



# Veeva Configuration Utilities

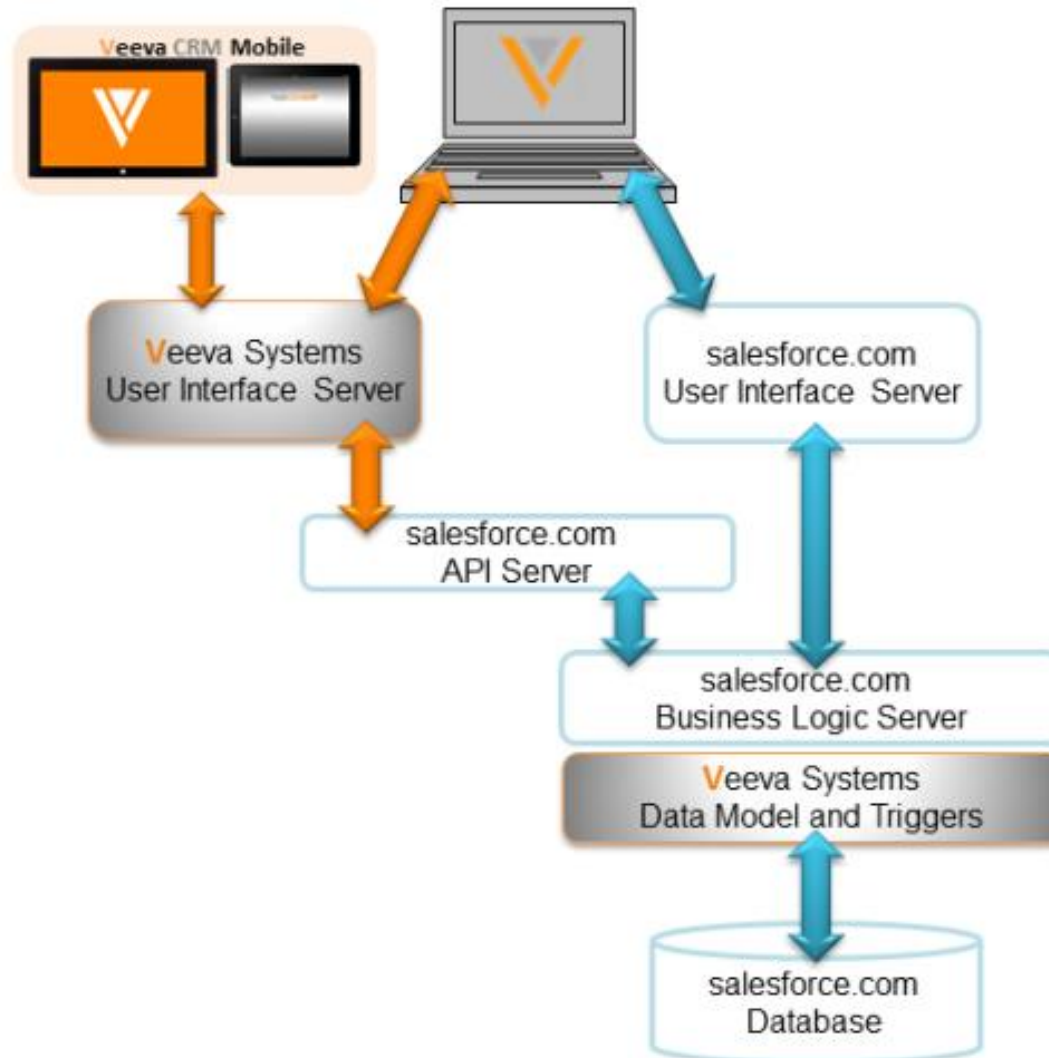
Veeva Professional Services

# Module Objectives

- **Discuss the Veeva CRM Architecture**
- **Introduce Veeva Configuration Utilities:**
  - Custom Settings
  - Veeva Messages
  - Clear VOD Cache
  - Review configuration best practices



