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Administration Training  
Participant Manual



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## Purpose of this Manual

This activity guide should be used by participants in the Veeva CRM Administration Training class or by anyone who is going through the Veeva CRM learning process.

These exercises should be used in conjunction with other Veeva CRM Administration Training material for participants to practice the topics discussed in the training.

To perform these exercises, you need the following:

- A training org in which data exists to support the labs
- Practice data files are provided to class participants

If you have any questions regarding this guide, please contact:

- [techtraining@veeva.com](mailto:techtraining@veeva.com)

# Module 01: Introduction to Veeva

## OBJECTIVES

- Provide a Veeva Company Overview
- Introduce the Veeva Product Suite
- Identify Veeva and Salesforce.com (SFDC) Help Resources
- Review Veeva New Release Cycle

### Veeva Systems, Inc.

#### Who We Are

Founded in 2007, Veeva Systems, Inc. is a leader in cloud-based software for the global life sciences industry. Committed to innovation, product excellence, and customer success, Veeva has more than 500 customers, ranging from the world's largest pharmaceutical companies to emerging biotechs. Veeva is headquartered in the San Francisco Bay Area with offices on the East Coast as well as in Europe, Asia, and Latin America and currently employs over 1,800 individuals globally.

#### Our Products

Veeva Systems, Inc. offers several cloud-based products to support work within the life sciences industry. Our main products include:

- **Veeva CRM:** Modeled after the consumer web and built on the Force.com platform, Veeva CRM is the first solution created specifically for life sciences and the unique needs of human, consumer, and animal health. With advanced capabilities for planning and coordination across all channels, and predictive analytics through [Veeva CRM Suggestions](#), Veeva CRM is the end-to-end solution that helps companies adapt quickly to changing business needs and drive business growth. **Veeva CRM Admin training is 4 days.**
- **Veeva Vault:** The first cloud-based suite of content management applications developed specifically for the global life sciences industry. Veeva Vault offers different applications for managing R&D (Clinical, Quality, and Regulatory) or Commercial content. Vaults can be integrated with Veeva CRM and other systems. **Veeva Vault Admin training is 3 days.**
- **Veeva CRM Multichannel:**
  - **Closed-loop Marketing (CLM)** - Veeva CLM is easy to use closed loop marketing for tailored sales calls and fast, accurate call recording. Because it is part of the rep's workflow, digital sales materials are easy to access and share. CLM content is created, reviewed and approved in a Vault and then synced to CRM.
  - **Approved Email:** Allows CRM users to send only pre-approved communication to health care providers (HCPs). Approved Email content is created, reviewed and approved in a Vault and then synced to CRM.
  - **Engage:** Today, more customers want to engage through their digital channel and device of choice. However, technology barriers and compliance risks have limited digital adoption. The Veeva CRM Engage family of applications makes it easy and compliant to engage through online meetings, virtual events, and web self-service. Engage content is created, reviewed and approved in a Vault and then synced to CRM. **Veeva Multichannel Admin training is 4 days.**
- **Veeva Align:** A global territory management tool built on the Veeva Vault platform. **Veeva Align Admin training is 2 days.**
- **Veeva Network:** Comprised of a growing database with millions of HCPs and HCOs (OpenData) and a Customer Master application which can be used to manage data change requests. **Veeva Network Admin training is 4 days.**

- **Veeva Events:** Built on the Force.com platform, Events is a custom solution used to plan and execute all events across the enterprise. Gives control and visibility to all speakers, attendees, activities and spend related to medical events. **Veeva Events Admin training is 2 days.**
- **Veeva CRM Reporting:** Veeva CRM reports provide insight into key transactional CRM data for your organization. This reporting training prepares CRM Business Administrators to create and troubleshoot SFDC reports and dashboards. **Veeva CRM Reporting training is 1 day.**

## **Additional Veeva Training**

You are attending just one of many Veeva courses and may need to take additional training in the future. To find a course and register for additional training visit our training page at:

<https://www.veeva.com/services/training/>

For private class requests send an email to: [trainingrequests@veeva.com](mailto:trainingrequests@veeva.com)

## **Veeva CRM Help Documentation**

One of the most useful resources you will have after training is the Veeva CRM online documentation. It can be accessed from within your training orgs via a link we've placed in the left sidebar. Keep in mind the URL for the online help documentation is public and does not require you to login to a Veeva org to access it.

To access the Veeva CRM Online Help documentation go to:

<https://crmhelp.veeva.com/doc/Content/Home.htm>

## **Salesforce Help Documentation**

In addition to the Veeva CRM online documentation, you will need to continue educating yourself on the Force.com platform.

To access the Salesforce Online Help documentation, go to:

<https://help.Salesforce/home>

## **Checking Veeva and Salesforce Service Status**

The trust.veeva.com website displays the most up to date information on Veeva Systems' service status. You can check this site to view the status of the Veeva servers. The site is updated for incidents of service unavailability longer than 15 minutes. If you experience software latency and/or outages, you can visit this site to see what is causing the problems and find out when it will be resolved.

The trust.salesforce.com website displays SFDC specific server statuses. If you experience software latency and/or outages, you can visit this site to see what is causing the problems and find out when it will be resolved.

## **Veeva Support Site**

If you experience issues with Veeva products, you should create a case with Veeva support.

To access the Veeva support site go to: <https://www.veeva.com/services/support-and-community/>

Only customers can get a login to the Veeva support site. If you work for a partner company, then you can get a login to the Veeva support site through the Veeva customer with which you are working. To request a Support Portal account, send an email to [global\\_support@veeva.com](mailto:global_support@veeva.com) along with the user's First Name, Last Name, Title, Phone, Email Address, and Organization (account in which to log tickets on behalf of).

When accessing the support site for the first time you should search and review the **Welcome to the Veeva Support Portal** page which describes how you can best take advantage of the support site.

## Veeva New Releases

### Timeline

Veeva releases 3 new versions of each product per year. The releases happen every 4 months in April, July, and December. Each release includes new features and in some cases enhancements to existing features.

New release notes are made available 30 days prior to the actual release date. Three weeks prior to upgrading the production environments, Veeva upgrades the full sandboxes. This should give Administrators time to review the release notes and test new features before enabling them in production. Most features are deployed disabled and the new release notes will have the instructions needed to enable the new features if desired.

### Regression Testing

Veeva performs regression testing to ensure that our new features don't break our pre-existing features prior to each upgrade.

Customers that have a lot of customizations are responsible for performing their own regression testing. If best practices have been followed when performing configurations and customizations, there should not be issues related to upgrades.

It is always a good idea to enable the new features in a sandbox first to make sure they don't cause any issues before enabling them in production.

### Patches

In addition to the regular major releases, Veeva will release more frequent patch releases. These are usually fixes to existing features but can also be new features.

Veeva orgs can be placed in a **limited release** schedule. Limited release orgs will get new features as they are completed and made available by the Veeva Product team. Some customers are waiting for new features and can get them before the scheduled general release date.

Most Veeva orgs are in the **general release** schedule and only get new releases every 4 months.

All orgs, limited or general release, will get patches to fix known issues. Patches are usually delivered on Thursday and Friday evenings.

# Module 02: Introduction to Veeva CRM and the SFDC Platform

## OBJECTIVES

- Understand the Relationship between Veeva CRM and Salesforce
- Login to Veeva CRM
- Navigate the End User Interface
- Navigate the Setup Console
- Manage Users
- Overview of Veeva CRM Offline
- Install Veeva CRM for iPad

## Veeva CRM and the Salesforce Platform

Veeva CRM is a custom application built on the Salesforce platform that extends Salesforce's out-of-the-box, cross-industry, customer relationship management (CRM) solution. Veeva has developed extensive custom functionality tailored to the life sciences industry using Salesforce configuration and developer tools.

Veeva has a special agreement with Salesforce in which most standard Salesforce functionality, such as Opportunities, Cases, Quotes and Forecasts are not accessible to Veeva users. The main standard Salesforce functionality available for Veeva users are Accounts and Contacts.

Veeva customers can take full advantage of the platform to further extend both the standard Salesforce and standard Veeva functionality.

With clicks or code, you can customize anything, and what you customize connects with your standard functionality in Salesforce. Here are some examples of what can be done in the platform:

- Create custom objects
- Create custom fields for standard or custom objects
- Configure how data is displayed
- Setup processes with automatic email alert actions

## Clicks vs Code

Now is a good time to define declarative and programmatic development and make sure you understand the difference between the two.

Declarative refers to point-and-click functionality in Salesforce. It means that you can configure and customize Salesforce without writing code.

Programmatic refers to code-driven functionality in Salesforce. It means that you can customize Salesforce using programmatic tools like Apex, Visualforce, and standard web technologies like JavaScript, CSS, and more.

The following table highlights some (but not all) of the declarative and programmatic options in Salesforce:

Declarative	
User Interface	Create forms and page layouts using drag-and-drop tools in the Page Layout editor.
Lightning Process Builder	Create rules that take time-dependent actions and automate multi-step processes using Workflows. Automate the processes your organization uses to approve Salesforce records using Approvals.
Schema Builder	Customize objects and create relationships between them using drag-and-drop tools in the Schema Builder.

Reports and Dashboards	Present data quickly and comprehensively using Report Builder. Show data from source reports as visual components using Dashboards.
<b>Programmatic</b>	
Apex	Develop with an object-oriented, Java-like programming language that's optimized and tuned for accessing Salesforce database objects.
Visualforce	Define user interface components and construct visual elements using a markup language like HTML, thus allowing the user to interact with and modify data from the database.
SOQL	Look at a specific set of data, like all Accounts in a geographic region, using Force.com's object database query language, similar in syntax to SQL. SOQL is used in many of the Salesforce APIs.

It's important to note that most things can be done with clicks, and the golden rule is to always try to build with clicks before going to code, as it is more sustainable and maintainable moving forward. Code is meant to give you more granular control of customization when clicks aren't enough.

You will be learning how to use the Force.com configuration console this week. **All configuration is performed from the online configuration console.** Once the configuration is completed, you simply synchronize using Veeva on the iPad or Surface to view and test the configuration offline.

## Veeva CRM Languages

As Veeva is implemented in a country for the first time, we will translate the Veeva specific user interface strings to the new language. These are examples of the currently available languages.

Chinese (Simplified)	Italian
Chinese (Traditional)	Japanese
Czech	Korean
Danish	Portuguese (Brazil)
Dutch	Polish
English	Romanian
Finnish	Russian
French	Slovak
German	Spanish
Greek	Spanish (Mexico)
Hungarian	Swedish
Indonesian	Thai
Ukrainian	Turkish
	Vietnamese

Veeva orgs are provided with English as the Default language. If your users need to view the user interface in one of these languages, all you should do is create a support case with Veeva requesting that the needed language is installed in your org. This process should only take a few hours.

If your company is implementing Veeva in a country for which we currently don't have a language available, you will need to work with a Veeva employee to submit a request for Veeva to be translated to the new language. This process will take 6 – 8 weeks on average.

## Salesforce Terminology

Before we go any further, we're about to start using a bunch of terms you might not know, so let's take a moment to define a few things.

Veeva uses a lot of platform terms and acronyms. Here are a few you'll see as we go through this module:

Term	Meaning
Org	Short for “organization,” the place where all your Veeva data, configuration, and customization lives. You and your users log in to access it. You might also hear this called “your instance of Veeva”. In this class, each participant has their own separate org to login to and configure.
Object	A table in the database. For example, Account, Call and Product.
Record	A row of data for a table in the database. For example, the Melany Segnit Account is a record of the Account object and Cholecap is a record of the Product object.
Field	A column of data for a table in the database. The place where you store a value, like a name or address.
Profile	A set of permissions that controls what functionality a user can access.

## Follow Along Exercise: Login to Veeva CRM

Each class participant should have received an email from [support@salesforce.com](mailto:support@salesforce.com) with the link to set the password for their Veeva CRM org. If you don't see this email, check your spam folder.

1. If you have not done so yet, set the password for your Veeva training org by clicking the **Verify Account** button within the email you received from support@salesforce.
2. If you have already set the password for your training org then:
  - a. Go to <https://login.salesforce.com>
  - b. Enter your username and password.
3. Close the **Getting Started with Chatter** window if necessary.

## Demo: Navigate the End User Interface

You are now logged in to your Veeva org as a System Administrator. We will start by reviewing some of the end user interface navigation.

1. Upon login, you are viewing the **Home** tab. You will see links to other tabs adjacent to Home in the tab menu bar. Click the **+** (**All Tabs**) icon to view a list of all tabs the user has access to.
  - a. Tabs can be based on Objects, Visualforce pages or Web content.
2. To view all Accounts, click the **My Accounts** tab.
  - a. This is one of many tabs where users can view and modify object data, in this case the Account object. Each row in the table is an Account record. Each column is an Account field.
3. Click the **Clinton Ackerman** link to view his Account details.
  - a. This is a standard Salesforce page layout created using a drag-and-drop page layout editor. Additionally, it includes sections such as Ratings and Evaluations that display custom Veeva developed S-Controls.

- b. After viewing a record, it will show up in the **Recent Items** section in the sidebar on the left-hand side of the screen. You can easily navigate back to the record later by clicking the link.
4. Click the **Veeva CRM Documentation** link in the sidebar on the left-hand side of the screen.
    - a. This is a quick link to the CRM online help documentation.
  5. Close the CRM online help documentation window.
  6. Click the **Help & Training** link in the top right-hand side of the screen.
    - a. This is a quick link to the Salesforce online help documentation.
  7. Close the Salesforce online help documentation window.
  8. Click the **Veeva CRM** menu link in the top right-hand side of the screen.
    - a. Each item in this menu is an App. We will primarily be working with the Veeva CRM App in this class. In Salesforce, an App is a collection of tabs. Notice that the Administrator has access to additional Apps. Selecting an App from this menu will update the tabs that are displayed.
  9. Close the App menu.

## Demo: Explore the Setup Console

In this demo, we will explore the Setup Console used by System Administrators for configuring and customizing an org.

We will start by reviewing relevant menu items in the **Personal Setup** section of the Setup menu.

1. Click **Training Attendee # → Setup**
2. Expand the **My Personal Information** menu in the Setup menu on the left-hand side of the screen.
  - a. Users can manage their own personal information from this page.
3. Click the **Personal Information** link to view the logged in user's detail page. Important fields include:
  - a. **Time Zone:** Different users may observe that the same record displays different time values within timestamp fields like created date, last modified date etc. This usually happens when the time zone setting for the users are different. Users can change their time zone from this page.
  - b. **Locale:** The locale will drive how certain field values are formatted for the user. For example, if a user's locale is set to English (US), then the currency fields will show the Dollar sign but if the locale is set to English (UK), then the currency fields will show the Pound sign.
  - c. **Language:** This is where users can set their language. If the language is changed here, the Veeva CRM user interface will be displayed in the selected language for the user.
  - d. **Role:** Determines a user's record-level access to object records through the Role Hierarchy.
    - a. **User License:** Veeva only uses two types of licenses:
      - i. **Salesforce** – The license type used for System Administrators.
      - ii. **Salesforce Platform** – The license type used for end users.
  - e. **Profile:** Determines a user's access privileges throughout the application.
  - f. Scroll down to the **Territories** section. This is a quick way for a user to see the territory to which they are assigned. In Veeva, the territory determines which Accounts the user has access to.
4. Click the **Grant Login Access** link under My Personal Information in the Setup menu.

- b. This is how users can give Veeva Administrators access to login as them for support and troubleshooting purposes. They would select the **Access Duration** value for the **Your Company's Administrator**.

Next, we will review relevant menu items in the **App Setup** section at a high level. This is where you will go to configure Veeva (Salesforce), build, deploy, and manage applications. We will spend most of this class working in this menu.

5. Expand the **Customize** menu. Review the following menu items under Customize:
  - a. **Home:** This is where administrators can configure the page layouts that display on the Home tab. Different page layouts can be assigned to different profiles. For example, Primary Care Sales Reps may see different components on the Home tab than Primary Care Sales Managers.
  - b. **Accounts:** Veeva uses the standard Accounts object to manage Veeva Accounts such as doctors and hospitals. Administrators can configure Veeva Accounts by creating or modifying components in this object. Common configuration includes creating custom fields, page layouts, validation rules, record types and buttons.
6. Expand the **Create** menu. Review the following menu items under Create:
  - a. **Objects:** There are the 220+ objects that Veeva provides out-of-the-box. From a Salesforce perspective, these are custom objects created by Veeva. A common Veeva configuration will be to go into existing Veeva objects and extend them by adding custom fields, page layouts, and validation rules.
  - b. **Workflow & Approvals:** In this section, you can define workflow rules and actions that implement business process automation.
7. Expand the **Develop** menu.
  - a. This area contains lots of custom Veeva specific application components such as Apex classes, Visualforce Pages, and Triggers. These components are used by the Veeva application to implement core standard Veeva functionality and business logic. **These application components should not be modified. If you think one must be modified, then you should contact a Veeva consultant first for guidance.**
    - i. **Apex Classes** – Custom Veeva logic implemented using Apex, which is the Force.com programming language.
    - ii. **Visualforce Pages** – Custom Veeva user interfaces implemented using HTML tags along with Force.com specific tags that can access the Salesforce database.
    - iii. **S-Controls** – This is Salesforce's old technology that has been replaced by Visualforce Pages. It also implements custom user interfaces. Veeva still uses S-Controls for Veeva specific functionality such as the Sphere of Influence and Product Metrics. Administrators will not need to create or modify S-Controls but simply place them on page layouts.
    - iv. **Triggers** – Implements custom cross-object inserts and updates.
8. Expand the **Deploy** menu.
  - a. This is one of many ways that Administrators can migrate setup configuration between orgs.
9. Expand the **Manage Users** menu. Review the following menu items:
  - a. **Users:** This is where Administrators can reset passwords and create new users.

- b. **Profiles:** This is where Administrators create and manage user profiles and assign permissions for the org.
- c. **Login History:** This page provides 6 months of history on who has logged into your org. View date, time, user IP address, browser, application and other important data. This is useful for both security tracking purposes and adoption.

10. Expand the **Company Profile** menu.

11. Click on the **Company Information** link. This page provides an overview of your Veeva org. Important fields include:

- a. **Organization Name:** Name of your Veeva org. Up to 80 characters are allowed in this field.
- b. **Fiscal Year Starts In:** If using a standard fiscal year, the starting month and year for the organization's fiscal year. If using a custom fiscal year, the value will be "Custom Fiscal Year."
- c. **Default Time Zone:** Primary time zone in which the organization is located. A user's individual Time Zone setting overrides the organization's Default Time Zone setting.
- d. **Default Language:** The default language that is selected for new users in the organization. This setting determines the language used for the user interface text and help. **You should not change this value in Veeva orgs.** Instead set the user's default language on the user's detail page.
- e. **Salesforce Organization ID:** Code that uniquely identifies your organization to Salesforce. Veeva support will often need this id when you create support cases.
- f. **User Licenses:** Number of user licenses available and being used in the org.
  - i. When a user leaves the organization, you should deactivate the user account to free-up the user license.

