Veeva Functionality Part 1

Veeva Professional Services

Module Objectives

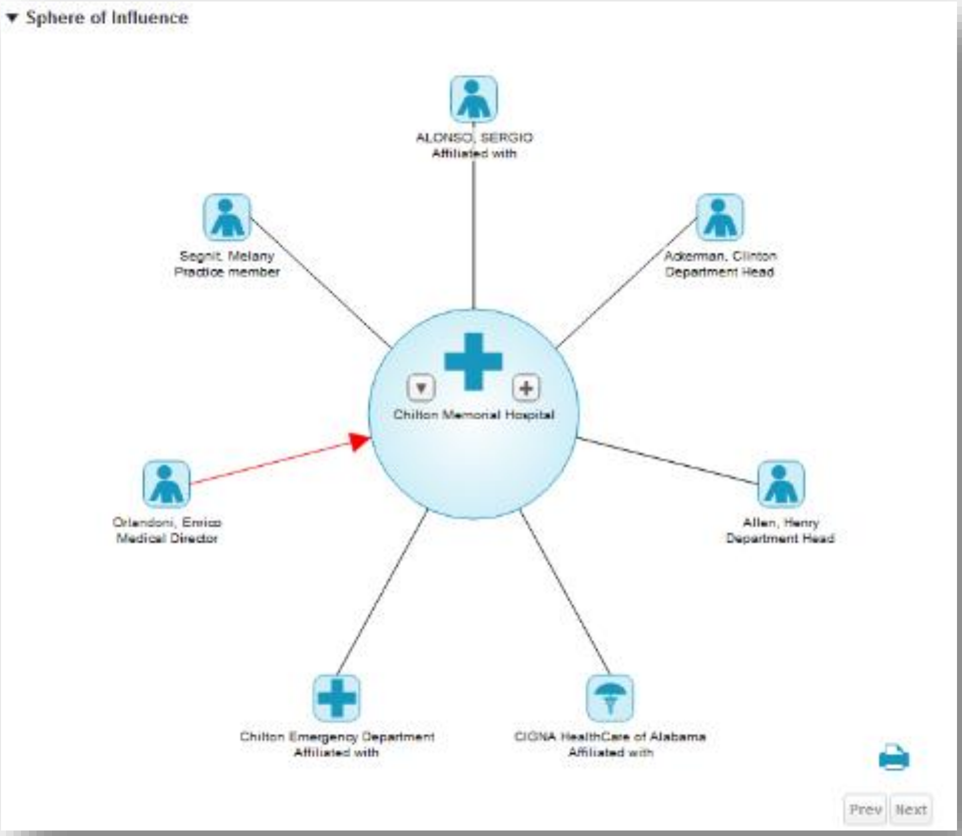
Describe and configure Veeva specific functionality including:

- Sphere of Influence
- Account Hierarchy
- Territory Specific Fields
- Address
- Veeva Account Merge
- My Schedule
- Multi Channel Calendar
- My Schedule on CRM (iPad)

Sphere of Influence

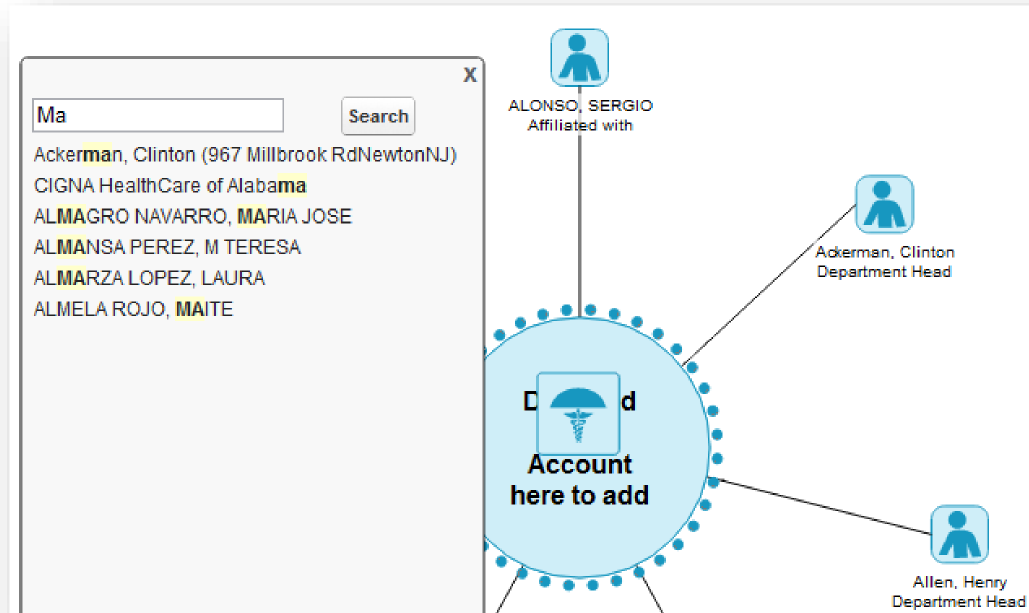
Sphere of Influence

- Displays all the relationships the center account has with other accounts (of any type) and contacts
- Drives the list of potential attendees when recording group calls
- A Veeva S-Control that can be placed on any Account or Contact page



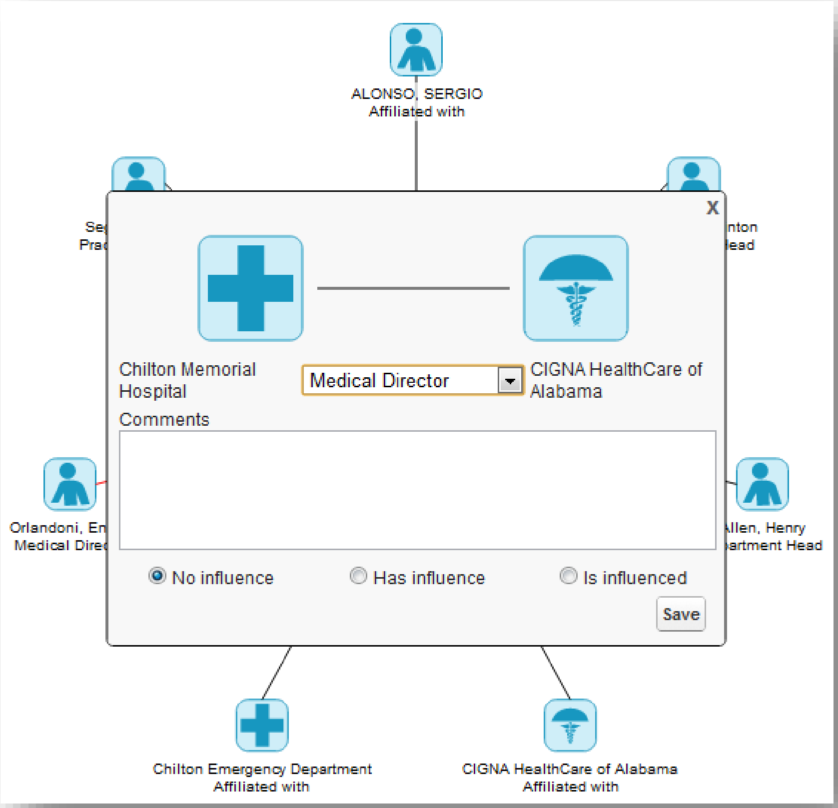
Sphere of Influence

- **Click the + to add an Account to the Sphere of Influence**
- **Search for the Account**
  - Data access controlled by territory hierarchy
- **Detail page of accounts outside the user’s territory is not visible**



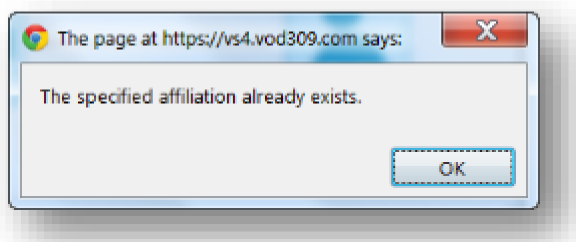
Affiliation – Configuration

- **Affiliation object stores Sphere of Influence data:**
  - Role picklist – values can be modified
  - Comments – Text field
  - Influence picklist – values **must** only be modified via Translation Workbench
    - Do not change picklist values in the field definition
    - Metadata is referenced by code to display the arrows properly
  - From Account / To Account – fields used to build the affiliation between Accounts



