Product Metrics Configuration

Veeva Professional Services

Module Objectives

- **Define Product Metrics / Ratings and Evaluations**

- **Create a custom Product Metrics field**

- **Create a Metrics Configuration record**
  - Including Detail Groups and Detail Topics metrics

- **Control access to Product Metrics fields**

What are Product Metrics?

- **Account level ratings and evaluations for products**
  - Dr. Ackerman is a high prescriber of Cholecap and and expert speaker for AMX

- **Users only see metrics for the products in their My Setup**

- **Product metrics values can be uploaded via backend processes or entered by users**

▼ Ratings and Evaluations

	Awareness	Segment	Movement	Speaker Skills
AMX	Advocate	Grow	✎	Expert
FEM	Advocate	Grow	✎	Intermediate
CABASES	Aware	Grow	✎	Intermediate
Cholecap	Aware	Guard	✎	Intermediate
Restolar	Prefers	Guard	✎	Novice

Product Metrics by Profiles

- **Different user profiles can access different sets of product metrics**

    - Primary Care: Awareness, Segment, Decile, Movement (Rx)

    - Managed Markets: Selling Stage, Formulary Status, Payer Rx

    - MSL: Speaker Skills, Trial Readiness

Product Metric Field Types

- **Box Picklist**

- **Text Picklist**

  Novice ▼

- **Number**

  3

- **Arrow**

  ⬆ 11.42%
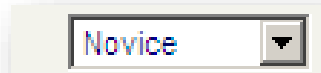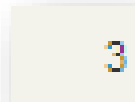
- **Checkbox**

  ☑

Product Metrics Object

- **Child of the Accounts object**
  - Include Product Metrics fields in My Accounts views

- **Limit the number of metric fields to 5 or 6 on Account page layouts**

- **Box picklists can have no more than 10 values**

Account Page Layout Configuration

- **Create a page layout section called Ratings and Evaluations**

  - Add the Ratings_vod S-Control

- **Use FLS to control user profiles access to Product Metrics fields**

  - Visible and read-only

Account Detail   Edit   Delete   Record a Call

▼ Hospital detail

Name	Chilton Memorial Hospital [View Hierarchy]
Parent Account	
Website	http://www.chilton.com

▼ Key Indicators

YTD Calls	2
Target?	✓
Call Class	A

Use FLS to control whether a Product Metric field is available to user profiles

▼ Ratings and Evaluations

Common ✏️

	Awareness		Segment		Movement
FEM	▮▮▮▮▯	Prefers	▮▮▮▯	Grow	⬆ 2.00% ✏️
CEKANCE	▮▮▮▮▯	Prefers	▮▮▮▮	Guard	⬆ 4.00% ✏️
Labrinone	▮▮▮▯▯	Aware	▮▮▮▯	Grow	⬆ 4.00% ✏️
XYKEX	▮▮▮▮▯	Prefers	▮▮▮▮	Guard	⬆ 2.00% ✏️

Product Catalog – No Metrics

- **Create the detail product(s) in the product catalog**

- **Set the No Metrics field to true for a product to prevent it from appearing in Product Metrics**

Product Catalog
Cholecap

Product Catalog [6] | Key Messages [3] | Product Plans [1] | Notes & Attachments [1] |

Product Catalog Detail   Edit Delete Clone

Product Name	Cholecap
Parent Product	
Product Type	Detail
Therapeutic Area	Cardiology
Therapeutic Class	High Cholesterol (Statins)
Description	
Sample Quantity	
Require Key Message On Detail	☐
Display Order	
No Metrics	☐

▼ **Key Indicators**

Controlled Substance	☐
Company Product	✓

Products of type Detail, and Detail Topic are displayed

Disable Product Metrics for a product with the No Metrics field

Product Security

- **To configure the product(s) users can see:**

  - All Tabs → My Setup

  - Edit the My Setup page for each user

- **A row for each product is displayed**

My Setup Edit interface showing Company Products with AMX and CABASES checked, and AKK OXHES N4A and CEKANCE unchecked.

Ratings and Evaluations table showing AMX, FEM, and CABASES rows with Awareness, Segment, and Movement columns.