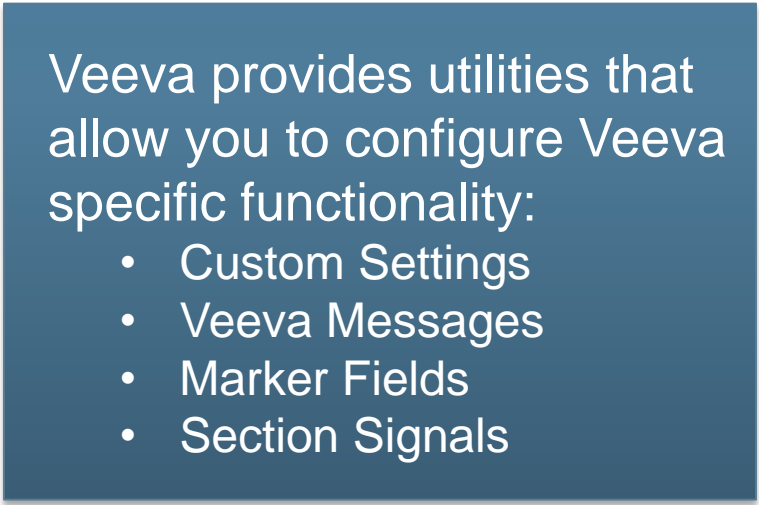
# The Veeva CRM Architecture



# Veeva Configuration Utilities

- **Some parts of the Veeva application cannot be configured 100% via Salesforce.com configuration tools**

- Calls
- Cycle Plans
- Medical Inquiries
- My Accounts
- My Setup
- My Samples
- My Schedule



Veeva provides utilities that allow you to configure Veeva specific functionality:

- Custom Settings
- Veeva Messages
- Marker Fields
- Section Signals

- The “My” tabs are Veeva customized user interface components created with s-controls which point to Veeva servers where the code actually lives

# Custom Settings



# Custom Settings

- **Use native Salesforce.com configuration tools for most of the Veeva CRM application configuration**
  - Examples: Objects, fields, validation rules, workflows
- **Use Custom Settings to control the behavior of Veeva specific functionality**
  - Example: Turning the Veeva Account Wizard on or off
- **Custom settings can be applied to the entire org, to specific profiles, and even to specific users**
  - Provides a flexible model to support for global implementations



