Sample Management

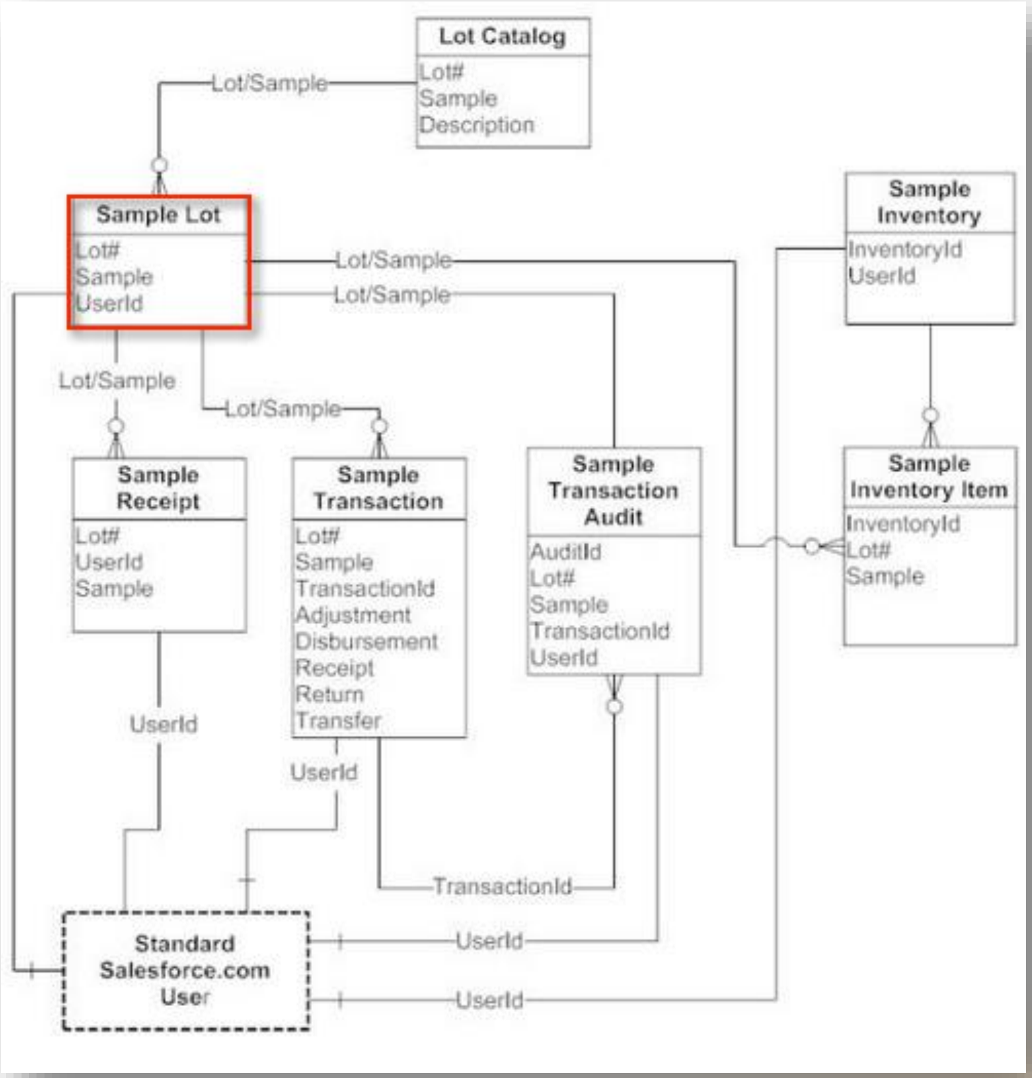
Veeva Professional Services

Module Objectives

- **In this module we will discuss**
  - Sample Management Data Model
  - Creating Sample Lots
  - Performing Sample Transactions
  - Sample Limits Overview

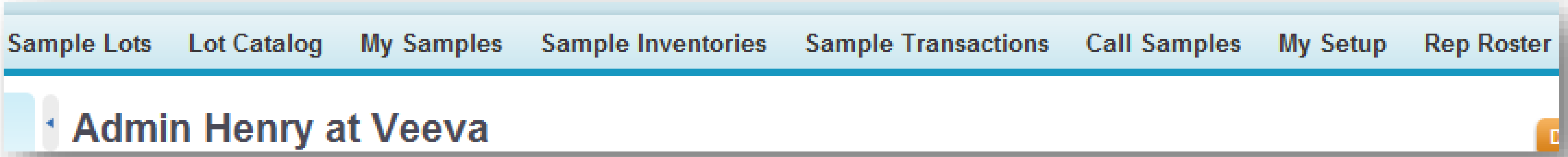
Samples Management ERD

- **Key object: Sample Lot**
- **Demo, Train & Test in Sandboxes, never in Production environments**



Sample Admin Application

- **It is helpful to create a Sample Admin application**
- **Go to Setup → Create → Apps and click the New button**
  - Add all tabs needed for Sample Administration



- **Make visible to System Administrators and other users who may need to perform sample administration tasks**

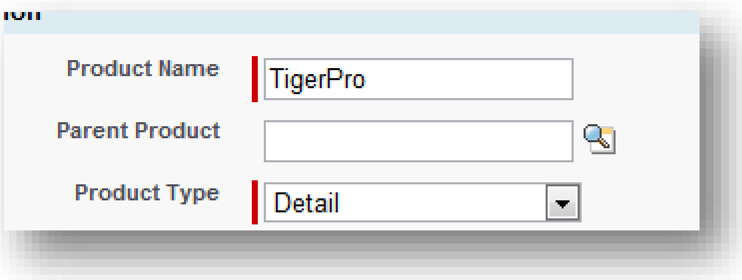
Manual Sample Setup

- **Steps for setting up a sample lot for a new product:**

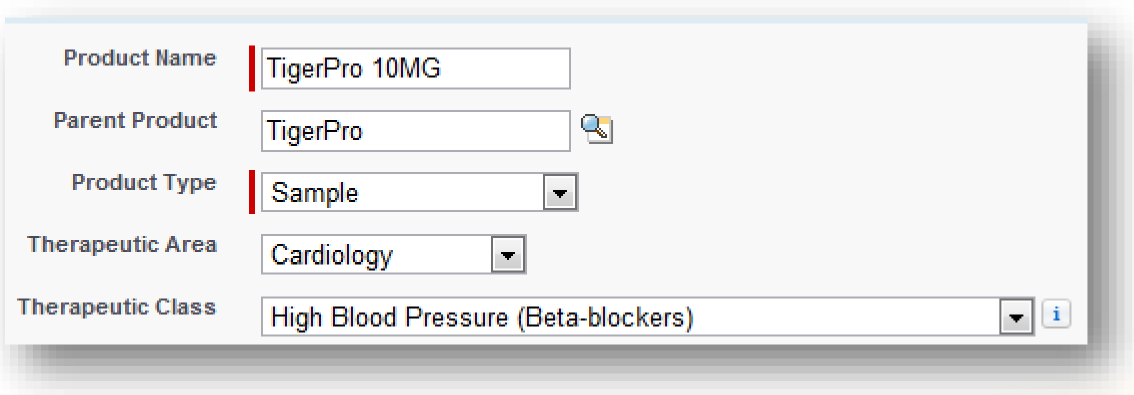
1. Create Detail and Sample Product
2. Give users access to Detail product in users' My Setup
3. Create a Rep Roster record for each user
4. Create a Sample Lot owned by the Sample Admin
5. Create a Sample Transfer for each user
6. User confirms Receipt of the sample shipment
7. User starts recording calls with active sample products

1. Product Catalog

- **Create Detail and Sample products**
  - Go to All Tabs → Product Catalog
- **Create a product of type Detail**
  - Leave Parent Product blank

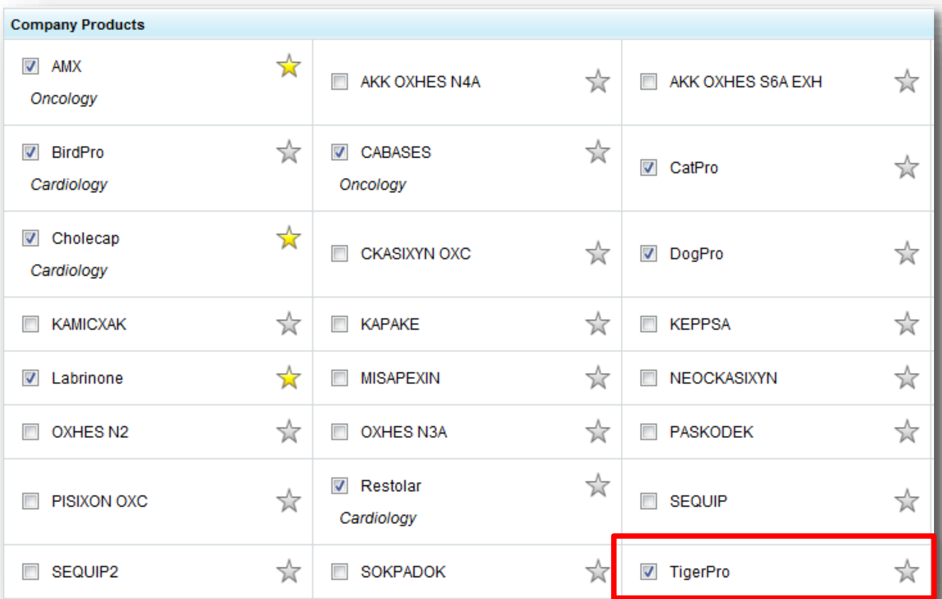


- **Create a product of Type Sample**
  - Set the Parent Product to the Detail product



2. Update My Setup

- **Give users access to Detail products**
  - Go to All Tabs → My Setup
  - Search for and edit each user's My Setup
  - Select the product the user is allowed to detail on call reports
- **The object is called My Setup Products**

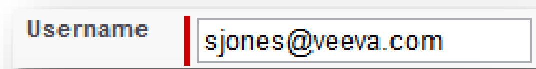


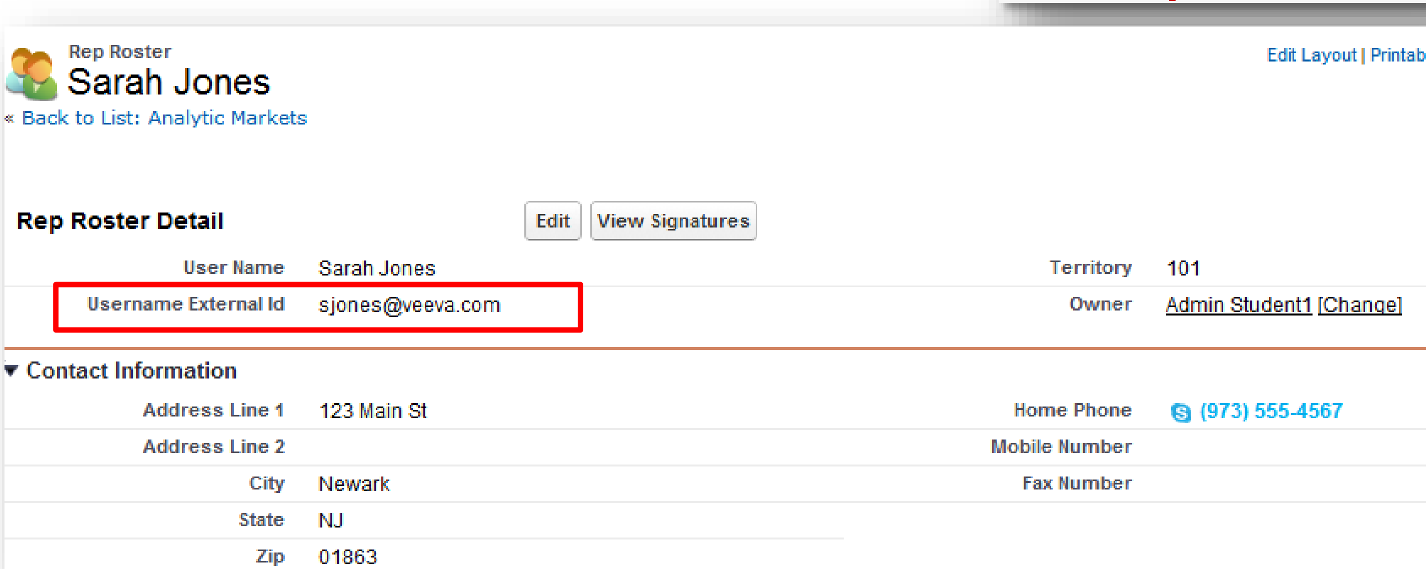
Company Products

☑ AMX *Oncology*	☐ AKK OXHES N4A	☐ AKK OXHES S6A EXH
☑ BirdPro *Cardiology*	☑ CABASES *Oncology*	☑ CatPro
☑ Cholecap *Cardiology*	☐ CKASIXYN OXC	☑ DogPro
☐ KAMICXAK	☐ KAPAKE	☐ KEPPSA
☑ Labrinone	☐ MISAPEXIN	☐ NEOCKASIXYN
☐ OXHES N2	☐ OXHES N3A	☐ PASKODEK
☐ PISIXON OXC	☑ Restolar *Cardiology*	☐ SEQUIP
☐ SEQUIP2	☐ SOKPADOK	☑ TigerPro

