



Online Application UI Settings

Veeva Professional Services

Module Objectives

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



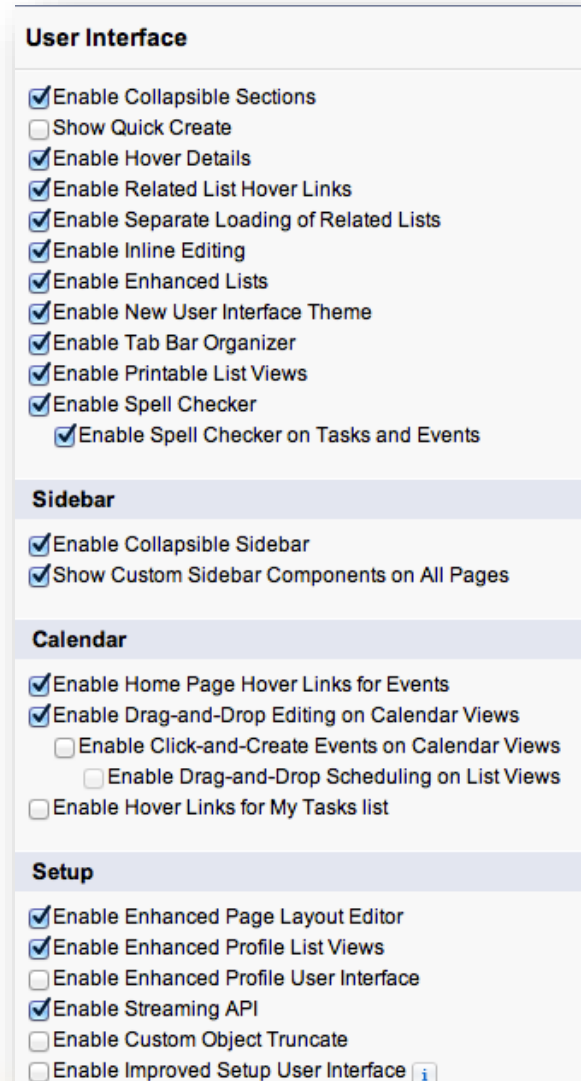
Online Application User Interface Settings



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)