12. Expand the **Security Controls** menu. Review the following menu items:

- c. **Login Access Policies:** If your company is using the login access functionality and don't want to require users to explicitly grant the login access, you can enable the grant login access for the entire org by selecting the **Administrators Can Log in as Any User** checkbox.  
 Only Administrators with the Modify All Data permission for specific objects and Delegated Administrators with the View Setup and Configuration permission can login as any user
- d. **View Setup Audit Trail.** Provides 6 months of configuration changes made to your org. View date, time, and user who made the change. Although not all changes are tracked, this is an essential tool for troubleshooting issues and finding the root cause.
- e. **Network Access.** Besides the standard username and password, Salesforce can be configured to check if the IP address being used is in a list of trusted IP addresses. This implements additional security to prevent hackers from trying to connect to orgs. Most Veeva orgs do not use this feature because field Sales Representatives are mobile and likely use several network connections throughout the day to access the Internet. Each time they connect to a different network a new IP address is assigned to their device. So, Veeva Consultants normally turn this feature off in Veeva orgs by whitelisting the entire world's IP range. This can be done easily by installing the package provided in this link for all users.

<https://na35.lightning.force.com/packagingSetupUI/ipLanding.app?apvId=04tF000000JHh6>

13. Expand the **Translation Workbench** menu.

- a. The **Translation Workbench** is used to maintain user interface label translations for orgs with multiple languages enabled. Export / Import functionality is available for bulk translations.

## Independent Exercise #1 – Update a User Account

In this exercise, you will update the email address and username for an end user, Sarah Jones. When you modify a user profile, Salesforce sends an email to the user requesting that they verify the changes. If the user does not verify it, then the changes are not saved.

1. From the Setup menu, go to **Manage Users → Users** and click the **Edit** link for **Jones, Sarah**.
2. Modify Sarah's **username** to remove the auto-generated characters between sjones and the @ sign. For example, the underlined characters in the following example should be removed, sjones.9utikrf5jaw8@<your training domain>.net.
- Note:** Your training domain matches the value after the @ sign in your System Administrator login username. Each participant has a unique training domain.
3. Change Sarah's email address to your **own real** email address.
4. Click **Save and OK**.
5. Go to **Training Attendee # → Logout**.
6. Close the web browser window.
7. Check your email inbox for Sarah's request to change email. Click the activation link to confirm the new email address. You may need to check your Spam or Junk folder if this email does not appear in your Inbox. The new email address will only be saved in the system after this link is clicked.
8. Click the link that reads **Continue**.

Check to make sure the email address has been changed. Then reset the password for Sarah Jones.

9. Login as the Administrator, if necessary.
10. From the Administration Setup menu, go to **Manage Users → Users**.
11. Click **Edit** link for **Jones, Sarah**. Make sure your email address displays.  
If the email has not changed and is still the old email, change it to your email again and save. Then repeat the previous steps to confirm the new email.
12. Click **Cancel**.
13. Check to select the checkbox for Jones, Sarah and click the **Reset Password(s)** button.
14. Click **OK**.
15. Go to **Training Attendee # → Logout**.
16. Check your email inbox for Sarah's password confirmation and click the activation link to login automatically.

Your Salesforce administrator recently reset the password for the username [sjones1@crmcert1.net](mailto:sjones1@crmcert1.net). To finish resetting your password, go to the following link. This link expires in 24 hours.

<https://login.salesforce.com/?c=zNFDRZ41sZfXtkRvBR8dSp5GU4Pv%2Bi2SumUXPaGg7GLrc%2FoDStinEq7hdVQ06xER5HMn8J1ujep%2B6e4lyle69F2ROYxrxFyQJla1eOSlsAxA%3D%3D>

17. The Change Your Password window displays.
18. Type **Train1234** as Sarah's new password and then click **Change Password**.
19. You are now logged in as Sarah Jones.

While logged in as Sarah Jones, grant the administrator login access for up to 1 year. Then login as the administrator and test that this has worked by logging in as Sarah Jones.

20. Go to **Setup** → **My Personal Information** → **Grant Login Access**.
21. Click the **Access Duration** field next to Your Company's Administrator.
22. Select **1 Year** from the **Access Duration** picklist.
23. Click **Save**.
24. Go to **Sarah Jones** → **Logout**. This will log Sarah Jones out.
25. Login as the Administrator.
26. Go to **Setup** → **Manage Users** → **Users**.
27. Click the **Login** link for Jones, Sarah. This is how the Administrator logs in as an end user. Notice the upper right corner of the screen shows you are logged in as Sarah Jones.
28. Go to **Sarah Jones** → **Logout**. You are automatically logged back in as the Administrator.
29. From the Administration Setup menu, go to **Security Controls** → **View Setup Audit Trail**. This audit trail shows that you have logged in and out as Sarah Jones.

## Veeva CRM Offline Devices

In addition to accessing Veeva CRM online, users can also work with Veeva CRM on their iPad or Windows mobile device. The Veeva CRM app is easy to install and deploy to end users. When Veeva CRM users log in to the app from one of these devices for the first time, a local database is created so they can work offline. They then synchronize data between their mobile device and the online application on a regular basis to keep the data up to date across platforms. We will discuss the synchronization process in more detail later in this course.

Whether your organization is using the iPad or Surface, the configuration is done once using the CRM online configuration setup menus.

Veeva CRM on iPad



Veeva CRM on Surface



Veeva CRM on Surface with Keyboard



### Exercise #2: Install Veeva CRM on iPad or Windows Device

If you have an iPad or a Windows device, you can install Veeva CRM by following the instructions in this exercise. If you're using a Windows device, you will have to follow the instructions on the Veeva CRM Online Help Documentation to [enable sideloading](#) and [install](#) Veeva CRM on the windows device.

1. Connect your iPad or Windows device to a wireless network.
2. Launch a web browser on your mobile device.

3. In the web browser, navigate to [login.salesforce.com](https://login.salesforce.com).
4. Log in to your Administrator account using the same login credentials you used to access Veeva CRM online.
5. If the **Salesforce1** page displays, click the menu button in the upper left corner of the page and select **Full Site**.
6. The Home page displays. If needed, click the Sidebar arrow to expand it.
7. In the lower part of the sidebar, click the **iRep Install** (or Install Window 8 application) link.
8. Click the **Download and Install Veeva CRM on iPad** (or Windows 8) link.
9. Click the **Install** link.
10. You should see the Veeva CRM icon being installed on the mobile device's desktop.

After installing Veeva CRM for iPad, first time users need to configure their device to trust the app developer:

11. Navigate to the iPad **Settings** menu.
12. Select **General**.
13. Select **Profiles**.
14. Select **Veeva Systems developer**.
15. Select **Trust**.

Now that the app has been trusted, you should be able to open it:

16. Tap the Veeva CRM icon on the mobile device's desktop to open the login page.
17. Enter **Sarah Jones**'s username and password.
18. Click the **Sign In** button.
19. A Synchronization process starts. This process should typically take about 2 to 5 minutes to complete.
20. Once the Synchronization process completes you should see the Veeva CRM home page on the device.

## iPad Demo: Navigate the Veeva CRM iPad Application

In this demo, we will navigate the Veeva CRM offline app on an iPad.

1. Upon login, the offline home page displays.
2. When working in the offline application, users navigate to different functional areas using the menu items on the left-hand side of the screen.
3. The Sync icon  in the bottom left corner of the screen is used to initiate the data synchronization process. It is important to note that users are not able to work in the application while the synchronization process is actively running.
4. Click the **My Accounts** menu item. A list of Account records displays.
5. Click the **Clinton Ackerman** Account. The same details for Clinton Ackerman display as they did online.

- a. The menu items on the left-hand side of the screen allow users to perform actions such as edit an Account record or record a call for an Account. These menu items correspond to the buttons that the user sees when viewing the Account record online.
- b. In the bottom portion of the left-hand navigation menu, related lists display for the user to access records of related data, such as Addresses for an Account.

# Module 03: SFDC User Interface Configurations

## OBJECTIVES

- Configure Salesforce User Interface Settings
- Understand Salesforce Search Functionality
- Setup a Company Logo
- Configure Home Page Layouts

### Salesforce User Interface Settings

Salesforce provides several settings that allow Administrators to enable various user interface configurations for an entire org. These settings are accessed from **Setup → Customize → User Interface**.

The table below describes some of the User Interface, Sidebar, and Setup settings. Keep in mind that these settings apply to the online application only and do not have any control over the Veeva user interface on the iPad or Surface. Most of these User Interface Settings are already enabled in your training org.

User Interface Setting	Meaning
Enable Collapsible Sections	Collapsible sections let users collapse or expand sections on their record detail pages by using the arrow icon next to the section heading. When enabling collapsible sections, make sure your section headings are displayed for each page layout. Sections remain expanded or collapsed until the user changes the settings for that tab. If your org has enabled record types, Salesforce remembers a different setting for each record type.
Show Quick Create	<b>Do not</b> enable in Veeva orgs. Quick Create allows users to create a record quickly with minimal information from an object tab. Accounts created using the Quick Create link will bypass the Veeva New Account Wizard.
Enable Hover Details	Hover detail displays an interactive overlay containing record details. Details appear when users hover over a link to that record in the Recent Items list on the sidebar, or in a lookup field on a record detail page. Users can quickly view information about a record before clicking to view or edit the record. The record's mini page layout determines which fields are included in the hover details. Users can't customize which fields appear.
Enable Related List Hover Links	Related list hover links display at the top of record detail pages and custom object detail pages in Setup. Users can hover over a related list link to display the list and its number of records in an interactive overlay. Users quickly view and manage the related list items from the overlay. Users can also click a related list hover link to jump to the related list without having to scroll down the page.
Enable Inline Editing	Inline editing lets users quickly edit field values, right on a record's detail page.
Sidebar Settings	Meaning
Enable Collapsible Sidebar	The collapsible sidebar enables users to show or hide the sidebar on every page that normally includes it. When enabled, the collapsible sidebar is available to all users in your org, but each user can choose how to display the sidebar. Users can leave the sidebar visible, or they can collapse it and show it only when needed by clicking the edge of the collapsed sidebar.

Setup Settings	Meaning
Enable Enhanced Profile User Interface	<b>Do not</b> enable this in your Veeva training org. Enables the enhanced profile user interface, which allows you to navigate, search, and modify settings for a single profile.

## SFDC Searching

Salesforce provides 3 types of searches within the online application. Each search type - sidebar, advanced, and global - searches a unique set of fields for each object. Your search results for an object depend on two factors: the type of search and the searchable fields for that object.

### Sidebar Search

The sidebar search is very limited because the search value is only searched within a small set of fields including name, phone, email, and any external IDs.

When using the sidebar search, search values with more than one word are treated as phrases. For example, if you are searching for Bob Jones, the search will only return records containing “Bob Jones” and not “Bobby Jones”.

You can also use the \* to represent any number of characters and the ? to represent a single character.

### Advanced Search

The advanced search will return more records because the search value will be searched within more fields, including all custom fields. Remember that most Veeva fields are custom fields from a Salesforce perspective.

**Therefore, you should recommend that end users always search using the advanced search.**

The advanced search treats search values with more than one word as separate words instead of phrases. Searching for Bob Jones, will return records containing Bob Jones as well as records containing Bob Smith whose email address is bsmith@jones.com.

The advanced search supports the AND, OR, and NOT operators in addition to \* and ?.

### Global Search

Global Search replaces the Sidebar Search and Advanced Search when Chatter is enabled for an org. Global Search is functionally similar to Advanced search but searches within even more objects and fields. In addition to all object records, the Global Search returns records related to Chatter such as Chatter Feeds and Chatter Groups.

### Search Settings

Salesforce provides several search settings that can be enabled to modify the Search functionality. These settings can be accessed by navigating to **Setup → Customize → Search → Search Settings**. Most of these Search Settings are already enabled in your training org.

Search Settings	
<input checked="" type="checkbox"/>	Save
<input checked="" type="checkbox"/>	Cancel
<input checked="" type="checkbox"/> Enable "Limit to Items I Own" Search Checkbox <input checked="" type="checkbox"/> Enable Document Content Search <input type="checkbox"/> Enable Search Optimization if your Content is Mostly in Japanese, Chinese, or Korean <input type="checkbox"/> Use Recently Viewed User Records for Blank and Auto-Complete Lookups <input checked="" type="checkbox"/> Enable Drop-Down List for Sidebar Search <input checked="" type="checkbox"/> Enable Sidebar Search Auto-Complete <input checked="" type="checkbox"/> Enable Single-Search-Result Shortcut for Sidebar and Advanced Search	

The table below describes some of the Search settings available:

Search Setting	Description
Enable “Limit to Items I Own” Search Checkbox	If this setting is enabled, the Limit to Items I Own option is available to users. The option allows users to include only records for which they are the record owner when entering search queries in the sidebar.
Enable Document Content Search	If this setting is enabled, users can perform a full-text document search. When a new document is uploaded or an old one is replaced, its contents are available as search terms to retrieve the document. This setting applies only to searches for the document object.
Enable Search Optimization if your Content is Mostly in Japanese, Chinese, or Korean	If this setting is enabled, search is optimized for the Chinese, Japanese, and Korean languages in the sidebar search. It affects sidebar search and the account search for <b>Find Duplicates</b> on a lead record in sidebar search and global search.
Enable Drop-Down List for Sidebar Search	If this setting is enabled, a drop-down appears for users to choose whether to search within tags, within a specific object, or across all objects.
Enable Sidebar Search Auto-Complete	If this setting is enabled, when users start typing search terms, sidebar search displays a matching list of recently viewed records.

## Demo: Use the Sidebar and Advanced Search

1. Enter **Sara Jones** in the Sidebar search field and click **Go**.
  - a. Notice there are no results returned. This is because the Sidebar search is looking for an exact match and Sarah has an h in her name that is missing in the search value.
2. Click the **Advanced Search...** link.
3. Enter **Sara Jones** in the **Search** field and click the **Search** button.
  - a. There are now results returned for multiple different objects that have matching field values.
4. Enter **New York** in the Sidebar search field and click **Go**.
  - a. How many records are returned in the results? For which objects? Notice that New York is part of the Name field for each of the resulting records.
5. Click the **Advanced Search...** link.
6. Enter **New York** in the **Search** field and click the **Search** button.
  - a. Notice there are now even more results returned for more objects. This is because additional fields, including custom fields (such as City) are searched using the Advanced Search.



When using the Quick Find / Search field in the Setup console, configuration components are being searched and not object records.

## Demo: Setup a Company Logo

Veeva customers can brand their Veeva Apps with their own logos. Administrators must upload the logo image into the **images** folder in the **Documents** tab before it can be selected as the App logo.

1. Once the image exists in the Documents tab, go to **Setup** → **Create** → **Apps** and click the **Edit** link for the desired app.

2. Click the **Insert an Image** button, navigate to the **images** folder and select the desired image.
3. Click **Save**.

## Home Page Configuration

When users log in to Salesforce, their first view will likely be the Home tab. The items displayed vary depending on your edition, layout, and customizations. A default layout generally includes the following:

- A sidebar where you can create new records, jump to your recently viewed items in Salesforce, add handy links, or restore items that you've deleted. The same sidebar appears on most pages.
- A list of your open tasks in Salesforce, with the option to filter by date range or view all open tasks. If you don't see them right away, scroll down, or collapse the Chatter feed to move Tasks up.
- Dashboards showing up-to-the-minute results from several reports. Dashboard information is refreshed whenever you reload the page.

Different Home Page layouts can be assigned to different profiles. For example, your Primary Care Sales users may need to see different components on the Home page than your Primary Care Sales Managers or MSLs.

When configuring Home Page layouts, you can select checkboxes to add existing Home Page Components. You must create the Home Page Components prior to being able to add them to the Page Layout. Home Page Components can be:

- Custom links
- Images / Logos
- Custom HTML Content
- VisualForce Pages

**Step 1. Select the components to show**

Step 1 of 2

Choose the components to include on your home page layout.

Layout Name  ! = Required Information

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

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

**Next** **Cancel**

Components selected in the **Wide Components to Show** section will display in the main Home screen. Components selected in the **Narrow Components to Show** section will display in the Sidebar.

Notice the **iRep** option within the Narrow Components section. Selecting this option enables users to install Veeva CRM for the iPad while logged in to the online application within a web browser on their iPad as was described in the previous module. An additional checkbox, **Veeva CRM on Windows 8**, enables a link for users to download the app for Windows mobile devices.

The home page configurations we are reviewing in this module only apply to the home page that displays within the online application. We will see how to configure the offline home page in a later module.

## Demo: Configure a Home Page Layout

In this demo, we will update the Home page layout displayed for the Administrator profile by adding the existing Specialist Alerts component.

1. Go to **Setup → Customize → Home → Home Page Layouts**. From here you can customize an existing Home page layout or create a new one.

Page Layout Assignment		New
Action	Name ↑	Created By
Edit   Del	Dashboard Home Page Default	Henry Almeida, 8/12/2011 3:04 PM
Edit   Del	Managed Markets Director Home Page Layout	demo user0, 8/12/2011 3:04 PM
Edit   Del	Managed Markets Sales Home Page Layout	demo user0, 8/12/2011 3:04 PM
Edit   Del	MSL Director Home Page Layout	demo user0, 8/12/2011 3:04 PM
Edit   Del	MSL Home Page Layout	demo user0, 8/12/2011 3:04 PM
Edit   Del	Specialty Sales Home Page Layout	demo user0, 8/12/2011 3:04 PM
Edit   Del	Specialty Sales Manager Home Page Layout	demo user0, 8/12/2011 3:04 PM

2. To determine which page layout is assigned to the System Administrator profile, click the **Page Layout Assignment** button.
  - a. Notice the **Dashboard Home Page Default** home page layout is assigned to the System Administrator profile.
3. Click the back button on the web browser to return to the previous page.
4. Click the link for **Dashboard Home Page Default**.
5. Click the **Edit** button to put the page layout in edit mode.



It is best practice **not** to enable the standard Salesforce calendar on the home page. Veeva users manage their schedule from the Veeva My Schedule tab and should not use the Salesforce calendar on the home page.

6. Select the checkbox for **Specialist Alerts** and click **Next**.
7. Order the components on the Wide (right) column so that the Specialist Alerts component displays right below Tasks.

**Step 2. Order the components**

Arrange the components on your home page.

Narrow (Left) Column	Wide (Right) Column
Sidebar Search Veeva CRM Help Messages & Alerts Recent Items VMobile Install iRep	Tasks <b>Specialist Alerts</b> Items to Approve Dashboard Snapshot
Top Up ▲ Down ▼ Bottom	Top Up ▲ Down ▼ Bottom

8. Click the **Save** button.
9. Click the **Home** tab and verify the Specialists Alerts section now displays.

## Independent Exercise #3 – Configure Custom Links to Display on the Home Page

In this exercise, you will configure custom links to display in the Home page sidebar. There are 3 basic steps: First, create the custom link to add to the Home page. After the link is created, add it to a Home page component. Then add the component to display on the Home page layout.

1. Add a new custom link to the Home page tab.
  - a. Go to **Setup** → **Customize** → **Home** → **Custom Links**
  - b. Click the **New** button.
  - c. Enter the following information:
    - i. **Label:** Clear Veeva Cache
    - ii. **Behavior:** Display in existing window with sidebar
    - iii. **Content Source:** Custom S-Control
    - iv. **Content:** CLEAN\_CACHE\_BY\_ORG [CLEAN\_CACHE\_BY\_ORG]
  - d. Click the **Save** button.
  - e. Click **OK** in the dialogue window. **Note:** Clear Veeva Cache will be discussed in a later module.
2. Add another new custom link to the Home tab by clicking the New button on the Custom Links page.
  - a. Enter the following information:
    - i. **Label:** Google
    - ii. **Behavior:** Display in new window
    - iii. **Content Source:** URL
    - iv. **Text box (open text field):** <http://www.google.com/>
  - b. Click the **Save** button.
  - c. Click **OK**.
3. Add the new links as a new Home page component.
  - a. Go to **Setup** → **Customize** → **Home** → **Home Page Components**.
  - b. In the **Custom Components** section, click the **New** button.
  - c. Click **Next**.
  - d. Enter **My Links** in the **Name** field. Type should default to Links.
  - e. Click **Next**.
  - f. On Step 2, select **Clear\_Veeva\_Cache** and click the **Add** arrow. Do the same for **Google** so that both links are displayed under Custom Links to show.
  - g. Click **Save**.
4. After creating the component, configure the Home page layout to display the links.
  - a. Go to **Customize** → **Home** → **Home Page Layouts**.
  - b. Click the **Edit** link next to **Dashboard Home Page Default**.