3. Rep Roster

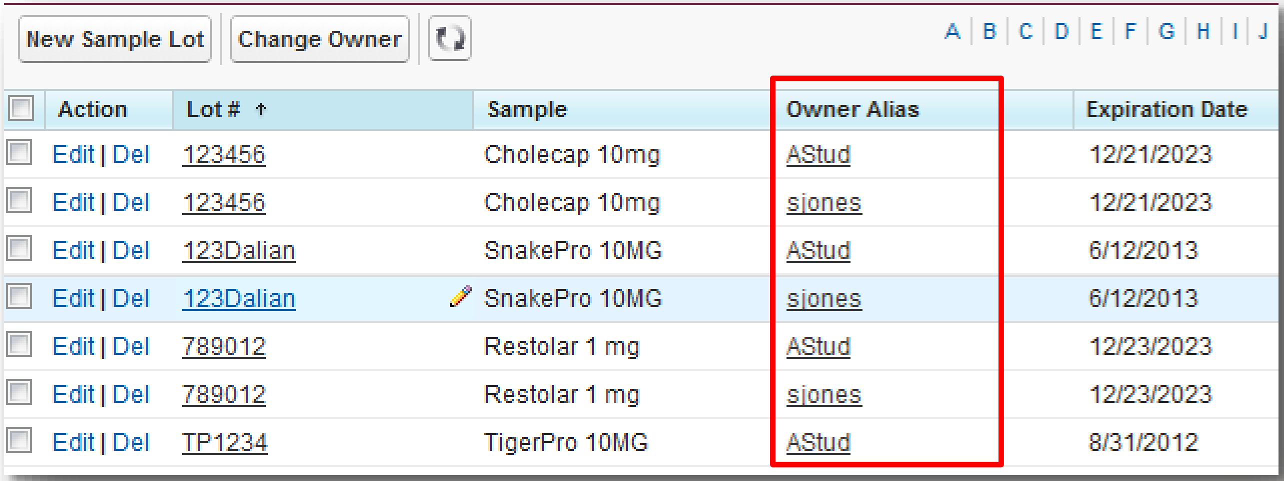
- **Each user must have a Rep Roster**
  - Go to All Tabs→ Rep Roster
  - Modify or create a Rep Roster for each user
- **Address is usually the location of the user's storage locker**
- **Username External Id must match user's SFDC username**
  - Otherwise, the address will not populate





Sample Lots

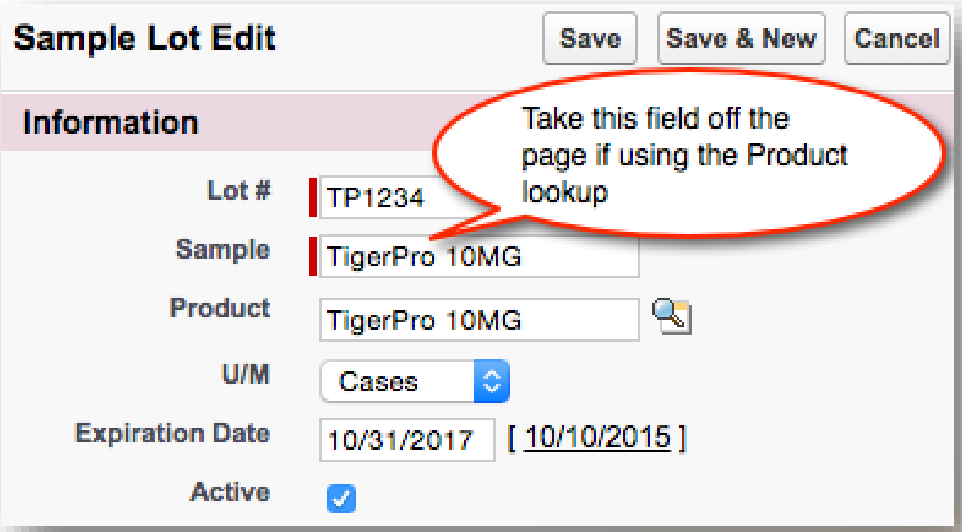
- **Sample Lot object contains all Lot #s that are available to users**
- **Users can record calls with samples from their active Sample Lots**
- **Sample Lot object's OWD is set to Private**
  - Users will only be able to access the Sample Lot records they own



	Action	Lot # ↑	Sample	Owner Alias	Expiration Date
	Edit | Del	123456	Cholecap 10mg	AStud	12/21/2023
	Edit | Del	123456	Cholecap 10mg	sjones	12/21/2023
	Edit | Del	123Dalian	SnakePro 10MG	AStud	6/12/2013
	Edit | Del	123Dalian	SnakePro 10MG	sjones	6/12/2013
	Edit | Del	789012	Restolar 1 mg	AStud	12/23/2023
	Edit | Del	789012	Restolar 1 mg	sjones	12/23/2023
	Edit | Del	TP1234	TigerPro 10MG	AStud	8/31/2012

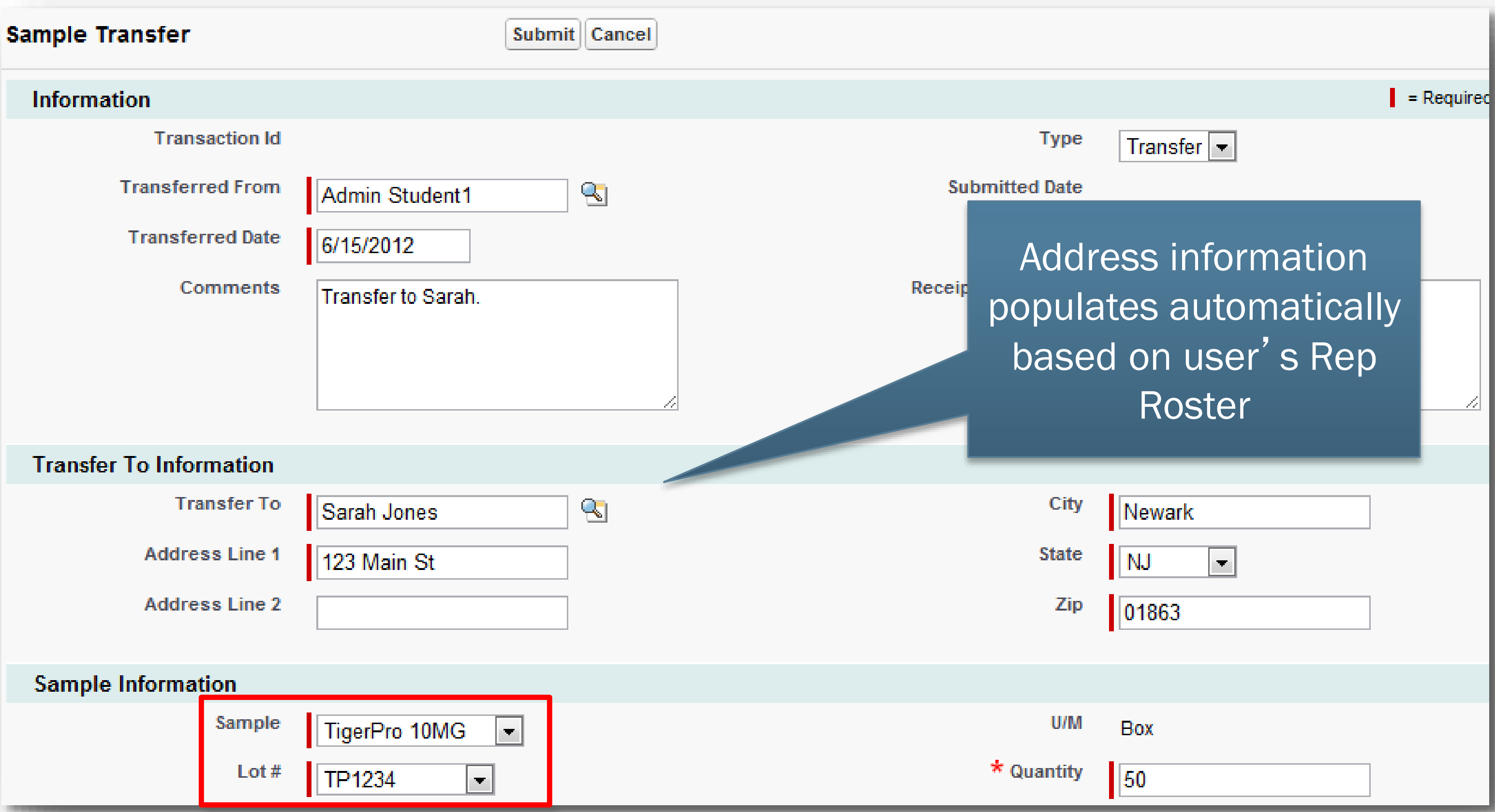
4. Create Sample Lot(s) as Admin

- **While logged in as the Administrator**
  - Go to All Tabs → Sample Lots → click the New button
- **Create the Sample lot which will then be used to transfer Samples to users**
  - Use either the Sample or Product (lookup) to associate the Sample Lot to the Sample Product



5.Transfer Samples to Users

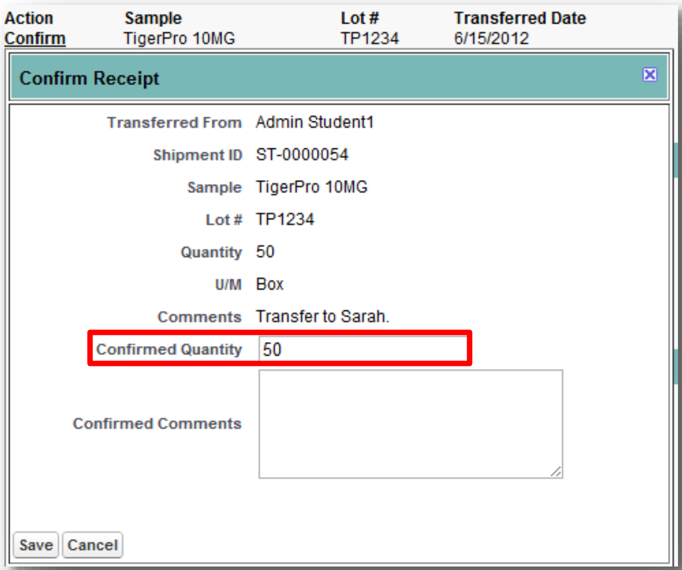
- **Go to My Samples tab → click the New Transfer link**



- **Click the Submit button**

6. User Confirms Sample Receipt

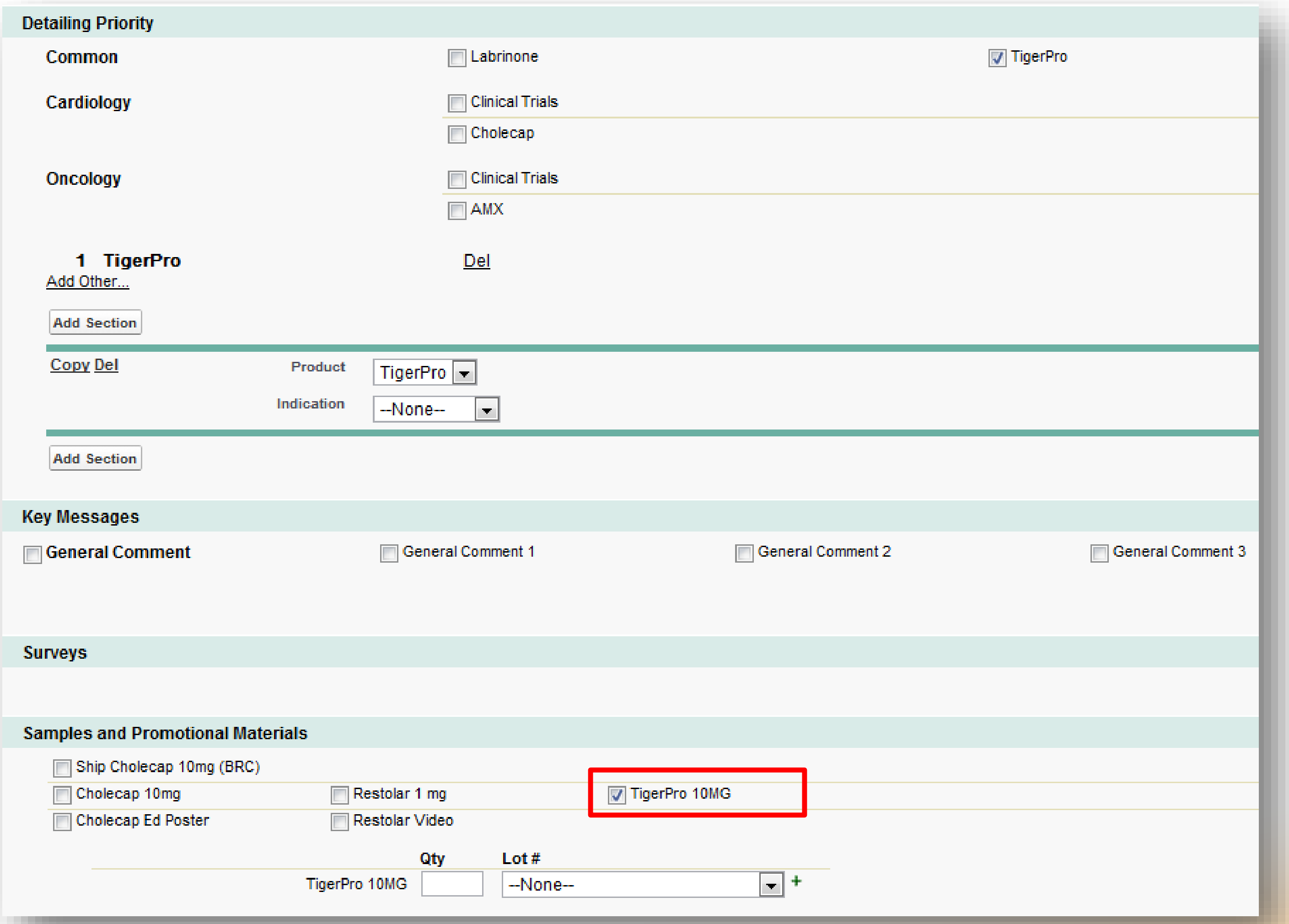
- **Login as the end-user and confirm sample receipt**
  - Go to My Sample tab → Pending Sample Receipts section
  - Click the Confirm link
  - Enter the Confirmed Quantity and click Save