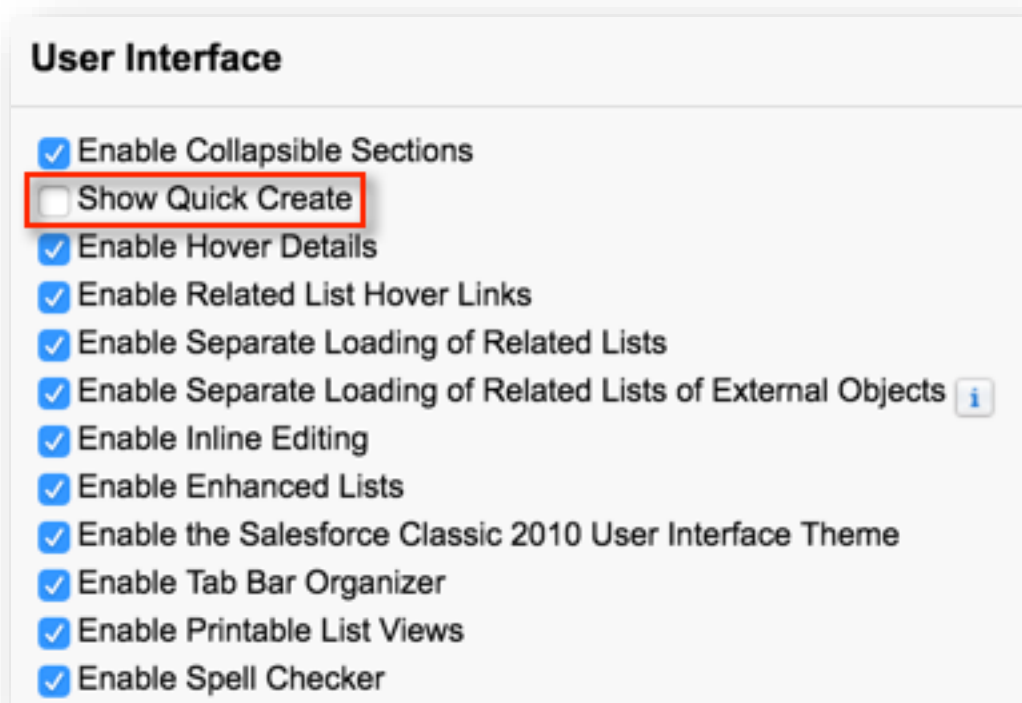


The screenshot shows the 'User Interface' settings page. It is organized into sections: 'User Interface', 'Sidebar', 'Calendar', and 'Setup'. Each section contains a list of features with checkboxes. In the 'User Interface' section, 'Show Quick Create' is disabled, while all other features are enabled. In the 'Sidebar' section, both features are enabled. In the 'Calendar' section, 'Enable Home Page Hover Links for Events' and 'Enable Drag-and-Drop Editing on Calendar Views' are enabled, while 'Enable Click-and-Create Events on Calendar Views', 'Enable Drag-and-Drop Scheduling on List Views', and 'Enable Hover Links for My Tasks list' are disabled. In the 'Setup' section, 'Enable Enhanced Page Layout Editor', 'Enable Enhanced Profile List Views', and 'Enable Streaming API' are enabled, while 'Enable Enhanced Profile User Interface', 'Enable Custom Object Truncate', and 'Enable Improved Setup User Interface' are disabled. An information icon is present next to the last option in the 'Setup' section.

Section	Feature	Status
User Interface	Enable Collapsible Sections	Enabled
	Show Quick Create	Disabled
	Enable Hover Details	Enabled
	Enable Related List Hover Links	Enabled
	Enable Separate Loading of Related Lists	Enabled
	Enable Inline Editing	Enabled
	Enable Enhanced Lists	Enabled
	Enable New User Interface Theme	Enabled
	Enable Tab Bar Organizer	Enabled
	Enable Printable List Views	Enabled
Sidebar	Enable Collapsible Sidebar	Enabled
	Show Custom Sidebar Components on All Pages	Enabled
Calendar	Enable Home Page Hover Links for Events	Enabled
	Enable Drag-and-Drop Editing on Calendar Views	Enabled
	Enable Click-and-Create Events on Calendar Views	Disabled
	Enable Drag-and-Drop Scheduling on List Views	Disabled
	Enable Hover Links for My Tasks list	Disabled
Setup	Enable Enhanced Page Layout Editor	Enabled
	Enable Enhanced Profile List Views	Enabled
	Enable Enhanced Profile User Interface	Disabled
	Enable Streaming API	Enabled
	Enable Custom Object Truncate	Disabled
	Enable Improved Setup User Interface	Disabled