- c. Check the **My Links** checkbox.
  - d. Click **Next**.
  - e. Under Narrow (Left) Column, select **My Links** and click the **Top** arrow to move it to the top.
  - f. Click **Save**.
5. Test the Home page configuration by clicking on the **Home** tab. My Links should now appear in the top left column with Clear Veeva Cache and Google.

# Module 04: Configure Page Layouts and Custom Objects

## OBJECTIVES

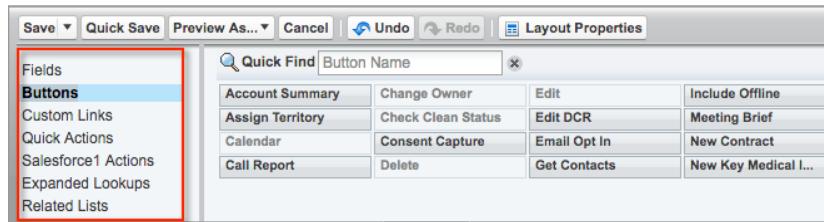
- Modify Page Layouts
- Understand the Purpose of Validation Rules
- Create a Custom Object
- Configure Custom Object Components
  - Custom Fields
  - Object Relationships
  - Page Layouts
  - Custom Object Tab
- Review Salesforce Platform Limits

## Modifying Page Layouts

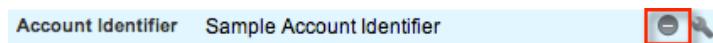
Page layouts control the layout and organization of buttons, fields, s-controls, VisualForce pages, custom links, and related lists on object record pages. They also help determine which fields are visible, read only, and required.

Salesforce provides a drag-and-drop tool for editing page layouts called the enhanced page layout editor. The enhanced page layout editor is enabled by default.

Within the enhanced page layout editor, you will see a menu of component types (for example: Fields, Buttons and Related Lists). After selecting a component type from this menu, you will see a list of all existing items of that type. Items that have already been added to the page layout will be greyed out. All other items can be clicked on, dragged onto the page layout, and dropped in an allowed location.



To remove unneeded fields, sections, s-controls, or related lists, you can click the remove icon next to it. This icon is visible once you hover over the field or section.



The wrench next to the remove icon can be used to update fields to make them read only or required on the page layout. For related lists, the wrench icon can be used to configure the columns and buttons that display for the related list.

Buttons can be removed from the page layout by dragging and dropping them back into the component selection box at the top of the page. This method can also be used to remove fields and sections in addition to using the remove icon.

New sections can be added to the page layout to organize related fields by clicking the Fields option in the component menu, clicking on the Section item and dragging and dropping it onto the page layout.

## Validation Rules

In addition to validating that a value has been entered in a field before saving by making it required, validation rules can be used to improve the quality of the values entered into fields. Validation rules verify that the data a

user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of “True” or “False”. Validation rules also include an error message to display to the user when the rule returns a value of “True” due to an invalid value.

## Field Dependencies

Field dependencies are used to filter the options in a picklist based on the value selected in another field. This reduces scrolling and increases data accuracy for picklists. Field dependencies are configured with controlling field and a dependent field. The controlling field controls the values available in one or more dependent fields.

## Demo: Modify an Existing Page Layout

In this demo, we will review how to make various types of updates to an existing page layout. We will review the specific components in context later in the training.

1. Login as the Administrator.
2. Go to **Setup → Customize → Accounts → Page Layouts**.
3. Click the **Edit** link for the **Hospital Department** page layout.
4. Remove the following buttons from the page:
  - a. Change Owner and Send Email
5. Add the following button to the page layout:
  - a. Meeting Brief
6. Remove the following fields from the page:
  - a. Group Specialty 1 and Target?
7. Add the following fields to the Account Information section of the page layout:
  - a. Accept Medicaid? And Accept Medicare?
8. Create a two columns section named Key Identifiers below the Key Indicators section.
9. Add the following fields to the Key Identifiers section of the page layout:
  - a. Account Identifier and AHA #
10. Make the following fields required on the page layout:
  - a. Account Identifier and AHA #
11. Remove the following related lists from the page layout:
  - a. Affiliations and Approval History
12. Add the following related lists to the page layout:
  - a. Account Plans and Account Tactics
13. Click the **Save** button and then click **Yes**.

## Demo: Review an Existing Validation Rule

In this demo, we will review the configuration of an existing validation rule. Before we review the configuration, we will see the validation error from the user perspective.

1. Login as the Administrator.
2. Using the sidebar search, locate the Melany Segnit account and click the link to view her detail page.
3. Click the **Edit** button to put the account page layout in edit mode.
4. Select the **PDRP Opt-out** checkbox.
5. Click **Save**. **Note:** A validation rule defined in the Accounts object prevents the record from being saved without a value in the PDRP Opt-out Date field when the PDRP Opt-Out checkbox is selected.
6. Click the **Cancel** button.

To review the configuration of this validation rule:

1. Go to **Setup → Customize → Accounts → Validation Rules**.
2. Click the link to view the **Require\_PDRP\_Out\_Out\_Date** validation rule details.
3. Review the **Error Condition Formula** and **Error Message**.
4. If you need to define new validation rules, you should click the **Help for this Page** link to learn more.

**Hint:** *To save time you can clone existing validation rules and use them as a starting point.*

## Custom Objects

Objects allow you to collect and store information in a database. Out-of-the-box, Veeva provides over 220 objects and their relationships to support standard Veeva functionality. From a Salesforce perspective, all Veeva standard objects are custom objects. Examples of Veeva standard objects are Address, Call, Call Detail, Product Catalog, and Sample Lot. In some cases, your organization may have requirements to store information for which an object does not already exist. In such cases, the CRM Administrator will need to create a custom object.

In Salesforce, each custom object is made up of several different components:



When creating a new custom object there are several different configurations that you will need to complete. Typically, when creating a new custom object, you will complete the configurations in the following order:

1. Create the custom object
2. Create custom fields and relationships
3. Configure page layout(s)

4. Configure search layout(s) and list view(s)
5. Configure record types (if applicable). We will discuss record types in more detail in a later module.
6. Configure page layout assignments
7. Create a custom object tab (if applicable). Custom object tabs allow you to find, add, change, and delete the data in your custom objects.

## Object Relationships

Standard and custom objects have relationships that define how records in one object relate to records in another object. For example, Accounts can have a one-to-many relationship with Calls. These relationships commonly appear in the application as related lists. You can create new relationships that enable you to add custom related lists to your page layouts.

Salesforce supports two types of relationships, lookup and master-detail.

**A Lookup Relationship** field creates a relationship that relates the object to another object. The relationship field allows users to click a lookup icon to select a value from a popup list of records. The other object is the source of the values in the list. On the associated record, you can display a related list to show the records that are related.

**A Master-Detail Relationship** field creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records
- The ownership and sharing of a detail record are determined by the master record
- When a user deletes the master record, all detail records are deleted
- You can create rollup summary fields on the master record to summarize the detail records
- Lastly, master-detail relationship fields can only be created from custom objects

## Platform Limits

Salesforce imposes limits in each Veeva org to prevent customers from using too many application resources. These are some of the common limits you should be aware of in Veeva orgs.

Component	Limit
Custom Objects	2000 per org
Custom Fields	800 per object
Custom Picklists	Up to 1,000 entries Up to 255 characters per entry
Field History Tracking	20 fields per object
Master-Detail Relationships	2 per object
Lookup Relationships	25 per object
External IDs	7 per object

If your Veeva org hits a limit you can create a support case with Salesforce directly and ask them to increase the limit. Salesforce will consider the business case, performance implications, and other factors before deciding whether to increase the limit in the specific org. Limits are subject to change in future Salesforce releases.

Visit the Salesforce [Features and Edition Limits](#) help page for the latest and full list of limits. When reviewing this page, look in the Unlimited and Performance Edition column.

## Demo: View Object Relationships Using the Schema Builder

The Schema Builder provides a dynamic environment for viewing and modifying all objects and object relationships in the Veeva application. It is a good way to visualize the objects and how they are related to each other.

1. Login as the Administrator.
2. Go to **Setup → Schema Builder**.
3. In the **Object** tabs, hover over the **Account** object and click the **Find Objects** magnifying glass icon.
4. Use the zoom out button to see more objects.

Notice almost all objects are related either directly or indirectly to the Account object. When a custom object is created, it must be related to the Account object for its data to be accessible offline from Veeva CRM on the iPad or Surface.

5. To focus on subset of objects, click the **Clear All** link in the objects menu.
6. Select **Account** from the objects menu.
7. Type **Address** in the search box.
8. Select **Call** from the objects menu.
9. Click the **Auto-Layout** button.

Limiting the total number of objects displayed at once will allow you to focus on specific objects and their relationships.

10. Click the **Close** button to exit the Schema Builder.

## Follow Along Exercise: Create a Custom Object

In this exercise, we will create a custom object to store a list of Universities for Professional accounts in Veeva. The University object will have the following components:

### Custom fields

- University Name - text
- Graduation Date - date
- Residency Completed - checkbox
- Degree Specialty - picklist

### Relationship

- Master-Detail to Account

### Field Dependency

- The Degree Specialty picklist will only become available if the Residency Completed checkbox is selected

### Related List

- The Universities for an account will display as a related list on the Professional page layout only

### Custom Tab

- A custom object tab will be created for Universities and added to the Veeva CRM application

1. Login as the Administrator.
2. Go to **Setup → Create → Objects**.

3. Click the **New Custom Object** button.
4. Enter the following Custom Object Definition information:

Field	Value
Label	University
Plural Label	Universities
Object Name	TR_University – best practice is to always prefix the API name of everything you create with your organization's initials. This will make it easier to identify and differentiate components that were created just for your company from standard Veeva components.
Description	Created for primary care reps in the US.
Record Name	University Name
Data Type	Text – in some cases the data in the custom object would not have a name. For example, Medical Inquiries don't have a name. In such cases, you can set the data type to auto number and then specify a display format and starting number.
Allow Reports	Selected – this will automatically create a report type for the new object so reports and dashboards can be created for the data in the object.
Allow Activities	Selected – this will create the activities related list for the object.
Track Field History	Selected – this will enable field tracking for the object. After the object is created you will need to select up to 20 fields for which to track history.
Allow Sharing	Selected by default – this will enable the record sharing functionality for object.
Allow Bulk API	Selected by default – this will allow Bulk API access to the data in the object.
Allow Streaming API Access	Selected by default – this will allow Streaming API access to the data in the object. This is useful when developers want notifications to be pushed from the server to the client based on pre-defined criteria.
Deployed	Selected by default – this means the new object will be active immediately after saved.
Allow Search	Selected – this makes the data in the object searchable.
Add Notes and Attachments related list to default page layout	Selected – this will add the Notes and Attachments related list to the University page layout. You can always remove this from the page layout if you change your mind later.
Launch New Custom Tab Wizard after saving this object	Not selected – this will launch the wizard to create a new tab for the object. You will create the tab separately later.

5. Click the **Save** button.

- The new object is created and displays the following standard components:

Component	Definition
Standard Fields	Created By, Last Modified By, Owner, University Name
Page Layout	University Layout
Search Layouts	Lookup Dialogs, Lookup Phone Dialogs, Universities List View, and Search Filter Fields
Buttons, Links, and Actions	Accept, Clone, Delete, Edit, List, New, and University Tab, View

### Object Relationship Field

Create a Mater-Detail Relationship to the Account from the University object.

- In the **Custom Fields & Relationships** section, click the **New** button.
- For the **Data Type**, select **Master-Detail Relationship**.
- Click **Next**.
- Select **Account** as the **Related To** object.
- Click **Next**.
- Enter the following new relationship field information:

Field	Value
Field Label	University Account
Field Name	TR_University_Account - best practice is to always prefix the API name of everything you create with your organization's initials. This will make it easier to identify and differentiate components that were created just for your company from standard Veeva components.
Description	This field associates Universities to Accounts.
Child Relationship Name	Universities
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	Selected – Child records can be reparented to other parent records after they are created.

- Click **Next**. Master-detail fields are required fields by default and all profiles have visibility to them.
- Click **Next**. The system automatically created the University Layout page layout. This step allows you to add the new field to this page layout. Since the master-detail field is required, the page layout is selected by default.
- Click **Next**.
- Since this is a master-detail field, the wizard is going to create a related list for Universities and add it to page layouts of the Account (related to) object. Select only the **Professional** page layout.
- Select the **Append related list to user's existing personal customizations**.

12. Click **Save**. The newly created field displays.

### Mobile ID Field

A field named Mobile\_ID\_vod must exist in all custom objects to support the ability to create records offline on Veeva CRM on the iPad and Surface. Create the Mobile\_ID\_vod field with the values provided below. This field should not be added to page layouts since users don't need to see it.

1. In the **Custom Fields & Relationships** section, click the **New** button.
2. For the **Data Type**, select **Text**.
3. Click **Next**.
4. Enter the following new relationship field information:

Field	Value
Field Label	Mobile_ID
Length	100
Field Name	Mobile_ID_vod
Description	Created for training.
Unique	Selected – Do not allow duplicate values Selected - Treat “ABC” and “abc” as duplicate values (case insensitive)
External ID	Selected – Set this field as the unique record identifier from an external system

5. Click **Next**.
6. Deselect the **Visible** checkbox for all profiles except for the **System Administrator**, **VExample Primary Care Sales – Platform** profiles. This will make the new field visible only to users assigned to these two profiles.
7. Click **Next**.
8. Deselect the **University Layout**. The Mobile ID field is not entered by the user and does not need to display on the page layout.
9. Click **Save**.

## Independent Exercise #4 – Create Custom Object Components

### Create Custom Fields

Add the following new custom fields to the University object and make them only visible to the System Administrator and VExample Primary Care Sales – Platform profiles. Continue to follow the API naming convention by prefixing all field names with TR\_.

- Graduation Date – Date data type
- Residency Completed – Checkbox data type

- Degree Specialty - Picklist data type. Enter the following values for the picklist: Oncology, Cardiology, Dentistry, Allergy. Each value must be entered on a separate line. Keep the “Restrict picklist to the values defined in the value set” option selected.

When you finish creating all fields, your Custom Fields & Relationships list should look like the screenshot below:

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit   Del   Replace	Degree Specialty	TR_Degree_Specialty__c	Picklist		Training Attendee 1, 3/21/2017 7:35 AM		<input type="checkbox"/>
Edit   Del	Graduation Date	TR_Graduation_Date__c	Date		Training Attendee 1, 3/21/2017 7:33 AM		<input type="checkbox"/>
Edit   Del	Mobile ID	Mobile_ID_vod__c	Text(100) (External ID) (Unique Case Insensitive)	✓	Training Attendee 1, 3/14/2017 1:20 PM		<input type="checkbox"/>
Edit   Del	Residency Completed	TR_Residency_Completed__c	Checkbox		Training Attendee 1, 3/21/2017 7:34 AM		<input type="checkbox"/>
Edit   Del	University Account	TR_University_Account__c	Master-Detail(Account)	✓	Training Attendee 1, 3/21/2017 7:29 AM		<input type="checkbox"/>

## Define Field Dependencies

Field dependencies allow you to make the value of one field dependent on values of another field. When creating field dependencies, you must select a controlling field and the controlled field.

For each controlling field value specify the value(s) available in the controlled field. You can include zero, one, or more values in the controlled field.

You have a requirement where the Degree Specialty picklist field should only become editable if the Residency Completed checkbox is selected. To enable this functionality, you will use field dependencies.

1. In the Custom Fields & Relationships section click the **Field Dependencies** button.
2. Click the **New** button.
3. For **Controlling Field** select **Residency Completed**.
4. For **Dependent Field** select **Degree Specialty**.
5. Click **Continue**.
6. Shift+click to select all values in the **Checked** column.
7. Click the **Include Values** button. The outcome of this configuration is that the Degree Specialty picklist field will only become editable if the Residency Completed checkbox is selected.
8. Click **Save**.
- Note:** A warning message will display indicating that there is a controlling field with no dependent values selected. This is the desired behavior in this example.
9. Click **OK** on the warning message.

## Modify a Page Layout

Edit the University Layout page layout and configure the fields, buttons, and related lists to display.

1. In the **Page Layouts** section, click the **Edit** link for the **University Layout** page layout.
2. Remove the **Change Owner** button from the page. To do this you can drag-and-drop the button to the fields area at the top of the page.
3. Create a new two column section named **Degree Info** and add **Residency Completed**, **Graduation Date**, and **Degree Specialty** fields to the new section. To do this drag-and-drop the **Section** button from the fields section at the top of the page to page layout.
4. The page layout should look like the screenshot below:

The screenshot shows the 'University Detail' page layout editor. At the top, there are 'Standard Buttons' (Edit, Delete, Clone) and 'Custom Buttons'. Below this is a section titled 'Information (Header visible on edit only)' containing fields for 'University Name' (Sample University Name) and 'University Account' (Sample Account). A 'Degree Info' section follows, containing 'Residency Completed' (checked), 'Graduation Date' (10/12/2016), 'Degree Specialty' (Sample Degree Specialty), and 'Created By' (Sample User). At the bottom is a 'System Information' section with 'Last Modified By' (Sample User).

5. Remove the **Activity History** related list from the page layout.
6. Add the **University History** related list to the page layout. To do this select Related Lists in the upper left corner of the page layout editor and then drag-and-drop the University History related list to the bottom of the page below Open Activities.
7. Remove the **New Event** button from the Open Activities related list. To do this, click the related list properties icon (wrench). Expand the buttons section, deselect the New Event button, and click **OK**.
8. **Save** the page layout.
9. If prompted, click **Yes** to Overwrite Users' Related List Customizations.

## Create a Custom Object Tab

Create a new tab to display Universities online.

1. Go to **Setup** → **Create** → **Tabs**.
2. In the Custom Object Tabs section, click the **New** button.
3. Select **University** for the **Object**.
4. Select any **Tab Style**.
5. Click **Next**.
6. Configure which profiles will have access to this new tab. Select Default Off for all profiles, then select Default On for System Administrator and VExample Primary Care Sales – Platform.
7. Click **Next**.
8. Deselect all custom apps and include the new tab only in the **Veeva CRM** custom app.
9. Click **Save**.

Edit each of the Search Layouts to control which University fields will display in search results, lookup dialogs, and the University tab.