- **After confirming, the user's inventory is updated and the corresponding Sample Lot is activated**

7. User Records a Call with Samples

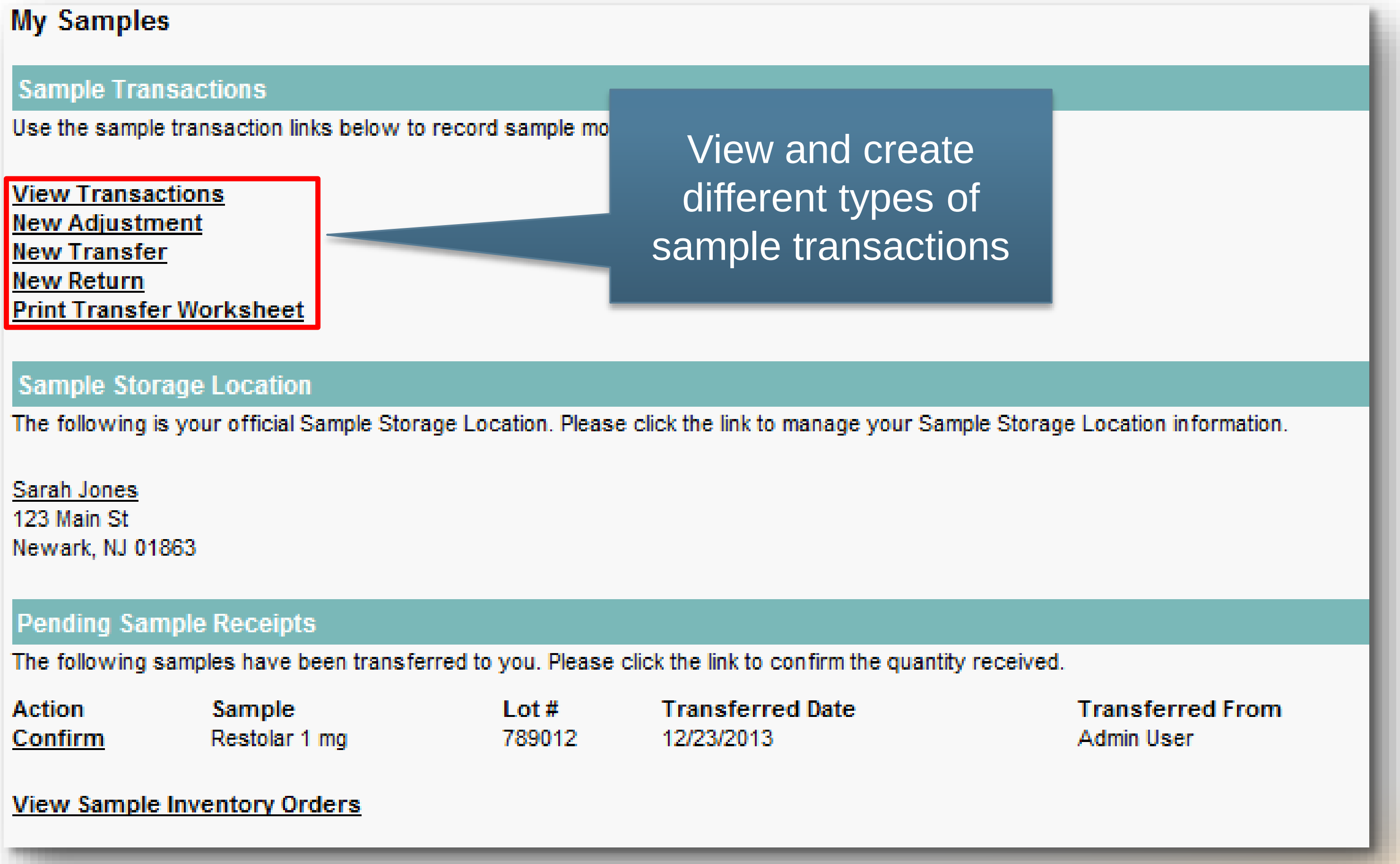
- **Record a call to make sure the sample product displays**



Sample Transactions

My Samples

- **Veeva custom tab to perform sample related tasks**



Sample Transactions

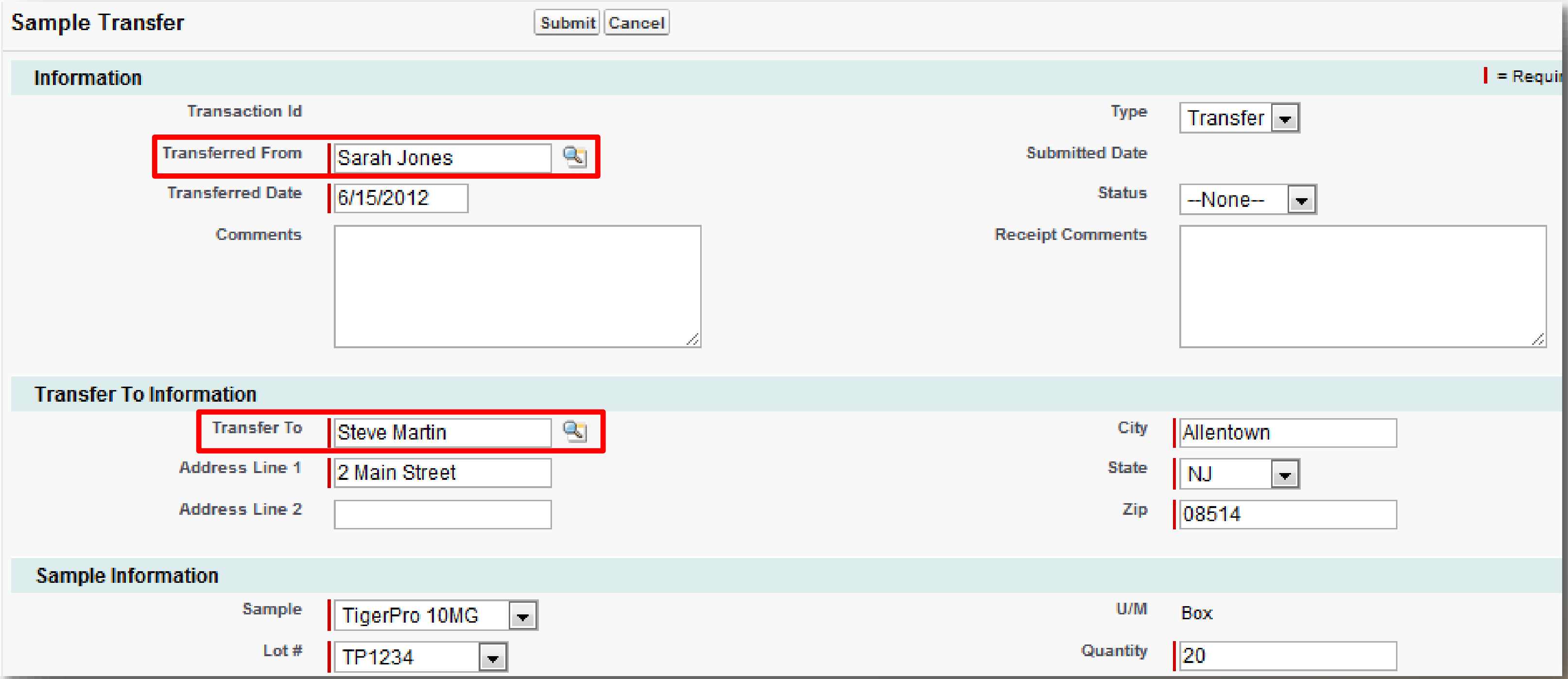
- **My Samples tab → View Transactions link**
- **Stores all the different types transactions in the system**
  - Receipts
  - Adjustments
  - Transfers
  - Returns
  - Disbursements

☐	Edit | Del	ST-0000051	Adjustment	SnakePro 10MG	123Dalian	-5
☐	Edit | Del	ST-0000052	Return	SnakePro 10MG	123Dalian	10
☐	Edit | Del	ST-0000053	Disbursement	Cholecap 10mg	123456	10
☐	Edit | Del	ST-0000054	Transfer	TigerPro 10MG	TP1234	50
☐	Edit | Del	ST-0000055	Receipt	TigerPro 10MG	TP1234	50
☐	Edit | Del	ST-0000056	Disbursement	TigerPro 10MG	TP1234	5

- **Based on the Sample Transaction object**
  - Each transaction is a record type and has its own page layout
  - You can add/remove fields to these page payouts
- **Most transactions are performed from the My Samples tab**
  - Disbursement transactions are created when a user submits (or saves) a Call with Samples

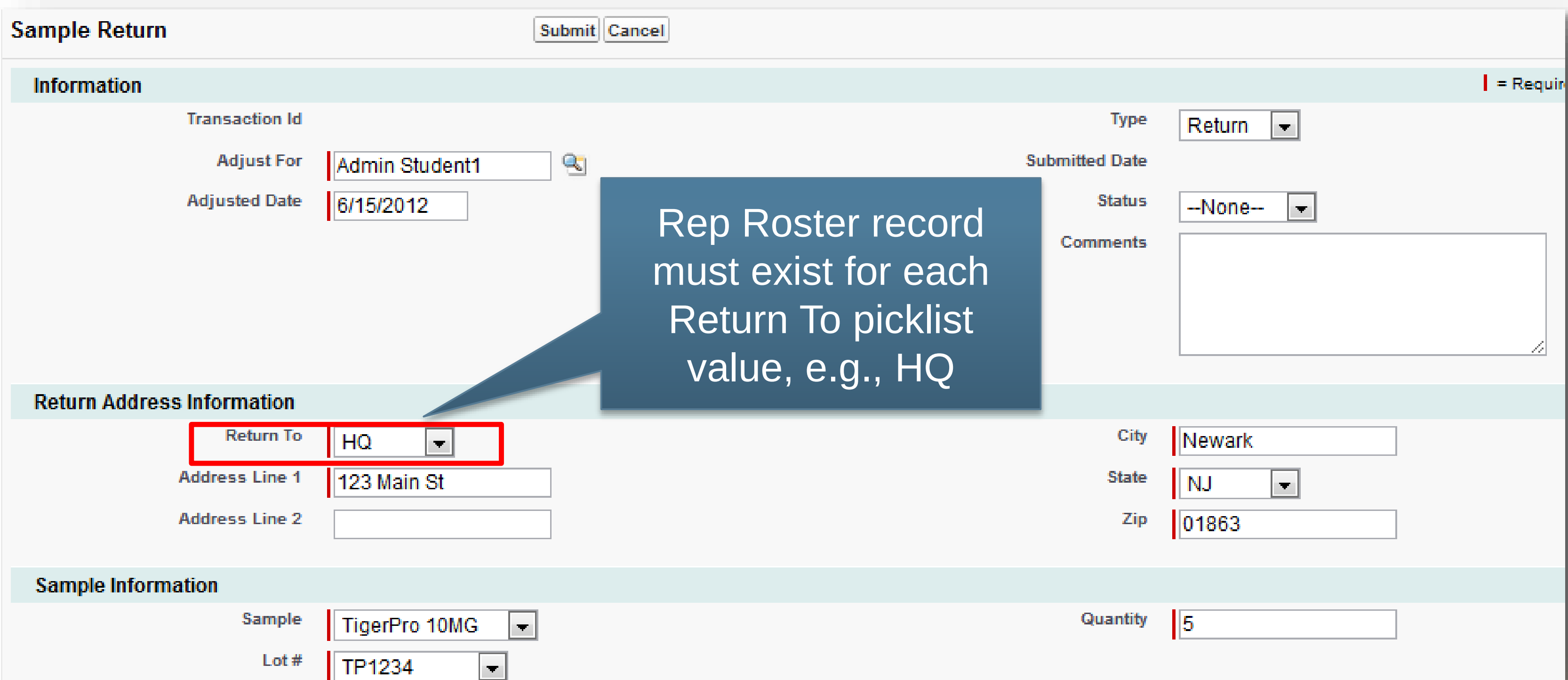
Transfer from One User to Another

- **My Samples → New Transfer link**
  - Transferred From user's Sample Lot's Calculated Quantity field is automatically deducted by the amount transferred
  - Transfer To user will need to confirm the Sample Receipt to activate the new Sample Lot