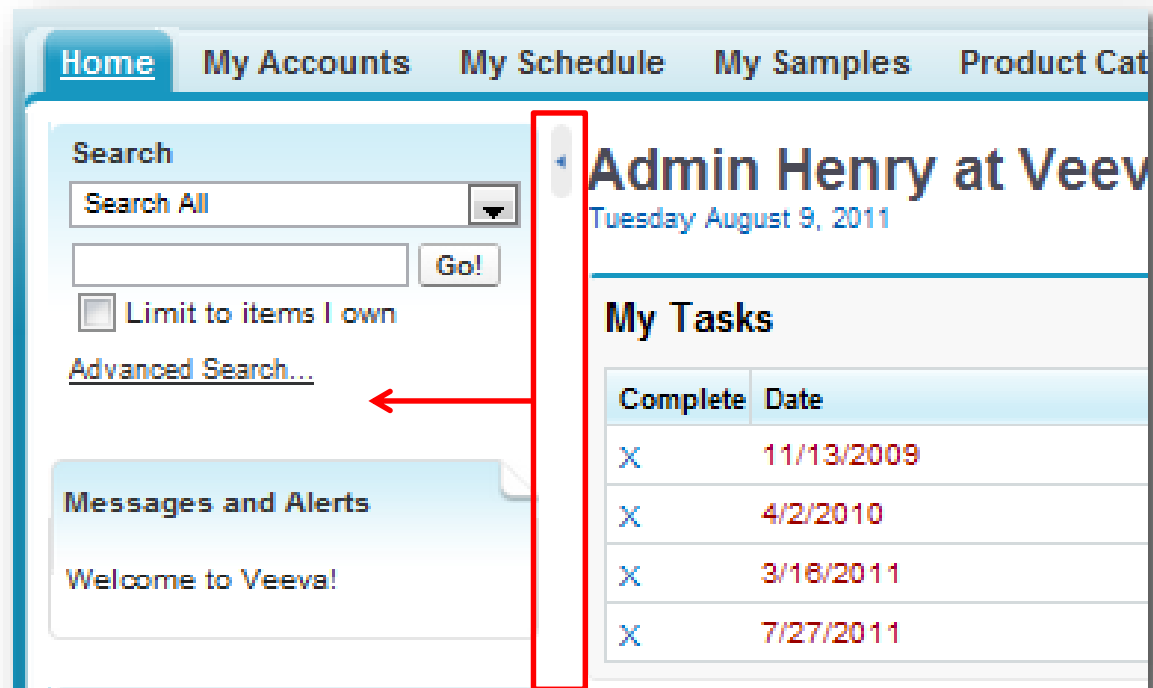
Show Quick Create

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



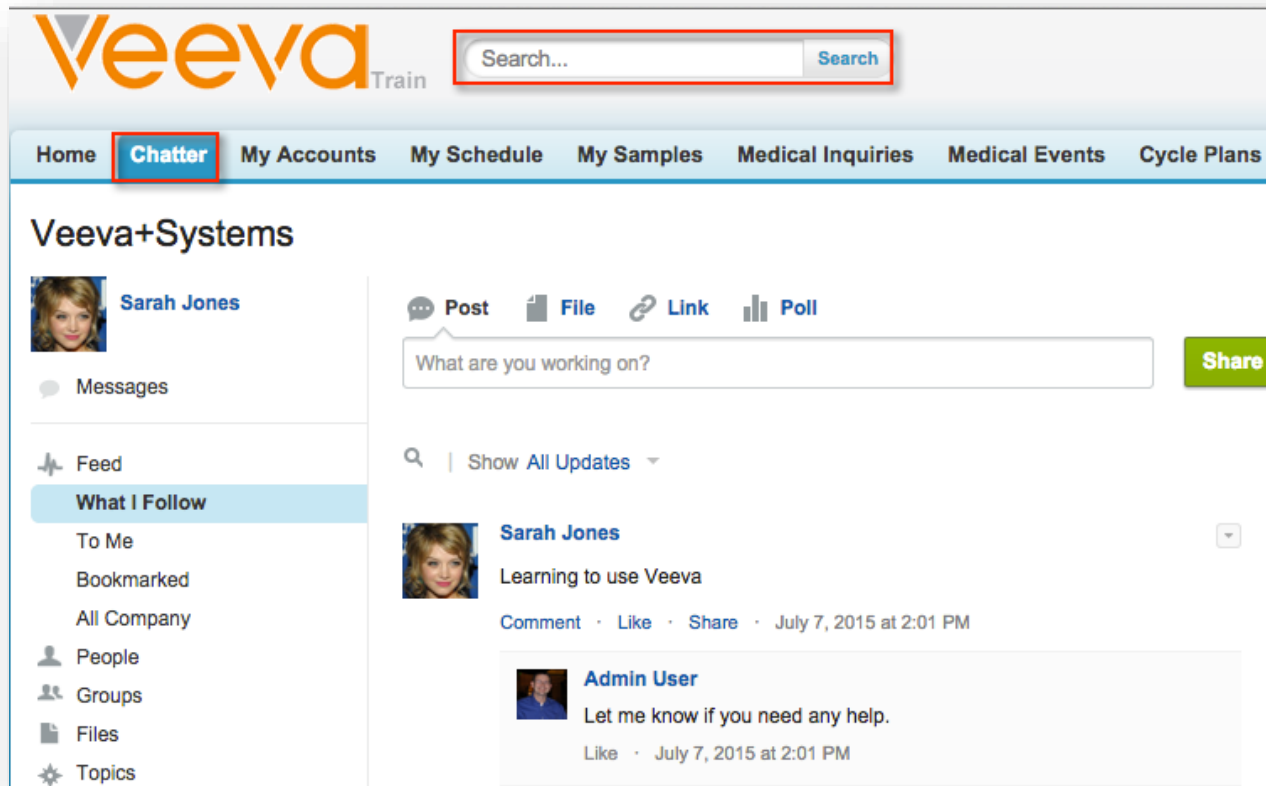
Enable Collapsible Sidebar

- 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

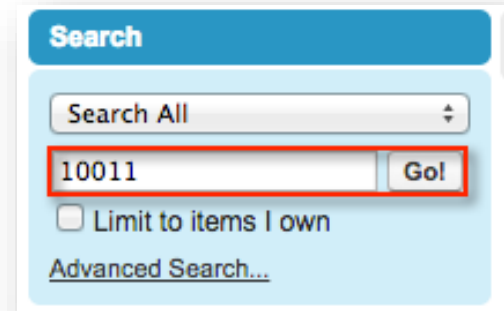
- **Refer to SFDC Help for more details on search:**

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

Business Account Fields			
Field Searched	Search Type		
	Sidebar	Advanced	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

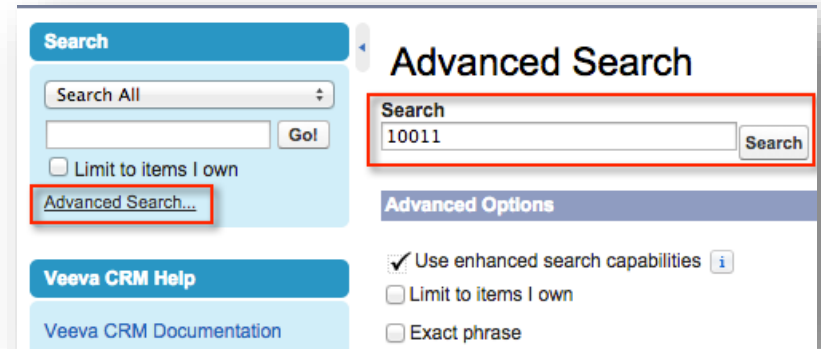
- **Searches a small set of fields including:**
 - Name, phone, email, and external ID
- **Searches conducted as phrase searches**
 - Searching for “Bob Jones” returns items with “Bob Jones” but not “Bobby Jones” or “Bob T Jones”
- **Use the * (asterisk) and ? (question mark) wildcard to refine results**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

A screenshot of a search sidebar. At the top is a blue header with the word "Search" in white. Below the header is a search input area. It features a dropdown menu labeled "Search All" with a downward arrow. Below the dropdown is a text input field containing the number "10011". To the right of the input field is a button labeled "Go!". Below the input field is a checkbox labeled "Limit to items I own". At the bottom of the sidebar is a link labeled "Advanced Search...".