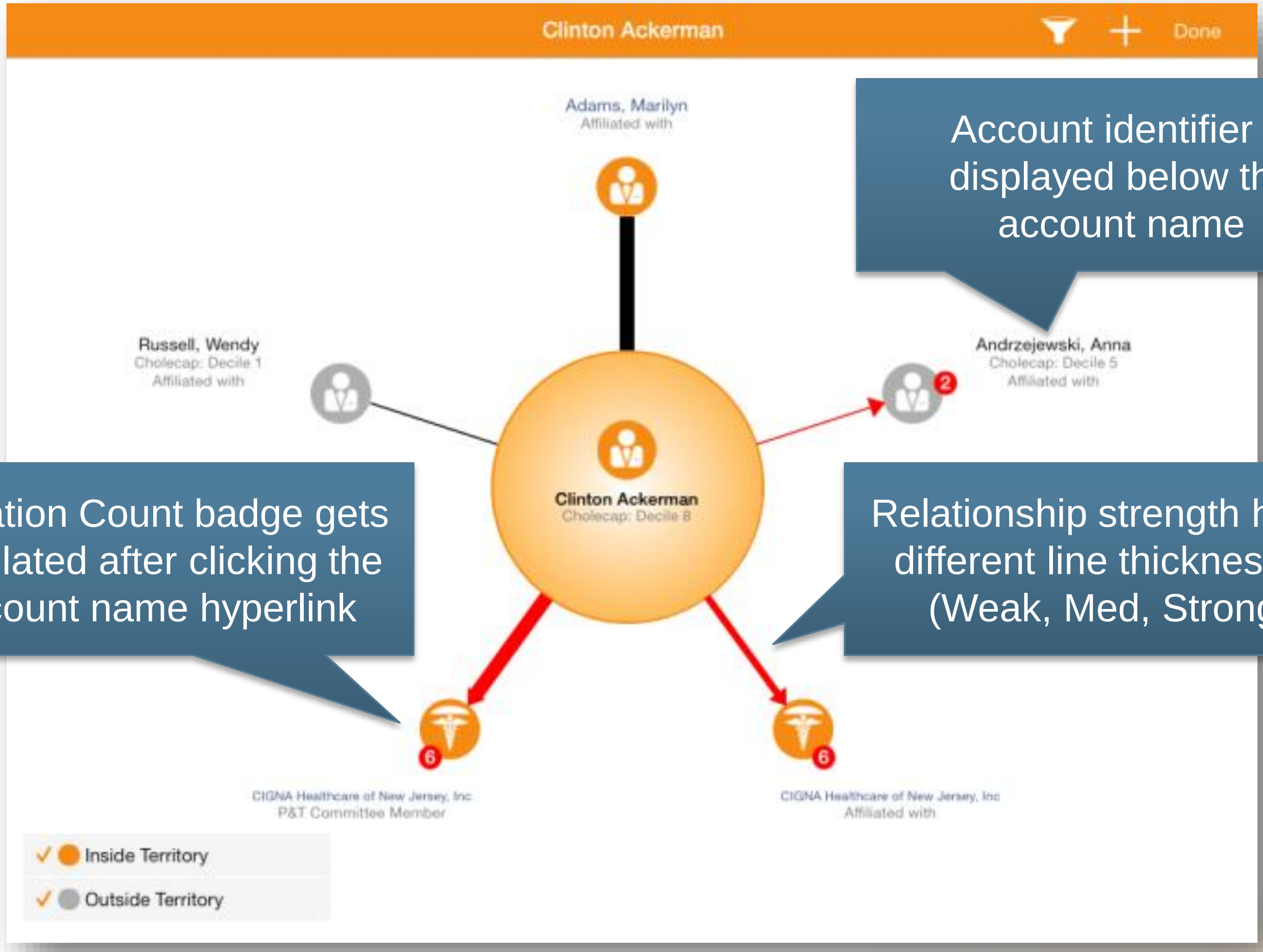
Affiliation – Configuration

- **Use Field-Level Security to hide fields such as Comments and Influence**
  - Do not hide the Roles field (or you will break the S-control)
- **Rename section header on the Account page layouts if the Influence field is hidden**
- **A trigger prevents duplicate affiliation records for the same Account and Role**



All fields for Affiliations have significant value and require special care. Do not add, modify, or delete any fields in this object.

Sphere of Influence: Additional Features – CRM (iPad)



Account identifier is displayed below the account name

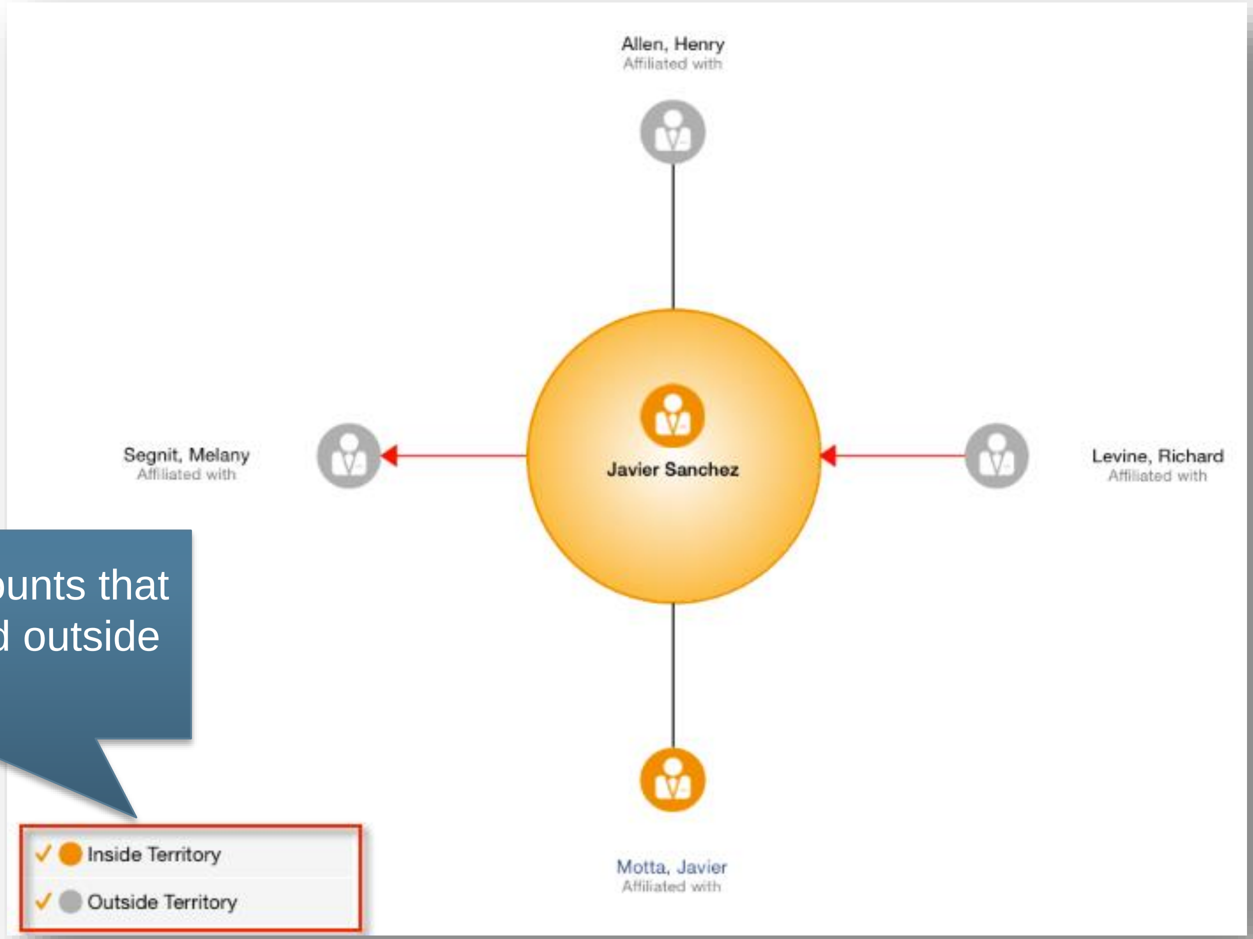
Affiliation Count badge gets populated after clicking the account name hyperlink

Relationship strength has 3 different line thicknesses (Weak, Med, Strong)

Sphere of Influence: Additional Features

- **Enable features to enhance the Sphere of Influence UI**
  - **Relationship strength** can be viewed and defined by the thickness of the line between accounts
    - Grant FLS access to the Relationship_Strength_vod field
  - **Affiliation count** badge shows the number of affiliations the To Account has to quickly identify the most connected people
    - Grant FLS access to the To_Account_Affiliation_Count_vod field
  - **Account identifier** can be displayed if using it on the Account object
    - Grant FLS access to the To_Account_Identifier_vod
- **These features are available offline on CRM (iPad) only**

Affiliation – Out of Territory – Veeva CRM (iPad)



Filter affiliated accounts that are both inside and outside territory

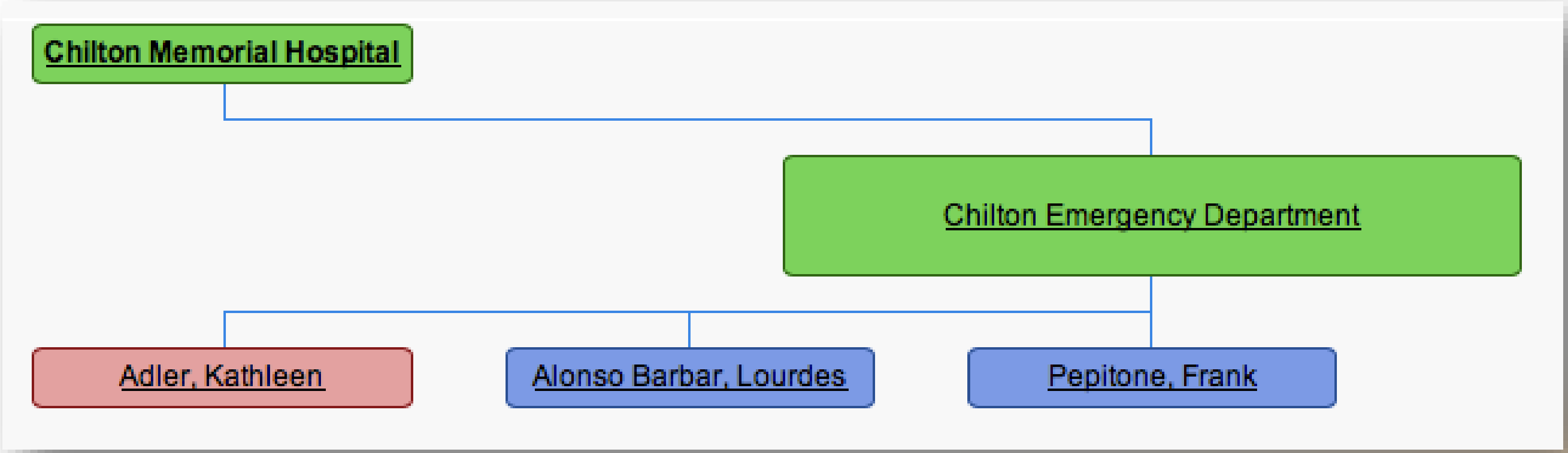
Affiliation – Out of Territory

- **Allow users to view out-of-territory affiliated accounts as long as one of the accounts within the Sphere of Influence is in their territory**
  - For example, Dr. Smith, who is in Sarah’s territory, is affiliated with Dr. Lee, Sarah will be able see this relationship even if Dr. Lee is not in her territory
- **Grant user profiles FLS to the following fields**
  - To_Account_Name_vod and To_Account_Record_Type_vod
- **This feature is available offline on CRM (iPad) only**

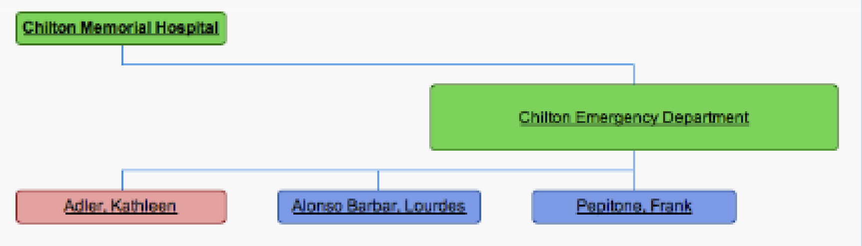
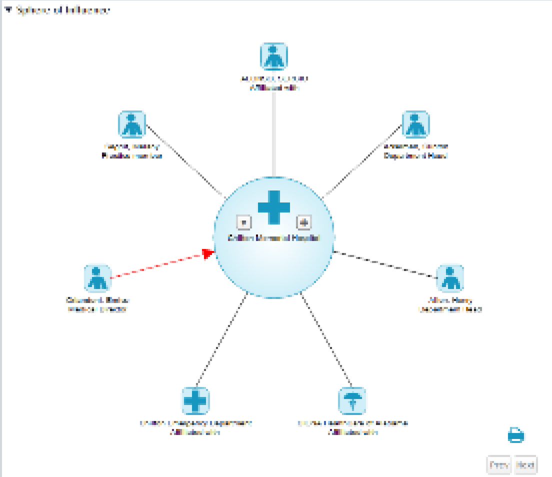
Account Hierarchy