# Custom Settings – My Accounts

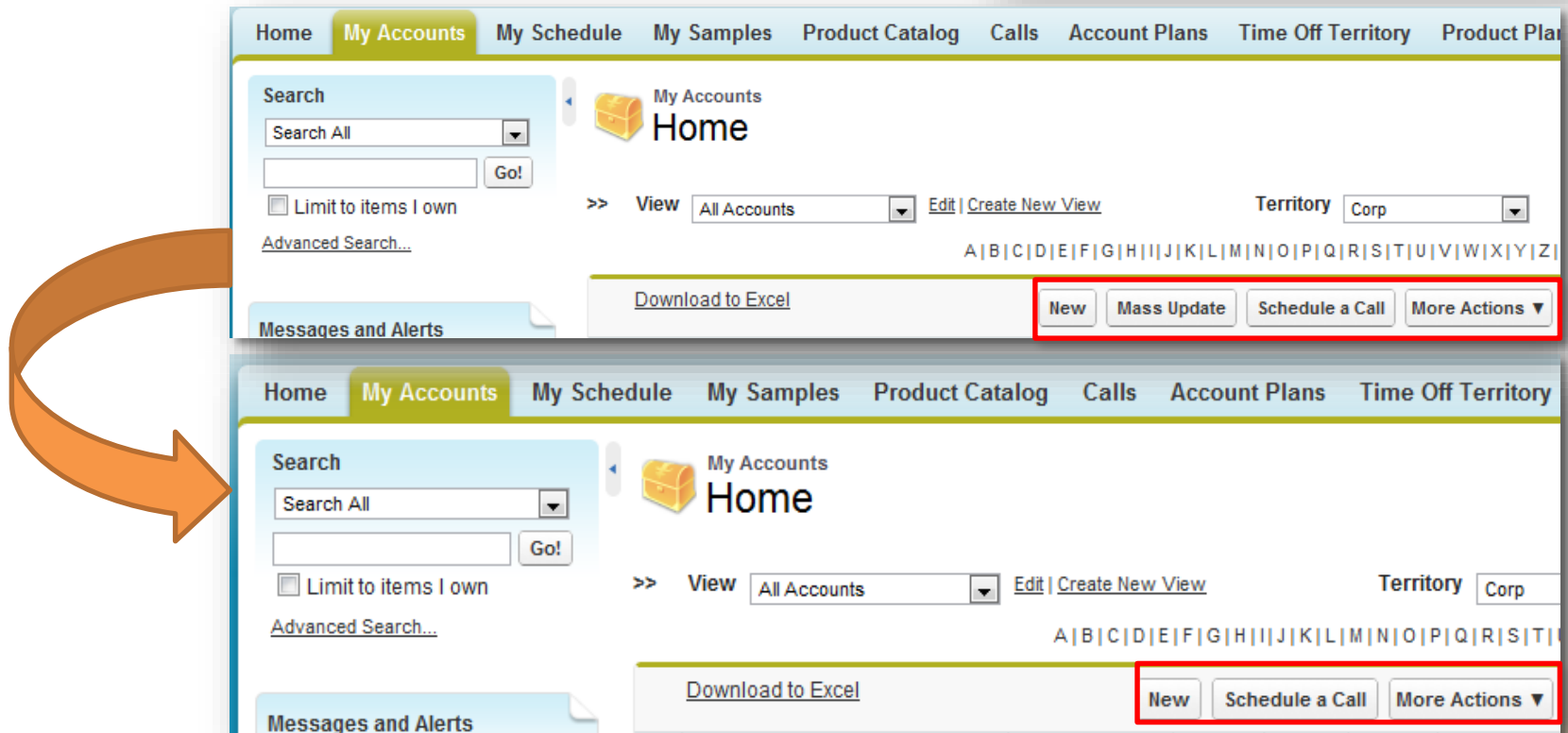
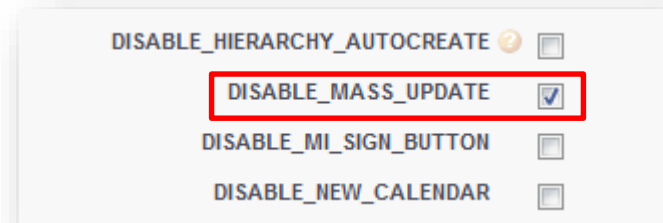
- **The My Accounts tab is one of the custom Veeva tabs**
  - Renders in a Veeva User Interface Server
  - Allows users to create new accounts using the Veeva New Account Wizard
  - Can display data from 4 Veeva objects side-by-side in custom views
    - Accounts, Address, Product Metrics, Territory Fields
- **Use Custom Settings to configure My Accounts functionality**



# Custom Settings Example

- To remove the Mass Update button

- Setup → Develop → Custom Settings → Veeva Settings → Manage → Disable Mass Update





# Custom Settings

- To view and modify Veeva custom settings:

- Setup → Develop → Custom Settings → Veeva Settings: Manage

<b>App Setup</b>  ▶ <b>Customize</b> ▶ <b>Create</b> ▼ <b>Develop</b> Apex Classes Apex Triggers	Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description
	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	<a href="#">Concur Settings</a>	Protected	Hierarchy		Concur Expense System int
	<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Manage</a>	<a href="#">Veeva Common</a>	Public	List		Please do not change any v so may cause the org not to use only.
	<a href="#">Edit</a>   <a href="#">Del</a>   <b>Manage</b>	<a href="#">Veeva Settings</a>	Public	Hierarchy		

- Click Edit to make organization level changes

▶ Import

▶ Desktop Integration

App Setup

▶ Customize

▶ Create

▼ Develop

Apex Classes

Apex Triggers

Apex Test Execution New!