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**

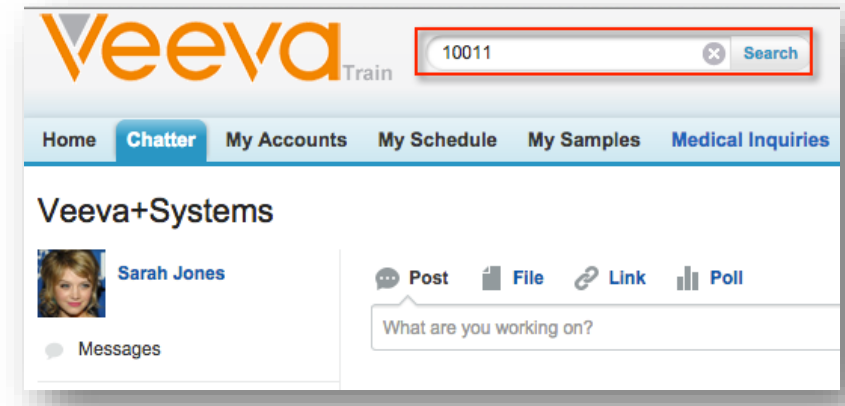


The screenshot displays the Veeva CRM Search interface. On the left, a sidebar contains a 'Search' button, a 'Search All' dropdown, a text input field, a 'Go!' button, a 'Limit to items I own' checkbox, and a link for 'Advanced Search...'. The main area is titled 'Advanced Search' and features a 'Search' input field with the text '10011' and a 'Search' button. Below this is an 'Advanced Options' section with a checked checkbox for 'Use enhanced search capabilities', and unchecked checkboxes for 'Limit to items I own' and 'Exact phrase'. At the bottom of the sidebar are links for 'Veeva CRM Help' and 'Veeva CRM Documentation'.

To enable
Advanced Search,
must also enable
Sidebar Search

Search – Global Search

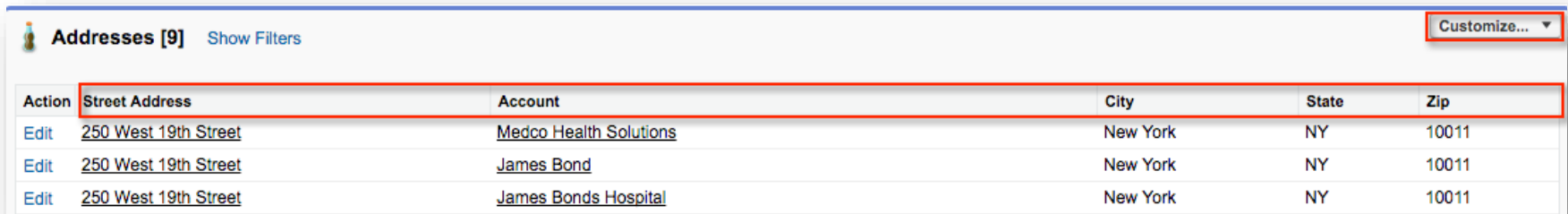
- Enabled when Chatter is enabled
- Similar to Advanced Search
- Can search in more objects and fields than the Advanced Search including
 - Chatter Feed and Chatter Group