Account Hierarchy

- **Displays hierarchical structure of all business accounts and associated physicians**
- **Displays structural relationships among accounts**
- **Allows administrators or users to manage hierarchy**
- **Drives list of group call attendees**

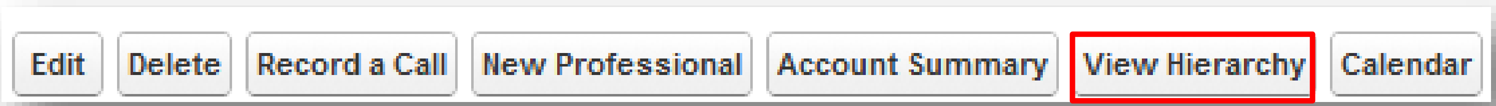


Account Hierarchy vs. Sphere of Influence

Account Hierarchy	Sphere of Influence / Affiliations
Displays a hierarchy of parent accounts and child accounts	Display affiliations between accounts
A structural relationship or physical layout of accounts	An informal relationship to convey influence between doctors
Example: Hospital, departments and the doctors in them	Example: High influence physician and his network
Cannot designate roles and influence	Can designate roles and influence
	

Account Hierarchy – Configuration

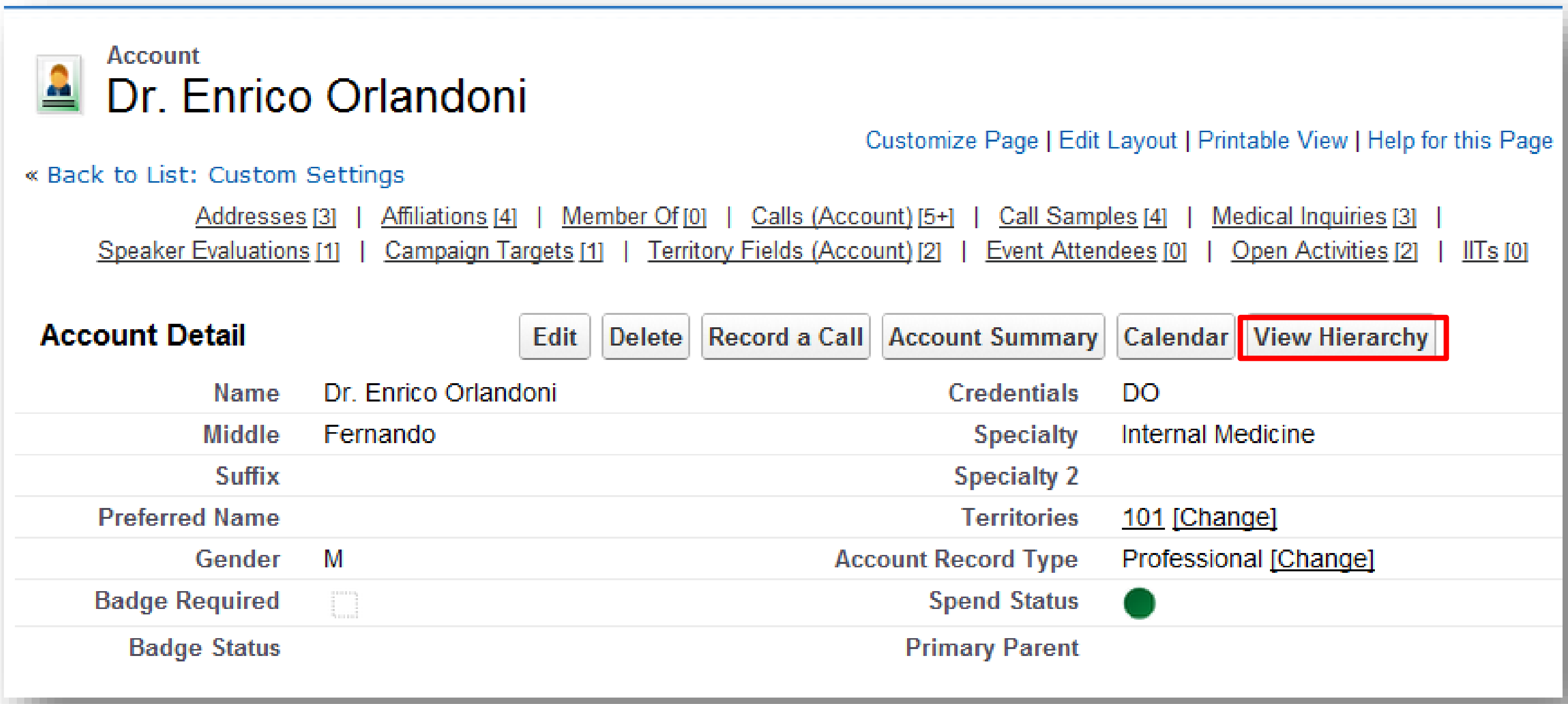
- **Users click on the View Hierarchy button on an Account record to access its Hierarchy**
  - Must add View Hierarchy button to Account page layouts



- **Profiles need CRUD permissions for Child_Account_vod object**
  - If users are not managing hierarchies, their profiles only need Read access

Scenario

- **Users need to view and manage Account Hierarchy from the Professional page layout**

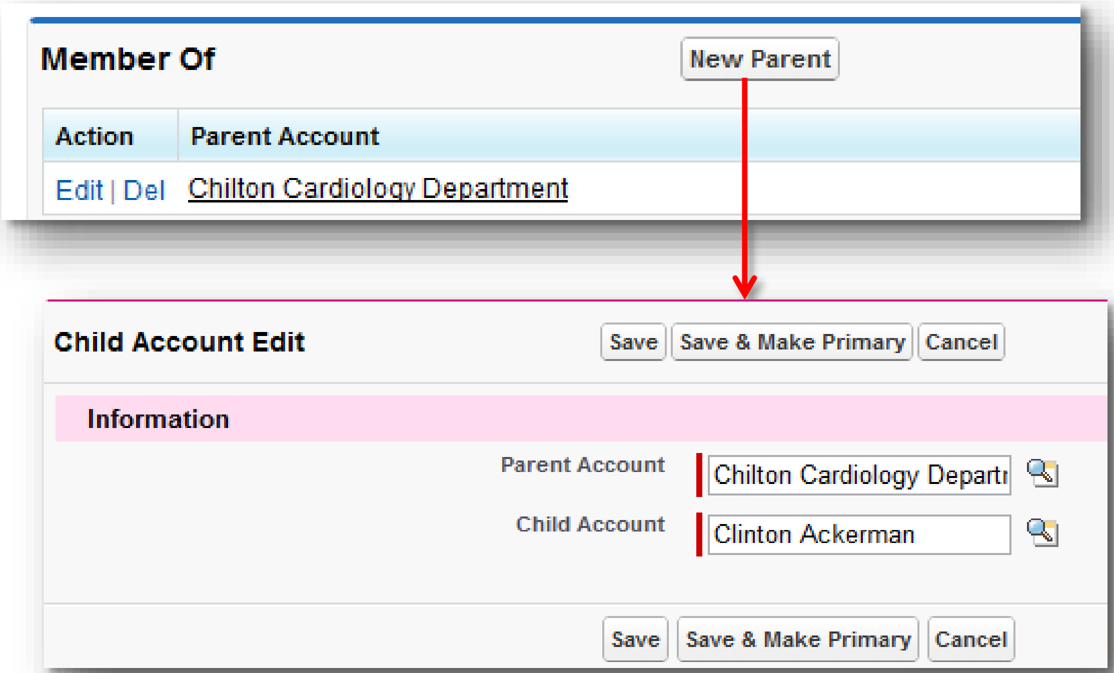


Account Hierarchy – Configuration

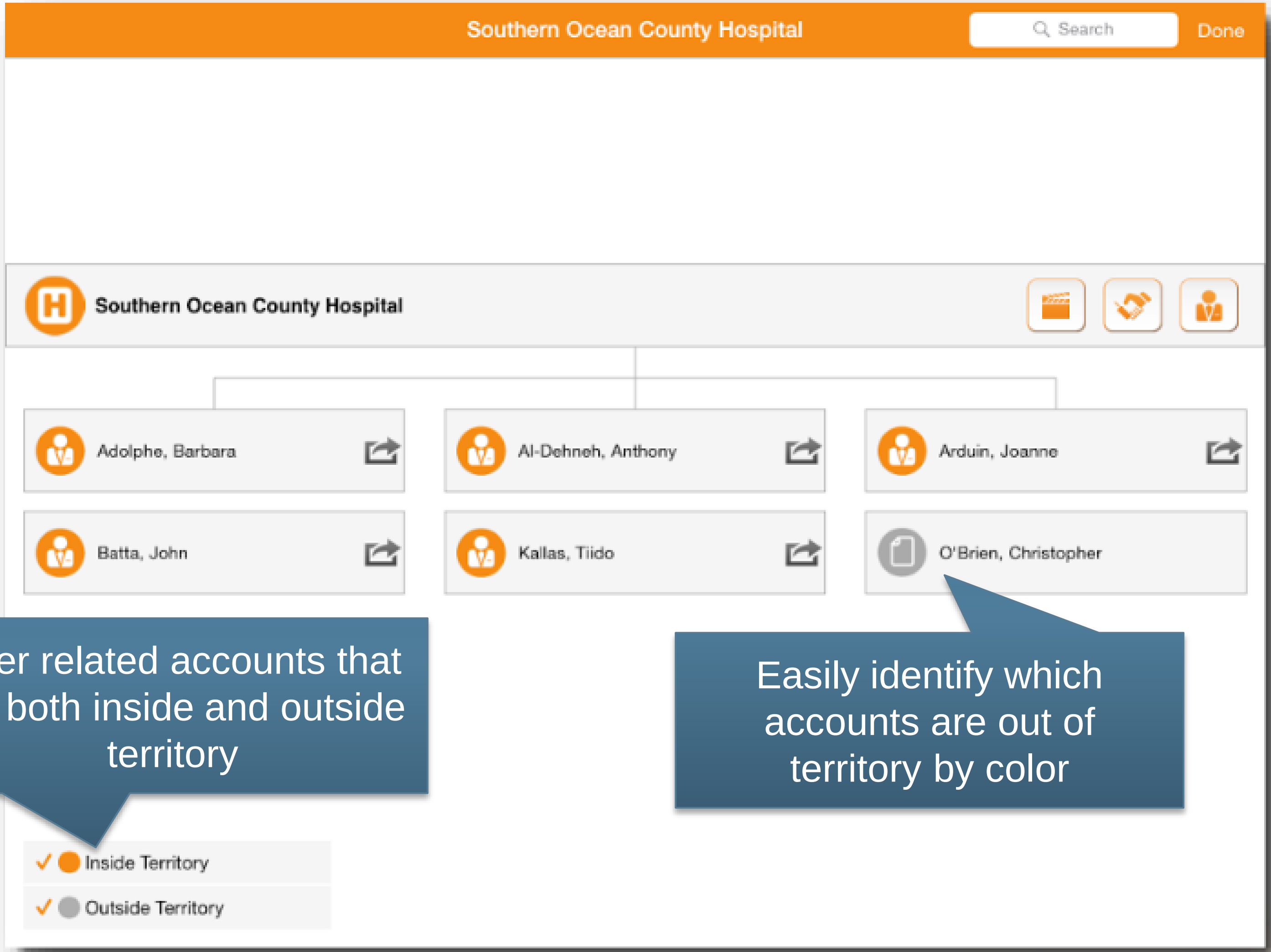
- **To configure the Accounts Professional page layout:**
  - Setup → Customize → Accounts → Person Accounts → Page Layouts
- **Edit the Professional page layout:**
  - Add the View Hierarchy button to the page layout
  - Add the Primary Parent field to the page layout
    - Modify its property and make it read-only
  - Add the Member Of related list to the page layout and:
    - Remove the Name field from the Select Fields list
    - Add the Parent Account Field to the Select Fields list
    - Deselect the standard New button
    - Add the New Parent button to the Selected Button list
- **Enable Read/Edit permission on the Child Account object for user profiles**