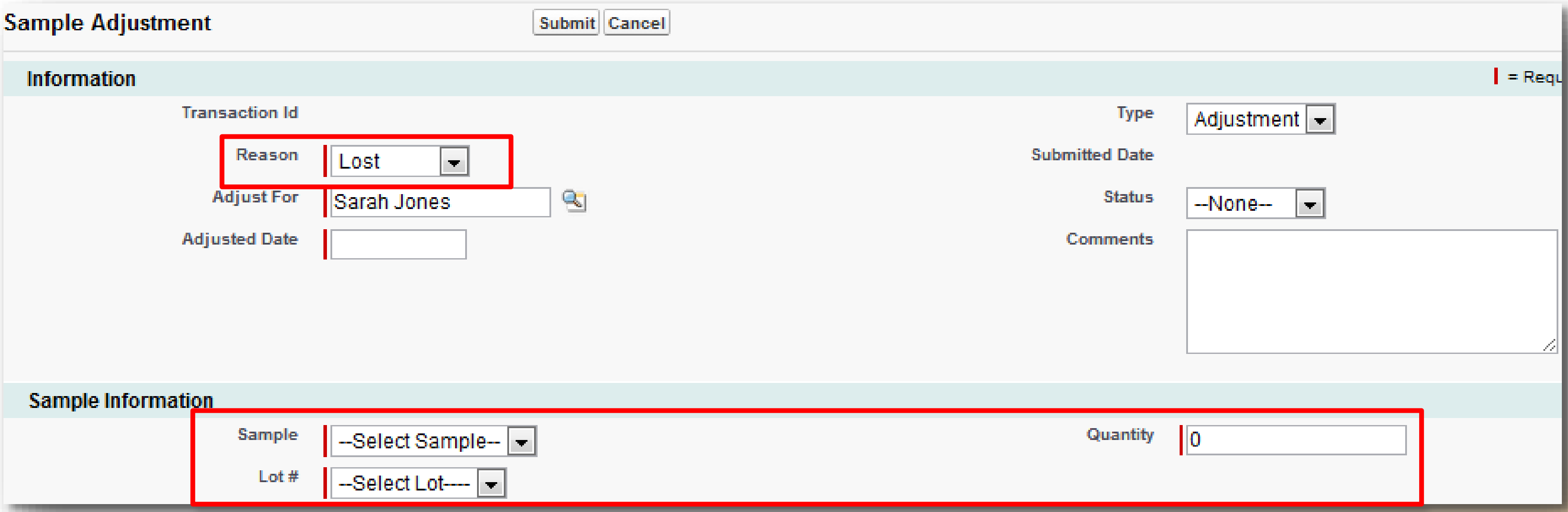
Sample Returns

- **My Samples → New Return link**
- **Return To picklist can be configured with new values**



Sample Adjustments – Sample Lot Quantity

- **If a user misplaces or enters an incorrect Lot # or Quantity in a call report with samples**
  - Create an Adjustment transaction to adjust the Calculated Quantity of a Sample Lot
- **My Samples tab → New Adjustment link**
  - Reason picklist can be modified in the Sample Transaction object



Sample Adjustments – Unlock Call

- **If a user enters an incorrect Lot # or Quantity and submits a call with signature**
  - Call can be unlocked by an Administrator so the User can re-enter the correct Sample Lot # or Quantity
- **Verify the customer's business process and compliance rules**
  - Some may require that a second signature be captured when changes to sample details on call reports are needed
  - Some may allow the user to enter an adjustment to the Sample Transaction

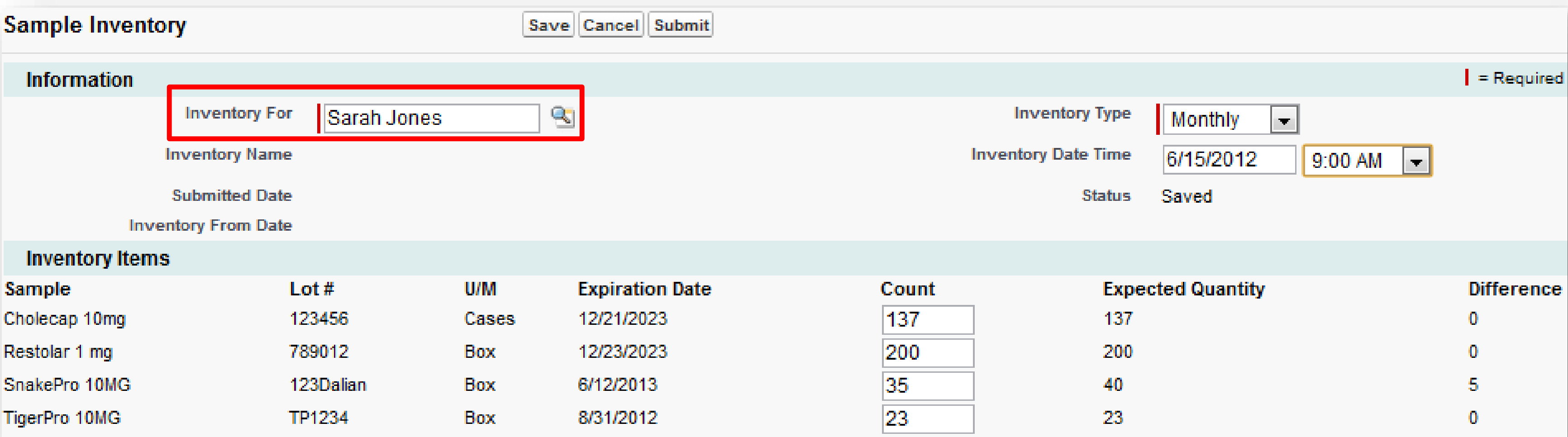
Sample Adjustments – Unlock Call

- **Without custom code, System Administrator would have to:**
  - Locate the submitted erroneous Call online
  - Unlock and save the Call to set the Call status to Saved
- **User syncs to get the saved Call offline and then**
  - Locates the Call offline
  - Accesses the Call's signature page and clears the signature
  - Changes the Call's sample Quantity and/or Lot#
  - Captures a new signature
  - Submits the Call again
- **Custom code such as Visualforce Pages and Apex Classes can be created to allow Users to select original Call and record a call correction**

Sample Inventory

- **Create a physical inventory count of all the Sample Lots that are marked as Active for specific Users**

- **Managers can create inventories for other Users**
  - My Samples → Sample Inventories section → New Inventory link



Sample Inventory Save Cancel Submit

Information = Required

Inventory For: Sarah Jones
Inventory Type: Monthly
Inventory Name
Inventory Date Time: 6/15/2012 9:00 AM
Submitted Date
Status: Saved
Inventory From Date

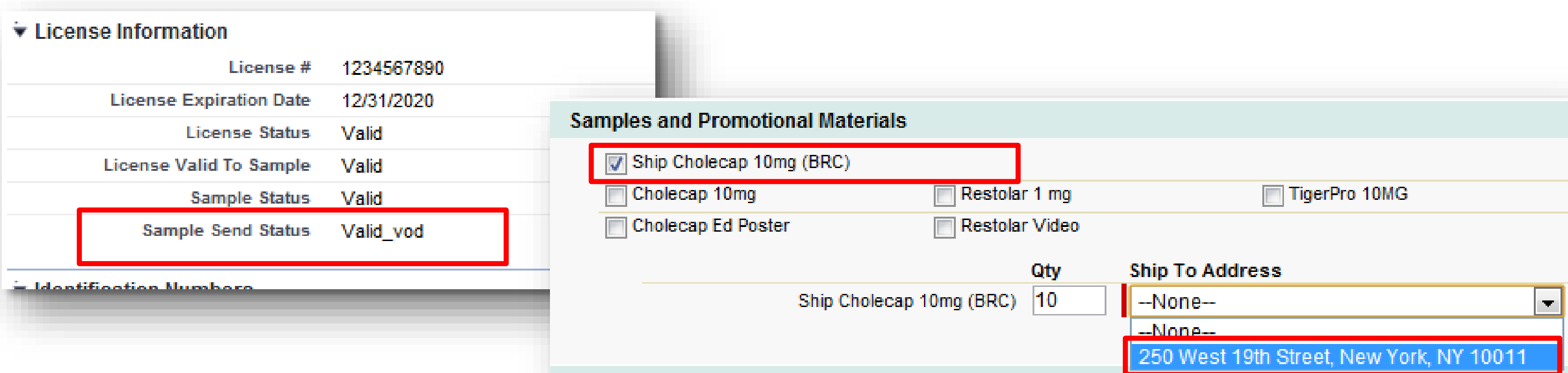
Inventory Items

Sample	Lot #	U/M	Expiration Date	Count	Expected Quantity	Difference
Cholecap 10mg	123456	Cases	12/21/2023	137	137	0
Restolar 1 mg	789012	Box	12/23/2023	200	200	0
SnakePro 10MG	123Dalian	Box	6/12/2013	35	40	5
TigerPro 10MG	TP1234	Box	8/31/2012	23	23	0

Best Practice: Users submit Inventory immediately after confirming Sample Receipts

Sample Send Address Restriction

- **Products of type BRC (Business Reply Card) allow samples to be shipped to doctors**
- **Shipping addresses can be restricted by setting the Sample Send Status field on the account address to**
  - Valid_vod (or Null) – Makes the address eligible for sample send
  - Invalid_vod – Makes the address not eligible for sample send



Sample Receipt Grouping

- **My Samples tab groups all sample receipts with the same Shipment ID together**

Pending Sample Receipts

The following samples have been transferred to you. Please click the link to confirm the quantity received.

Action						
Confirm	**Shipment ID**	ST-0000036				
	Sample	**Lot #**	**Transferred Date**	**Transferred From**	**Quantity**	**U/M**
	Restolar 1 mg	789012	10/28/2009	Henry Almeida	200	Box
Confirm	**Shipment ID**	123				
	Sample	**Lot #**	**Transferred Date**	**Transferred From**	**Quantity**	**U/M**
	Cholecap 10mg	123456	9/19/2012	Henry Almeida	40	Cases
	TigerPro 10MG	1234	9/19/2012	Henry Almeida	50	Cases
Confirm	**Shipment ID**	ST-0000047				
	Sample	**Lot #**	**Transferred Date**	**Transferred From**	**Quantity**	**U/M**
	TigerPro 10MG	1234	9/19/2012	Henry Almeida	50	Cases

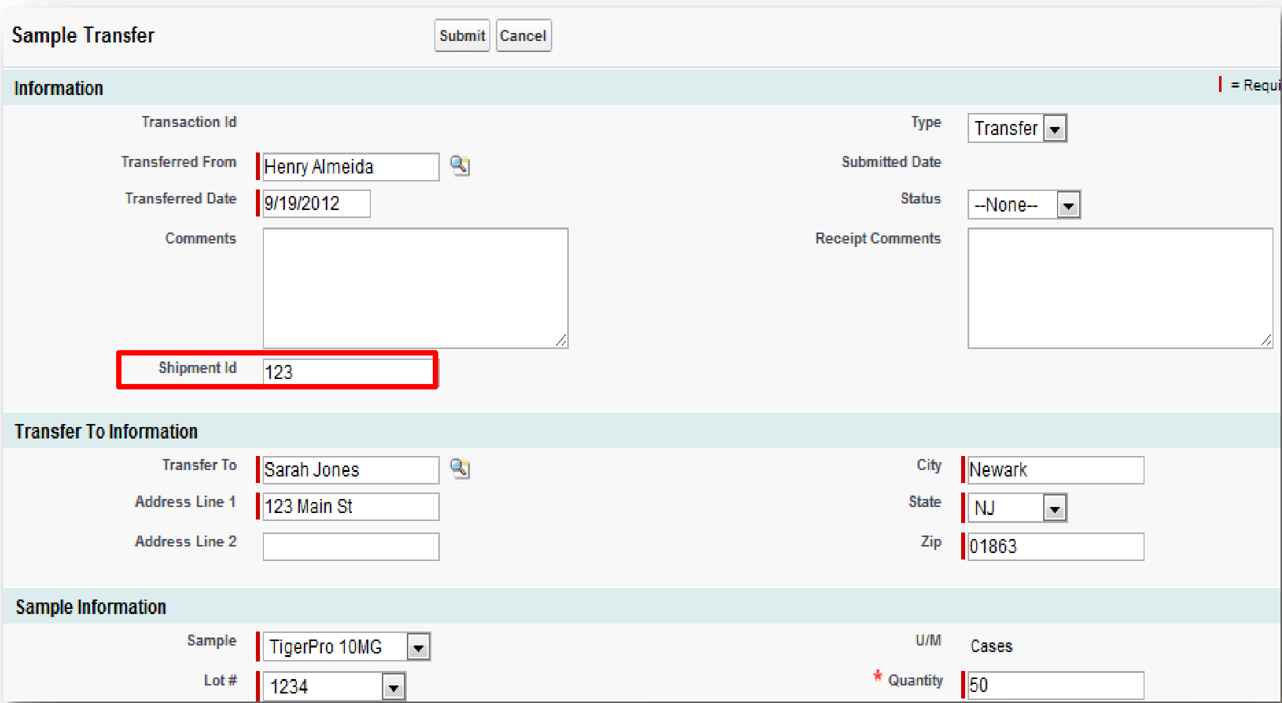
- **When users click Confirm, all line items with the same Shipment ID can be confirmed as one action**