1. Go to **Setup** → **Create** → **Objects**.

- Click the link to access the details of the **University** object.
- Scroll down to the Search Layouts section and click **Edit** next to each layout. Configure the columns displayed as in the screenshot below:

Action	Layout	Columns Displayed	Buttons Displayed
Edit	Search Results	University Name, University Account, Degree Specialty, Graduation Date, Residency Completed, Created By, Created Date	
Edit	Lookup Dialogs	University Name, University Account, Degree Specialty, Graduation Date, Residency Completed, Created By, Created Date	N/A
Edit	Lookup Phone Dialogs	University Name, University Account, Degree Specialty, Graduation Date, Residency Completed, Created By, Created Date	N/A
Edit	Universities Tab	University Name, University Account, Degree Specialty, Graduation Date, Residency Completed, Created By, Created Date	N/A
Edit	Universities List View	N/A	New, Accept, Change Owner
Edit	Search Filter Fields	University Account, University Name, Degree Specialty, Graduation Date, Residency Completed, Created By, Created Date	N/A

### Test the configuration you have done for the new University object.

- Click the Universities tab and then click the **New** button.
- Enter information for the University record as in the screenshot below and click **Save**.

The screenshot shows the 'New University' edit page. At the top, there's a 'Help for this Page' link. Below it, the title 'New University' is displayed. The page has two main sections: 'Information' and 'Degree Info'. In the 'Information' section, there are fields for 'University Name' (containing 'Princeton University') and 'University Account' (containing 'Melany Segnit'). In the 'Degree Info' section, there are fields for 'Residency Completed' (with a checked checkbox), 'Graduation Date' (set to '10/30/2015'), 'Degree Specialty' (set to 'Oncology'), and a 'Save' button at the bottom.

- Click the **Universities** tab and verify the new University record is displayed.
- Click the **Melany Segnit** link. This will navigate you to Melany's account page.
- Scroll to the bottom of Melany's account page. Notice there is a Universities related list. There is also a New University button that allows users to create a new University from this related list.

Modify the related list on the Account page layout so that users are not able to create a new University record from this related list.

- Scroll to the top of Melany's account profile page and click the **Edit Layout** link.
- Scroll to the bottom of the Professional page layout. You should see the Universities related list.
- Edit the Universities related list and remove (uncheck) the **New** button.
- At the top of the Professional page layout, click the **Save** button.
- Scroll to the bottom of Melany's account profile page and verify the New button does not display in the University related list.



Sarah Jones' profile does not yet have access to the University object so you will not see University data when logged in as Sarah Jones online or offline. You will give her access in a later exercise.

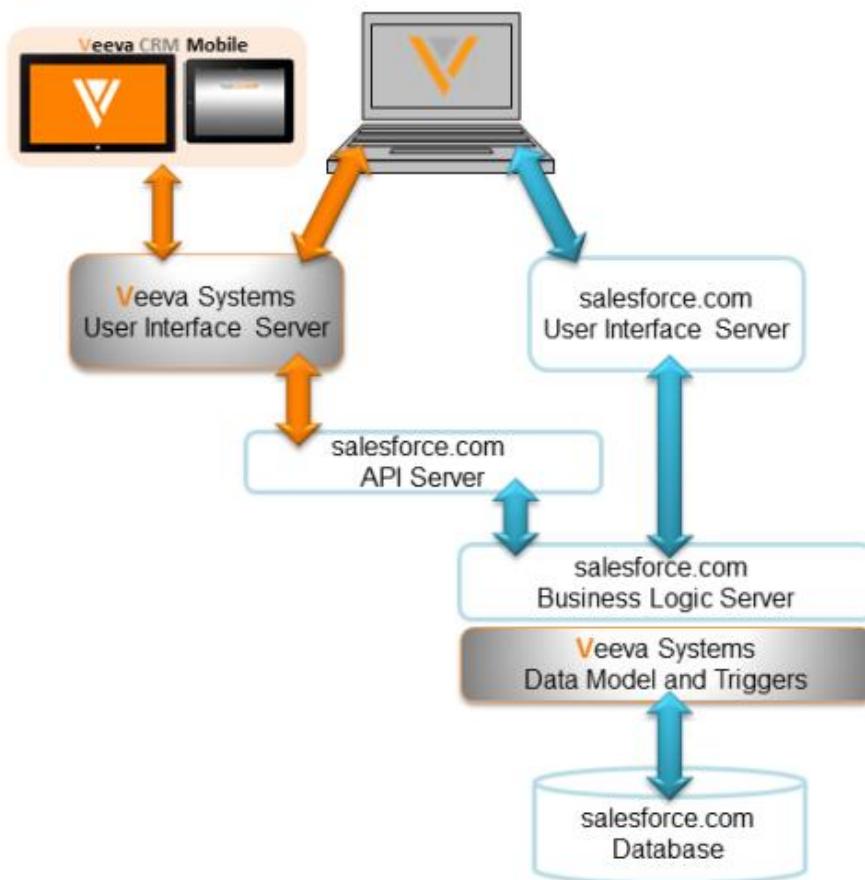
# Module 05: Veeva Configuration Utilities

## OBJECTIVES

- Review the Veeva CRM Architecture
- Clear Veeva Cache
- Configure Veeva Settings
- Configure Veeva Messages
- Follow Best Practices for Modifying Veeva Messages

## Veeva CRM Architecture

The diagram below depicts the high-level Veeva CRM Architecture.



Veeva is a cloud application built on the Force.com platform. Some Veeva functionality is based on standard Salesforce and is rendered by the Salesforce User Interface (UI) Servers. An example of functionality that is considered standard Salesforce is the online Speaker Evaluations tab because it has no custom code behind it. If users access Speaker Evaluations from the iPad or Surface and then sync, the sync request is handled by Veeva UI Servers. In some cases, depending on the functionality, when users work from the online application, the system will also access the Veeva UI Servers. An example is when they access any of the My tabs, such as My Accounts or My Schedule. Whether working online or offline, Veeva has built lots of custom code in the form of Apex Classes and Triggers that are used by the application to enforce compliance business rules. All Veeva's data is stored in the standard Salesforce database.

## Clearing Veeva Cache

Veeva CRM caches components that are specific to the Veeva CRM application on the Veeva user interface (UI) server. This is done to improve response times for users when they navigate to pages containing Veeva custom-coded components. A few examples of these components include:

- My Accounts
- My Schedule
- Calls
- Cycle Plans

The cache will automatically rebuild based on the value of the CACHE\_TIMEOUT Veeva Setting. The default value is every 16 hours. You can also force to clear cache as needed after you modify Veeva CRM specific components.

Keep in mind clearing cache will impact users currently logged in to Veeva online and those in the process of synchronizing from one of the offline devices. **Therefore, you should not clear Cache in production during business hours.**

## Veeva Configuration Utilities

Custom components in the Veeva application, such as Call Reports and the functionality behind the tabs containing the word “My” in them cannot always be configured using standard Salesforce point-and-click tools since they were developed using S-Controls or VisualForce pages.

The My tabs contain Veeva custom application components rendered by Veeva UI Servers where the Java code that renders the functionality in them lives. To customize the My tabs without touching the actual code behind them, you will need to use Veeva specific configuration utilities such as:

- Veeva Settings
- Veeva Messages

We will introduce these two Veeva specific configuration utilities in this module but will also use them throughout the remainder of the course.

## Veeva Settings

To allow Administrators to easily configure the behavior of Veeva custom coded functionality without having to modify the underlying developer components such as VisualForce Pages or S-Controls, Veeva provides several Custom Settings. Custom Settings, also referred to as Veeva Settings, can be configured to enable or disable functionality as well as configure values that determine how certain functionality behaves.

Veeva Settings are stored in the Veeva Settings object. Veeva Settings can be configured at the org level or at individual profile levels. Each grouping of Veeva Settings is a separate record in the Veeva Settings object. Each setting is a field in the record. The value in the field is used within the Veeva code to determine the behavior of Veeva custom components.

An example of a Veeva Setting is the DISABLE\_MASS\_UPDATE setting. This setting is used to remove the Mass Update button from the My Accounts tab. Since the My Accounts tab is based on a Veeva custom coded component, this button cannot be removed using standard Salesforce configuration tools.

The cache must be cleared when changes are made to Veeva Settings.

For a complete list of Veeva Settings see the following CRM Online Help page:

[https://crmhelp.veeva.com/doc/Content/CRM\\_topics/General/AppendixACustomSettings.htm](https://crmhelp.veeva.com/doc/Content/CRM_topics/General/AppendixACustomSettings.htm)

## Demo: Configure Veeva Settings

In this demo, we will enable the Parent Account Wizard functionality for the entire organization. Additional details about the functionality behind the Parent Account Wizard will be explained in a later module.

Before enabling this setting, let's view the current functionality so we can compare to the functionality after configuring the setting.

1. Login as the Administrator.
2. Click **My Accounts** to view the My Accounts tab.
3. Click the **New** button.
4. Select **Hospital Department** from the Record Type drop-down menu.
5. Click **Continue**. Notice the free text fields for entering the address.

The screenshot shows the 'Account Edit' screen. Under 'Account Required Information', the 'Record Type' is set to 'Hospital Department'. The 'Name' field is empty, and the 'Territory' dropdown shows 'Corp'. Under 'Address Required Information', there are fields for Street Address, Address line 2, City, State, Zip, and Country, all of which are currently empty.

We will now enable a Veeva Setting that will allow users to select a Parent Account and default the active addresses for the Parent Account for selection.

6. Go to **Setup → Develop → Custom Settings**.

The screenshot shows the 'Custom Settings' list page. The table has columns for Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, Number of Records, and Total Size. One row for 'Veeva Settings' is selected, showing 'Edit | Del | Manage' actions, 'Public' visibility, 'Hierarchy' settings type, and a record size of 17,196 with 1 record.

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edit   Del   Manage	Veeva Settings	Public	Hierarchy			17,196	1	17196

7. Click the **Manage** link next to **Veeva Settings**.
8. Click the **Edit** button.
9. To locate the desired setting, use **Control + F** to open the browser find field.
10. Search for **Enable\_Parent**.
11. Select the check for **ENABLE\_PARENT\_ACCOUNT\_WIZARD**.



12. Click the **Save** button.
13. Click the **Home** tab.
14. Click on the **Clear Veeva Cache** link on the sidebar. If this link was not created in a previous exercise, then go to **All Tabs → Clear VOD Cache**.

Clearing the cache is necessary since this Veeva Setting modifies the user interface components cached on the Veeva UI servers.

Test the Veeva Setting you just enabled by creating a new account.

1. Click the **My Accounts** tab. The My Accounts tabs will take a few seconds to load.
2. Click the **New** button to create a new account.

3. Select the **Hospital Department** from the Record Type drop-down menu.
4. Click **Continue**.

You should now see the **Primary Parent** field, which is what was configured via the Veeva Setting we enabled.

5. Click **Cancel**.

Next, we will configure Veeva Settings for a specific user profile. We will leave the Parent Account Wizard off for the VExample Primary Care Sales – Platform profile and leave it enabled for the rest of the users in the org.

1. Login as the Administrator.
2. Go to **Setup → Develop → Custom Settings**.
3. Click the **Manage** link next to **Veeva Settings**.
4. Scroll to the bottom of the page and in the Setup Owner section click **New** to add profile specific Veeva Settings.
5. Select **Profile** for the **Location** dropdown and select the **VExample Primary Care Sales – Platform** profile. All settings selected on this set will now apply to users assigned to the selected profile.
6. Make sure the **ENABLE\_PARENT\_ACCOUNT\_WIZARD** Veeva Setting is not selected.
7. Click the **Save** button.
8. Click the **Home** tab.
9. Clear the Veeva cache by clicking on the **Clear Veeva Cache** link in the sidebar. If this link was not created in a previous lab, then go to **All Tabs → Clear VOD Cache**.

Test the Veeva Setting as Sarah Jones who is assigned to the VExample Primary Care Sales – Platform profile you configured the Veeva Setting for.

1. In the Sidebar Search window, search for **Sarah Jones** and select her name.
2. Click the **Login** button in **Sarah Jones's** user account.
3. You should now be logged in as **Sarah Jones**.
4. Click the **My Accounts** tab.
5. Click the **New** button to create a new account.
6. Select **Hospital Department** for the account record type.
7. Click **Continue**.
8. You should **not** see the **Primary Parent** field because it has been disabled for Sarah's profile.
9. Click **Cancel**.
10. Select **Sarah Jones → Logout**. You should be logged back in as the Administrator.

Since we will not be using profile level settings in this training, delete the profile specific Veeva Setting.

1. Go to **Setup → Develop → Custom Settings**.
2. Click the **Manage** link next to Veeva Settings.
3. Scroll to the bottom of the page and click the **Del** link next to **VExample Primary Care Sales – Platform**.
4. Click **OK**.
5. Click the **Home** tab.
6. Clear the Veeva cache by clicking the **Clear Veeva Cache** link in the sidebar.

## Veeva Messages

Veeva Messages are used to configure text that displays in Veeva custom coded components, for example, field labels, button labels and error messages. Veeva Messages are stored in the Veeva Messages custom object. In addition to UI labels, there are some Veeva Messages that control the behavior of Veeva components.

An example of a Veeva Message is the MASS\_UPDATE message. Whereas as a Veeva Setting can be configured to remove the Mass Update button from the My Accounts tab, a Veeva Message can be configured to modify the label that displays within the button.

When configuring Veeva Messages, you should not change the text value of a delivered Veeva Message. If you do, it will be overwritten when your Veeva application is upgraded to a new version. Follow best practice when modifying Veeva Messages by doing the following:

1. Disable the existing original Veeva Message by setting it to inactive.
2. Clone the original Veeva Message.
3. Set the cloned Veeva Message to active.
4. Modify the value in the Text field of the cloned Veeva Message.
5. Update the External ID field of the cloned Veeva Message with a unique value.

You should not change any other values in any other fields in Veeva Messages.

 Some Veeva Settings are pointers to related Veeva Messages. In these cases, the Veeva Message is used to control the configuration option due to the 255-character limit on Veeva Settings. Do not modify Veeva Settings pointing to Veeva Messages. Instead, find the corresponding Veeva Message and make the configuration change there. You can identify these Veeva Settings by the formatting [Veeva Message Name];[Veeva Message Category], as in the example below.

`NEW_ACCOUNT_TYPES_DISABLE_LICENSE_INFO`    `NEW_ACCOUNT_TYPES_DISABLE_LICENSE_INFO;;Account`

## Demo: Configure a Veeva Message

In this demo, we will practice the steps for configuring a Veeva Message by modifying the label of the Mass Update button on the My Accounts tab.

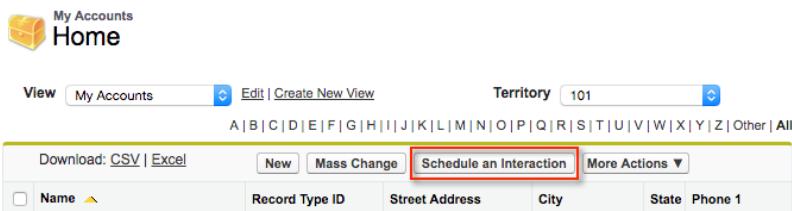
1. Login as the Administrator.
2. Click the **Home** tab.
3. In the Sidebar Search, click the **Advanced Search** link.
4. Type **Mass Update** in the Search field and click the **Search** button. A list of Veeva Messages related to Mass Update displays. **Hint:** *You always search for the exact UI string value you want to modify.*
5. Click the **MASS\_UPDATE** link for the Veeva Message for the **MyAccounts** category and Language set to **en\_US**.
6. Click the **Edit** button.
7. Uncheck the **Active** checkbox and click **Save**. We are inactivating the original Veeva message.
8. Click the **Clone** button.
9. Make the following changes to the cloned Veeva message:
  - a. Check the **Active** checkbox to activate it.
  - b. Change the Text to **Mass Change** (but do not change the Message Name).

- c. Prefix the External ID value with **TR\_**. The external ID prefix should follow the same name convention you use for name objects, fields, etc...

10. Click **Save**.
11. Clear the Veeva Cache.
12. Click the **My Accounts** tab.
13. The label for the **Mass Update** button should now be **Mass Change**.

## Independent Exercise #5 – Configure Veeva Messages and Settings

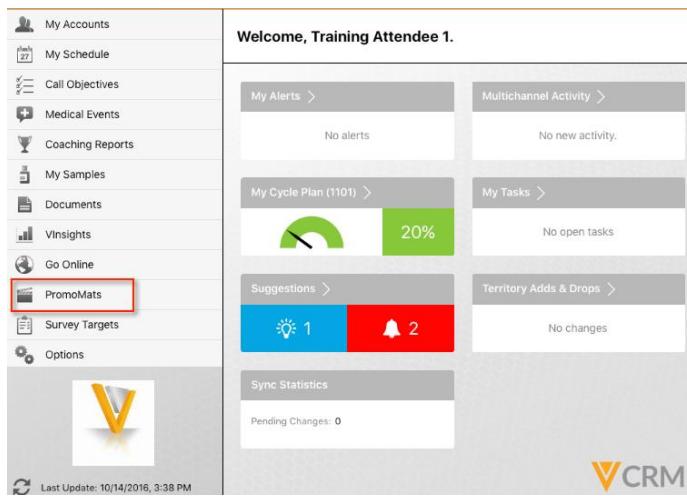
1. The text label that displays within the **Schedule a Call** button on the My Accounts tab is stored in a Veeva Message named **SCHEDEULE\_CALL**. Following best practices, change the label of the **Schedule a Call** button to **Schedule an Interaction**. Test the configuration by logging in as Sarah Jones. The My Accounts tab should display as in the screenshot below:



2. Following best practices, change the label of the **Media** menu for Veeva CRM on the iPad to **PromoMats** as in the screenshot below.

**Hint:** The name of Veeva Messages that store user interface labels are based on the original label text. Veeva Messages that store user interface labels specific to the iPad will have the category set to **iPad**.

You will only be able to test this configuration if you have the Veeva CRM App installed on an iPad.



3. Remove the **Mass Update** (renamed Mass Change) button from the My Accounts tab for all users in your training Veeva org. Test the configuration by logging in as Sarah Jones. The My Accounts tab should display without the Mass Update button as in the screenshot below. **Hint:** You need to disable the mass update functionality.



View My Accounts

Edit | Create New View

Territory

101

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Download: CSV | Excel

New

Schedule an Interaction

More Actions ▾

<input type="checkbox"/>	Name	Record Type ID	Street Address	City	State	Phone 1
<input type="checkbox"/>	Ackerman, Clinton	Professional	967 Millbrook Rd	Newton	NJ	

# Module 06: My Accounts Configuration

## OBJECTIVES

- Overview of Accounts
- Overview of My Accounts Tab Functionality
- Create Views
- Create Account Lists
- Use the New Account Wizard
- Configure New Account Wizard Functionality
- Work with Accounts on the iPad
- Use the Global Account Search

## Accounts

Accounts are at the core of many parts of CRM. Accounts represent the people and businesses with which Veeva users do business. People are referred to as Person Accounts in Veeva. Person accounts include Health Care Providers (HCPs), which are also referred to as Professionals. Business accounts include Health Care Organizations (HCOs) such as Hospitals and Pharmacies.

Veeva uses the standard Salesforce Account object, which includes fields from both the Account and Contact objects for person accounts and fields from the Account object for business accounts.

## My Accounts Tab

The My Accounts tab is built with Veeva custom code and brings together data from four objects:

- Account
- Address
- Territory Field
- Product Metrics

It supports filtering and displaying data from any field in these 4 objects.

## Territory Filter

The My Accounts tab has a Territory field that is used to filter the Accounts displayed on the page. Accounts are aligned to one or more territories. Users are assigned to a territory and only have access to Accounts aligned to their territory. Sales Managers have access to Accounts in their territory as well as Accounts in territories that fall below theirs in the territory hierarchy.

Selecting the All Accounts option in the Territory filter can be useful for Systems Administrators to see a list of all accounts including those that have not yet been assigned to a territory.