Account Hierarchy Related List

- **Users can build account hierarchy from the Member Of or Members related list**
  - Click the New Parent button
  - Select the Parent Account to create the hierarchy relationship



Account Hierarchy: Out of Territory – CRM (iPad)



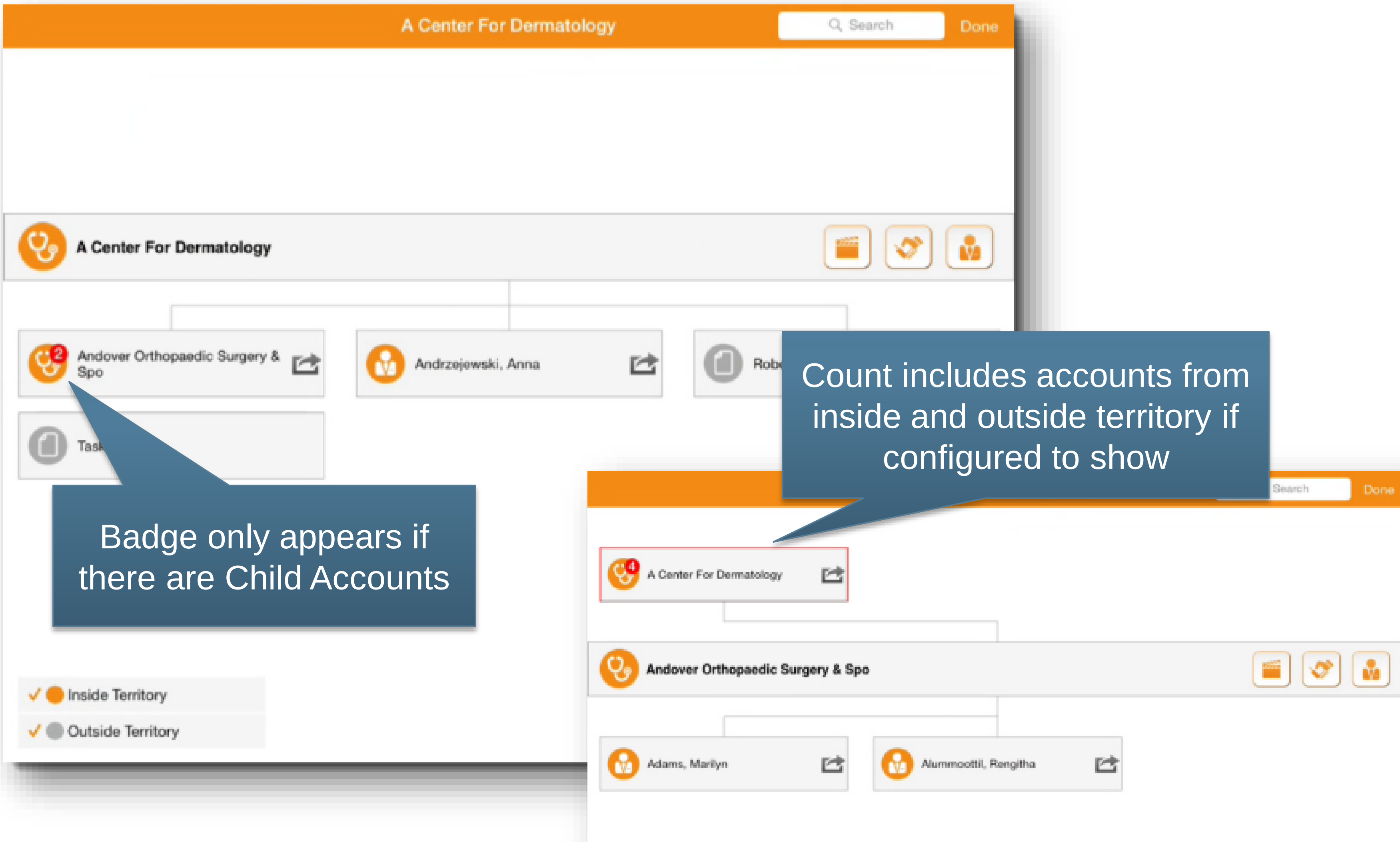
Filter related accounts that are both inside and outside territory

Easily identify which accounts are out of territory by color

Account Hierarchy: Out of Territory

- **Allow users to view out-of-territory accounts in the Account Hierarchy**
- **Grant user profiles FLS to the following fields in the Child_Account_vod object**
    - Parent_Name_vod and Child_Name_vod
- **This feature is available offline on CRM (iPad) only**

Account Hierarchy: Child Count – CRM (iPad)



Account Hierarchy: Child Count

- **Allow users to view count of Account's children in the UI**
  - Identify largest accounts in the territory
- **Grant user profiles FLS to the following fields in the Child_Account_vod**
  - Parent_Affiliation_Count_vod and Child_Affiliation_Count
- **This feature is available offline on CRM (iPad) only**

Labs

Please complete the following labs before continuing to the next topic:

1.1 Sphere of Influence

1.2 Account Hierarchy

Territory Specific Fields

Territory Specific Fields (TSF)

- **Territory Specific Field is used for maintaining activity at the account-territory level**
  - Territory Field custom object (TSF_vod) stores data specific to an account and a territory (user)
- **Simple way to track territory level activity such as:**
  - YTD Activity
  - Last Activity Date
  - My Preferred Address
  - My Badge Status

Territory Fields (Account) New Territory Field Territory Fields (Account) Help ?

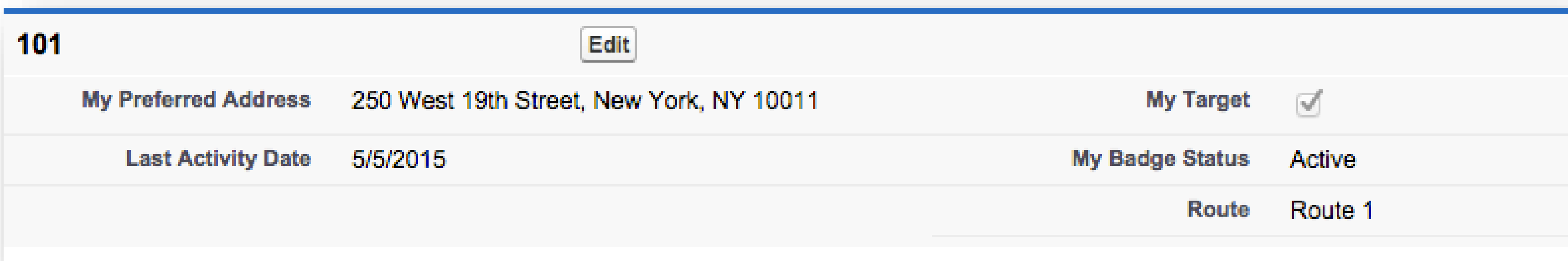
Action	TSF Name	YTD Activity	My Preferred Address	My Preferred Location	Allowed Product	Route
Edit | Del	101	3	250 West 19th Street		Cholecap;;AMX	

Veeva-Managed Attributes

- **A TSF record is automatically created for each territory the Account and User are aligned to:**
  - After creating a Call for an Account
  - During a mass update of a TSF field from the My Accounts tab
- **YTD Activity and Last Activity Date TSF fields are updated:**
  - Last Activity Date is set to the value of the last call date
  - YTD Activity is incremented by one
  - Only Saved or Submitted Calls for that Account with date/time prior to the current date/time are counted
- **TSF Address field is updated with the most recently saved address selected on the call record for the account**
  - Uses My Preferred Address

Territory Specific Fields (TSF)

- **Territory Specific Fields information can be added to Accounts page layouts by using**
  - Account Territory Info s-control
  - TSF Visualforce page



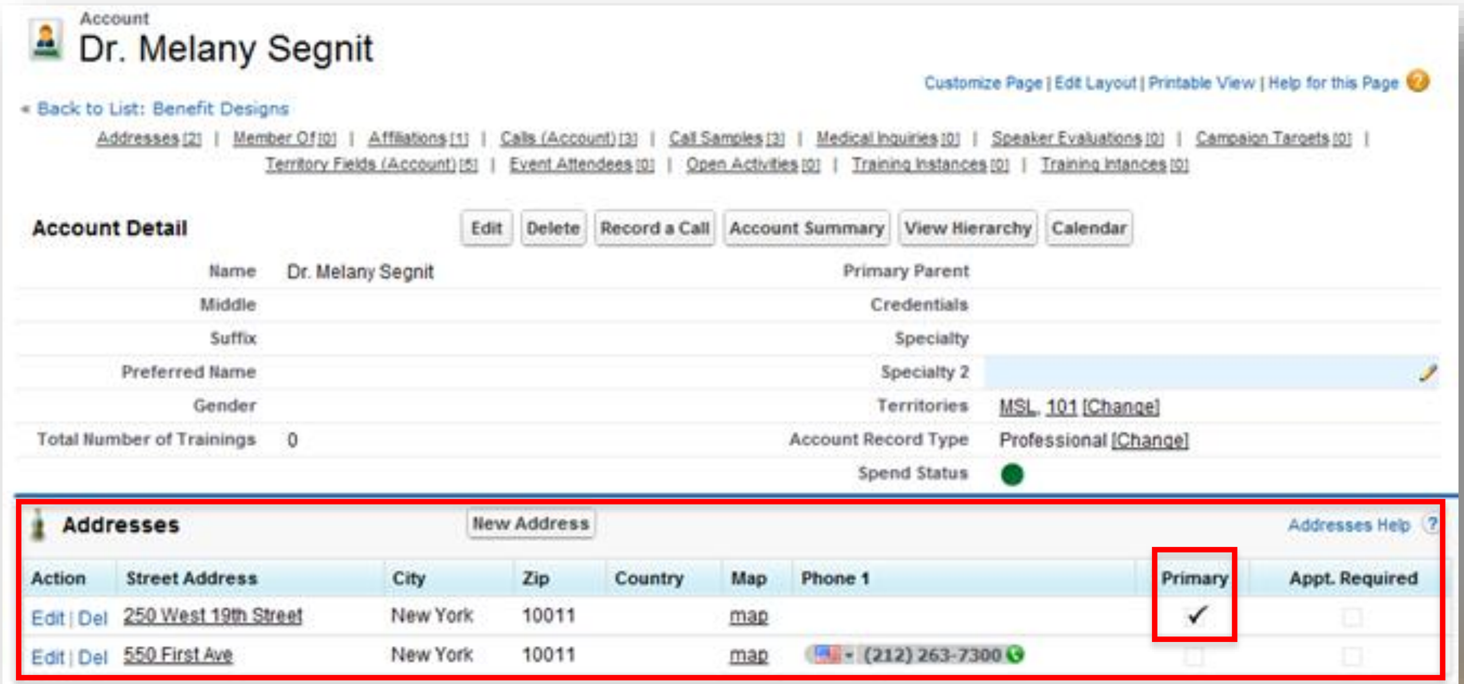
Territory Specific Fields (TSF)