Sample Information

Sample	Lot #	Quantity	U/M	Transferred Date	Transferred From	Comments	Confirmed Quantity	Confirmed Comments
TigerPro 10MG	1234	50	Cases	9/19/2012	Henry Almeida			
Cholecap 10mg	123456	40	Cases	9/19/2012	Henry Almeida			

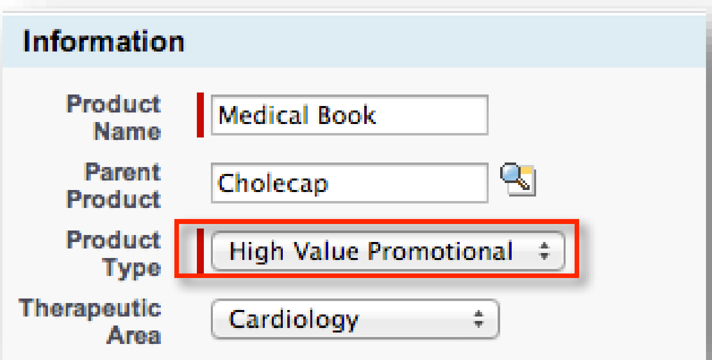
Sample Receipt Grouping

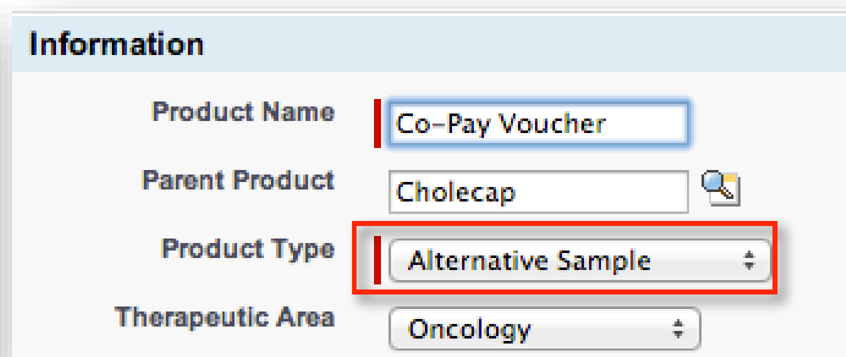
- **To enable Sample Receipt Grouping**
  - Set Veeva Setting Enable_Sample_Receipt_Grouping to True
  - Add the Shipment ID field to the Sample_Transfer_Layout
  - Enter same Shipment ID for each transfer to so they can be confirmed as a group



High Value Promotional Items and Alternative Samples

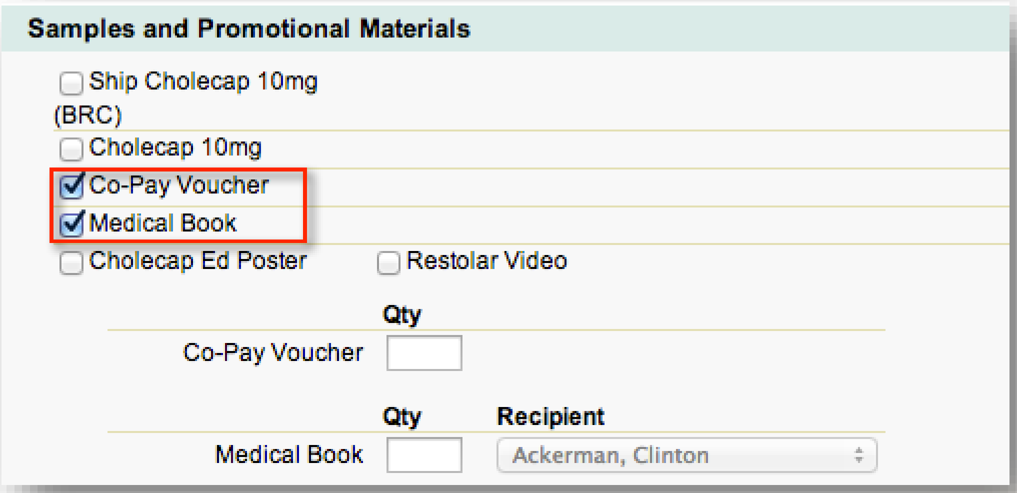
- **Special product types to support Sunshine Act requirements**
  - **High Value Promotional item** - any highly valued marketing or sales aid that is left at a call location
    - Ex: medical books, models, and demonstration devices
    - Requires HCP signature
  - **Alternative Sample** – sample product that does not require a lot number for disbursement
    - Ex: co-pay cards or vouchers
    - Requires both a valid license status and a signature





High Value Promotional Items and Alternative Samples

- **Configured the same as Samples or Promotional Items**
  - Must set the Parent Product to the appropriate detail product
- **Section signals available for the Samples section of the Call page layout**
  - --nhvp – no high value promotional items displayed
  - --nas – no alternate samples displayed



Sample and Promotional Items Limits

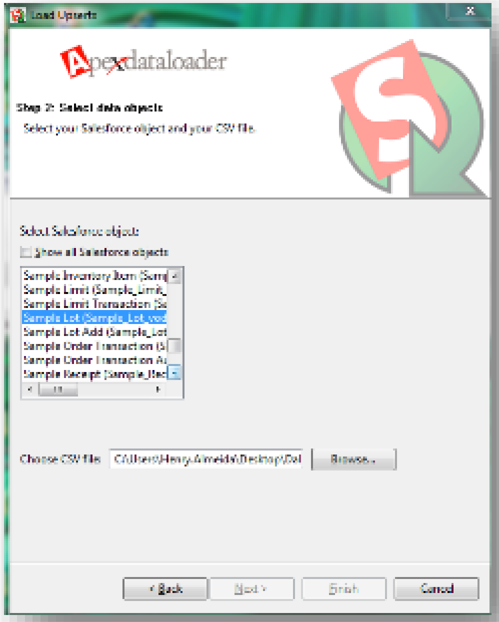
- **Sample and Promotional Item limits can be created to control the quantities users can give to HCPs**
  - Limits are enforced when calls are submitted
- **Limits can be defined over a time period or per call**
  - HCPs can receive up to 30 boxes of Cholecap 10MG over 1 year
  - HCPs can receive up to 5 boxes of Cholecap 10MG per call
- **Sample and Promotional items limit is supported online and offline**
- **See appendix for more details**

Controlled Substances Sampling

- **Can be performed via the hand disbursement model as well as the Sample Send/BRC process**
  - All other components of the Samples Management solution are applicable to the Controlled Substance support including
    - Sample Inventories, Sample Transactions, and the associated features
- **Compliant**
  - 21 CFR Part 1300
  - 21 CFR Part 11
  - PDMA
  - State Specific Rules
  - Credential Specific Rules
- **Available online an offline**
- **Refer to the Veeva CRM Online Help for details**

Sample Setup via Integration or Data Loader

- **Manual setup is cumbersome for large amounts of sample data**
  - Sample Lots and Sample Receipt transactions can be created using Apex Data loader
- **Customers often use an integration process to populate Sample Lots**
- **Veeva can integrate with Knipper and QPharma for sample compliance and inventory management**



QPHARMA
No Matter What They Throw At You We've Got You Covered

Module Summary

- **In this module we discussed**
    - Sample Management Data Model
    - Creating Sample Lots
    - Performing Sample Transactions
    - Sample Limits Overview

Labs

For more information, see Appendix

Configure Sample

- Create new sample product
- Create new lot catalog
- Create new sample lot
- Perform sample transactions

Appendix

Sample Limits

Sample Limit Template

- **Eliminates the need to pre-load all sample limit records before starting to sample**
- **Sample Limit Template – is a record in the Sample Limit object associated with a Product (of type Sample, BRC, or Sample Product Group) and an Account Type (person)**
  - Automatically generates a Sample Limit record for the Account when the first valid sample disbursement/request is recorded
- **The Account_Type_vod field differentiates a template from actual Sample Limit record**
  - Value must match the Account type name such as Professional_vod

Configuring Sample Limits

- **Grant appropriate permissions to the Sample Limits object:**
  - Give Edit permission to Administrators
  - Give Read permission to Users
- **Create a tab for the Sample Limit object**
- **Configure Sample Limit page layout to display necessary fields**

Sample Limit Detail Edit | Delete | Clone

Sample Limit Name	Cert Sample Limit	Owner	Henry Almeida [Change]
Product	Cert Product 20mg	Disable Txn Create	
Limit Quantity	40	Enforce Limit	✓
Account		Limit Per Call	
User		Disbursed Quantity	0
Start Date	1/1/2013	Remaining Quantity	40
End Date	12/31/2099	Group Id	__a00Z000000GGZ81IAH____Template_vod__
Sample Limit Type	Account	External Id	

Sample Limit Template

Account Types	Professional_vod	Template in Use	✓
Template Group		Template Unique Key	Professional_vod_2_a00Z000000GGZ81IAH_2013-01-01 00:00:00_2099-12-31 00:00:00_null

Rolling Sample Limits Info

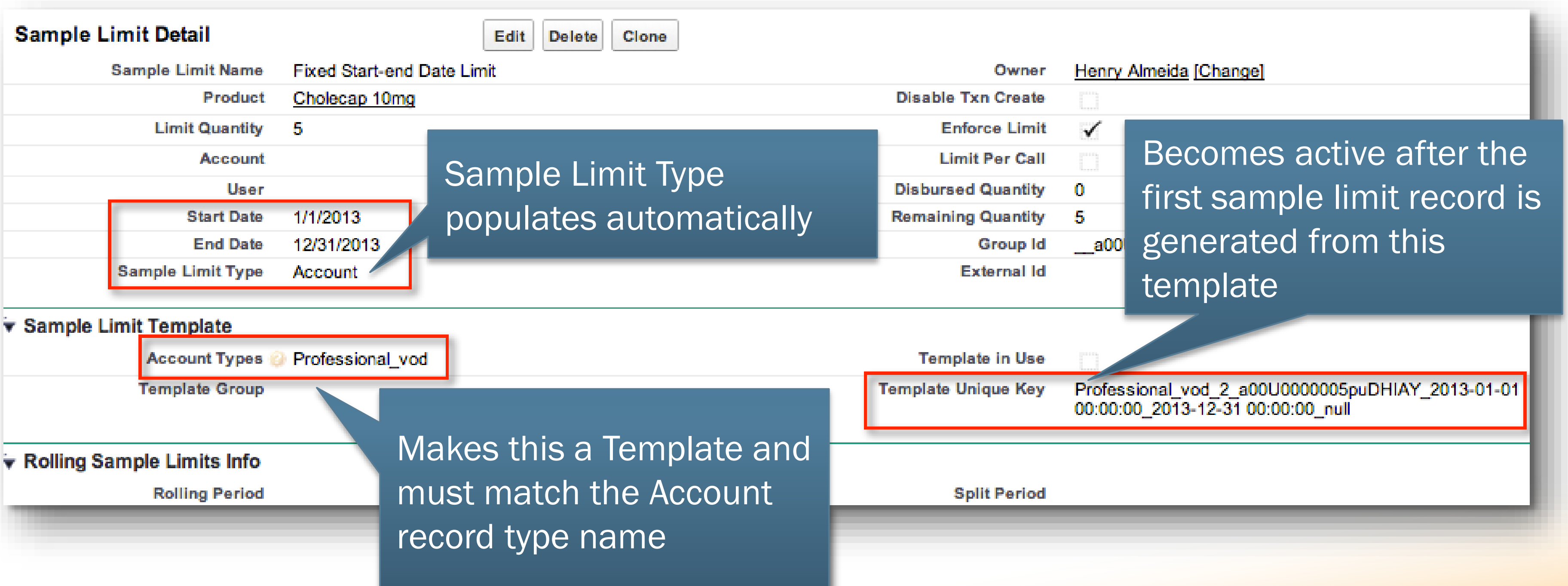
Rolling Period	24	Split Period	Year

Sample Limits and Dates

- **Fixed Limits**
  - Start and end dates do not change
  - System copies the start and end date of the template to generate the Sample Limit record dates
- **Rolling Limits**
  - Start date becomes the date of the first sample disbursement of the product for that Account
  - End date becomes [(start date) + rolling period (months) – 1 day]
- **Split Periods – several Sample Limit records will be created**
  - One for each corresponding period as long as the template is valid