Callout box:
- Company products are **bold**
- Competitor products not bold

Product Metric Configuration

Adding a New Product Metric: 3 Step Process

- **Product Metric Configuration**

Create a custom field in Product Metrics	Set Field Level Security	Create an entry in Metric Configurations
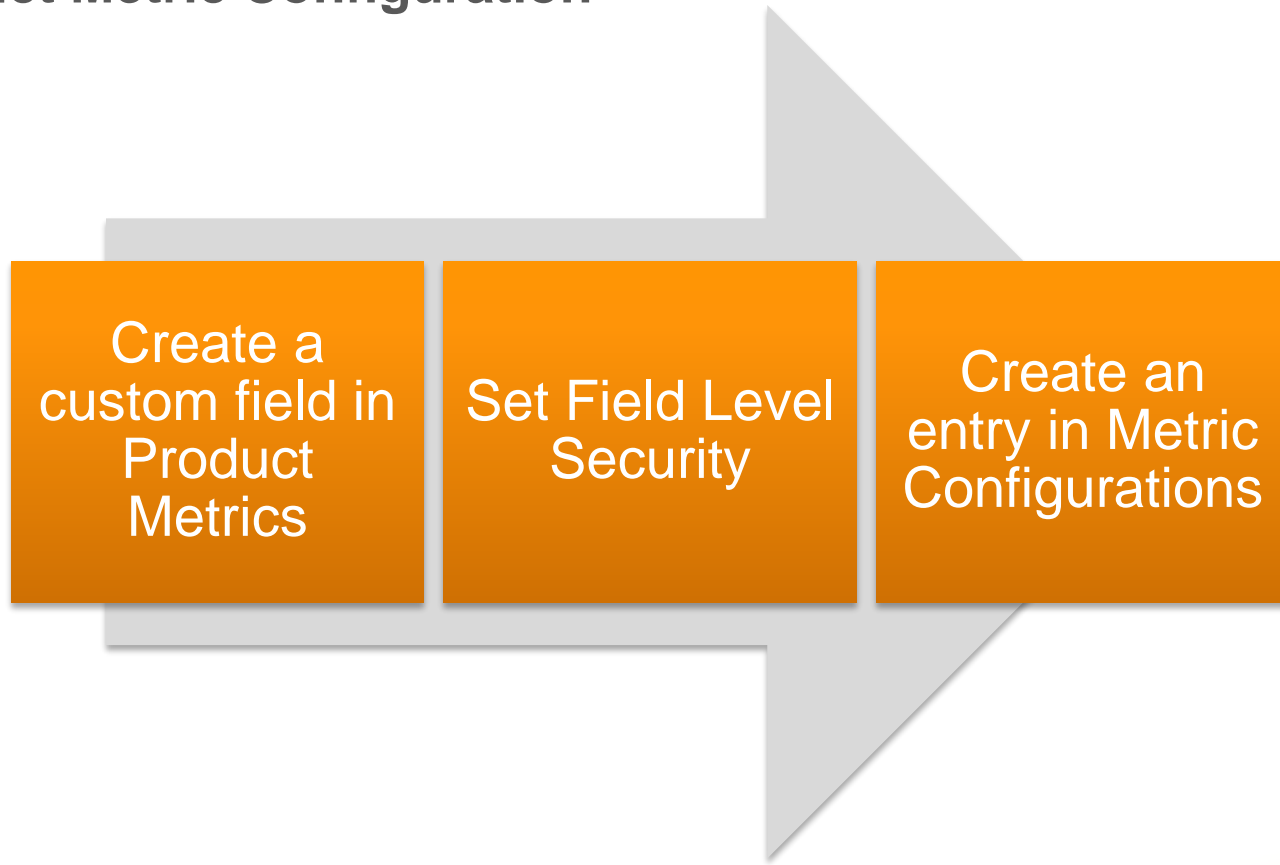
Step 1: Create a Custom Field in Product Metrics

- **To create custom Product Metrics fields:**

  - Setup → Create → Objects → Product Metrics

- **Create new field(s) with one of the following data types:**

  - Picklist

  - Number

  - Currency

  - Percentage

  - Checkbox

Certain fields require special care. Do not modify or delete the Name, Accounts, Products, and Mobile ID fields.