- **Record types are supported**
  - View different TSF page layouts based on type of Account being viewed
  - Create a TSF record type with a name that matches the name of the account record type
    - If Account record type name = Professional_vod
    - Then TSF record type name = Professional_vod
  - Available online and offline
- **Fields not displayed on TSF page layouts**
  - Created By
  - Last Modified By
  - Account
  - Territory_VoD

Addresses

Address Object

- **Stores address data for Veeva accounts**
  - Child object to Account object
    - Has a Master-Detail field to Account
    - Displays as a related list on the Account page layouts
  - Each address is stored as a separate record



Addresses

- **Two Record Types**
  - Company Maintained
    - Fields are set to read-only on page layout
  - Rep Maintained
    - Fields are set to editable on page layout
- **Can have multiple addresses for one account**
  - One address has to be marked Primary
    - For territory alignment
  - One address can be marked Preferred
    - Via Territory Specific Fields
    - Last address used on a call for the account

Primary & Preferred Addresses

Preferred Address

- Territory-Specific: 1 per territory
- Preferred field in the TSF object
- Displayed in My Accounts tab by default
- Defaulted in call address picklist
- Updated by Call Trigger to be last address on a call associated to the territory

Primary Address

- Displayed in My Accounts tab when no Preferred Address exists
- Applies to the Account (not territory specific)
- Primary checkbox stored in the Address object
- Used for territory alignment

Key Address Fields

Inactive	Lock
• Exclude an inactive address from being displayed in Call and My Schedule picklists • Inactive_vod__c (custom field) on the Address object	• Prevents the address Name field from being edited • Locked_vod__c (custom field) on the Address object • Control access with Field Level Security

Address Sample Rules

DEA & State License info stored on Address object

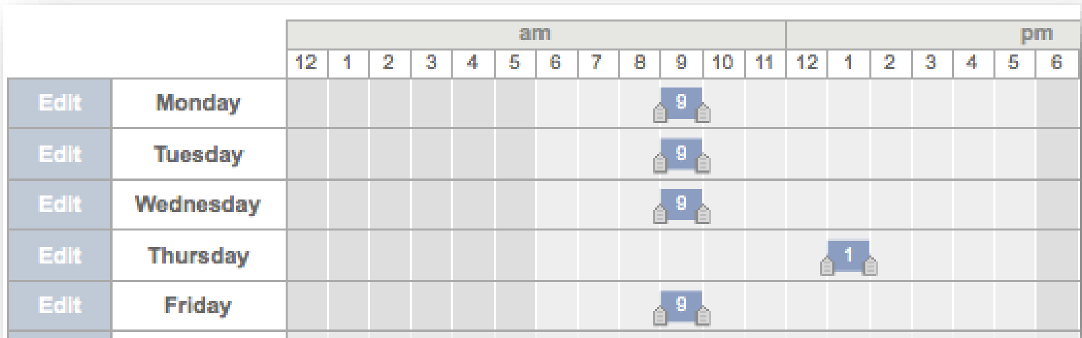
- **State License:**
  - If there are multiple addresses in the same state, the state license will be the same for those addresses
  - License is copied automatically when a new address in the same state is created
    - In Canada, license information is copied across all Canadian addresses
  - When license information changes, all related fields will be automatically updated for all addresses in the same state

▼ License Information

License #	123456	DEA #	12345
License Expiration Date	8/13/2011	DEA Expiration Date	8/5/2013
License Status	Valid	DEA License Address	550 First Ave NY 10016

Office Best Times

- **Veeva uses office best times with the scheduling functionality**
  - Highlights the best times in the Veeva schedule and inserts the call records in the correct time slot

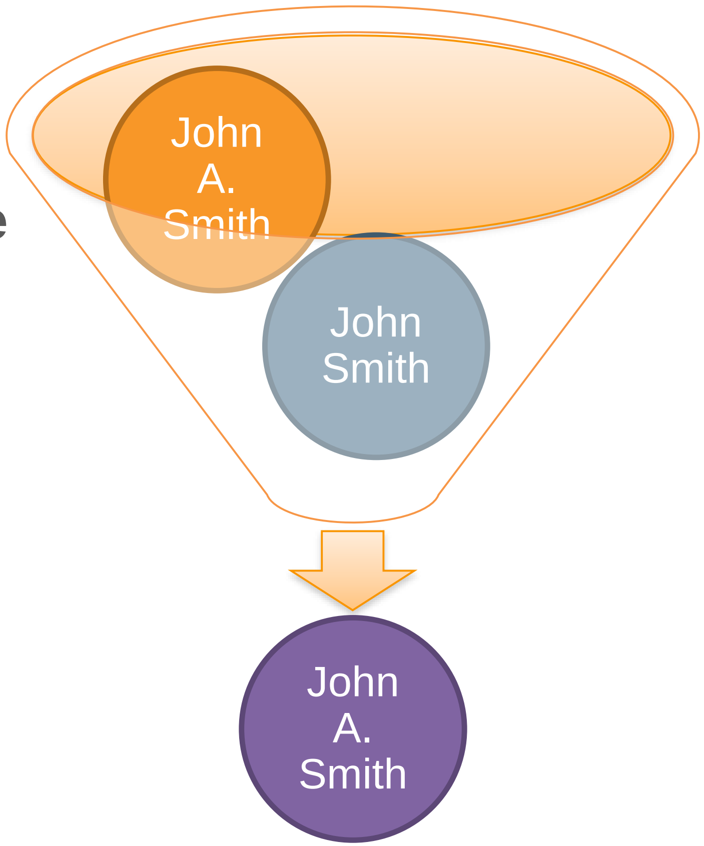


- **To configure Office Best Times:**
  - Place the Office Best Times s-control on the Address page layouts
  - Give user profiles FLS access to the Best_times_vod field in the Address_vod__c object
- **Provide best times values for address**
  - Allow users to enter online or offline using CRM (iPad) or data load it for them

Account Merge Administration

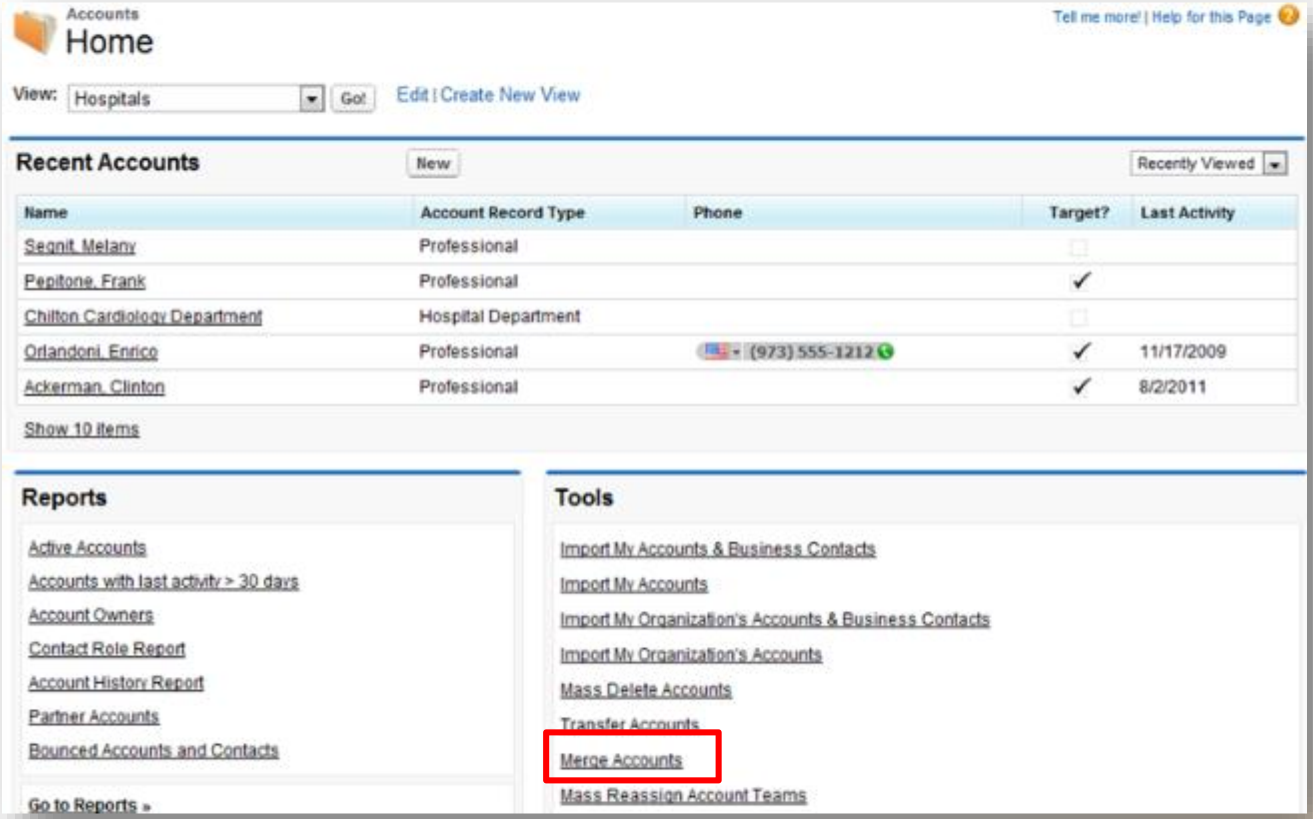
Veeva Account Merge

- **Duplicate accounts can be merged by Administrators**
- **Allows the merging up to three duplicate Accounts in one**
  - Not possible to merge a person account with a business account or vice versa
- **Merge process re-associates all related records to winning Account**
  - Addresses
  - TSFs
  - Calls
  - All other records in Master-Detail relationships