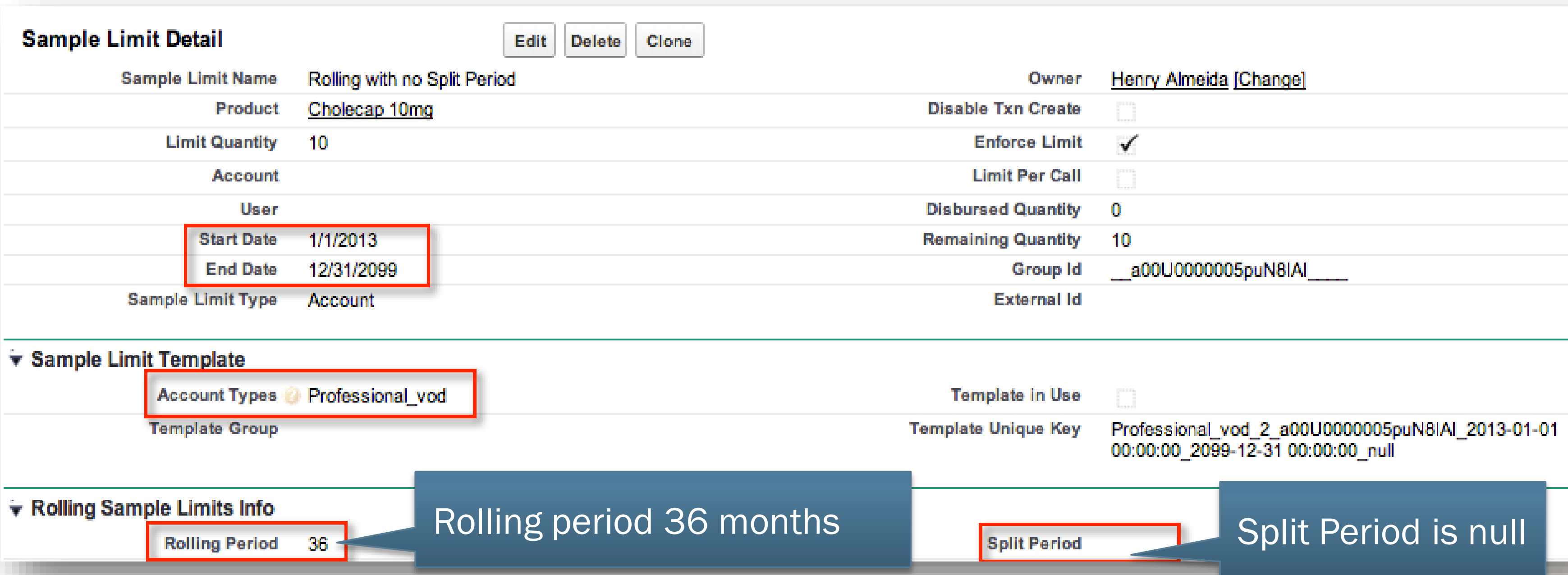
Fixed Start - End Date Limits

- **From a start date, any account of type Professional can receive up to 5 Cholecap 10mg samples in 2013**
- **Must create on Sample Template per year**



Rolling Limits with no Split Period Scenario

- **From a start date, any account of type Professional can receive up to 10 Cholecap 10mg samples during a 36-month period after the first sample disbursement/request of Cholecap 10mg**



Sample Limit Detail Edit Delete Clone

Sample Limit Name	Rolling with no Split Period	Owner	Henry Almeida [Change]
Product	Cholecap 10mg	Disable Txn Create	
Limit Quantity	10	Enforce Limit	✓
Account		Limit Per Call	
User		Disbursed Quantity	0
Start Date	1/1/2013	Remaining Quantity	10
End Date	12/31/2099	Group Id	__a00U0000005puN8IAI____
Sample Limit Type	Account	External Id	

Sample Limit Template

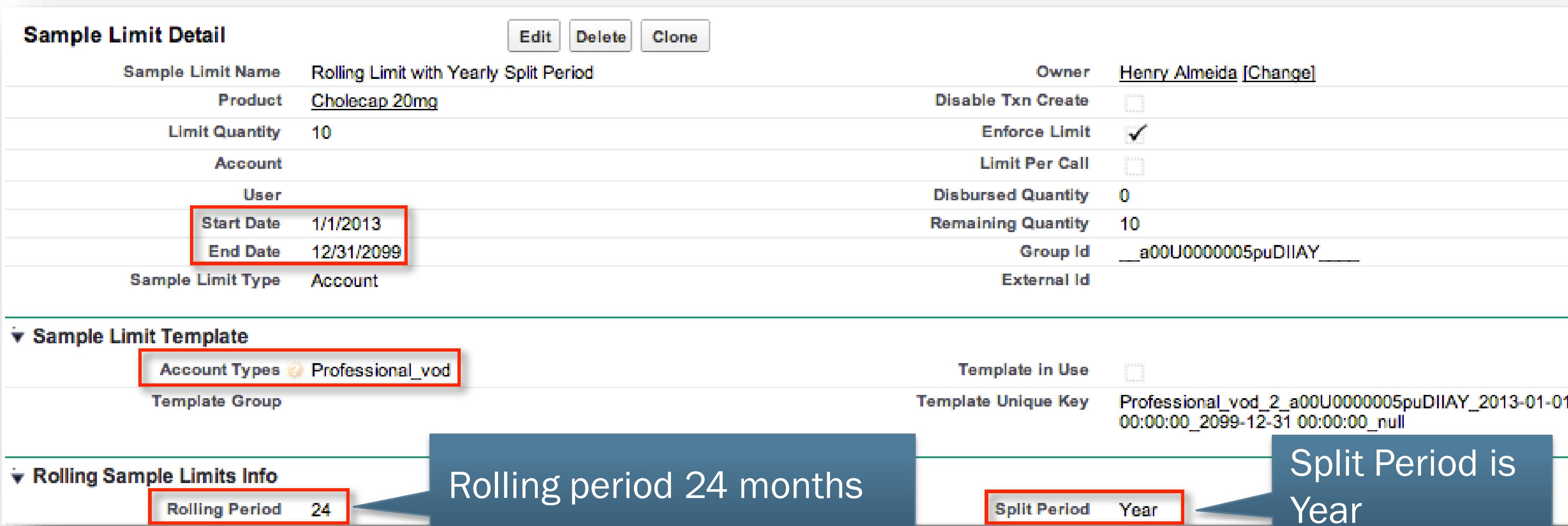
Account Types	Professional_vod	Template in Use	
Template Group		Template Unique Key	Professional_vod_2_a00U0000005puN8IAI_2013-01-01 00:00:00_2099-12-31 00:00:00_null

Rolling Sample Limits Info

Rolling Period	36	Split Period	

Rolling Limits with Split Period of Type Year

- **From a start date, any account of type Professional can receive up to 10 Cholecap 20mg samples per calendar year after the first sample disbursement/request of Cholecap 10mg, during a 24-month rolling period**



Rolling Limits with Split Period of Type Year

- **In this example, 4 Sample Limit records for an Account/Product are generated,**
  - One for each split period
  - After the 24 months period, a subsequent Sample Limit record with a limit of 0 is automatically generated until 12.31.2099 to prevent sampling of that product

Cholecap 20mg_Clinton A...	Clinton Ackerman	6/22/2013	12/31/2013	Cholecap 20mg	10
Cholecap 20mg_Clinton ...	Clinton Ackerman	1/1/2014	12/31/2014	Cholecap 20mg	10
Cholecap 20mg_Clinton A...	Clinton Ackerman	1/1/2015	6/21/2015	Cholecap 20mg	10
Cholecap 20mg_Clinton ...	Clinton Ackerman	6/22/2015	12/31/2099	Cholecap 20mg	0

Rolling Limits with Split Period of Type 12-Month

- **From a start date, any account of type Professional can receive up to 4 Restolar 1mg samples per year (using a 12-month rolling scale) after the first sample disbursement/request of Restolar 1mg, during a 24-month rolling period**
  - Once that period is over, no sampling is allowed

Sample Limit Name	Rolling with Split Period of 12-Month	Owner	Henry Almeida [Change]
Product	Restolar 1 mg	Disable Txn Create	
Limit Quantity	4	Enforce Limit	✓
Account		Limit Per Call	
User		Disbursed Quantity	0
Start Date	1/1/2013	Remaining Quantity	4
End Date	12/31/2099	Group Id	__a00U0000005puDNIAY____
Sample Limit Type	Account	External Id	

Sample Limit Template

Account Types	Professional_vod	Template in Use	
Template Group		Template Unique Key	Professional_vod_2_a00U0000005puDNIAY_2013-01-01 00:00:00_2099-12-31 00:00:00_null

Rolling Sample Limits Info

Rolling Period	24	Split Period	12Months

Rolling period 24 months

Split Period is 12Months

Rolling Limits with Split Period of Type 12-Month

- **In this example 3 Sample Limit records are generated**
  - One for each split period - 1 for the first 12-month period - 1 for the second 12-month period
  - 1 subsequent Sample Limit record with a limit of 0 that is automatically generated until 12.31.2099 to prevent sampling of that product after the 24-month period

Restolar 1 mg_Frank Pepi...	Frank Pepitone	6/22/2013	6/21/2014	Restolar 1 mg	4
Restolar 1 mg_Frank P...	Frank Pepitone	6/22/2014	6/21/2015	Restolar 1 mg	4
Restolar 1 mg_Frank P...	Frank Pepitone	6/22/2015	12/31/2099	Restolar 1 mg	0

Sample Limits Notes

- **Sample Limits are not enforced online for paper based Call Reports with samples**
  - Requires Sample Card # on the Call Report indicating a paper based Call with Samples
  - These calls will decrement the limit quantity but the user will not be prevented from submitting the call
- **Sample Limits will only be enforced online if the --npdma section signal is used and if there is no Sample Card # entered**
  - npdma = Non-PDMA sampling which does not enforce validation of signature date or sample cards

Sample Limit Template Important Notes

- There can't be two sample limit records during the same time period for the same Account/Product combination
- Once a template is used to generate a sample limit is is flagged by the Template_In_Use_vod field
- Use the Template_Group_vod fiedl to assign Sample Limits templates to specific user groups or profiles
- Sample Limit Templates are enforced on the first call offline even for newly created accounts

Global Sample Limits

- **A Sample Product Group is a collection of products of type “Sample” or “BRC” against which specific disbursement limit rules may be defined**
  - Products in the group may or may not belong to the same “Detail” product
- **Sample Limits may be enforced for Sample Product Groups at the following levels:**
  - Individual Accounts
  - Account per call

Enabling Global Sample Limits

- **Administrators must have full Create, Read, Update and Delete access to the Product Group object**
  - Give end-user profile read-only access to the Product Group object

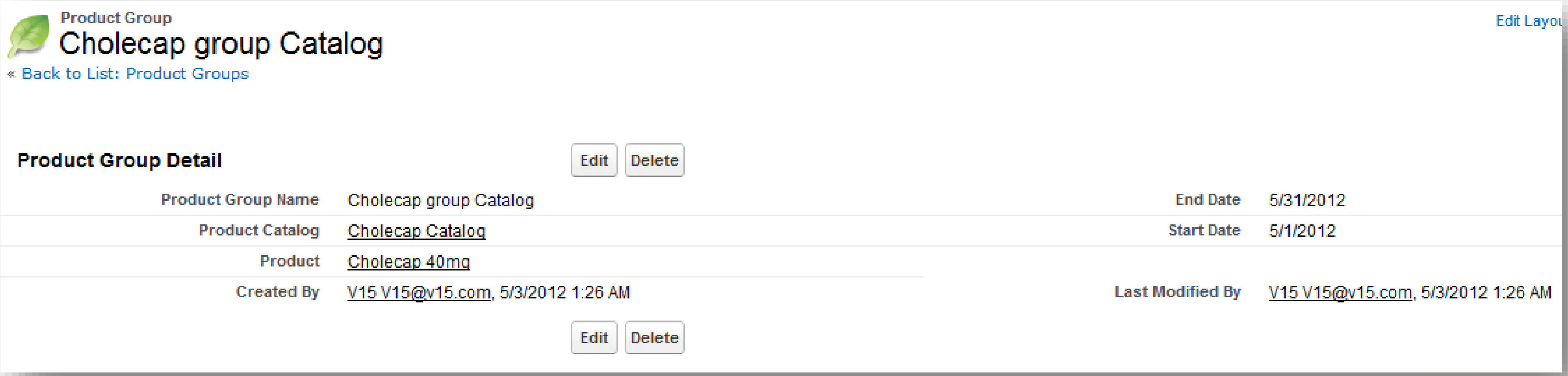
- Enter a Sample Product Group in Product Catalog
- Select product type = “Product Group”

Product Catalog Detail

Product Name	Cholecap Catalog
Parent Product	
Product Type	Product Group
Therapeutic Area	Cardiology
Therapeutic Class	CHF Agents

Enabling Global Sample Limits

- **Go to the Product Group tab:**
  - Product Group Name: Enter a Sample Product Group Name
  - Product Catalog: Select the Sample Product Group
  - Product: Select the Product you want to add to the Sample Product Group (types = Sample and BRC)
  - Define a Start Date and an End Date



Limits for Sample Product Group

- **Account / Sample Product Group Limit / Call:**
  - A user can disburse up to X sample quantity of Sample Product Group A per call
    - Limit applies to a specific Account across all Users for each call
  - Example:
    - Cholecap 10mg and Cholecap 20mg belong to Sample Product Group A
    - Dr. Enrico Orlandoni has a limit of 4 samples for Sample Product Group A per call on the time period starting from 01/01/2012 to 12/31/2012
    - The sum of the samples of Cholecap 10mg and Cholecap 20mg being disbursed during the Call must not exceed 4 for all calls made between 01/01/2012 and 12/31/2012

