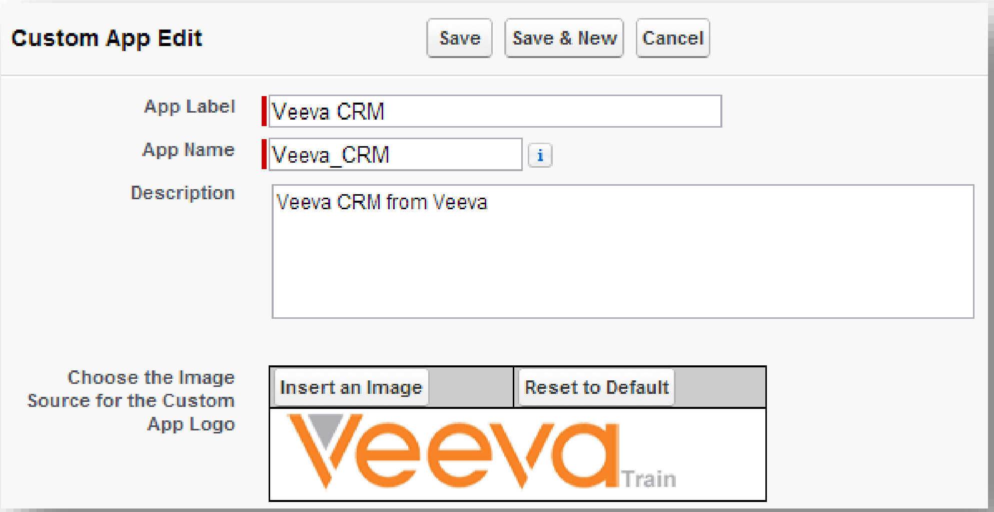




Company Logo

Configure a Company Logo

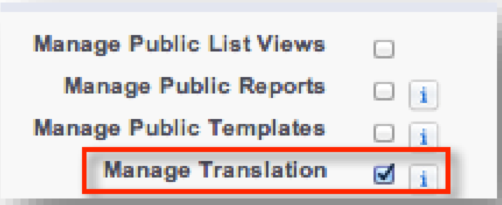
- **To configure a company logo**
  - Upload the logo image into the images folder through
    - All Tabs → Documents
  - Insert the logo image into the desired application
    - Setup → Create → Apps and click the Edit link for the Veeva CRM application



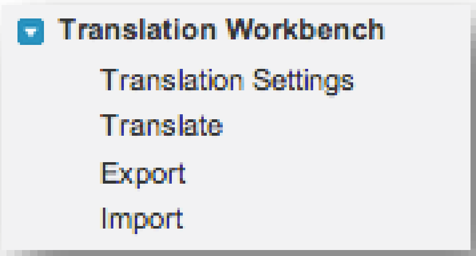
Translation Workbench

Translation workbench

- **Allows Administrators to translate user interface (UI) strings**
  - Best practice is to use the translation workbench to change UI strings such as field labels and picklist values
- **User Permission: Manage Translation (default for admin profile) is needed**



- **To access it go to**
  - Setup → Admin Setup → Translation Workbench
- **Two options for entering translations**
  - Straight through the UI - Translate
  - Exporting components / editing files/ importing translated files - Export, Import



- **For more details on the translation workbench, please see appendix**

Module Summary

- **Explored User Interface Settings**
- **Discussed Searching**
- **Configured the Home Tab**
- **Introduced the Translation Workbench**

Labs

Explore Application Configuration settings

Configure a Home Tab page layout

Appendix

Using the Translation Workbench

Translating from the UI

1
- Click Your **Name → Setup → Translation Workbench →Translate**

2
- Select the **Language** you're translating into

3
- Select a **Setup Component**

4
- Select an **Object** (*optional*)

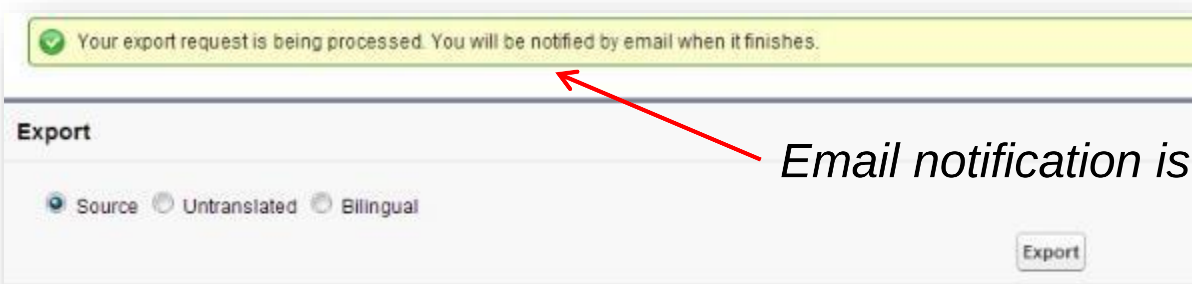
5
- Double click in the translation column to enter new values