Veeva Account Merge

- **Veeva Administrators use the standard SFDC Accounts tab to merge Account**
  - Veeva end-users should not have access to this tab



Veeva Account Merge

- **If using custom merge functionality, first disable Veeva Account Merge:**
  - Setup → Create → Custom Labels
  - Set DISABLE_VEEVA_MERGE_vod Custom Label = True

Edit | Del	DISABLE_VEEVA_MERGE_vod	VBioPharma	DISABLE VEEVA MERGE	true

Veeva Account Merge – Addresses

- **Determine how addresses should be merged by:**
  - Setup → Create → Custom Labels → ACCOUNT_ADDRESS_MERGE_BEHAVIOR

INACTIVE	ACTIVE	ASIS
• Default value • Copies all addresses from the losing Account as Inactive • Inactive flag = true for these records • Administrator can later change address to Active upon verification	• Copies all addresses from the losing Account as Active • Inactive flag = false for these records	• Copies all addresses from the losing Account without changing the Inactive flag • Inactive flag = same value as before the merge

Account Merge History

- **Account Merge History object keeps a history of the accounts that are merged**
  - Add as a related list to My Accounts tab page layout

Displays the SFDC Id for the accounts that were merged

Account Merge Historys

Action	Account Merge History Name	Created By	Created Date	Last Modified By	Account Person ContactId	Created By Alias	Last Modified By Alias	Last Modified Date
Edit | Del	001d0000009k7pM	Admin Student1, 1/9/2012 7:05 AM	1/9/2012	Admin Student1, 1/9/2012 7:05 AM	003d0000009gRN0	AStud	AStud	1/9/2012
Edit | Del	001d0000009k7pN	Admin Student1, 1/9/2012 7:05 AM	1/9/2012	Admin Student1, 1/9/2012 7:05 AM	003d0000009gRN0	AStud	AStud	1/9/2012
Edit | Del	001d000000AzCuHAAV	Admin Student1, 2/15/2012 9:37 AM	2/15/2012	Admin Student1, 2/15/2012 9:37 AM	003d0000009gRN5AAM	AStud	AStud	2/15/2012

Veeva Account Merge – Calls

If Call Reports exist for the losing Account	Call reports will be migrated to the winning account
If a call is recorded offline for a deleted Account via the merge process	Call is automatically attached to the winning account upon synchronization

Veeva Account Merge – Territory Specific Fields

- **Territory Specific Field is used for maintaining activity at the account-territory level:**
  - Preferred address, YTD activity, last activity date
- **When merging two accounts:**

If a TSF record exists for the losing Account but not for the winning account → The losing Account's TSF record will be *copied to the winning Account*

If a TSF record exists for both the winning and losing Accounts → The losing Account's TSF record will be *deleted; Will not be updated until next time a call is created*

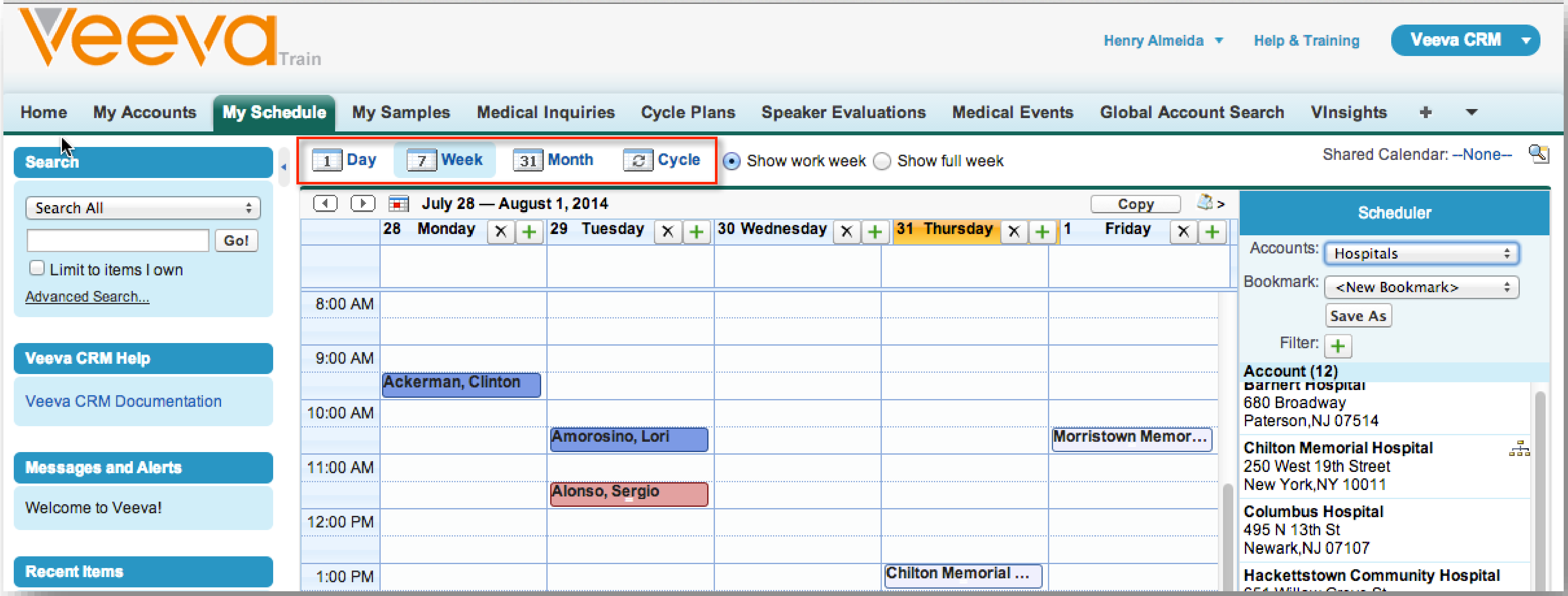
How to “Unmerge” Accounts

- **There is no Unmerge button!**
- **If two Accounts are merged through the UI with Veeva Merge with an incorrect winning account selected:**
  - Go to the Recycle Bin and "undelete" the Account deleted via the merge
  - Merge the two Accounts again – be sure to select the correct winning account
  - Check to make sure all related data looks correct in the winning account detail page
    - Pay attention to the addresses as they will all likely be set to “Inactive”

My Schedule

My Schedule

- **Contains 4 tabs**
  - Day, Week, Month, and Cycle

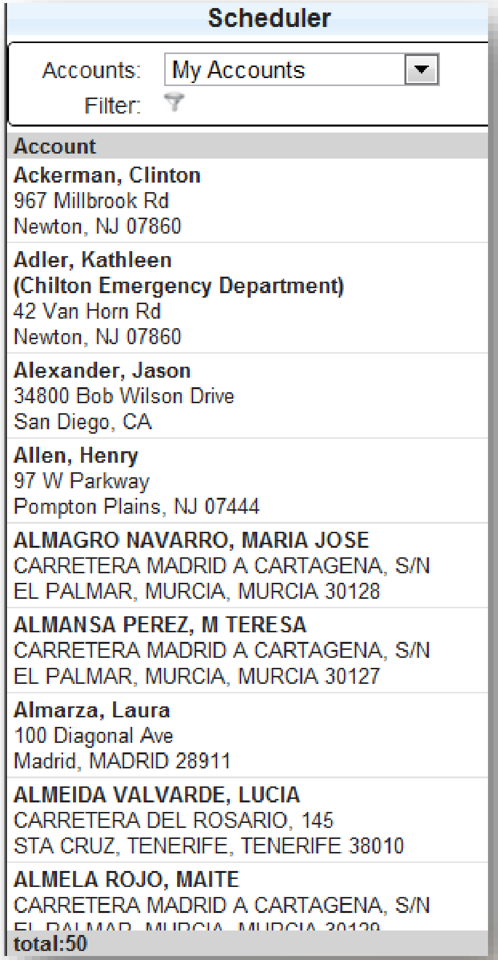


My Schedule

- **ENABLE_NEW_CALENDAR_ONLINE custom setting must be set to True to use the Veeva My Schedule online**
- **Enable New iPad Calendar custom setting must be set to True to use the Veeva My Schedule offline on CRM (iPad)**
- **Best Practice: Remove the standard SFDC Calendar from Home page layout and left sidebar**
  - Shortcut link to “Calendar” is not the same as My Schedule and is not used in the Veeva application

My Schedule – Enhanced Scheduler

- **Allows users to schedule calls against Accounts from various lists, while viewing their schedule**
- **Lists available for selection:**
    - My Accounts Views
    - Account Lists
    - User's active or future Cycle Plans
- **Drag and drop selected accounts onto the calendar to schedule a call for that account**



My Schedule – Configuration

Pre-Call Notes field visibility

- Use standard field-level security

Address records may be suppressed

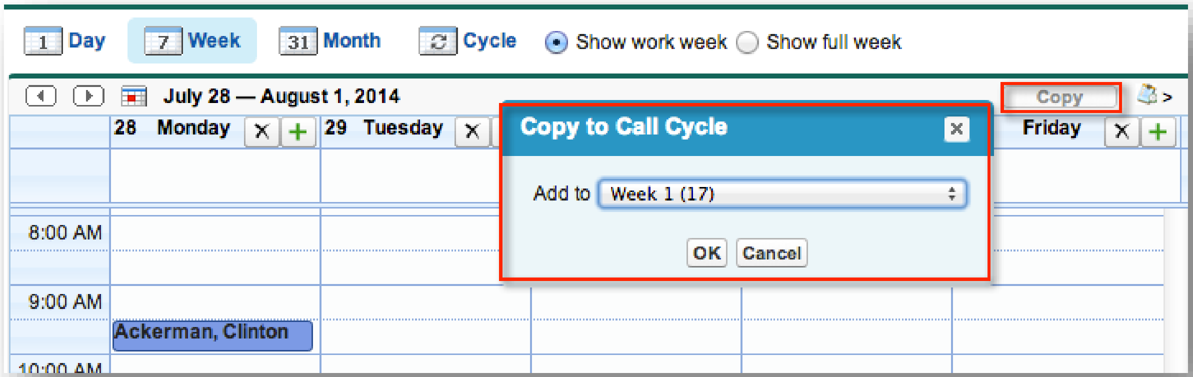
- Use the Inactive_vod field

Number of attendees displayed on the day and week views for group calls

- Set the Veeva Custom Setting Enable_Group_Call_Attendee_Display to True

My Schedule – Configuration

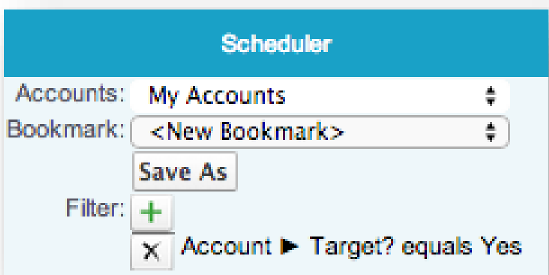
- **Users can create a Call Cycle by copying an entire week's schedule to a call cycle week**
- **To enable the Copy button:**
  - Set Enable_Copy_To_Call_Cycle_Button Custom Setting to True