EditDelete

▼ Default Organization Level Value

Location	Veeva
Disable Affiliation Autocreate	<input checked="" type="checkbox"/>
Last Address Run	4/13/2011 11:00 AM
ACCOUNT_MOBILE_SOQL	ACCOUNT_MOBILE_SOQL;;Blackberry
AFFILIATION_VOD__C_MOBILE_SOQL	AFFILIATION_VOD__C_MOBILE_SOQL;;Blackberry
ANALYTIC_ACCOUNT_CAP	50,000
ATTEMPT_REFRESH_REMINDER_DELAY	60

# Clear Veeva Cache

- **Custom Settings are stored in the Salesforce.com database but also cached in the Veeva UI Servers**
  - Helps to increase application performance
  - Cache will rebuild depending on the value for CACHE\_TIMEOUT Veeva Setting
    - The default value is 16 hours, though the setting is stored in minutes
  - You also can force the Cache to clear after modifying Custom Settings
- **To clear Veeva Cache:**
  - + All Tabs → Clear VOD Cache tab
  - Can add this to default tabs (Customize Tabs)
  - Do not clear Cache in production during business hours



# Custom Settings Example

- To remove the Mass Update button for most users but leave it on for others
  - Define profile specific custom settings
  - Disable Mass Update custom setting for users of specific profiles
  - Setup → Develop → Custom Settings → Veeva Settings → Manage → Scroll to the bottom of the page and click New to add profile specific Veeva custom settings

**Edit Veeva Settings** [Save] [Cancel]

**Veeva Settings Information**

Location: Profile ▼ VExample Primary Care S

Enable Samples On Save ☐

Disable Affiliation Autocreate ☒

DISABLE\_HIERARCHY\_AUTOCREATE ☐

**DISABLE\_MASS\_UPDATE** ☒

DISABLE\_MI\_SIGN\_BUTTON ☐

DISABLE\_NEW\_CALENDAR ☐

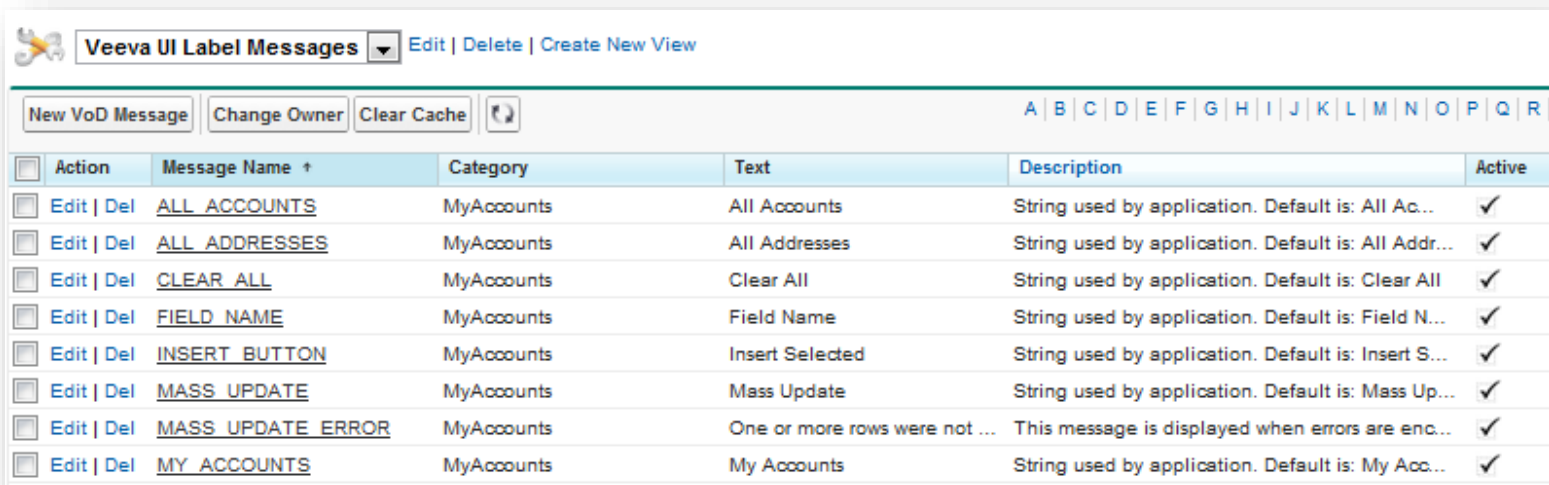
Users of this profile will not see the Mass Update button

# Veeva Messages



# Veeva Message

- Veeva object that contains data driven configuration records used to control Veeva specific user interface strings and error messages
  - Examples: Labels of buttons in one of the “My” tabs or a Veeva menu in the iPad
  - Available in multiple languages
- + All Tabs → VoD Message tab



The screenshot shows the 'Veeva UI Label Messages' interface. At the top, there is a dropdown menu set to 'Veeva UI Label Messages' and links for 'Edit', 'Delete', and 'Create New View'. Below this is a toolbar with buttons for 'New VoD Message', 'Change Owner', 'Clear Cache', and a refresh icon. To the right of the toolbar is an alphabetical index from A to R. The main part of the interface is a table with the following columns: Action, Message Name, Category, Text, Description, and Active. The table contains eight rows of messages, all of which are active.