6
- Click **Save**

Export Component Labels

- **Three types of files can be exported:**

Source	Untranslated	Bilingual
• Creates a .stf file with all the translatable labels • Content will be in the org's default language • Used for first translation	• Creates .zip folder with several .stf files • Filters labels and only exports untranslated labels	• Creates .zip with several .stf files • **All** the labels in their current form (translated or not) • Used for reviewing/editing translations



Email notification is sent when export is finished

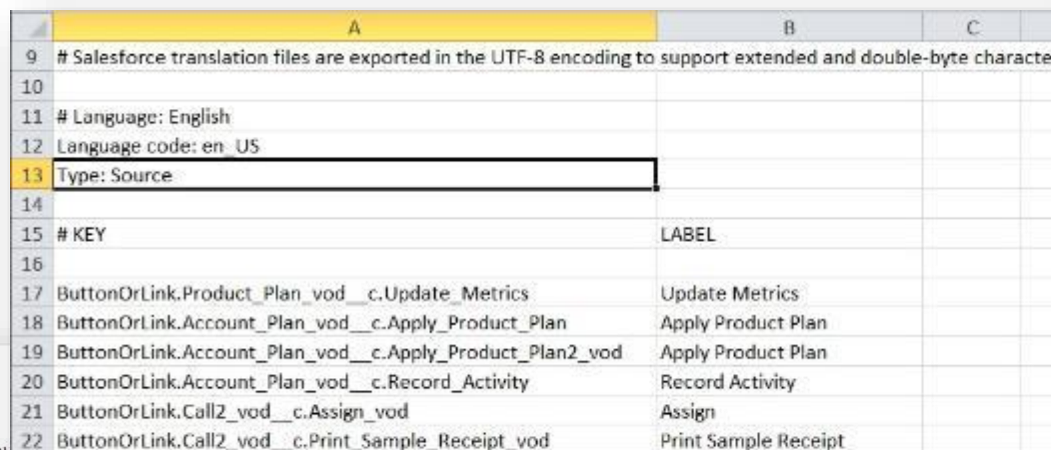
Prepare Translation Files

- **Create one copy of Source for every language you translate into**
    - Change header with appropriate country code (fr, de, es)
- **Do not add / remove columns from file**
- **Do not change file extension: .stf is the standard salesforce translation format**
- **The files can be edited in a text editor (Notepad) or in Excel**
    - Warning: Excel may corrupt your files by adding quotation marks for entries that contain a comma

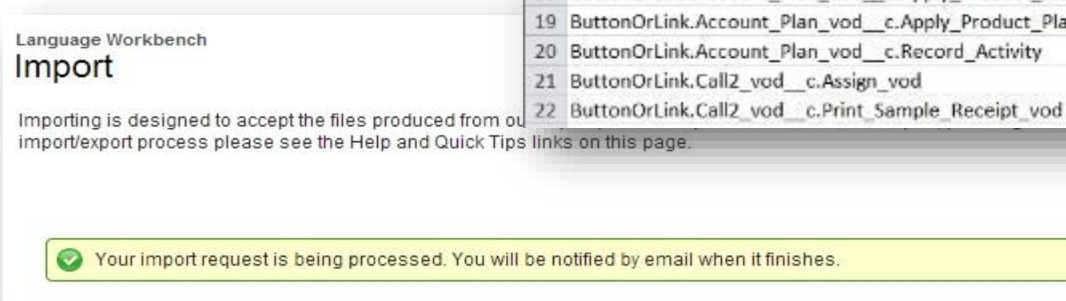
Import Translated File(s)

Create 1 file for each language → Add language attribute (code) → Select files (or zip) → Upload

- **File size limit is 5MB for one upload**
  - Do several uploads if needed
- **After the import is complete**
  - Labels get updated
  - Confirmation email is sent



	A	B	C
9	# Salesforce translation files are exported in the UTF-8 encoding to support extended and double-byte character		
10			
11	# Language: English		
12	Language code: en_US		
13	Type: Source		
14			
15	# KEY	LABEL	
16			
17	ButtonOrLink.Product_Plan_vod__c.Update_Metrics	Update Metrics	
18	ButtonOrLink.Account_Plan_vod__c.Apply_Product_Plan	Apply Product Plan	
19	ButtonOrLink.Account_Plan_vod__c.Apply_Product_Plan2_vod	Apply Product Plan	
20	ButtonOrLink.Account_Plan_vod__c.Record_Activity	Record Activity	
21	ButtonOrLink.Call2_vod__c.Assign_vod	Assign	
22	ButtonOrLink.Call2_vod__c.Print_Sample_Receipt_vod	Print Sample Receipt	



Tabs Names & Labels

Changing Tabs Names and Labels

- **You can edit most of the tabs names & labels to better match your organization's terminology**
  - User Permissions: 'Customize Application' or 'View Setup and Configuration'

- **Go to Setup → Customize → Tab Names and Labels → Rename Tabs and Labels**

→ *Not all tabs can be renamed*

→ *Best Practice: Do not rename Veeva Tabs (My Accounts)*

→ *You may need to manually update other items: list view names, report types, Record Types that contain the original name*