- **If not being used the Cycle tab can be hidden by:**
  - Checking the Disable_Call_Cycle_View_vod field on the Preferences_vod object or
  - Removing access to the Call_Cycle_Entry_vod object

My Schedule – List Filters

- **To define the available filters, populate the SCHEDULER_FILTER_vod Custom Setting with a comma-delimited list of API Field Names:**



- Account, Address, or TSF objects
- [Object Code].[API Field Name]:

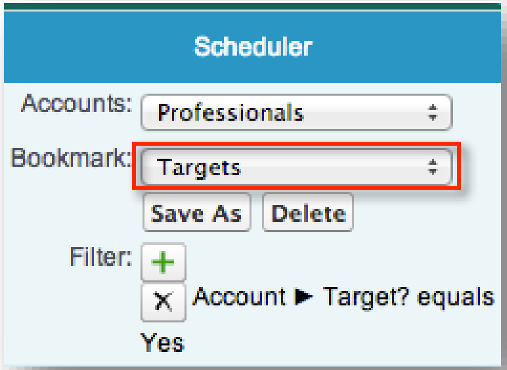
ACC = Account
ADD = Address
TSF = Territory Specific Field

For example:
ACC.Target__c
ADD.Zip_vod__c
TSF.Last_Activity_Date_vod__c

- From these objects, only these types of fields are supported:
  - Date, Checkbox, Picklist, and Text

My Schedule – Bookmarks

- **Users can bookmark previously used search criteria eliminating the need to re-create commonly used search filters**
- **Bookmarks can be created online only and viewed online and on offline**
- **To enable access to Bookmarks**
  - Give profiles CRUD permission to the Bookmark_vod object
  - Give profiles access to all Bookmark_vod record types
  - Activate Bookmark_vod__c VMOC record

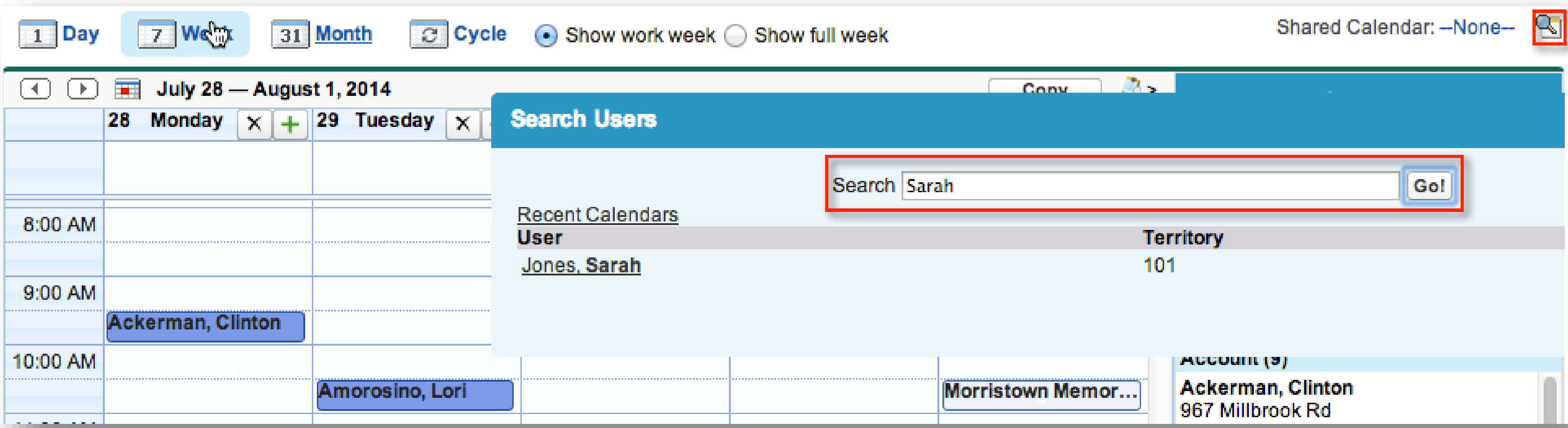


My Schedule – Monthly View

- My Schedule tab includes a monthly view
- Reps can view their schedule for a full month, create new calls, and drill into existing calls, events and Time Off Territory records
- This feature is on by default and does not require configuration
- Available on the online and offline platforms

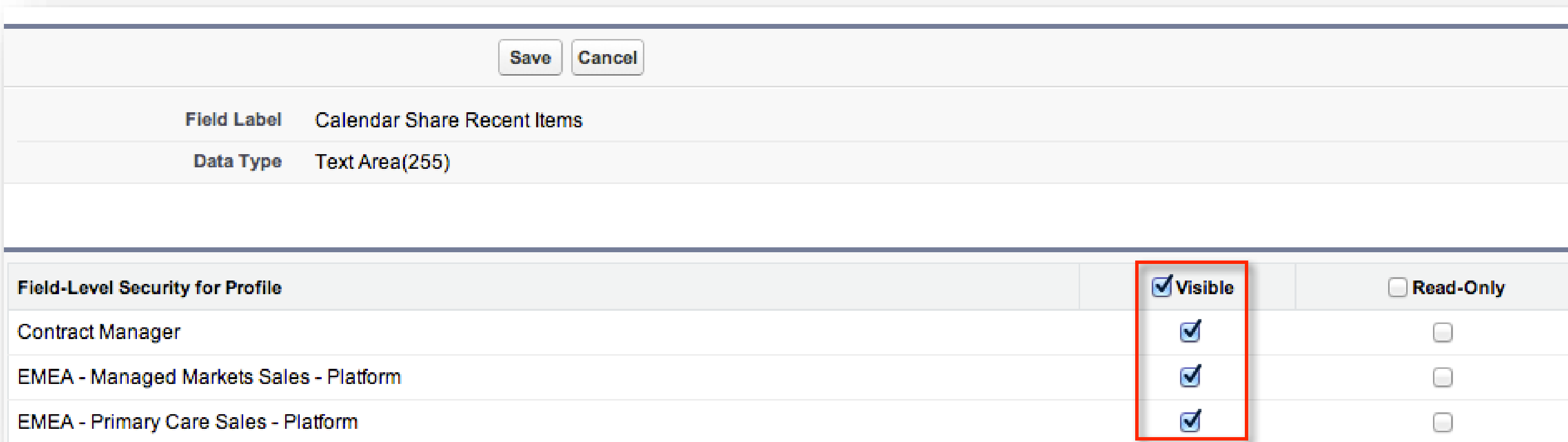
Calendar Sharing

- **Only available online, allow users to overlay a read-only view of another user's calendar on top of their own**
  - Helps users avoid call scheduling conflicts



Enable Calendar Sharing

- **To enable this feature go to**
  - Setup → Create → Objects → Preferences
  - Grant user profiles visibility to the Calendar_Share_Recent_Items_vod__c field
  - Visibility is controlled through roles or sharing rules for the Activity object



Multi-Channel Calendar

- **Provides a 360-degree view of all interactions with an account**
- **Month-at-a-time calendar**
- **Online and Tablet editions**
- **Various data types and unique**
- **Click the Calendar button on the detail page**

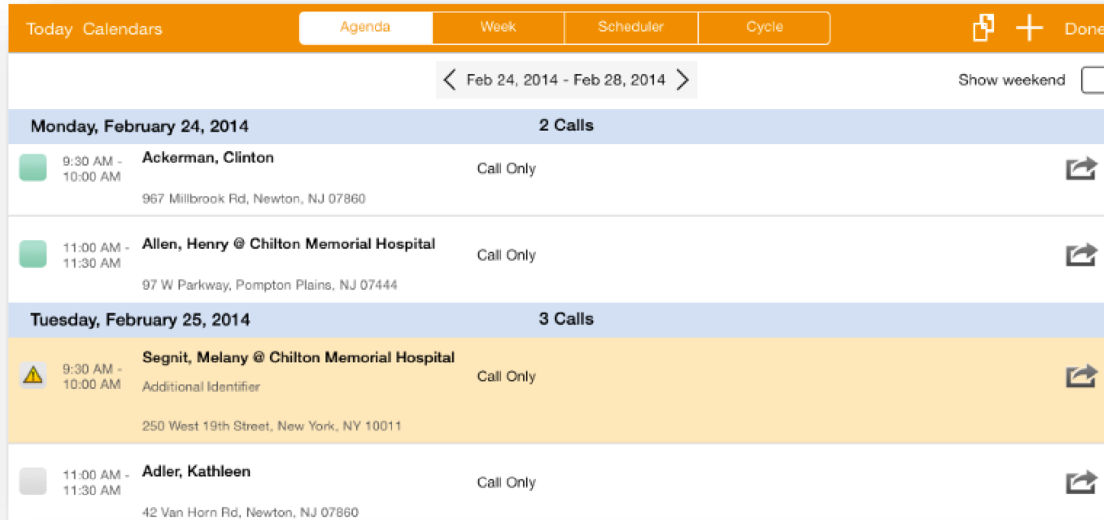
Multi-Channel Calendar

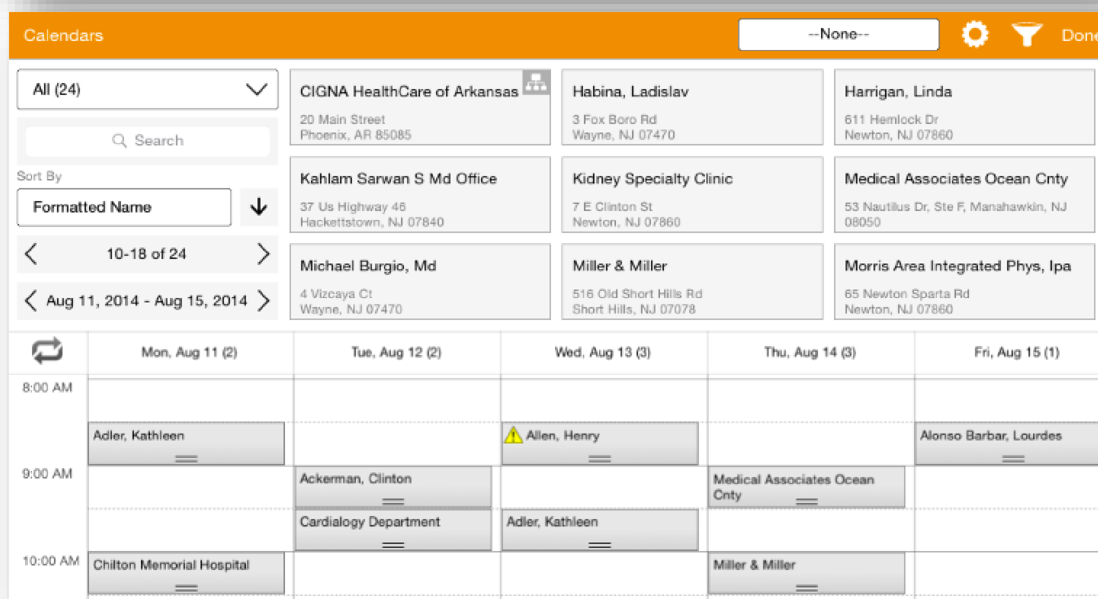
- **Display various activities:**
  - Calls
  - MIRFs
  - Medical Events
  - Events
- **Load records from external data sources into Salesforce.com Event object**
- **Use Record Types and color coding to quickly determine types of interactions when viewing Multi-Channel Calendar**
  - Record Type name is viewed when hovering over event in Calendar