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

Search Results Layouts

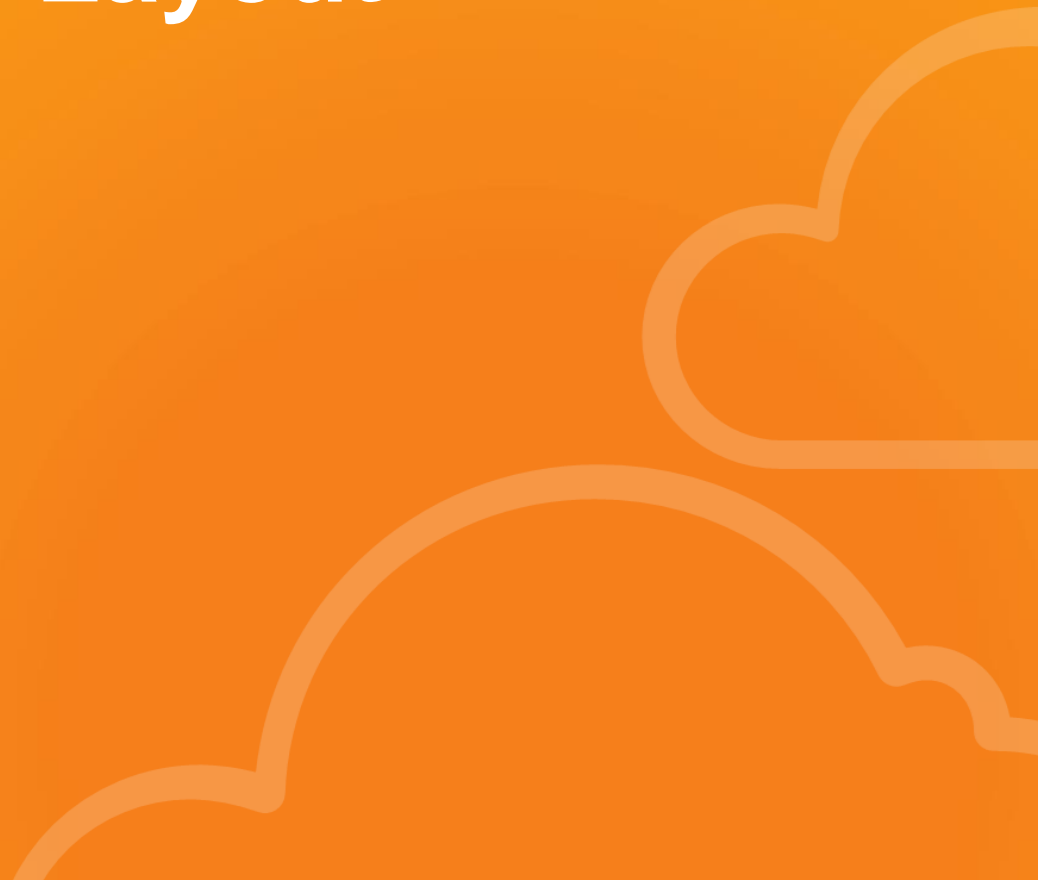
- Search results page layouts are configured per object
- To configure a search results page layout:
 - Setup → Create → Objects → [Object] → Search Layouts section
 - In the Search Results page layout, add fields to display



Addresses [9] [Show Filters](#) Customize...

Action	Street Address	Account	City	State	Zip
Edit	250 West 19th Street	Medco Health Solutions	New York	NY	10011
Edit	250 West 19th Street	James Bond	New York	NY	10011
Edit	250 West 19th Street	James Bonds Hospital	New York	NY	10011

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

Layout Name |

Select Wide Components to Show

Items to Approve	<input checked="" type="checkbox"/>	Calendar	<input type="checkbox"/>
Tasks	<input checked="" type="checkbox"/>	Dashboard Snapshot	<input checked="" type="checkbox"/>
Managed Markets Alerts	<input type="checkbox"/>	MSL Alerts	<input type="checkbox"/>
Specialist Alerts	<input type="checkbox"/>		

Select Narrow Components to Show

Sidebar Search	<input checked="" type="checkbox"/>	Create New...	<input type="checkbox"/>
Document Search	<input type="checkbox"/>	Recent Items	<input checked="" type="checkbox"/>
Solution Search	<input type="checkbox"/>	Messages & Alerts	<input checked="" type="checkbox"/>
Product Search	<input type="checkbox"/>	Custom Links	<input type="checkbox"/>
Veeva CRM Help	<input checked="" type="checkbox"/>	VMobile Install	<input checked="" type="checkbox"/>
IRep	<input checked="" type="checkbox"/>	Veeva CRM on Windows 8	<input checked="" type="checkbox"/>
Admin Links	<input type="checkbox"/>		

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

Step 2. Order the components

Arrange the components on your home page.

Narrow (Left) Column		Wide (Right) Column	
Sidebar Search	Top	Tasks	Top
Messages & Alerts	Up	Items to Approve	Up
Recent Items		Dashboard Snapshot	
VMobile Install	Down		Down
iRep	Bottom		Bottom

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

Profile	
Contract Manager	Dashboard Home Page Default
EMEA - Managed Markets Sales - Platform	Managed Markets Sales Home Page Layout
EMEA - Primary Care Sales - Platform	Specialty Sales Home Page Layout
EMEA System Administrator	Dashboard Home Page Default
Managed Markets Director	Managed Markets Director Home Page Layout
Managed Markets Director - Platform	Managed Markets Director Home Page Layout
Managed Markets Sales	Managed Markets Sales Home Page Layout
Managed Markets Sales - Platform	Managed Markets Sales Home Page Layout