 The All Accounts territory field option can be disabled by updating the **Disable\_All\_Accounts** Veeva Setting.

## Account Views

Account views can be created to allow users to further filter the accounts displayed on the My Accounts tab based on specified criteria. For example, a view could be created to display only Hospitals that are flagged as Target Accounts.

Veeva Administrators can create views and make them available to end users. These views are called Default Views. Users can also be granted permission to create their own views that will be visible only to themselves. Views can be created **online only** but are accessible from Veeva CRM on the iPad and Surface.

Views are stored in an object called **Views**.

-  User profiles must have **Read** permission on the Views object to access views and **Create** permission if they will be creating views.

## Account Lists

Users can group accounts into lists to help organize their Accounts. When creating new account lists, users will normally filter based on a view first and then select the desired Accounts and add them to a named list. Whereas account views display results dynamically, the Accounts that display when a list is selected are static until the list is modified. Lists can be created either online or offline on the iPad or Surface.

Lists are stored in the **Account List** and **Account List Items** objects.

-  User profiles must have at least Create permission on both the Account List and Account List Items objects to create Account lists.

When a user filters the My Accounts page online by selecting a list, the columns displayed are static. To configure which columns display when using Account List filters, you can modify the **Account\_List\_Cols** Veeva Message. When adding columns, use the following format in the text field of the Veeva Message:

- **Object\_Name.FieldAPI\_Name** – example to display zip code from the Address object enter **Address\_vod\_\_c.Zip\_vod\_\_c**.

Note: There are 2 underscores preceding c. All configuration is case sensitive. Columns can be added from the Account, Address or Territory Field objects.

## Demo: Create an Account View

In this demo, we will create a new default view to allow users to quickly view all Hospital accounts with the Account Target? Field selected.

1. Login as the Administrator.
2. Click the **My Accounts** tab.
3. Click the **Create New View** link at the top of the page.  
 This link only displays if the user's profile has Create permission on the Views object.
4. In Step 1, enter **Target Hospitals** for the **Name**.
5. In Step 2, click the **Clear All** link to deselect all checkboxes. This step allows you to filter based on the account type. We will discuss account types in more detail later.
6. Check the **Hospital** checkbox to select the Hospital record type.
7. Select the **My Preferred Addresses** radio button. The My Preferred Address is set to the address where the user last visited the account.
8. In Step 3, set the following search criteria:

**Step 3. Search Criteria**

Set the search conditions to further restrict the list.

Record	Field	Operator	Value
Account	Target?	equals	true
-None--	-None--	--None--	

AND

- In Step 4, set the following columns to display in the list:

**Step 4. Select Columns**

Select the information to display in each column of the list.

Record	Field
X Account	Name
↑ X Account	Do Not Call?
↑ X Account	Target?
↑ X Account	YTD Calls
↑ X Address	City
↑ X Territory Field	Last Activity Date

- In Step 5, select the **This view is accessible by all users** radio button.

**Step 5. Visibility**

Control who can see this view.

This view is hidden from all users  
 This view is accessible by all users  
 This view is accessible by profile  
[Select All](#) [Clear All](#)

- Click the **Save** button.

- Make sure Corp is selected in the Territory filter.

Notice the new Target Hospitals view is displayed in the View dropdown.

## Demo: Create an Account List

In this demo, we will log in as Sarah Jones and create a user list. The user list will be called Top Professionals.

- Login as Sarah Jones.
- Click the **My Accounts** tab.
- Select **My Accounts** from the **View** dropdown
- Click the checkboxes for the first 4 account records.
- Click the **More Actions** button and then click **Add to List**.
- In the **Add to** dropdown menu, select **<New List>** and click **OK**.
- Enter **Top Professionals** for the list name.
- Click the color button and select a color for this list.
- Click **OK**.
- Select the **Top Professionals** list from the **View** dropdown menu.

Selecting an Account List filters the accounts displayed in the grid below. Account Lists and Views can also be used to filter accounts in other parts of the Veeva application including Cycle Plans and My Schedule.

- Logout as Sarah Jones.

## Veeva New Account Wizard

In most Veeva implementations users are allowed to create new accounts. This access is controlled by giving create object permission on the Account object. Assuming users are allowed to create accounts, Veeva provides

Account Wizard functionality that can be enabled to guide users through the process of creating a new Account record.

The default Salesforce functionality for creating a new Account only allows the user to enter field values for the Account object prior to saving the record.

The screenshot below shows the standard Salesforce Account creation page.

This screenshot shows the standard Salesforce Account creation page. It features several sections: Account Information (Name, Parent Account, Speciality, Primary Parent, Account Record Type, Hospital Department), Key Indicators (Call Class, Call Frequency), Additional Information (Total # MDs/DOs, Total # Pharmacists, # Beds, Employees), Identification Numbers (External ID), and Territory Assignment (Territory VoD, Territory Test VoD, Exclude from Zip to Terr Processing). At the bottom are Save, Save & New, and Cancel buttons.

If enabled, the Veeva New Account Wizard (NAW) allows users to enter required Account field values and create a corresponding address record all in one screen. The NAW is enabled by enabling the **NEW\_ACCOUNT\_WIZARD** Veeva Setting.

When enabled, the NAW screen will include any fields that are flagged as required on the corresponding Account object page layout. Once the Account record has been saved, the user can then click edit on the Account detail screen to enter values for any additional optional fields.

The screenshot below shows the New Account Wizard.

This screenshot shows the Veeva New Account Wizard screen. It has two main sections: Account Required Information (Record Type: Hospital Department, Name, Territory: 101) and Address Required Information (Street Address, Address line 2, City, State, Zip, Country). At the bottom are Save and Cancel buttons.

To allow users to create Account records more efficiently, there is an additional Veeva Setting that can be enabled to allow users to add non-required field values prior to saving the Account. This functionality is enabled by setting the **Account Preview During Creation** Veeva Setting to a value of 1. When enabled, once the user has entered all required field values for the Account, they will be able to click a Continue button to view and enter values for any non-required fields prior to saving the new Account record.

When both the **NEW\_ACCOUNT\_WIZARD** and the **ENABLE\_PARENT\_ACCOUNT\_WIZARD** Veeva Settings are enabled, users will have the ability to select a parent account for the new account during account creation. Rather than manually entering an address for the new account, the user can then choose an address from a list of active addresses for the selected parent account.

The screenshot shows the 'Account Edit' screen with the following details:

- Record Type:** Hospital Department
- Name:** [Redacted]
- Role:** Affiliated with [Redacted]
- Territory:** 101
- Parent Account and Address Information:** A note says "Select a primary parent for the new account." Below it, a section titled "Primary Parent" lists "Chilton Memorial Hosp" with a magnifying glass icon.
- Address Selection:** A table lists two addresses:

Select	Address	Address Type	Primary
<input checked="" type="checkbox"/>	250 West 19th Street New York, NY 37847 US		<input checked="" type="radio"/>
<input type="checkbox"/>	123 North Street		<input type="radio"/>
- Buttons:** Save and Cancel

By default, when the Parent Account Wizard is enabled, the Primary Parent will be a required field for all account record types. In some cases, the account being created may not have a parent account. The **ENABLE\_PARENT\_WIZARD\_OPT\_ACCT\_TYPES** Veeva Message can be configured to make the Parent Account field optional for specific account record types. For example, a value of Hospital\_vod in this message will make the parent account optional when creating a new hospital account.

To disable the Parent Account Wizard functionality completely for certain account record types while still using it for others, the record types that should not use the Parent Account Wizard can be set in the **DISABLE\_PARENT\_WIZARD\_ACCT\_TYPES** Veeva Setting.

## Independent Exercise #6 – Views, Lists, and the New Account Wizard

The existing Hospitals view is not configured properly, you will start by fixing it.

1. If needed, login as the Administrator.
2. Click the **My Accounts** tab.
3. Select **Hospitals** from the **View** dropdown.
4. Click the **Edit** link.
5. Check the **Hospital** checkbox in the **What to search in** section.
6. Click the **Save** button.
7. Repeat the previous steps to fix the **Hospital Departments** and **Professionals** views to filter on the relevant Account Record Type in the **What to search in** section.
8. Create a new view named **Acute Care Professional in NY**. The view should have the following characteristics:
  - a. Show professionals with a specialty of Acute Care in all zip codes starting with 100.

- b. The result set should show Name, Specialty, City, Zip, and YTD Activity.
  - c. The view should only be visible to the System Administrators and the VExample Primary Care Sales – Platform profiles.
9. Set the **Territory** filter to **All Accounts** so you can see accounts listed in the result set.
10. Login as Sarah Jones and create a list named **Highly Cooperative Docs** and add the following accounts to the list:
- a. Melany Segnit
  - b. Clinton Ackerman
  - c. Frank Pepitone

Next, you will use the Parent Account Wizard to create three new accounts: A Hospital, a Hospital Department, and a Professional (HCP).

1. Login as the Administrator.
2. Go to **Develop → Custom Settings** and make sure the **ENABLE\_PARENT\_ACCOUNT\_WIZARD** Veeva Setting is enabled.
3. If you had to enable the setting, clear the Veeva cache.
  - a. Click on the Clear Veeva Cache link in the sidebar or go to **All Tabs → Clear VOD Cache**.

The training org has already been configured to make the Parent Account Wizard optional when creating a Hospital. To verify this:

1. Click on the Advanced Search link on the sidebar and search for the **ENABLE\_PARENT\_WIZARD\_OPT\_ACCT\_TYPES** Veeva Message.
2. Verify there are two Veeva Messages. One is active and the other is inactive. Notice that the Text field for the active one lists Hospital\_vod. This means that when a new hospital is created and the Parent Account Wizard is enabled, the user will have the ability to decide whether to select a Parent Account for the hospital.

Test the Parent Account Wizard configuration by creating a new hospital account.

1. Click the **My Accounts** tab.
2. Click the **New** button to create a new account.
3. In the **Record Type of new record** dropdown, select **Hospital** then click **Continue**.

The Territory field defaults to the user's territory.

The Parent Account Wizard displays the **Primary Parent** field and an option to create from existing parent account.

4. Since you do not need the Parent Account Wizard when creating a hospital, deselect the checkbox for **Create from existing parent account?**
5. Create a **Hospital** with the following information:

Record Type Hospital  
Name San Diego Med Center  
Territory Corp

**Parent Account and Address Information**

Create from existing parent account?   
Street Address 34800 Bob Wilson Drive  
Address line 2  
City San Diego  
State CA  
Zip 92134  
Country US

6. Click the **Save** button. **Note:** If you see a warning saying **This Hospital may already exist...** ignore it and click **Save**.
7. On the newly created Hospital account, click the **Edit** button.
8. Check the **Target?** checkbox to indicate this is a target hospital.
9. Click the **Save** button.
10. Create another new account for a Hospital Department named **San Diego Med Center ER** and select the hospital you just created as its Primary Parent.
  - a. If you made the AHA# and Account Identifier required on the Hospital Department page layout in a previous module, those fields will be required in the NAW when adding new Hospital Departments. If these fields display, you must provide values. You can make up values for this exercise.
  - b. When you select the Primary Parent account, the wizard automatically pulls the address(as) from it. Select an address to copy it for the new Account.

Upon saving the new Hospital Department account record, the Parent Account Wizard automatically created an account hierarchy between the Hospital and the Hospital Department. Account hierarchy will be discussed in more detail in a different module.

1. Click the **View Hierarchy** button.
2. The Account Hierarchy displays showing the relationship between the two accounts.
3. In the Account Hierarchy, click the **San Diego Med Center ER** link.

Lastly, you will create a Professional Account from the Hospital Department account detail page so that San Diego Med Center ER will automatically be selected as the parent account for the new professional.

1. On the San Diego Med Center ER account detail page, click the **New Professional** button and create a Professional with the following information:

**Account Edit**

**Account Required Information**

Record Type	Professional
First Name	--None-- <input type="button" value="▼"/> Jason
Last Name	Alexander
Role	Practice member <input type="button" value="▼"/>
Territory	Corp <input type="button" value="▼"/>

**Parent Account and Address Information**

Select a primary parent for the new account.

Primary Parent San Diego Med Center ER

Add an address from the list. At least one address must be selected.

Select	Address	Address Type	Primary
<input checked="" type="checkbox"/>	34800 Bob Wilson Drive San Diego, CA 92134		<input checked="" type="radio"/>

**License Information**

License #	<input type="text"/>
License Expiration Date	<input type="text"/>

- Click the **Save** button.

The New Professional Wizard also created the Account Hierarchy relationship to the San Diego Med Center ER.

## iPad Demo: Working with Accounts on the iPad

Before completing this demo, be sure to initiate the sync process on your device.

- Login as Sarah Jones on the iPad.
- Click **My Accounts** in the navigation menu.
  - In addition to using Views and Account Lists, users can filter by Business Accounts and Person Accounts by deselecting / selecting these options under the Account Types heading in the left-hand navigation menu.
- Deselect **Business Accounts** within the **Account Type** menu. All Business Accounts have now been filtered out and only Person Accounts display.



Users may have difficulty finding the correct HCP when there are multiple accounts with the same name. The name of the primary parent account can be configured to display on iPad and Windows by enabling the **ENABLE\_ACCOUNT\_PARENT\_DISPLAY** Veeva Setting.

This has been enabled in our training org and can be viewed when looking at the Kathleen Adler account on the My Accounts screen on the iPad.

Adler, Kathleen @ Chilton Emergency Department

42 Van Horn Rd  
Newton, NJ 27860

- Click **Account Lists** in the navigation menu.

- a. Notice that **Top Professionals**, the Account List that was created online in a previous demo, displays. The newly created Account List will not display if a sync has not been performed since the Account List was created online.
5. Drag and drop an Account to add it to the **Top Professionals** Account List.
- a. Users can also create new Account Lists on the iPad using the New List link in the navigation menu.
6. Click the + icon in the top right corner of the screen to create a new account record.
7. Select **Hospital Department** as the record type.
- a. The New Account Wizard displays with the same fields that display online.
8. Enter **Chilton Pediatrics** in the **Name** field.
9. Select **Chilton Memorial Hospital** as the Primary Parent.
10. Select an address from the list of addresses for Chilton Memorial Hospital.
11. Click **Done**.
12. Click **Save** in the bottom right corner.
- a. If values for required fields have not been entered, an error will display. To view the errors, click the red x icon.
- 
13. Enter values for any necessary required fields.
14. Click **Save** again.
- a. The same duplicate check that is performed online when creating new accounts is also performed offline. If there are potential duplicates click the <#> **Matches** link to review the potential duplicates.
15. Click **Save** again.
- a. The new account record has been created and the account detail page displays. The new account record will be available online after the next synchronization is completed.

## Global Account Search

In some cases, users will need to record a call for a Professional that is physically present at the time of the call but is not in his/her territory. To minimize the creation of duplicate account records in the Veeva database, the Veeva Global Account Search (GAS) can be deployed into customers' orgs.

The Veeva Global Account Search feature allows users to search for Accounts in the entire Veeva database and locate Accounts that are in and out of their territory. Once the account is located, users can take certain actions, such as add the account to their own territories. The Global Account Search is only available online and not on the iPad or Windows mobile devices.

## Demo: Use the Global Account Search

In this demo, we will log in as an end user and then use the Global Account Search to locate an Account outside the user's territory and add the account to the user's territory.

1. Login as Sarah Jones.
2. Click the **My Accounts** tab.
3. From the **View** dropdown, select **My Accounts**.
4. Do you see an Account named Ayrton Senna? \_\_\_\_\_

This Account is in territory 103. Since Sarah's territory is 101, she cannot see him in her list of Accounts.

5. Click the **Global Account Search** tab.
6. In the **Last Name** field, enter **Senna** as in the screenshot below:

The screenshot shows a search form titled "Search For Account" with a "Search" button. There are three search criteria sections: "Name", "First Name", and "Last Name". Each section has two radio buttons: "Exact Match" (selected) and "Starts With". The "Last Name" section has the value "Senna" entered into its input field.

Search For Account		Search	
Name	<input checked="" type="radio"/> Exact Match	<input type="radio"/> Starts With	<input type="text"/>
First Name	<input checked="" type="radio"/> Exact Match	<input type="radio"/> Starts With	<input type="text"/>
Last Name	<input checked="" type="radio"/> Exact Match	<input type="radio"/> Starts With	<input type="text"/> Senna

7. Click the **Search** button.
8. Ayrton Senna should display in the search result. Click to select the checkbox next to his name.
9. Click the **Add To Territory** button.  
A message is displayed indicating the account is added to Sarah Jones's territory.
10. Click the **My Accounts** tab.  
You should now see Ayrton Senna listed as one of Sarah Jones's accounts in territory 101.

# Module 07: Account Object Configuration

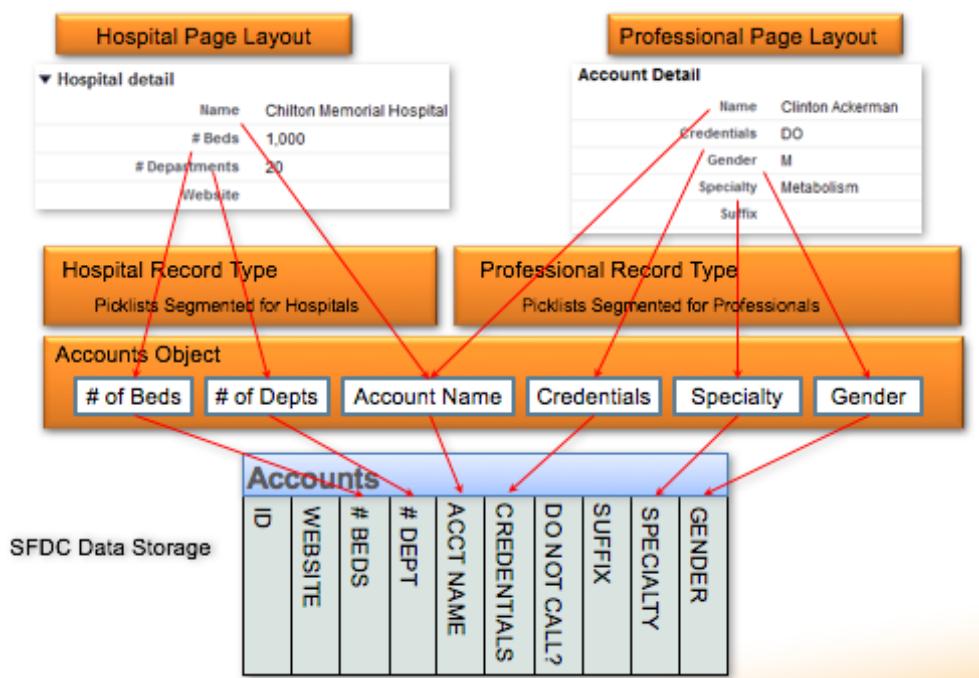
## OBJECTIVES

- Overview of Veeva Account Record Types
- Create Custom Account Fields
- Configure Custom Account Buttons
- Use the Translation Workbench to Modify Account Record Type Labels
- Create Custom Account Record Types

## Account Record Types

Record types let you offer different business processes, picklist values, and page layouts to different groups of users. Record types can be defined in any object. Veeva provides record types in many of our standard objects. However, not every object needs to have record types.

The image below depicts example record types in the Account object:



The lowest layer is the SFDC Data Storage. The physical database is managed by SFDC. When we perform configuration, we work in the objects layer. An object represents a table and contains fields. Most of the fields in an object map to a single table. If you have lookup or master-detail fields, then the data in those fields will map to columns in related tables.