Action	Message Name	Category	Text	Description	Active
<input type="checkbox"/> Edit   Del	<u>ALL ACCOUNTS</u>	MyAccounts	All Accounts	String used by application. Default is: All Ac...	✓
<input type="checkbox"/> Edit   Del	<u>ALL ADDRESSES</u>	MyAccounts	All Addresses	String used by application. Default is: All Addr...	✓
<input type="checkbox"/> Edit   Del	<u>CLEAR ALL</u>	MyAccounts	Clear All	String used by application. Default is: Clear All	✓
<input type="checkbox"/> Edit   Del	<u>FIELD NAME</u>	MyAccounts	Field Name	String used by application. Default is: Field N...	✓
<input type="checkbox"/> Edit   Del	<u>INSERT BUTTON</u>	MyAccounts	Insert Selected	String used by application. Default is: Insert S...	✓
<input type="checkbox"/> Edit   Del	<u>MASS UPDATE</u>	MyAccounts	Mass Update	String used by application. Default is: Mass Up...	✓
<input type="checkbox"/> Edit   Del	<u>MASS UPDATE ERROR</u>	MyAccounts	One or more rows were not ...	This message is displayed when errors are enc...	✓
<input type="checkbox"/> Edit   Del	<u>MY ACCOUNTS</u>	MyAccounts	My Accounts	String used by application. Default is: My Acc...	✓

# Veeva Messages Best Practice

- **To create a custom Veeva Message you MUST:**

- Deactivate original Veeva Message
- Clone original Veeva Message
- Activate the new custom Veeva Message
- Enter text in custom Veeva Message to alter application
- Enter an External ID for custom Veeva Message
- Save custom Veeva Message
- Clear Veeva Cache



If you do not **CLONE** the original Veeva Message, it will be overwritten during the next application upgrade!

# Veeva Message Example

- To change the label for the Mass Update button to Mass Change on the My Accounts tab:
  - Sidebar → Advanced Search: search for Mass Update
  - Click Edit on the Mass Update Veeva Message

## Advanced Search Results

Search   ☐ Limit to items I own

Scope: All objects | [Advanced Search](#)

[VoD Message](#) [6]

 **VoD Message [6]** [Show Filters](#)

Action	Message Name	Active	Category	Language	Text
<a href="#">Edit</a>	<a href="#">DISABLE_MASS_UPDATE</a>	<input checked="" type="checkbox"/>	MyAccounts	en_US	false
<a href="#">Edit</a>	<a href="#">MASS_UPDATE</a>	<input type="checkbox"/>	MyAccounts	en_US	Mass Update

# Veeva Message Example

Original Mass Update  
label Veeva Message

2. Clone the Veeva Message

**VoD Message Detail** [Edit](#) [Delete](#) [Clone](#)

**Verticals onDemand Information - Do Not Change**

Message Name	MASS_UPDATE	Category	MyAccounts
Description	String used by application. Default is: Mass Update	External ID	MyAccounts-MASS_UPDATE- en_US

**Customer Editable Information**

Active	<input type="checkbox"/>		
Language	en_US		
Text	Mass Update		
Created By	<a href="#">Admin Henry</a> , 7/27/2011 3:33 AM	Last Modified By	<a href="#">Admin Henry</a> , 8/11/2011 7:58 AM
Owner	<a href="#">Admin Henry</a> <a href="#">[Change]</a>		

[Edit](#) [Delete](#) [Clone](#)

1. Deactivate the original  
Veeva Message





# Veeva Message Example

Cloned custom Mass Update  
label Veeva Message

3. Activate the cloned message
4. Enter new text: Mass Change
5. Enter a new External ID
6. Save Veeva Message

## VoD Message Detail

[Edit](#)[Delete](#)[Clone](#)