Limits for Sample Product Group

- **Account / Sample Product Group Limit:**
  - For an Account, X sample quantity of Sample Product Group A can be disbursed over a period of time
    - Limit applies to a specific Account across all Users
  - Example:
    - Cholecap 10mg and Cholecap 20mg belong to Sample Product Group A
    - Dr Enrico Orlandoni has a limit of 10 samples for any sample that belongs to Sample Product Group A from 01/01/2012 to 12/31/201
    - The sum of the samples of Cholecap 10mg and Cholecap 20mg being disbursed over the time period must not exceed 10

Sample Product Restrictions

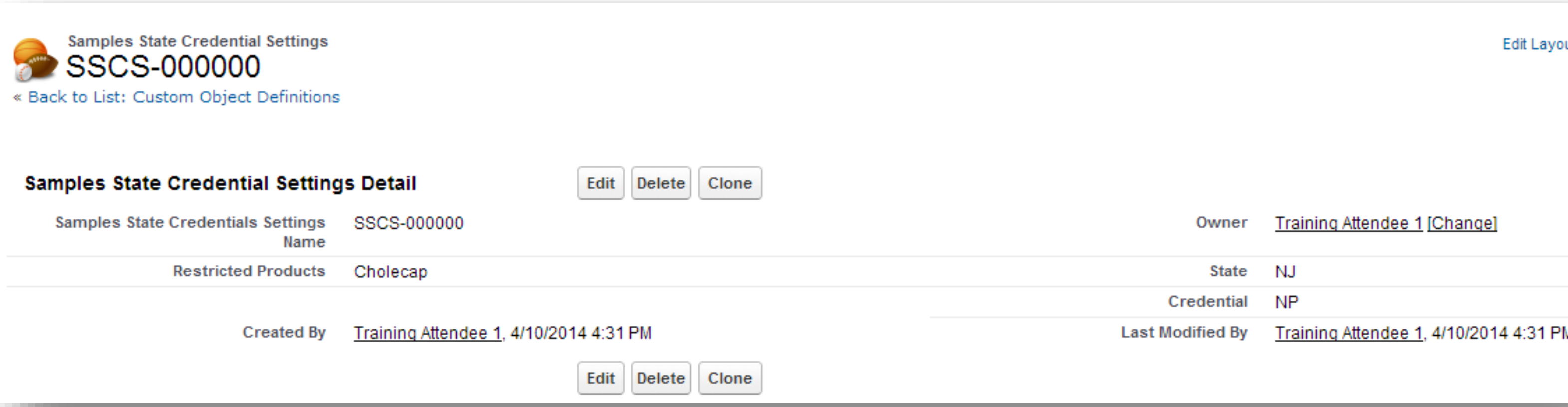
- **Government regulations in the US and in other countries require the restriction of certain products to certain credentialed HCPs**
  - Restrict based on **state** and **credentials**
- **Restriction is dynamically applied based on where the sample is disbursed**
- **Restrictions apply based on the call address and the credentials of the <u>sample recipient</u>**
- **Applies to the following product types**
  - Samples, BRCs and a combination of both
- **Available online and on iPad**

Sample Product Restrictions Configuration

- **Admin Full CRUD and User Read on**
    - **Sample_State_Credential _Settings** object
    - Admin and User FLS (**edit**) access to following fields
        - Restricted Products_vod
        - Credential_vod
        - State_vod
        - Country_vod
- **Configure the warning message on the call report with the Veeva Message**
    - ACCOUNT_SAMPLE_PRODUCT_RESTRICTION
- **Make sure the VMOC record with Device = iPad is active for**
    - Sample_State_Crendential_Settings object

Sample Product Restrictions Configuration

- **Configure the Sample State Credential Settings Page Layout**



- **Configure a custom tab for the Credential Settings object, assign the tab to the appropriate profile(s) and application(s)**

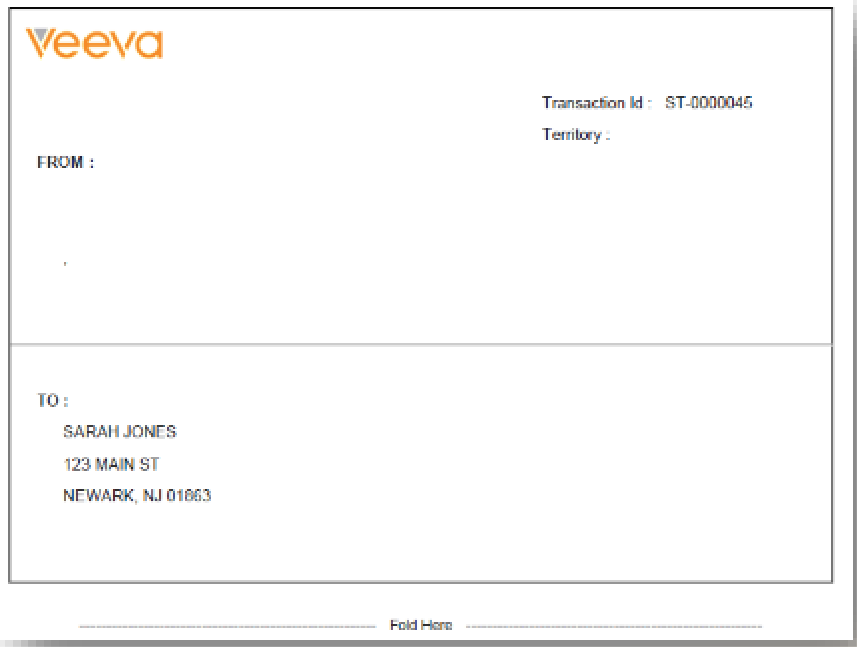
- **… when in doubt… Clear The Cache!**

Appendix

Package Labels &
Signature Receipts

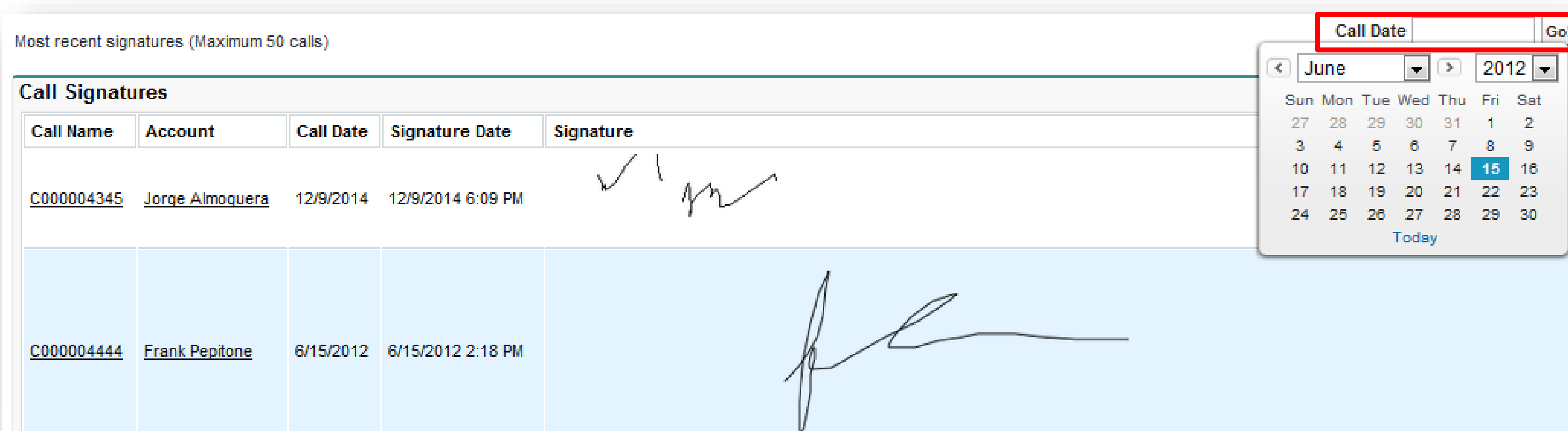
Package Labels

- **Quickly create package labels for Returns or Transfers**
- **Created as a PDF with accurate mailing information**
- **To enable:**
  - Add the New Package Label button to the Sample Return Layout and the Sample Transfer Layout
  - Create □ Object □ Sample Transaction □ Page Layout
  - Grant users view access to Package Label Visualforce page



Viewing Signatures by Rep Roster or Account

- **Viewing signatures by Account**
  - Click the View Signatures button on the Call(s) related list of the Account
  - Must add the View Signatures button to the Calls related list on Account page layouts
- **Viewing signatures by User**
  - Click the View Signatures button on the Rep Roster tab
- **Signatures can be filtered by call date and printed**



Print Sample Receipt

- **Add Print Sample Receipt button to the Calls related list on Account page layouts**
  - Click the Print Sample Receipt button to display a printable PDF of the sample disbursement transaction
- **Can include logos or other organizational customizations**

Frank Pepitone
123 Main Street, Allentown, NJ 08514
License:
6/15/2012 2:18 PM

I hereby certify that I have requested the listed Samples and Quantities and all information pertaining to my License is valid and accurate.

Quantity	Description
2	Box TigerPro 10MG (lot: TP1234), Manufacturer: Merck & Co.

Call: C000004444
Name: Sarah Jones
Territory: Corp

Print Sample Inventory Worksheet

- **Print Sample Inventory Worksheets from My Samples tab**
  - Used to perform inventories at a later date
- **To enable, set the Enable Inventory Worksheet custom setting to True**
  - Displays a link on the Sample Inventories section of the My Samples page

Inventory For: Admin Henry

Territory Name: Corp, EMEA

Employee #:

Inventory From Date: 10/26/2009 11:18 AM

Disclaimer: The following Sample Inventory is for Sales Reps to capture data. Please record all data in the Online system and submit. Copies of this Sample Inventory may be destroyed.

Sample	Lot #	Expiration Date	Quantity	U/M
Cert Product 20mg	5555555	8/9/2012		Box
Cholecap 10mg	123456	10/26/2019		Cases
Cholecap 10mg	33445566	8/15/2014		Cases
Restolar 1 mg	789012	10/28/2019		Box

Print Sample Transfer Worksheet

- **Print Sample Transfer Worksheets from My Samples tab**
  - Designed to capture sample transfer quantities at a later time
- **To enable, set the Enable Transfer Worksheet custom setting to True**

Transfer From: Admin Henry

Territory Name: Corp, EMEA

Employee #:

Transfer Date: ______________________________ **Address:** ______________________________

Transfer To: ______________________________ ______________________________

______________________, ____ ________

Sample	Lot #	Expiration Date	Quantity	U/M
Cert Product 20mg	5555555	8/9/2012		Box
Cholecap 10mg	123456	10/26/2019		Cases
Cholecap 10mg	33445566	8/15/2014		Cases
Restolar 1 mg	789012	10/28/2019		Box

Appendix

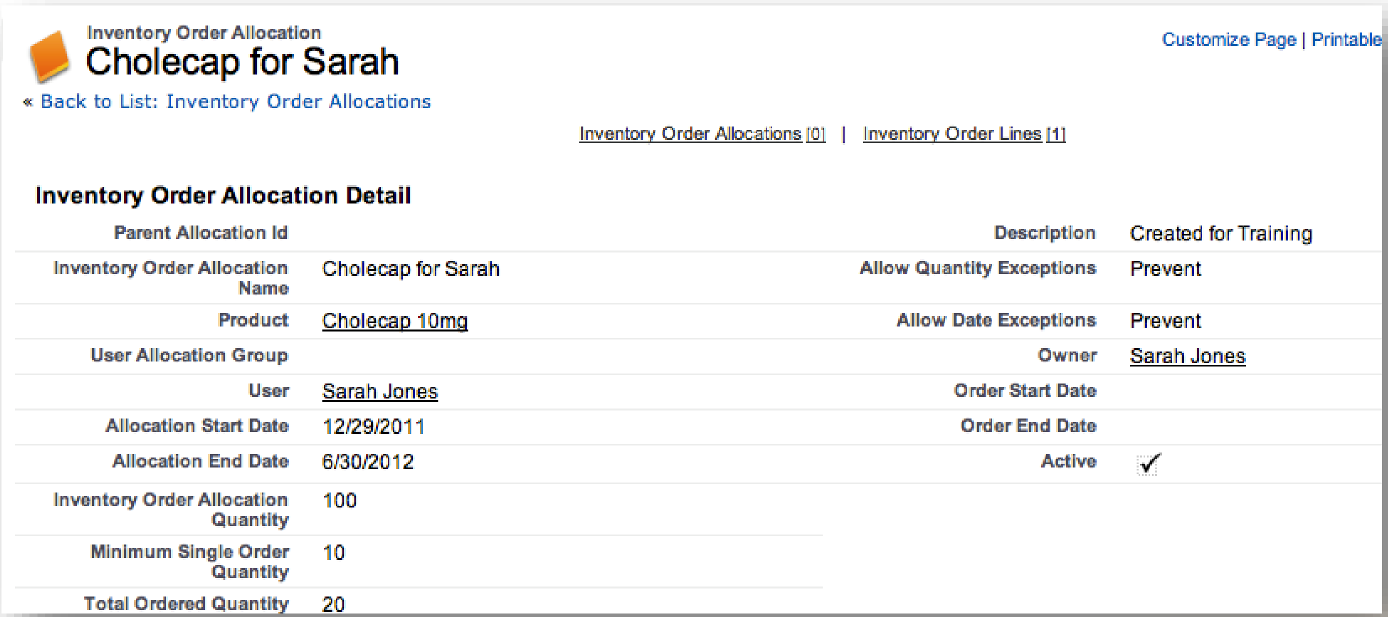
Inventory Ordering

Sample and Promotional Item Ordering

- **Give Users, District Managers and Home Office Sample Administrators a tool to allocate and place orders for promotional items**
- **The process for Inventory Ordering contains several key concepts**
  - Inventory Order Allocations
  - Inventory Order Entry
  - Product Order Allocations