Salesforce allows you to define record types within objects and then define one or more page layouts to show information specific to a record type. In this example, you can see we have a Hospital and a Professional record type. Each record type is associated with its corresponding page layout. Fields that describe professionals, such as gender and credentials, are placed on the Professional page layout. Fields that describe a hospital, such as # of departments and website, are placed on the Hospital page layout. This mechanism allows us to have one object to store data for many different entities (account types) instead of creating a separate object for each entity.

Another important fact is that each record type can have multiple page layouts. This can be used to support users in different business units or geographic locations. For example, the hospital page layout may be slightly different for users in Canada as compared to users in the US.

## Custom Account Fields

A common configuration within the Accounts object is to create custom fields. When you create a custom field in an object that contains multiple record types you should pay attention to which page layout(s) the new field should be added to. It is also important to identify which users or profiles should have access to new fields.

### Demo: Create a Custom Account Field

In this demo, we will create a custom picklist field for tracking a **Preferred Phone**. It needs to be placed only on the Professional page layout and it should only be visible to the **System Administrator** and **VExample Primary Care Sales – Platform** profile.

1. Login as the Administrator.
2. Go to **Setup** → **Customize** → **Accounts** → **Fields**.
3. In the **Account Custom Fields & Relationships** section click the **New** button.
4. For the **Data Type** select **Picklist**.
5. Click **Next**.
6. Enter the following field information:

Field	Value
Field Label	Preferred Phone
Values	Enter the following values with each value separated by a new line: Mobile Home Office
Field Name	TR_PREFERRED_PHONE – Remember the best practice is to always enter a prefix for custom component names.
Description	Stores preferred phone type for professional accounts.

7. Click **Next**.
8. Deselect the **Visible** checkbox for all profiles except for the **System Administrator** and **VExample Primary Care Sales – Platform** profiles.
9. Click **Next**.
10. Deselect all page layouts except the **Professional** page layout.
11. Click **Save**.

Modify the professional page layout and add the Preferred Phone field to the existing Contact Information and Preferences section.

1. Go to **Setup** → **Customize** → **Accounts** → **Person Accounts** → **Page Layouts**.
2. Click the **Edit** link for the Professional page layout.
3. The Preferred Phone field should be in the Account Information section of the page layout. Drag-and-drop it to the Contact Information and Preferences section as in the screenshot below:

Contact Information and Preferences		Do Not Call?	Sample Do Not Call?
Phone	1-415-555-1212 <th>Preferred Phone</th> <td>Sample Preferred Phone</td>	Preferred Phone	Sample Preferred Phone
Mobile	1-415-555-1212		

4. Click **Save**.

Test to make sure the configuration looks correct as the end user.

1. Login as Sarah Jones.
2. Search for a professional account such as Melany Segnit and click the link to display the Account's detail page.
3. Ensure the Preferred Phone field appears as expected in the Contact Information and Preferences section.
4. Edit the account and select a value for the Preferred Phone field.
5. Click **Save**.

## Demo: Configure a Custom Account Button

In this demo, we will configure the existing New Professional button in the Account object and change its label to New Person and point it to the existing S-Control for creating a new Person Account.

We will start by viewing the current behavior of the button.

1. Login as the Administrator.
2. Search for **Chilton Memorial Hospital** and click the **New Professional** button.  
The Veeva New Account Wizard displays. Notice that the Record Type field is defaulted to Professional and is read only.
3. Click **Cancel**.

We will now modify the behavior of the button.

4. Go to **Setup** → **Customize** → **Accounts** → **Buttons, Links, and Actions**.
5. Click the link to go into the **New Professional** button.
6. Click **Edit**.
7. Change the **Label** to **New Person**.
8. Verify the **Content Source** field is set to **Custom S-Control** and select **New Account [New\_Person\_vod]** from the **Content** field drop-down menu.



The New Account [New\_Person\_vod] standard Veeva S-Control can be found under Develop → S-Control. It allows users to select any Person Account type as the Record Type when creating a new Account.

9. Click **Save**.

Test the Configuration.

10. Login as Sarah Jones.
11. Search for **Chilton Memorial Hospital** and click the **New Person** button.

The Veeva New Account Wizard should display, notice the Record Type field should display a list for person accounts to select from.

12. Click **Cancel**.

## Using the SFDC Translation Workbench to Modify Account Record Type Labels

In addition to modifying Veeva CRM labels and error messages using Veeva Messages, there are some scenarios where you will need to modify UI labels using the Salesforce Translation Workbench. This applies to Record Type Labels and Picklist Values that are referenced within Veeva custom code. When Veeva custom code references label values, if the original label value is modified, the Veeva custom functionality will no longer behave as expected.

Therefore, it is best practice to use the Salesforce translation workbench to change the labels of Veeva specific components such as picklist values and record type labels, instead of changing the metadata values, to avoid breaking Veeva specific functionality.

-  Only users with the Manage Translation permission enabled on their profile will have access to the Translation Workbench.

You should never update out-of-the-box Account record type labels directly. Doing so will break custom Account button functionality. We will walk through an example of how to modify an out-of-the-box Account record type label by translating the value using the Salesforce translation workbench.

### Demo: Use the Translation Workbench

1. To modify translations from the UI, go to **Setup → Translation Workbench → Translate**.
2. Select the **Language** you're translating into (English).



In some cases, like this one, you will be translating to the same language as the original string just to provide a different value for it.

3. Select **Record Type** from the **Setup Component** drop-down menu.
4. Select **Account** from the **Object** drop-down menu.
5. Double click in the **Record Type Label Translation** column for Practice\_vod.
6. Update the translation value to **Clinic**.
7. Click **Save**.
8. Clear the Veeva Cache.
9. Go to the **My Accounts** tab.
10. Click the **New** button.

Notice that in the drop-down menu, the Practice Record Type now displays as Clinic.

11. Click the **Cancel** button.

### Independent Exercise #7 – Create Custom Account Fields, Page Layouts, and Record Types

1. The business needs to track whether users will need a badge to enter certain hospitals. Create a custom checkbox field in the Accounts object named Badge Required?. This field should only be visible by the System Administrator and the VExample Primary Care Sales – Platform profiles. The field should only be visible on the Hospital page layout.
2. Make the existing Website field appear in the New Account Wizard when creating a new hospital (only) but not when creating any other account record types. This should be done by making the Website field required on the Hospital page layout.

Once configured, clear the Veeva Cache and test the configuration by following the steps below:

- a. Click the **My Accounts** tab.
  - b. Click the **New** button.
  - c. Select **Hospital** and click **Continue**. You should see the Website field in the wizard page layout, as all required fields are automatically added to the wizard.
  - d. Click **Cancel**.
3. The business needs to keep track of interactions that users have with staff members such as receptionists for business accounts. Since Veeva does not have an out-of-the-box Staff record type and corresponding Staff page layout, you will create a new page layout and record type to display staff information.

Create a new page layout called Staff based on the existing Professional page layout.

- a. Go to **Setup** → **Customize** → **Accounts** → **Person Accounts** → **Page Layouts**.
- b. Click the **New** button to create a new page layout.
- c. Select **Professional** from the **Existing Page Layout** dropdown.  
Note: Selecting an existing page layout here will automatically default the same components from the selected page layout on the new page layout.
- d. Type **Staff** for the **Page Layout Name**.
- e. Click **Save**.

Next, since not all fields relevant to Professional Accounts are relevant for Staff Accounts, you will need to modify the Staff page layout. Add and remove the necessary page layout components from the Staff page layout so that only the fields displayed in the screenshot below are included for Staff Accounts and save your changes once complete.

**Note:** You do not need to remove the default Salesforce sections with no fields. These sections are greyed out in the page layout editor and will not display to users unless fields are added to them. If removing these sections you will receive a warning message that indicates they cannot be added back.

The screenshot shows the 'Person Account Detail' page layout editor. At the top, there are 'Standard Buttons' (Edit, Delete) and 'Custom Buttons' (Record a Call). The layout is divided into several sections:

- Account Information (Header visible on edit only):** Contains fields for Account Name (Sample Account Name), Middle (Sample Middle), Preferred Name (Sample Preferred Name), Account Record Type (Sample Account Record Type), Birthdate (3/25/2015), and Gender (Sample Gender).
- Contact Information and Preferences:** Contains Phone (1-415-555-1212) and Mobile (1-415-555-1212) under Contact Information, and Email (sarah.sample@company.com) and Website (www.salesforce.com) under Preferences.
- Identification Numbers:** Contains ME # (Sample ME #), ID (Sample ID), and ID2 (Sample ID2) under Identification Numbers, and External ID (Sample External ID) under External ID.
- Custom Links (Header not visible):** Contains a 'View User Territory' link.
- Mobile Cards (Salesforce1 only):** A section for dragging expanded lookups and mobile-enabled Visualforce pages.
- Related Lists:** A list of related lists, with 'Addresses' being the currently selected one. The Addresses table has columns: Street Address, City, Zip, Country, Map, Phone 1, Primary, and Inactive. A sample row shows: Sample Street Address, Sample City, Sample Zip, Sample Country, Sample Map, 1-415-555-1212, checked for Primary and Inactive.

Next, create a new Staff record type based on the Professional record type.

- f. Go to **Setup** → **Customize** → **Accounts** → **Person Accounts** → **Record Types**.
- g. Click the **New** button and create a new record type with the following information:

Record Type

Existing Record Type	Professional_vod
Record Type Label	Staff
Record Type Name	Staff
Description	Created for Training.
Active	<input checked="" type="checkbox"/>

- h. Click to select the checkbox next to **Enable for Profile** to enable this record type for only the following profiles:

System Administrator	Professional_vod	<input checked="" type="checkbox"/>	<input type="checkbox"/>
VExample Primary Care Sales Management - Platform	Professional_vod (Default) ,KOL_vod	<input checked="" type="checkbox"/>	<input type="checkbox"/>
VExample Primary Care Sales - Platform	Professional_vod (Default) ,KOL_vod ,Pharmacy Staff ,Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- i. Click the **Next** button at the bottom of the page.
- j. Select **Apply a different layout for each profile**.

Apply one layout to all profiles       Apply a different layout for each profile  
-- Select Page Layout --

- k. Select the **Staff** page layout for only the following profiles.

System Administrator	Staff
VExample Primary Care Sales Management - Platform	Staff
VExample Primary Care Sales - Platform	Staff

- l. Click the **Save** button.
- m. Clear Veeva Cache.

Test the configuration:

- a. Login as Sarah Jones.
  - b. Click the **My Accounts** tab.
  - c. Click the **New** button and create a new **Staff** account.
  - d. Enter the staff information and **Save** the new record.
  - e. Notice the page layout for Staff is the simplified page layout you created.
4. When users create a staff account, the New Account Wizard page displays a section for license #. Since a license # is not needed for staff accounts, disable the license info section on the NAW page.
    - a. Follow best practices for configuring a Veeva Message to modify the NEW\_ACCOUNT\_TYPES\_DISABLE\_LICENSE\_INFO Veeva Message. Enter the Record Type Label of the Staff record type in the **Text** field of the message to disable the license information on the NAW page for this record type.
    - b. Clear Veeva cache.

Test the configuration:

- c. Login as Sarah Jones.
  - d. Click the **My Accounts** tab.
  - e. Click the **New** button and create a new **Staff** account.
  - f. Make sure the License # section does not display in the NAW.
5. Your users would like to use the term HCP when referring to Professional accounts. Use the Salesforce Translation Workbench to provide the new value for the Professional Record type in the Account object. **Reminder:** Best practice is to always use the translation workbench when changing Account record type labels to avoid unexpected behavior with Account custom buttons.

Once you have made the update, clear the cache and test your configuration by navigating to the New account page and verifying the value has changed in the Record Type drop-down menu.

# Module 08: Profiles and Permission Sets

## OBJECTIVES

- Understand the Purpose of Profiles
- Understand the Purpose of Permission Sets
- Configure Profiles
- Configure Permission Sets

### What is a Profile?

Profiles control a user's access to functionality throughout Veeva. Each user account is assigned a single profile. When users log in to Veeva, their profile controls the tabs they see, determines whether they can create, edit, or delete records for specific objects and controls which type of records they can create, among other things.

Profiles are typically defined for each functional role within your organization, such as Primary Care Sales, Specialty Sales or Medical Science Liaisons (MSLs).

In implementations where a single Veeva org is used across multiple countries, it is common to have separate profiles per country, such as Primary Care – US and Primary Care – CA.

Minimizing the number of profiles is helpful because during upgrades System Administrators will have fewer profiles to configure.

### Demo: Profile Configuration

1. Login as the Administrator.
2. Go to **Setup → Manage Users → Profiles**.
3. Click the letter V in the alpha bar to view profiles with names starting with V.
4. Click the **VExample Primary Care Sales – Platform** profile name link to view the details of the profile. *Do not click the Edit link.*

End user profiles will typically have “platform” in the name.

The profile detail page allows you to configure access to various application components such as page layouts, fields, record types, tabs, objects, etc.

Starting at the top of the profile page we will review each profile section. Some sections allow you to set access for each object. Since Veeva has over 220 objects, the profile page is very long.

5. Scroll to the **Page Layouts** section.  
This section allows you to assign page layouts per record type and profile.
6. Click the **View Assignment** link next to **Account**.
7. Click the browser's **Back** button to go back to the profile.
8. Scroll to the **Field-Level Security (FLS)** section.  
This section allows you to give users of the profile either edit access or read access to specific fields within each object.

9. Click the **View** link next to **Account**.

**Warning:** Be careful when removing FLS from profiles, especially in the Address and Call objects. It would be better to remove the fields from the page layouts instead of using FLS to remove them.

10. Click the browser's **Back** button to go back to the profile.

11. Scroll to the **Record Type Settings** section.

If an object has more than one record type, administrators can configure which record types the profile will grant access to. This will control the types of records users will be able to create. For example, if users are allowed to create Accounts, this setting will control which type of Accounts they will be allowed to create.

12. Click the **Edit** link under **Accounts**.

The Default Record Type setting controls the default type of record to be created when the new button is clicked by a user.

13. Click the browser's **Back** button to go back to the profile.

14. Scroll to the top of the profile page and click the **Edit** button.



When the profile is in Edit mode, it only shows the Custom Apps Settings, Tabs Settings and Object Permissions sections.

15. Scroll to the **Custom App Settings** section.

An application is a collection of tabs which can be made available to user profiles so they can quickly access the tabs needed to perform specific tasks. Veeva end user profiles typically only need access to the standard **Veeva CRM** application.

System Administrators can create additional applications, such as a Sampling Admin application, which would contain the tabs needed to perform the administration of samples. The System Administrator would then give certain profiles, such as the Sales Operations profile, access to the Sampling Admin application.

16. Scroll to the **Tab Settings** section.

Best practice is to give user profiles access to only the tabs they needed to perform their job functions.

There are 3 different settings available for each tab:

- i. **Default On** tabs will appear on the tab bar by default. The most frequently used tabs should be set to default on.
- ii. **Default Off** tabs are only available through the All Tabs (+) menu.
- iii. **Tab Hidden** tabs are not available to the user. **Note:** Users are not able to search on objects whose tab is hidden

17. Scroll to the **Standard and Custom Object Permissions** section.

Object permissions control whether users can Create, Read, Edit or Delete data records for specific objects. For example, if your company is not allowing users to create Accounts and Addresses, then you would only give Read permission on these objects.

In some cases, for Veeva functionality to work, you will be instructed to give very specific CRED permission for certain objects.

The View All and Modify All permissions are only given to System Administrator profiles.

18. Scroll down to the **Password Policies** section.

In some cases, you may need to set password policies per profile. An example would be for certain integration user profiles you would need to set the password to never expire to avoid periodic disruption of integration due to passwords expiring.

19. Click the **Cancel** button.

20. Scroll to the **Enable Apex Class Access** section.

21. Click the **Edit** button in this section.

Veeva continuously creates new functionality after each new version release. In some cases, you will need to give user profiles access to specified Apex Classes as part of enabling a new feature.

22. Click the **Cancel** button.
23. Scroll to the **Enable Visualforce Page Access** section.
24. Click the **Edit** button in this section.

Veeva continuously creates new functionality after each new version release. In some cases, you will need to give user profiles access to new Visualforce Pages as part of enabling a new feature.

25. Click the **Cancel** button.

## What is a Permission Set?

Permission sets are used to grant additional application permissions to specific subsets of users without having to modify or clone user profiles.

Profiles should be used to grant the base level application permissions that every user within a specific functional role will need. Permission sets can then be created and assigned to subsets of users to grant additional permissions beyond what is provided through their profile. This allows you to minimize the total number of different profiles needed for an implementation.

Veeva provides several standard permission sets to help you quickly grant access to certain functionality such as Approved Email, Events Management, and Network.

In addition to being able to create permission sets through the online user interface, they can also be data loaded.



In order for permission sets to be enforced offline, enable the **PermissionSet Support** Veeva Setting.

## Demo: Configure a Permission Set

Next, we will configure a permission set that will give specific users the ability to delete Accounts even though their profile does not grant this access.

1. Go to **Setup** → **Manage Users** → **Permission Sets**.
2. Click the **New** button.
3. In the **Label** field type **Account Deletion**.
4. Set the **License** to **Salesforce Platform**.
5. Click the **Save** button.
6. Click the **Object Settings** link.
7. Click the **Accounts** link.
8. Click the **Edit** button.
9. In the **Object Permissions** section, click to select Delete.

Notice that Read and Edit are automatically selected after selecting Delete. User's cannot have Delete permission without having Read and Edit permission.

10. Click the **Save** button.
11. Click the **Manage Assignments** button. Now that the permission set has been created, you can assign users to it.

12. Click **Add Assignments**.
13. Select the checkbox for **Jones, Sarah**. **Note:** You can select up to a 1000 users.
14. Click the **Assign** button.
15. Click the **Done** button.
16. Click the **Jones, Sarah** link to view her account page.
17. Scroll to the Permission Set Assignments section.

In addition to managing permission set assignments from the permission set, you can also modify the permission sets assigned to an individual user from the user account record.

## Independent Exercise #8 - Configure the Primary Care Sales Profile

In this exercise, you will practice configuring a profile. Don't worry about the use of the specific object, fields, and record types at this point. You will learn more about them throughout the course.

You need to configure the **VExample Primary Care Sales – Platform** profile to meet specific business requirements. A Veeva Business Analyst has spent time gathering these requirements. As the System Administrator, you have now been tasked with making the following configuration changes for the **VExample Primary Care Sales – Platform** profile:

1. Give edit **Field-Level Security** (FLS) to the following fields on the Account object:
  - a. Approved Email Consent, CLM Opt Type, and HCO Type
2. Give access to only the following **Record Types** for Accounts:
  - a. Hospital, Hospital Department, Pharmacy, and Professional
3. Give access to only the following **Record Types** for Calls:
  - a. Call Report and Event
4. Give access to all **Visualforce Pages**.
5. Give access to all **Apex Classes**.
6. Make the following **tabs** default on:
  - a. Reports, Calls, and CLM Presentations
7. Make the following **tabs** hidden:
  - a. Product Plans, and Product Strategies
8. Remove the delete **object permission** for the following objects:
  - a. Benefit Designs and Benefit Design Lines
9. Give full CRED (create, read, edit, delete) **object permission** for the University object.

Test some of the profile updates by clearing the Veeva Cache and logging in as Sarah Jones.