Step 2: Set Field Level Security

- **Determine which Profiles need read and edit access to the Product Metrics fields**

  - Ex: Sales reps are not allowed to change the Movement field value which is fed in from an external source

Use FLS to control whether a Product Metric field can be edited

| Save | Cancel |

| Field Label | 12 mo TRx Chg |
| Data Type | Percent(3, 1) |

Field-Level Security for Profile	Visible	Read-Only
Contract Manager	☐	☐
EMEA - Managed Markets Sales - Platform	☑	☑
EMEA - Primary Care Sales - Platform	☑	☑

Step 3: Create Metric Configurations

- **Columns are controlled by Metric Configurations object**

    - Controls how product metrics fields should appear

    - Controls which account record types should display the product metric field

Step 3: Create Metric Configurations

- **All Tabs → Metric Configurations**

  - Metric: Copy and paste the API Name of the Product Metrics field

  - In the Display Order field, Enter a numeric value in the Display Order field that corresponds to the order in which this metric is displayed

Control Account record types the Metric Configurations records applies to

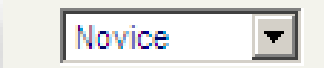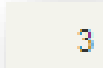Metric Type – Arrows require threshold values: Red/Yellow: Threshold when the arrow changes from red to yellow Yellow/Green: Threshold when the arrow changes from yellow to green Any value in between will be yellow

Step 3: Create Metric Configurations

- **Use the following field type to match the desired metric type:**

Box Picklist	Text Picklist	Number	Arrow	Checkbox
• Picklist	• Picklist	• Number • Currency • Percentage	• Number • Currency • Percentage	• Checkbox

Product Metrics Considerations

- **When adding new Account record types:**

  - Decide if Product Metrics data needs to be displayed for new record types

  - Update Applies To multi-value picklist in the Metric Configurations object and add the new record type(s) to the list

Detail Group and Detail Topics in Product Metrics

- **Product Metrics can be defined for Detail Groups and Detail Topics in the same way they are used for Products**
- **Create Metric Configuration records for Detail Groups and Detail Topics**
  - To save time you can clone existing metric configuration records
  - Set the Detail Group or Detail Topics attributes as needed

Create Metric Configurations for Detail Group

- **When creating or editing the Metric Configuration, follow the same procedure for Products and:**

  - Select the Detail Group to enable metrics for the Products associated with the Detail Group OR

  - Select the Detail Group and also check the Detail Topic checkbox to apply the metrics to all topics associated to the named Detail Group

Important Notes about Metrics

- **Make sure user profiles have at least Read permission to the following fields in the Metric Configuration object:**

  - Detail Group

  - Detail Topic

- **The No Detail and No Metric flags on the Product Catalog entry also restrict Detail Topics**

Metrics Control in Ratings and Evaluations

- **When viewing Ratings and Evaluations, the user can turn On/Off the tabs which appear at the top of the section**

Click on a tab to show metrics for that particular Detail Group

Common tab contains products not associated with a Detail Group and will always display

Click on the Edit tab to turn tabs on and off

Metrics Veeva Settings

- **Veeva Setting related to Detail Groups and Detail Topics:**

  - Disable Edit Account Metrics Tab

    - If set to True, users cannot edit the Product Group tabs in the Account Ratings and Evaluations section

    - Default is Unchecked

Product Metrics on iPad

Product Metrics on iPad

Note: The process for setting up and controlling visibility for product metrics follows the same model as Veeva CRM online

Module Summary

- **Defined Ratings and Evaluations**

- **Listed Product Metric use cases**

- **Defined Products**

- **Created a custom Product Metrics field**

- **Created a Metrics Configuration record**

- **Configured Metric Configuration for Detail Group and Detail Topics**

Labs

Create new products

Create custom Product Metrics field

Define new Metric Configurations entry

> Including Detail Groups and Detail Topics

Test new Ratings and Evaluations configuration