Inventory Order Allocations

- **Allocations of products for a given time frame, user (or user group) and product**
  - Stored in the Inventory_Order_Allocation_vod object
  - Created by Sample Administrators
  - Managers then have the option of reallocating these initial allocations to their direct reports


Inventory Order Allocation
Cholecap for Sarah
« Back to List: Inventory Order Allocations
Customize Page | Printable
Inventory Order Allocations [0] | Inventory Order Lines [1]

Inventory Order Allocation Detail

Parent Allocation Id		Description	Created for Training
Inventory Order Allocation Name	Cholecap for Sarah	Allow Quantity Exceptions	Prevent
Product	Cholecap 10mg	Allow Date Exceptions	Prevent
User Allocation Group		Owner	Sarah Jones
User	Sarah Jones	Order Start Date	
Allocation Start Date	12/29/2011	Order End Date	
Allocation End Date	6/30/2012	Active	✓
Inventory Order Allocation Quantity	100		
Minimum Single Order Quantity	10		
Total Ordered Quantity	20		

Inventory Order Entry

- **Orders that Users place to replenish their stock of samples or promotional items**
  - The quantity and time frame for orders are driven by the inventory allocation for that product-user combination

Inventory Order Detail Clone

Information

Inventory Order Number	IO-0000004	Total Order Quantity	20
Order Create Date	12/29/2011	Approved	☑
Order For User	Sarah Jones	Approved Date	
Order Status	Submitted	Approved By	
Order Type		Approver	Veeva Train DOT
Order Submit Date	12/29/2011	Require Approval	☐

Inventory Order Lines

Product	Order Quantity	Remaining Allocation	Order Fulfilled Quantity	Requested Delivery Date	Inventory Order Line Status
Cholecap 10mg	20	80	20	12/29/2011	Submitted

Clone

Product Order Allocations

- **Allocations can be managed through the Product Allocation Manager table**
- **Each manager (or administrator) can view the allocation he/she has received, and allocate the different products to his/her direct reports**

Allocation Date 12/29/2011 User Sarah Jones

Product Cholecap 10mg Show Inactive Values?

Allocation Details

	Cholecap Total			Cholecap 10mg		
User	**Unused**	**Allocated**	**Ordered**	**Unused**	**Allocated**	**Ordered**
Grand Total	80	100	20	80	100	20
Veeva Train DOT	-	-	-	-	-	-
EMEA-USER ADMIN	-	-	-	-	-	-
Jordan James	-	-	-	-	-	-
Juan Carlos	-	-	-	-	-	-
Lupita Mendez	-	-	-	-	-	-
Sarah Jones	80	100	20	80	100	20

Sample and Promotional Item Ordering

- **There are two ways to assign Inventory Order Allocations**
  - Top-Down Allocation - From managers down to users
  - User Group Level - A user is defined as an “Inventory Group Member” based on the allocation group code indicated in the Inventory_Order_Allocation_Group_vod field on the User object
    - If an allocation is assigned to a user group, then all users within that group will be allocated an equal amount of product
- **Inventory Order Exceptions - An order exception occurs when a user tries to order more product than their remaining Inventory Order allocation allows, or order outside the pre-defined date of an allocation**
  - This order is an exception and may need an approval process
  - Exceptions are defined when creating allocations records

Sample and Promotional Item Ordering

- **Two types of exceptions can be defined for each allocation**
  - Quantity Exceptions and Date Exceptions
- **For each allocation, one of the following four options can be required when an exception is encountered**
  - “Do Nothing” – no action is required and no warning is displayed
  - “Warn” – warning icons will appear next to the quantity on the order line
  - “Require Approval” – the exception requires approval of a manager. In this case the Order Header will be marked as “Approval Required”
  - “Prevent” – Exceptions are not allowed. The user will not be able to submit the order

Enabling Sample and Promotional Item Ordering

- **General Configuration**
  - Create a new VisualForce Tab for Product Order Allocation
    - This tab's content should be the Inventory_Order_Reallocate_vod tab
  - Add Inventory_Order_Allocation_Group_vod field to the User object page layout
  - Create Tab for Inventory Order Allocation (only if allocations are to be created manually)
  - Create Tab for Inventory Orders
  - Ensure the following fields on Inventory_Order_vod__c page layout are read only fields
  - The order of fields on the Inventory Order Line related list is determined by the Inventory Order Line page layout

Sample and Promotional Item Ordering

- **User/DM Security Profile Configuration**
  - Provide full permission to Inventory_Order_vod and Inventory_Order_Line_vod
  - Provide Read access to Inventory_Order_Allocation_vod
  - Grant access to Inventory Order tab or utilize the links available on the "My Samples" page
  - Grant access to the following VisualForce pages
    - Edit_Inventory_Sample_Order_vod
    - New_Inventory_Sample_Order_vod
    - View_Inventory_Sample_Order_vod
    - Clone_Inventory_Sample_Order_vod
    - Inventory_Order_Reallocate_vod (optional for Users)

Appendix

BRC and Lot Catalog

Alignment of Promotional Items and BRC by User

- **Promotional Items and BRCs can be aligned to specific users**
  - Using My Setup Products
  - Allows users who detail the same brand to have access to different promotional products and BRCs for that brand
- **Supported Online, Tablet, iPad, and Blackberry**
- **Refer to the Veeva CRM Admin guide for details**

Lot Catalog (Optional)

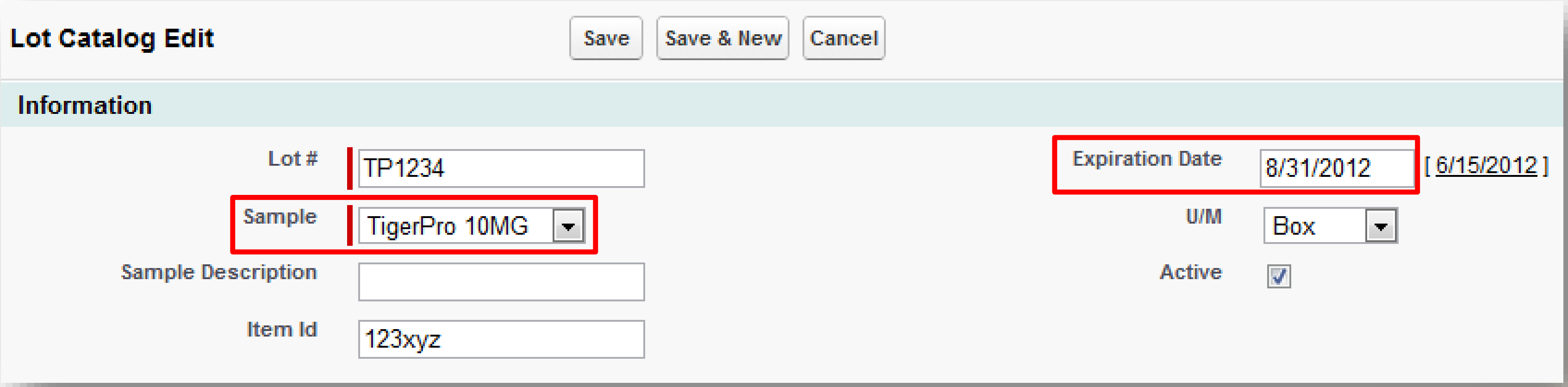
- **Update the Sample picklist in the Lot Catalog object**
  - Go to Create → Objects → Lot Catalog → Sample
  - Add a picklist value for each sample product
    - Value must match exactly the name of the sample product in the Product Catalog
    - Copy and paste from the Product Catalog to avoid mistakes

Picklist Values New | Reorder | Replace | Printable View

Action	Values	Default	Chart Colors
Edit | Del	Cholecap 10mg		Assigned dynamically
Edit | Del	Cholecap 20mg		Assigned dynamically
Edit | Del	Cholecap 40mg		Assigned dynamically
Edit | Del	Cholecap 80mg		Assigned dynamically
Edit | Del	Restolar .5mg		Assigned dynamically
Edit | Del	Restolar 1mg		Assigned dynamically
Edit | Del	SnakePro 10MG		Assigned dynamically
Edit | Del	TigerPro 10MG		Assigned dynamically

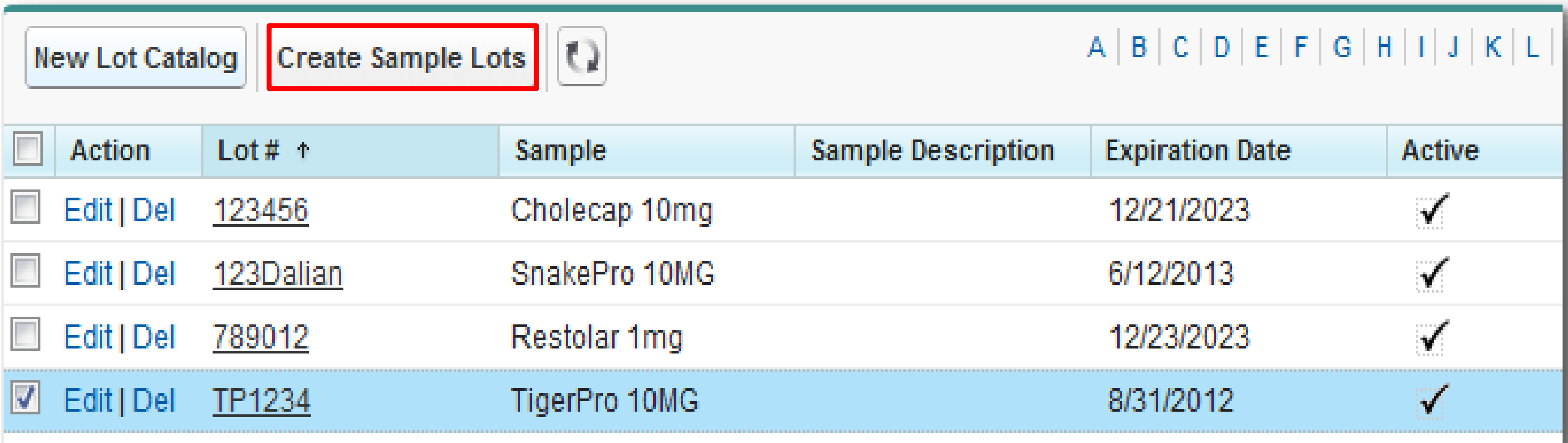
Lot Catalog (Optional) – Continued

- **Create the Lot Catalog record for the sample product lot**
  - Go to All Tabs → Lot Catalog
  - Select the Sample from the picklist
  - Expiration Date must be set to a future date
- **The Lot Catalog represents all Samples and their corresponding Lot #s**



Sample Lot from Lot Catalog

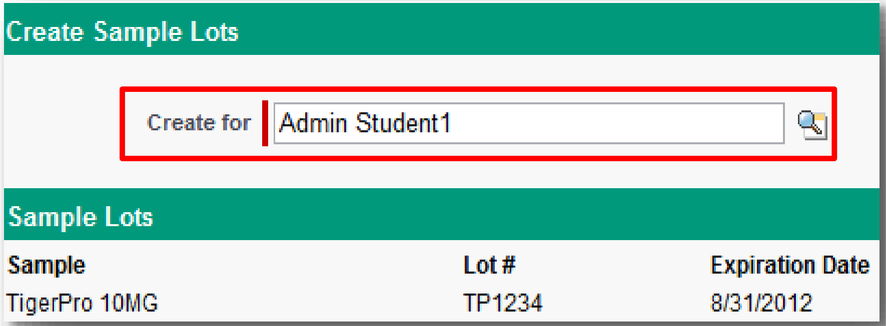
- **Create a Sample Lot for the Sample Admin**
  - Go to All Tabs → Lot Catalog → click the Go button
  - Select the checkbox for the desired sample product lot
  - Click the Create Sample Lots button



	Action	Lot # ↑	Sample	Sample Description	Expiration Date	Active
☐	Edit | Del	123456	Cholecap 10mg		12/21/2023	✓
☐	Edit | Del	123Dalian	SnakePro 10MG		6/12/2013	✓
☐	Edit | Del	789012	Restolar 1mg		12/23/2023	✓
☑	Edit | Del	TP1234	TigerPro 10MG		8/31/2012	✓

Sample Lot from Lot Catalog – Continued

- **Select the owner for the new Sample Lot and click Save**



- **This feature should only be used to create Sample Lots for Sample Admins**
  - Creation of these types of Sample Lot records does not calculate expected quantity on hand