1. Verify that when creating a new Account, Sarah only has access to create a Hospital, Hospital Department, Pharmacy, or Professional Account.
2. Verify that Sarah cannot access the Product Plan or Product Strategy tabs through the All Tabs page.
3. Verify that Sarah sees the University related list on Professional account detail pages.

Once a sync has been completed on the iPad all the same changes will apply offline.

# Module 09: Affiliations, Account Hierarchy, and Merging

## OBJECTIVES

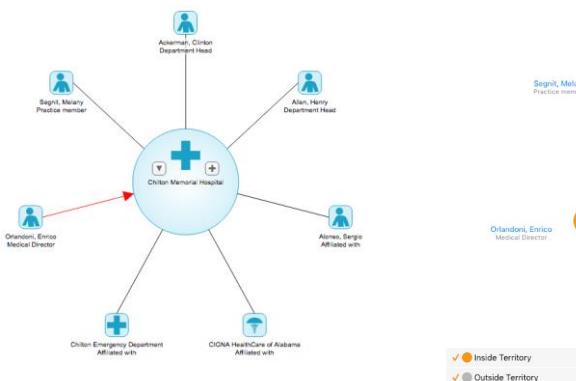
- Understand Affiliation Functionality
- Configure the Sphere of Influence
- Understand Account Hierarchy Functionality
- Configure Account Hierarchy
- Merge Accounts

### Affiliations (Sphere of Influence)

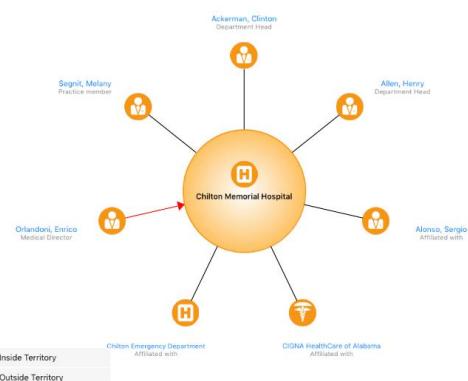
The custom Affiliations object stores information about relationships between Accounts. The Sphere of Influence S-Control allows users to view and manage these relationships using a graphical display.

The look and feel of the Sphere of Influence is slightly different online as compared to how it looks offline on the iPad or Surface.

Sphere of Influence Online



Sphere of Influence on iPad



Important facts about the Sphere of Influence:

- The relationship between the accounts can be a soft relationship.
  - A professional may have influence on a hospital without physically working there.
- Users review the Sphere of Influence to get an understanding of how the accounts are affiliated to each other and whether certain professionals have influence over others.
- When recording a call for a business account, such as a hospital, the person accounts affiliated to the hospital will default on the call page as potential attendees.

### Demo: Use the Sphere of Influence

1. Login as Sarah Jones.
2. In the sidebar, search for **Chilton Memorial Hospital** and click on the link to view its detail page.
3. Scroll down to the **Sphere of Influence** section and click the **View** button.  
Notice that this hospital already has several affiliations defined.
4. Click the + sign in the sphere to add a new affiliation.
5. In the search dialog box, type the letters **AI** and click **Search** to search for accounts starting with Al.

6. Drag the **Allen, Henry** account and drop it into the center circle.
7. Select **Department Head** from the **Role** field.
8. Type **Very Important** in the **Comments** field.
9. Select the **Has influence** radio button.

**Note:** A picklist field named Influence stores the values for these 3 radio button labels.

10. Click **Save**.

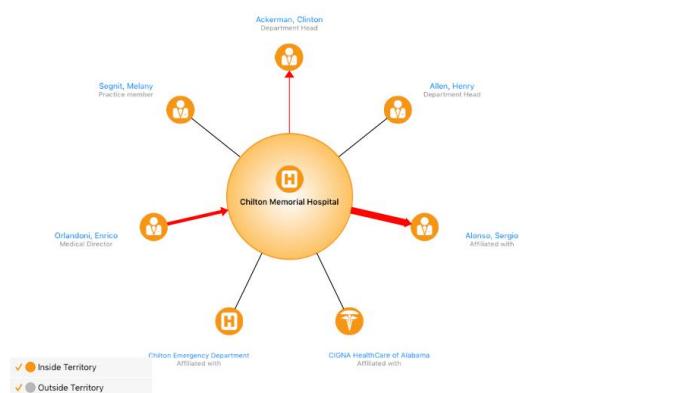
Sometimes the Sphere of Influence will have many accounts and it may be useful for users to filter the sphere to display only specific account types or roles. To filter:

1. Click the **down arrow** in the sphere.
2. Select **Professional (HCP)** from the **Account Type** dropdown.
3. Click the **Save** button.  
The sphere will now only show professional accounts.
4. Click the **down arrow** in the sphere.
5. Click **Clear**.
6. Click the **Save** button.  
The sphere should now display all account affiliations.
7. Logout as Sarah Jones.

## Configuring Affiliations and the Sphere of Influence

Here are some important affiliation configuration tips:

- You can hide most Affiliation object fields using FLS. The one field you should not hide with FLS is the Roles field because it will cause an error in the affiliation s-control.
- The From Account and To Account fields are used to build the relationship between Accounts. These fields are populated with the Id's of the Accounts when data loading affiliations.
- Use the Translation Workbench if you need to change the labels of the Influence picklist values.
- If user profiles have edit access to the Relationship Strength field they will be able to set the strength values offline only. The relationship strength changes the thickness of the lines and arrows as shown in the image below:



## Demo: Configure the Sphere of Influence

In this demo, we will remove the Comments field from the Sphere of Influence display for all profiles by setting Field Level Security on the Comments field in the Affiliation object.

1. Login as the Administrator.
2. Go to **Create → Objects → Affiliation**.
3. Under Custom Fields & Relationships, click the **Comments** field link.
4. Click the **Set Field-Level Security** button.
5. Uncheck the **Visible** checkbox for all profiles.
6. Click **Save**.
7. Clear Veeva Cache.

Test the configuration.

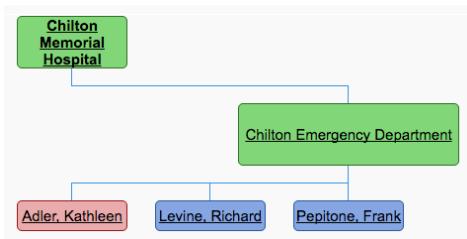
8. Click the **Home** tab.
9. In the sidebar, under recent items, click the link for **Chilton Memorial Hospital**.
10. Scroll down the page and click the **View** button in the **Sphere of Influence** section.
11. Click the icon for one of the Accounts.
12. Notice the **Comments** field does not display.
13. Click the **Save** button.

## Account Hierarchy

A custom View Hierarchy button can be added to Account page layouts to provide users with a visual representation of the hierarchical relationships between Parent and Child Accounts. For example, a Hospital Department may have a Hospital set as the Parent Account and may have Professionals as Members (Children Accounts).

The look and feel of the Account Hierarchy is slightly different online as compared to how it looks offline on the iPad or Surface.

Account Hierarchy Online



Account Hierarchy on iPad



Important facts about the Account Hierarchy:

- The relationship between the accounts is a physical relationship.
  - If an HCP displays in a hospital department within a hierarchy, it means that the HCP physically works in that hospital department.

- Users review the Account Hierarchy to get an understanding of who they expect to see when they visit that account.
- When recording a call for a business account, such as a hospital, the person accounts associated to the hospital will default on the call page as potential attendees.

## Demo: Use the Account Hierarchy

In this demo, we will login as an end user and associate a professional to a hospital department in the Account Hierarchy.

1. Login as Sarah Jones.
2. Click the link for **Chilton Memorial Hospital** in the **Recent Items** section on the **Home** tab.
3. Click the **View Hierarchy** button. You should see the account hierarchy display.
4. In the account hierarchy structure, click the link for **Chilton Emergency Department**. You should see the entire hierarchy structure including the professional accounts in the emergency department.

Add another professional as a member of the Chilton Emergency Department.

1. In the account hierarchy structure, click the link for **Chilton Emergency Department**. This will take you to the department's account page.
2. Scroll down the page until you see the **Members** related list.
3. In the **Members** related list, click the **New Child** button.
4. Click the **lookup** button for the **Child Account**.
5. Search for and select **Melany Segnit**.
6. Click **Save**.

To verify the member has been added:

7. Click the link for the **Chilton Emergency Department** account.
8. Scroll down the page until you see the **Members** related list. You should see Melany Segnit in the list as in the screenshot below.
9. Scroll back to the top of the page and click the **View Hierarchy** button. You should now see Melany Segnit in the hierarchy structure as in the screenshot below.

## Account Hierarchy Configuration

To allow users to view the Account Hierarchy:

- Add the View Hierarchy button to the necessary Account page layout(s).
- Give the appropriate profiles access to the **Account\_Hierarchy\_vod** VisualForce page.
- Account hierarchy data is stored in the **Child Accounts** object. User profiles should have the appropriate level of CRED permissions on this object to view and manage this information.

To allow users to manage the Account Hierarchy, configure the following on the Account page layout(s):

- Add the Primary Parent field and make it read only.
  - This will allow users to easily view the Primary Parent for the Account.
  - Users will need the appropriate FLS for this field.
  - **Note:** Veeva does not use the Parent Account field on the Account object.
- Add the Members and/or Members Of related lists, depending on the level in the hierarchy of the Account record type page layout you are modifying.

- Disable the standard New button.
- Add the New Parent button on the Member Of related list.
- Add the New Child button on the Members related list.
- Give the appropriate profiles access to the following Visualforce pages:
  - Clone\_Child\_Account\_vod
  - Edit\_Child\_Account\_vod
  - New\_Child\_Account\_vod
  - View\_Child\_Account\_vod
  - New\_Child\_Account\_From\_List\_vod

## Demo: Configure the Account Hierarchy

In this demo, we will enable the Account Hierarchy functionality on the KOL page layout.

1. Login as the Administrator.
2. Go to **Customize** → **Accounts** → **Person Accounts** → **Page Layouts**.
3. Edit the **KOL** page layout.
4. Add the **View Hierarchy** button to the **Custom Buttons** section.
5. Add the **Primary Parent** field to the **Account Information** section and make it **read-only** on the page layout.

Configure the Member Of related list to allow users to manage Parent accounts.

6. Add the **Member Of** related list to the page layout.
7. Click the  to display the **Member Of** related list properties.
8. Add the **Parent Account** field to the Selected Fields.
9. Remove the **Name** field from the Selected Fields.
10. Expand the Buttons section by clicking on the + sign.
11. **Deselect** the standard New button to hide it.
12. Select the **New Parent** button to display.
13. Click **OK**.
14. Save the page layout.

## Independent Exercise #9 - Configure Affiliations and Account Hierarchy

In this exercise, you will practice configuring both the Affiliations and Account Hierarchy functionality.

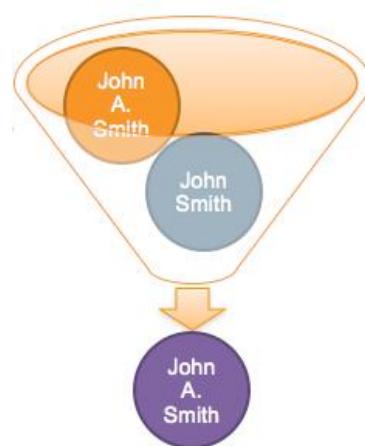
1. The Primary Care Sales users in your organization do not need to use the Influence field in the Sphere of Influence since the business does not use the concept of influence. To configure this requirement, perform the following tasks:
  - a. Using FLS hide the Influence field in the Affiliation object from the VExample Primary Care Sales – Platform profile.
  - b. Rename the Sphere of Influence section on the Professional page layout and call it Affiliations instead.
2. Configure the Account Hierarchy functionality on the Professional page layout. Review the **Account Hierarchy Configuration** section of this module to verify that you have configured all relevant components.

Login as Sarah Jones to test the configurations as a Primary Care Sales user.

## Merging Duplicate Accounts

Veeva has extended the standard Salesforce merge process to include custom code for deep merging of Veeva account data. The merge process associates the losing account's related records to the winning account. The following objects are included in the deep merge:

- Addresses
- Territory Fields (TSF)
- Calls
- All other objects in master-detail relationship to Accounts



### Address Merge Processing Options

When using the Veeva account merge process, you can configure how you would like to process address merges. To configure address merge behavior:

1. Login as the Administrator
2. Go to **Setup → Create → Custom Labels**.
3. Click the link to go into the **Account\_Address\_Merge\_Behavior** custom label.
4. The default **value** is **INACTIVE**. You can change the value to:
  - a. **INACTIVE**: Associates all addresses from the losing account to the winning account as Inactive. Sets the addresses' Inactive field to True. This option gives you the opportunity to review the merged addresses before making them active for use.
  - b. **ACTIVE**: Associates all addresses from the losing account to the winning account as Active. Sets the addresses' Inactive field to False
  - c. **ASIS**: Associates all addresses from the losing account to the winning account as is, without modifying the addresses' Inactive field.

### Territory Specific Fields Merge

Customized logic is used to enforce the unique combination of an Account and Territory for Territory Specific Field records for merging Accounts.

- If a TSF record exists for the losing Account where the TSF record does not exist based upon the Territory on the winning Account, then the losing Account's TSF record will be copied to the winning Account
- If a TSF record exists for the losing Account where the TSF record exists based upon the Territory on the winning Account, then the losing Account's TSF record will be deleted

This behavior is not configurable.

### Call Merge Processing

If Call records exist in the losing account, they are copied to the winning account.

If a call is recorded offline on the iPad for an account that was deleted via a merge, the call will automatically be associated to the winning account after syncing.

This is possible because the Account Merge History object contains a list of merged accounts. The sync process checks this object when it doesn't find an account during syncing.

## Unmerging

There is no “Unmerge” button! Take extra care when merging accounts. Pay attention to which account is selected as the master or winning account. If you make a mistake during the merge, it will not be easy to unmerge.

One un-merging option will be to find the deleted account in the Salesforce Recycle Bin, which you can access from the left sidebar, and undelete the account. Deleted data stays in the Recycle bin for 15 days. Then merge again.

The other option is to use a data loading tool to re-associate the deleted related data to a new account.

## Veeva Account Merge Opt Out

You can choose to use Veeva’s account merge functionality or use the Veeva merge API to implement your own merging solution. The default behavior uses the Veeva account merge functionality.

To disable the Veeva account merge logic in order to implement a custom solution you would:

1. Login as the Administrator
2. Go to **Setup → Create → Custom Labels**.
3. Click the letter **D** in the alpha bar.
4. Click the link to go into the **Disable\_Veeva\_Merge\_vod** custom label.
5. The default **value** is **false**. You would type **true** to disable the Veeva account merge functionality.

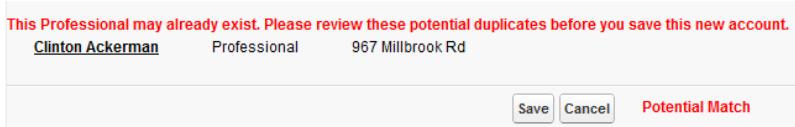
## Independent Exercise #10 - Merge Accounts

In this exercise, you will login as an end user and create a duplicate account. You will then log in as the Administrator and merge the two duplicate accounts.

1. Login as Sarah Jones.
2. Go to the **My Accounts** tab and create a new Professional (HCP) account with the following information:

Account Required Information			
Record Type	HCP		
First Name	Dr.	Clinton	
Last Name	Ackerman		
Role	Practice member		
Territory	101		
Parent Account and Address Information			
Select a primary parent for the new account.			
Primary Parent	Chilton Emergency Dep		
Add an address from the list. At least one address must be selected.			
Select	Address	Address Type	Primary
<input checked="" type="checkbox"/>	250 West 19th Street New York, NY 37849 US	Business	<input type="radio"/>
License Information			
Licence #	80 123456		
License Expiration Date	5/1/2015		

3. Click **Save**. When creating an account that might have a match in Veeva, the following message will be displayed to warn the user of potential duplicate records.



4. Ignore the message and click **Save**.
5. On the Account page for Clinton Ackerman, click **Edit** to fill in additional information:

Field	Value
Gender	Male
Target?	Yes
KOL?	Yes
Phone	212-555-1000
Email	<a href="mailto:dr@ackerman.com">dr@ackerman.com</a>

6. Save the record.
7. Click **Sarah Jones → Logout**. You should be automatically logged back in as the Veeva Administrator.

Now login as the administrator and merge the two duplicate accounts.

1. To merge accounts, go to **All Tabs → Accounts**.
2. Under **Tools**, click **Merge Accounts**.
3. On the Merge Accounts screen, type **Clinton Ackerman** and click **Find Accounts**.
4. The two Clinton Ackerman records are displayed with the checkboxes automatically checked. Click **Next**.
5. The page displays two Clinton Ackerman records side by side for comparison. The record on the left is the master, and the record on the right is the one you created earlier. Review each field and select the fields where there are new values, e.g., Gender, Target?, KOL?, Phone, and Email.
6. Click **Merge**.
7. Click **OK** to the pop-up warning.
8. The two account records have been merged.

# Module 10: Territory Specific Fields, Addresses, and My Schedule

## OBJECTIVES

- Understand the use of Territory Specific Fields (TSF)
- Overview of Address Functionality
- Use My Schedule
- Configure My Schedule

## Territory Specific Fields (TSF)

Territory Field (TSF) is a Veeva custom object that stores data specific to an account and a territory. In Veeva a territory also represents a user, so you can think of TSF as user specific data for accounts. Using Territory Fields is especially useful when an account is aligned to multiple territories.

### TSF Example

A professional (HCP) may work at multiple locations. For example, Dr. Melany Segnit works in two locations. She works at New York University Hospital in New York, NY on Mondays through Thursdays and at a group practice in Princeton, NJ on Fridays. Since she works at two separate locations she is aligned to two separate territories. Territory 101 is the NY location and Territory 102 is the NJ location.

A Veeva user is assigned to one territory. Sarah is assigned to territory 101 and John is assigned to territory 102. This means that Sarah will visit Dr. Melany in NY and John will visit her in NJ.

It is important for Sarah and John to keep track of certain information that pertains to Dr. Melany but also to themselves (their own territory). Common TSF information includes:

- The preferred address where the user visits the account
- The date the account was last visited by the user
- The number of times the account has been visited by the user since the start of the year
- Whether the account is a target account for the user

### Creating or Updating TSF Records

TSF records are created or updated in two ways:

- When a user saves, or submits a Call with a date/time prior to the current date/time
- When a user updates TSF fields via the Mass Update button in the My Accounts tab

Most TSF fields are populated automatically with a trigger that runs when a Call is saved or submitted.

Custom fields can be created in the Territory Fields object. You can use FLS to control whether users are allowed to modify custom TSF field values.

### TSF Record Types

It is possible to configure TSF fields that pertain to only certain types of accounts. For example, you may have a My Badge Status field in the TSF object which should be displayed on TSF records for hospital accounts but not on TSF records for professional accounts.

To configure TSF per record type you would:

- Create the custom field in the Territory Field object
- Create the page layout in the Territory Field object for each record type and add the custom field to the page layout
- Create the record type in the Territory Field object and associate the related page layout
  - The trick is the Territory Field record type name must be an exact case sensitive match to the name or the corresponding account record type

When a call is recorded for an account, the system sets the TSF record type to the same record type of the account. For example, when a call is recorded for a hospital, the system sets the record type for the TSF record to hospital and hence the hospital TSF page layout is used for the TSF record.