### ▼ Verticals onDemand Information - Do Not Change

Message Name **MASS\_UPDATE**

Category **MyAccounts**

Description String used by application.  
Default is: Mass Update

External ID **TRAIN\_CUSTOM\_ID**

### ▼ Customer Editable Information

Active ☒

Language **en\_US**

Text **Mass Change**

Created By Admin Henry, 8/11/2011 7:59 AM

Last Modified By Admin Henry, 8/11/2011 8:11 AM

Owner Admin Henry [Change]

[Edit](#)[Delete](#)[Clone](#)

Do not change the  
Message Name as it  
referenced by the code



# Custom Settings vs. Veeva Messages

## Custom Settings

- Disable or enable functionality
- For example, removing or adding a button in one of the “My” tabs

## Veeva Messages

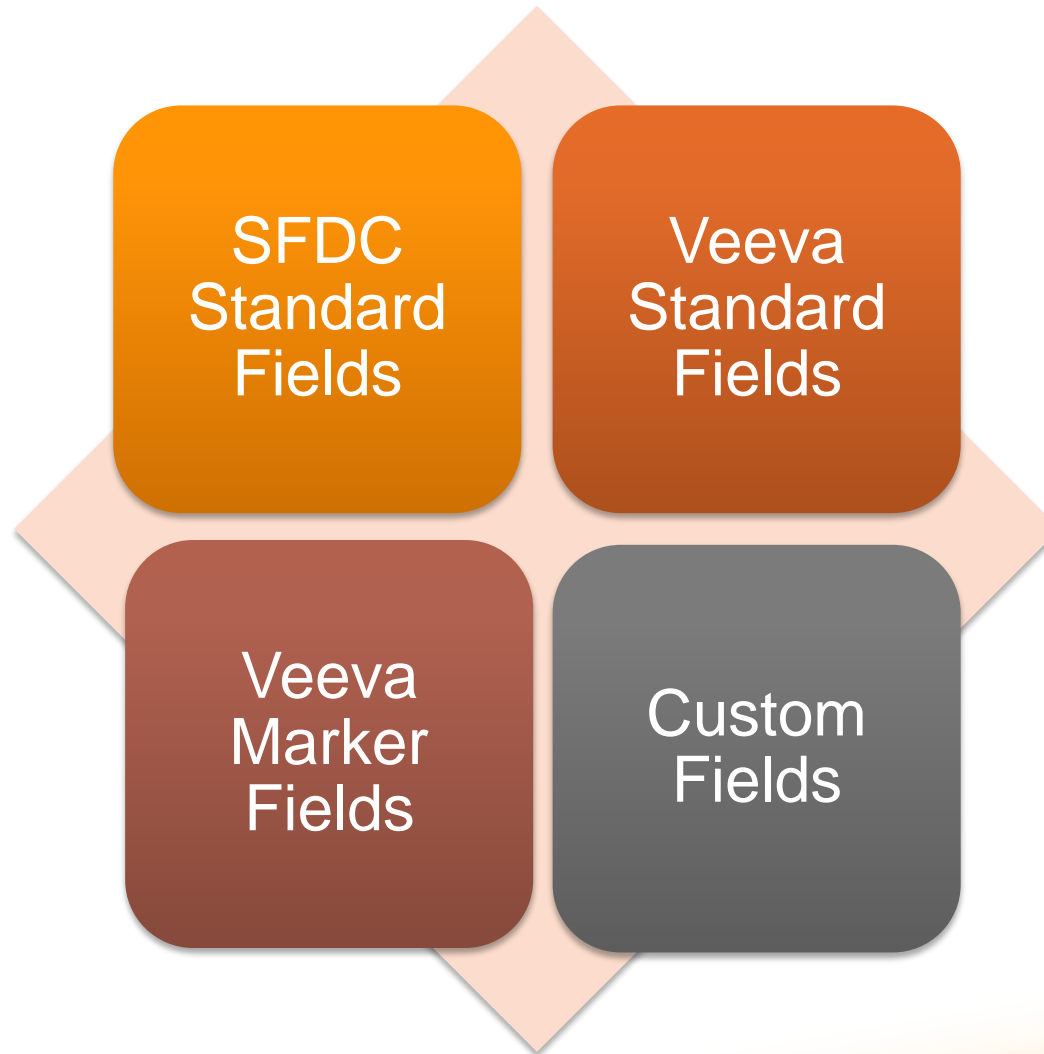
- Change UI strings
- For example, changing labels for menus in the iPad