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

Layout Name | **Dashboard Home Page**

Select Wide Components to Show

Items to Approve	<input checked="" type="checkbox"/>	Calendar <input type="checkbox"/>	
Tasks	<input checked="" type="checkbox"/>		
Managed Markets Alerts	<input type="checkbox"/>		
Specialist Alerts	<input type="checkbox"/>		
		Dashboard Snapshot	<input checked="" type="checkbox"/>
		MSL Alerts	<input type="checkbox"/>

Select Narrow Components to Show

Sidebar Search	<input checked="" type="checkbox"/>	Create New...	<input type="checkbox"/>
Document Search	<input type="checkbox"/>	Recent Items	<input checked="" type="checkbox"/>

Do not enable SFDC calendar unless users are using Blackberry Events

Veeva CRM Online Help

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

The image displays two screenshots from the Veeva CRM system. The left screenshot shows a 'Select Narrow Components to Show' dialog box with a list of components and their selection status:

Component	Selected
Sidebar Search	<input checked="" type="checkbox"/>
Document Search	<input type="checkbox"/>
Solution Search	<input type="checkbox"/>
Product Search	<input type="checkbox"/>
Veeva CRM Help	<input checked="" type="checkbox"/>
iRep	<input checked="" type="checkbox"/>
Admin Links	<input type="checkbox"/>

The right screenshot shows the Veeva CRM Online Help home page. The page features a search bar at the top, a 'Veeva CRM Help' link in the sidebar, and a main content area with a search bar and two large circular icons: 'What's New' (megaphone icon) and 'Getting Started' (power icon). Below these icons are two columns of links: 'General' and 'Accounts'.

General

- Platform Functionality
- Components
- Managing Cache
- SFDC My Domain
- SFDC Lightning
- Security in Veeva CRM

Accounts

- Overview
- Accounts Platforms
- Components
- Configuration
- Account Planning/Execution

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

Custom App Edit Save Save & New Cancel


App Label

App Name i

Description

Choose the Image Source for the Custom App Logo

Insert an Image Reset to Default



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

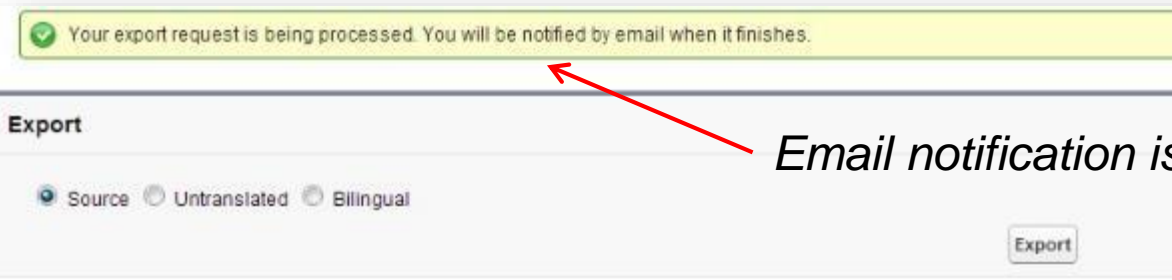
- Click **Save**



Export Component Labels

- Three types of files can be exported:

Source	Untranslated	Bilingual
<ul style="list-style-type: none">Creates a .stf file with all the translatable labelsContent will be in the org's default languageUsed for first translation	<ul style="list-style-type: none">Creates .zip folder with several .stf filesFilters labels and only exports untranslated labels	<ul style="list-style-type: none">Creates .zip with several .stf filesAll 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)



- **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 characters		
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	

Language Workbench Import

Importing is designed to accept the files produced from our import/export process please see the Help and Quick Tips links on this page.

✓ Your import request is being processed. You will be notified by email when it finishes.

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*