My Schedule on CRM (iPad)

My Schedule

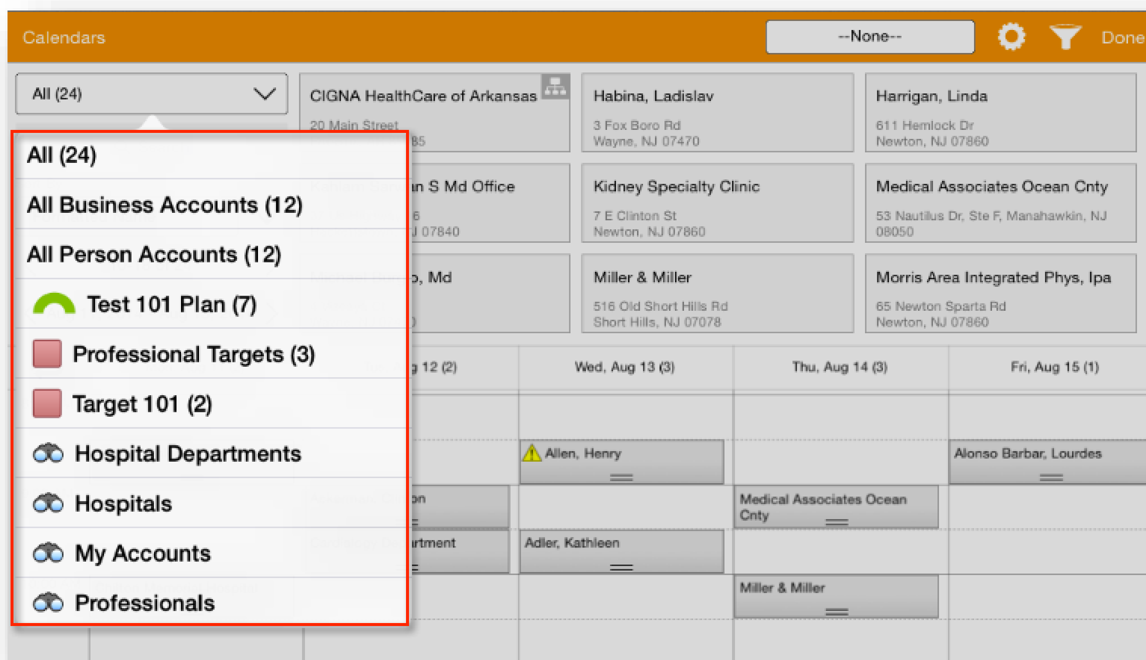
- **Displays daily or weekly schedule**
- **Users can create**
  - New Call, TOT
  - Calendar Events
- **Managers can view their employees' schedule**
  - Based on Role hierarchy





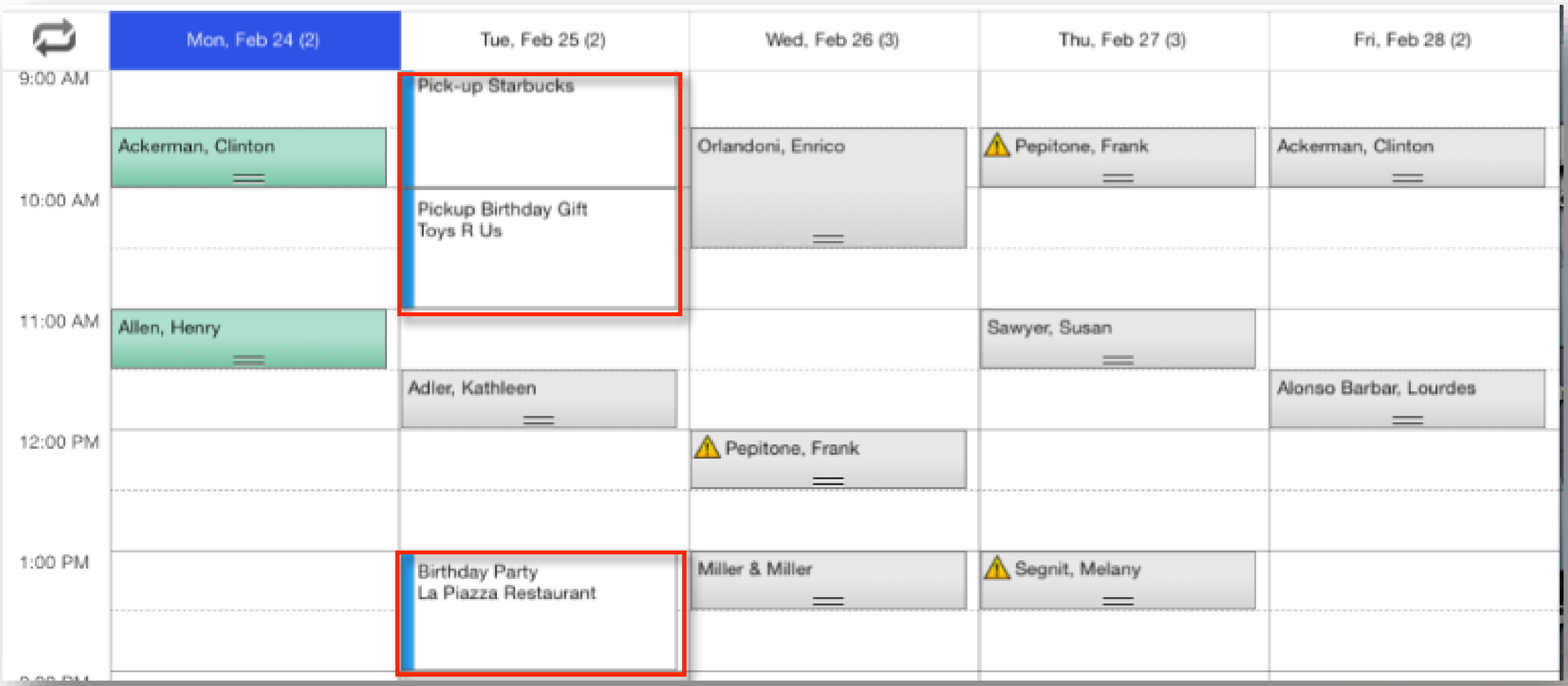
My Schedule – Week Scheduler

- Drag-and-drop Accounts in Views, Lists, and Cycle Plans to the weekly scheduler
- Makes it easy to find the Accounts to add to the schedule when planning calls
- Displays call counts in the day header



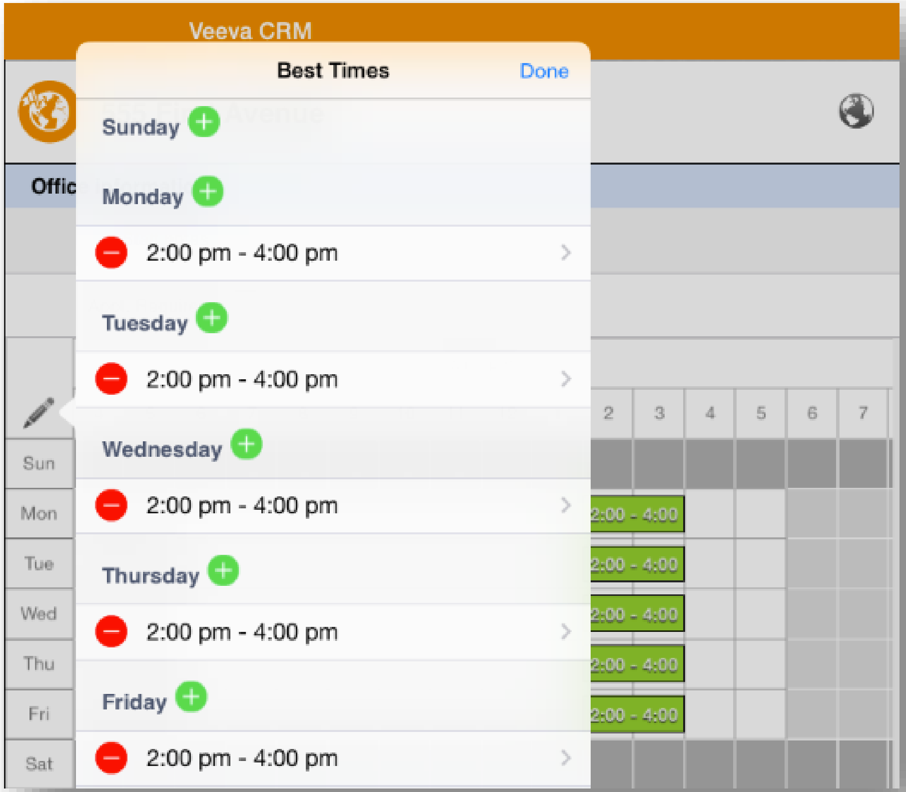
My Schedule – External Calendars

- **To avoid scheduling conflicts, users can view their personal or work iPad calendars in their offline CRM (iPad) calendar**
  - Set the ENABLE_EXTERNAL_CALENDARS custom setting to True



My Schedule – Office Best Times

- **Users can enter office best times offline on CRM (iPad)**
  - Navigate to the account and view an address to enter its office best times values



Module Summary

- **Described and configured many Veeva specific functionality including:**
    - Sphere of Influence
    - Account Hierarchy
    - Territory Specific Fields
    - Address
    - Veeva Account Merge
    - My Schedule
    - Multi Channel Calendar
    - My Schedule on CRM (iPad)

Labs

Please complete the following labs:

1.3 Merge Accounts

1.4 My Schedule