**DONT FORGET TO CLEAR VOD CACHE!**

# Configuration Best Practices



# Four Kinds of Fields



# SFDC Standard Fields

- **SFDC standard fields are automatically created when creating a custom object**
  - Created By
  - Last Modified By
  - Record Type
  - Record Name / Number
  - Owner

## Standard Fields

Action	Field Label	Field Name	Data Type
	<u>Created By</u>	CreatedBy	Lookup(User)
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)
<a href="#">Edit</a>	<u>Record Type</u>	RecordType	Record Type
<a href="#">Edit</a>	<u>Street Address</u>	Name	Text(80)



# Veeva Standard Fields

- Veeva Standard Fields are denoted with the suffix “\_vod”
- Program logic relies on their field name: **DO NOT CHANGE!**

Custom Field Definition Detail		Edit	Set Field-Level Security	View Field Accessibility
<b>Field Information</b>				
Field Label	Account	Object Name	Call	
Field Name	Account_vod	Data Type	Lookup	
API Name	Account_vod__c			
Description	Lookup to the account that the call is associated with.			
Help Text				
Created By	demo_user9, 7/27/2011 3:33 AM		Modified By	Admin Henry, 7/27/2011 3:33 AM

Don't...

Delete Veeva Standard Fields or future upgrades may be compromised

Edit the name or data type

Instead, you can...

Remove from a page layout

Change field label



Hiding a field using FLS may cause an error if the field is referenced in code!



# Custom Fields

- Custom fields can be created to address business needs
- Use your company's initials as a prefix to differentiate between Veeva custom fields and your custom fields
  - Example: VS\_Medical\_Inquiry\_\_ID (where VS is your company's initials)
- Do not name fields with “\_vod” – unless explicit instructed

Standard Fields			
Action	Field Label	Field Name	Data Type
	<u>Created By</u>	CreatedBy	Lookup(User)
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)
<a href="#">Edit</a>	<u>Owner</u>	Owner	Lookup(User,Queue)
<a href="#">Edit</a>	<u>Training Number</u>	Name	Auto Number

Custom Fields & Relationships			
<a href="#">New</a> <a href="#">Field Dependencies</a> <a href="#">Set History Tracking</a>			
Action	Field Label	API Name	Data Type
<a href="#">Edit</a>   <a href="#">Del</a>	<u>Medical Inquiry ID</u>	VS_Medical_Inquiry_ID__c	Text(50) (External ID) (Unique Case Insensitive)



# Veeva Marker Fields

- Special fields mainly used on Call page layouts
  - Stores no data, only adds functionality to page layouts
- Denoted with prefix “zvod\_” and suffix “vod”

**Custom Field Definition Detail**

[Edit](#)[Set Field-Level Security](#)[View Field Accessibility](#)

**Field Information**

Field Label	zvod_Key_Messages	Object Name	<a href="#">Call</a>
Field Name	zvod_Key_Messages_vod	Data Type	Checkbox
API Name	zvod_Key_Messages_vod__c		
Description	Marker field used to place Key Messages section on layout.		
Help Text			
Created By	<a href="#">demo user7</a> , 2/27/2012 1:33 PM		Modified By <a href="#">Admin Student1</a> , 2/27/2012 1:33 PM

Don't...

Delete Veeva Marker Fields

Edit the name or data type

Instead, you can...

Add or remove them from a page layout





# Configuration Best Practices

Never delete or modify (other than the label) anything with “\_vod” in the name

Never use the “\_vod” when creating or modifying customer specific objects

It is recommended to *not* rename Veeva Tabs

Clear the Veeva Cache after all configurations



# Module Summary

- **Discussed the Veeva CRM Architecture**
- **Introduced Veeva Configuration Utilities:**
  - Custom Settings
  - Veeva Messages
  - Clear VOD Cache
  - Reviewed configuration best practices



# Labs

Modify a Custom Setting

Create a Veeva Message