## Demo: Create TSF Records by Recording Calls

In this demo, we will create TSF records by recording a Call for a professional (HCP) and a hospital. We will then review the resulting TSF records generated for each account.

1. Login as Sarah Jones.
2. Search for **Melany Segnit** and view her account detail page.
3. TSF records can be displayed in two ways on the account pages:
  - a. By placing the Account Territory Info S-Control or the TSF VisualForce page in a custom section on the account page layouts header. This is the preferred option.
  - b. By adding the Territory Fields (Account) related list to account page layouts. Not the preferred option because users will then see each other's TSF records if an account is aligned to multiple territories.
4. Look in the **Territory Info** section. Notice there are no values for the 101 TSF fields.
5. Scroll down to the **Territory Fields (Account)** related list. Notice there are no TSF records listed for this account.

Record a call for Melany Segnit to generate a TSF record. Don't worry about the details for a call yet. We will cover call reporting in detail in a later module.

1. Scroll to the top of the page.
2. Click the **Record a Call** button.
3. In the **Address** dropdown, select the **202 Carnegie Center Drive** address.
4. Click the **Submit** button. The call will be submitted and locked. A trigger will run and create the TSF record.
5. Click the **Segnit, Melany** account link to view her detail page.
6. Look in the **TSF Info** section. Notice that there are now values for the 101 TSF fields. Also notice the absence of a field named **Badge Status** on the TSF record.
7. Scroll down to the **Territory Fields (Account)** related list. Notice now there is a TSF record listed for this account and territory 101, which is Sarah Jones's territory.

Record a call for Chilton Memorial Hospital and view the My Badge Status field, which only appears on the TSF records for hospital accounts.

1. You should still be logged in as Sarah Jones.
2. Search for **Chilton Memorial Hospital** and view its account detail page.
3. Click the **Record a Call** button.
4. In the **Attendees** section, select **Clinton Ackerman**.
5. Click the **Submit** button. The call will be submitted and locked. A trigger will run and create the TSF record.
6. Click the **Chilton Memorial Hospital** account link to view its detail page.
7. Look in the **TSF Info** section. Notice the **My Badge Status** field displays in this case.
8. Click the **Edit** button in the TSF info section.

9. Set the **My Badge Status** field to **Active**.

10. Click **Save**.

11. **Logout** as Sarah Jones.

## Addresses

Veeva allows multiples addresses to be stored for each person or business account. Addresses are stored in Veeva's Address object. As with any object, you can add custom fields and rename field labels in this object.

The Address object has a master-detail relationship with the Account object and can be displayed as a related list on account page layouts.

**Warning:** *You should not hide address fields with FLS because that can cause unexpected application behavior. Instead of hiding address fields via FLS, it is best practice to remove the unnecessary fields from the necessary address page layout(s).*

### Address Record Types

The Address object has two record types

- Company Maintained – Fields are set to read-only on the page layout.
  - Set addresses to this record type to prevent users from modifying the addresses
- Rep Maintained – Fields are editable on the page layout
  - Set the addresses to this record type to allow user to modify the addresses

### Primary Vs. My Preferred Address

Primary Address - An address can be marked as primary by setting the Primary field to true. Veeva uses the Primary address by default in territory alignment processing.

My Preferred Address – A user's my preferred address is stored in the TSF object My Preferred Address field and is populated automatically with the address used in last call for the account

### Key Address Fields

Inactive - The Inactive field can be used as a soft delete. Addresses marked as inactive will not be available for selection on the Call page or anywhere else in the application where an address is used.

Lock – The Lock field provides a mechanism to prevent users from being able to modify the Address Line 1 field online. Company Maintained addresses will normally have the Lock field set to true. Edits are blocked by a trigger which generates an error on save.

### Address Sample Rules

Veeva stores professionals' license to sample information on fields in the Address object. In order for a professional to receive samples at a specific location, the location's address must have a valid license.

If there are multiple addresses in the same state, the state license will be the same for those addresses. A trigger copies the license information to a new address if another address in the same state already exists. When license information changes, all related fields are automatically updated for all addresses in the same state.

In Canada, the law is different than in the US. The same license is shared across all Canadian addresses for the same professional.

### Office Best Times

Veeva uses office best times with the scheduling functionality. Users can provide the best times to visit specific addresses and the system highlights the best time in the Veeva schedule when users are planning their calls.

To configure best times:

- Place the Office Best Times S-Control on the Address page layout

- Give user profiles FLS access to the Best Times field in the Address object
- Provide best time values – you can let the users enter the values or data load it for them

## Demo: Address Lock Functionality

1. Login as Sarah Jones.
2. Search for **Melany Segnit** and view her account detail page.
3. Scroll down to the **Addresses** related list.
4. Click the link to view the details of the **555 First Avenue** address.
5. Notice this address has a **Company Maintained** record type and most fields are set to read-only.
6. Click the **Edit** button.
7. Notice the **Lock** field is set to true.
8. Change the Street Address to **500 First Avenue**.
9. Click **Save**. The system displays an error because users are not allowed to change this field when the Lock field is set to true.
10. Click **Cancel**.

## Demo: License Copy Functionality

1. You should already be logged in as Sarah Jones.
2. Click **Melany Segnit** link to view her account detail page.
3. Scroll down to the **Addresses** related list.
4. Click the link to view the details of the **555 First Avenue** address.
5. Notice the State for this address is set to NY.
6. Scroll to the **License Information** section. Notice the address already has a valid license.
7. Click the **Melany Segnit** account link to view her detail page.
8. Scroll to the **Addresses** related list and click the **New Address** button.
9. The address type defaults to Rep Maintained, click **Continue**.
10. Enter a **Street Address**, a **City**, and select **NY** for the **State**.
11. Click **Save**.
12. Scroll to the bottom of the address page. You should see the license information copied from another NY address.

## Demo: Office Best Times

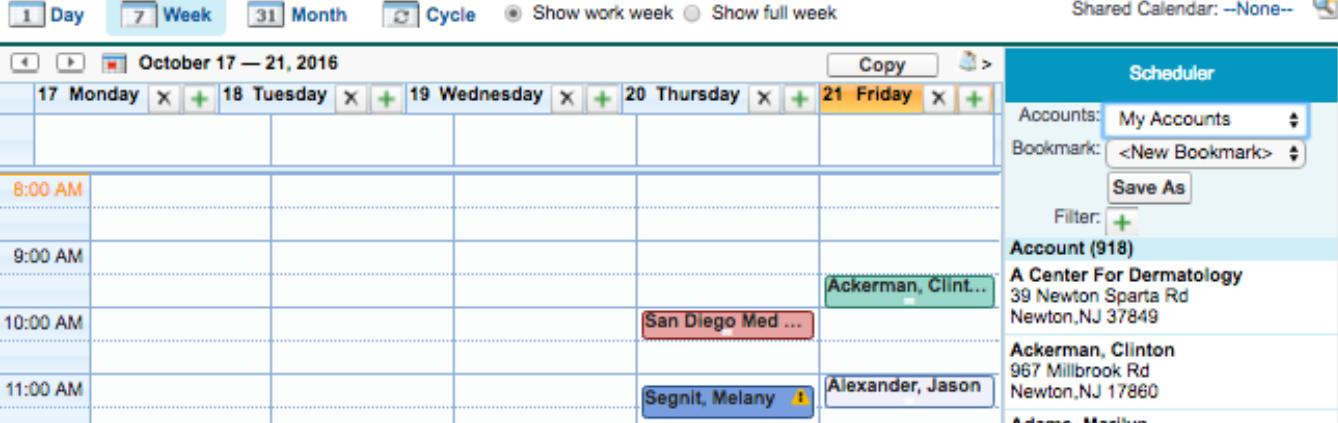
1. You should be looking at the new address you created for Melany Segnit.
2. In the **Office Best Times** s-control, click the **Edit** link next to **Monday**.
3. In the **Enter Time** field, type **10am to 12pm**.
4. Click **Done** and then click **Yes** to apply it for the rest of the workdays. The office best times will be used to highlight the schedule when the user adds the account to the Veeva schedule.

## My Schedule

The My Schedule tab displays all a user's activities in agenda, weekly, and monthly views. Users can create and modify activities in My Schedule as well as apply call cycles, map daily calls, and view office best times.

 For My Schedule to display properly online the ENABLE\_NEW\_CALENDAR\_ONLINE Veeva setting must be set to True.

The screenshot below shows My Schedule online.



Shared Calendar: --None-- 

Scheduler

Accounts: My Accounts 

Bookmark: <New Bookmark> 

Save As 

Filter: 

Account (918)

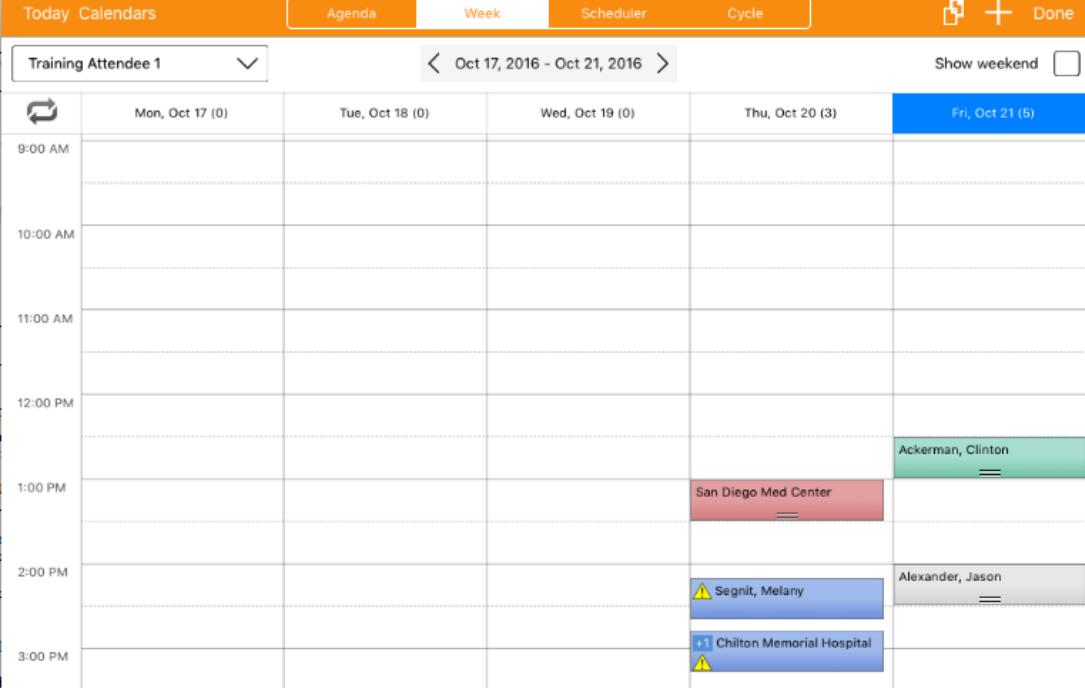
A Center For Dermatology  
39 Newton Sparta Rd  
Newton,NJ 37849

Ackerman, Clinton  
967 Millbrook Rd  
Newton,NJ 17860

Address Book 

 For the My Schedule to display properly offline, the Enable New iPad Calendar Veeva setting must be set to True. Best practice is not to display the standard SFDC Calendar on the Home tab.

The screenshot below shows My Schedule on the iPad.



The table below lists the types of activities that can be displayed within My Schedule, the object that stores the activity type, and the color code for each activity type on the schedule.

Activity Type	Description	Object	Color
Call	Record of an interaction between a user and an account. Users only see calls that they own. Managers can see the calls for their subordinates.	Call Object. Event stub is also created to make calls visible on the SFDC calendar	Colors for calls are based on the call status and date: <ul style="list-style-type: none"> <li>• Planned: Clear or custom</li> <li>• Saved: Teal</li> <li>• Submitted: Blue</li> <li>• Planned in the past: Red</li> </ul>
Time Off Territory	Time blocked off for personal time, such as vacation, sick days, or jury duty.	Time Off Territory	Maroon
SFDC Events	General appointments.	Event	Orange
Medical Events	Education seminars, speaker events or business meetings. Users see events that they own or are invited to.	Medical Event	Purple

## Multichannel Calendar

In addition to viewing activities across Accounts using My Schedule, users can also see a monthly view of activities for a specific Account. This Multichannel Calendar can be viewed by clicking the Calendar button on the Account page layout.

## Demo: Use My Schedule Online

In this demo, we will explore the My Schedule functionality by scheduling calls using the enhanced scheduler, applying scheduler filters, and using the call cycle functionality.

1. Login as Sarah Jones.
2. Click the **My Schedule** tab. The schedule has 4 tabs, Day, Week, Month, and Cycle. The system remembers which tab the user viewed last before switching to other areas of the application and will default to that tab when the user returns to My Schedule.
3. Click the **Week** tab. The **scheduler** displays on the right side of the schedule.

Use the scheduler to add calls to the schedule. This is also referred to as the enhanced scheduler.

4. Click the **Accounts** drop-down and select **My Accounts**. This dropdown menu includes the views and lists defined on the My Accounts tab.
5. Drag-and-drop Clinton Ackerman from the Scheduler to a desired time slot on the schedule. Notice the schedule highlights the office best time for Clinton.

Use the Scheduler Filter.

6. Click the + sign next to **Filter** to open the **Apply Filters** window.
7. Click the **Add Filter** dropdown to view the filters that currently exist.
8. For the filter enter “**State equals NY**” and click the **Add** button.
9. Click **Apply**. This will filter the accounts in the scheduler and show only accounts that meet the selected criteria. **Note:** *The filter shows the accounts that have at least one address in NY. The scheduler may display an account with a preferred or primary address in a different state.*

Use the Scheduler Bookmark.

10. Click the **Save As** button.
11. In the Save window enter **Accounts in NY**.
12. Click **Save**.

Use the Call Cycle functionality to create a weekly plan.

13. In the **Week** tab, make sure the **Copy** button appears on the upper right corner.
14. Click the **right** arrow to display next week's schedule.
15. Click the 11:00 AM slot on the calendar for any day to launch the search dialog box.
16. In the search field, type the letters **New** and click **Go**.
17. Select the checkbox for a few of the returned records and click the **Add** button. This should add all the accounts as stubs on the calendar.
18. Drag-and-drop the stubs to different time slots on the calendar to complete the schedule plan.
19. Click the **Copy** button.
20. In the **Copy to Call Cycle** window, select **Week 2 (0)** and click **OK**. This will copy the activities from the current week to a template call cycle week. Users will be able to apply this template week to a future week.

Apply a call cycle week to a future week.

21. Click the **Week** tab.
22. Use the right arrow to display a week a month in the future.
23. Click the + sign next one of the week days.
24. In the search field type **Week** and click **Go**.
25. Select **Week 1** and click **Add**. This applies the activities from the week 1 cycle to the current week. Users can then finalize the week's schedule by adding and rearranging the activities on the schedule.

Map an activity address.

26. Right-click and hold one of the schedule stubs and then click **Map this address**. Google map will launch.
27. Close the Google map window.

Add time off territory

28. Right-click and hold one of the time slots and then select **New Time Off Territory**.
29. Enter the time off territory details and click **Save**.

View the Multichannel Calendar for an Account

30. Open the **Melany Segnit** Account.
31. Click the **Calendar** button.

All the interactions for the Account are displayed. System Admins can also data load records from an external data source into the standard Salesforce Events object.

## My Schedule Configuration



You can display the number of attendees on the Day or Week view for group calls by setting the `Enable_Group_Call_Attendee_Display` Veeva setting to True.

To use the Call Cycle functionality, set the Enable\_Copy\_To\_Call\_Cycle\_Button Veeva setting to True. This will display the Copy button on the Week view.

 The Pre-Call Notes field exists in the Call object. You can use FLS to hide or display it on the day view for specific user profiles.

To hide the Cycle tab, you can remove CRED permissions for the Call Cycle Entry object from user profiles.

## Configuring Additional Scheduler Filter Fields

 The filter fields that are available in the Scheduler are configured using the SCHEDULER\_FILTER Veeva Setting. To modify the available filter fields, enter each filter option that you would like to include in the format specified below and separate each value with a comma and no space.

[Object Code].[Field API Name] – *all values are case sensitive!*

Supported objects include:

- **Account** – code ACC – Example: ACC.Target\_\_c
- **Address** – code ADD – Example: ADD.Zip\_vod\_\_c
- **Territory Field** – code TSF – Example: TSF.Last\_Activity\_Date\_vod\_\_c

**Note:** There are 2 underscores in \_\_c

Supported field types include:

- Date, Checkbox, Picklist and Text fields.

## Independent Exercise #11 – Configure Addresses and My Schedule

1. You have a requirement to prevent Primary Care Sales users from creating addresses of type Company Maintained. To configure this requirement, modify the VExample Primary Care – Sales Platform profile and remove access to the Company Maintained record type.
  - a. Test the configuration by creating an address for an account and making sure it is set to Rep Maintained by default.
2. You have a requirement to allow all users to filter the My Schedule using the Zip field in the Address object. To configure this requirement, modify the SCHEDULER FILTER Veeva setting and add the Zip field as a filter. **Hint:** Refer to the Additional My Schedule configuration section in the previous section for details.
  - a. Clear Veeva Cache.
  - b. Test the configuration by selecting the My Accounts view in the scheduler. Then applying the zip filter to show accounts where the zip starts with 100.
  - c. Save the new zip filter as a bookmark named Accounts in Zip 100\*.

## iPad Demo: Use My Schedule on the iPad

In this demo, we will explore the My Schedule functionality on the iPad. Before starting this demo, be sure to initiate the sync process on your device.

1. Login as Sarah Jones on the iPad.
2. Click **My Schedule** in the navigation menu.
3. Click the **Week** view in the top navigation menu.

4. Navigate to a future week using the forward arrow.
5. Click the Apply Call Cycle icon .
6. Select **Week 1**.
7. Click **Apply**.
8. Drag and drop one of the planned calls to move it to a different time.
9. Click on the account name within one of the planned calls.
10. Click **Planned (Clear)** and select a color to update the color of the planned call.
11. Click the **+** icon to add a call for another account to the schedule for the week.
12. Enter **Pepitone** in the Account search box and hit **Enter** on your keyboard.
13. Drag and drop **Frank Pepitone** on to the schedule.
14. Click the **x** in the Account search box to clear the search filter.
15. Click into the Bookmark field that currently displays **--None--**.
  - a. The bookmark that was configured online shows up here for selection. The funnel icon to the right of this field can also be used to apply filters.
16. Click **Done**.

## External Calendars

To avoid scheduling conflicts, users can view their personal or work iPad calendars within the offline CRM for iPad calendar. All calendars in the iPad calendar application are available in CRM for iPad. This feature is only available on the iPad.



This functionality is enabled using the ENABLE\_EXTERNAL\_CALENDARS Veeva Setting. When enabled, the Calendars button displays on the Agenda, Week, and Call Scheduler (+ icon) pages, allowing the user to select additional calendars from their iPad to display activities for.

# Module 11: Product Catalog and My Setup

## OBJECTIVES

- Review Veeva Product Types
- Use My Setup to Configure User Access to Products
- Create a Detail Product
- Configure Product Favorites
- Create Detail Topics and Detail Groups

## Veeva CRM Product Catalog and Product Types

Whether Veeva CRM users are detailing, sampling, or placing an order for a product, most of what they do in Veeva CRM involves a product.

The custom Veeva Product Catalog (Product\_vod) object stores all types of Veeva products. Veeva does not use the standard Salesforce Product object. As with any object, you can extend the Product Catalog object by adding custom fields as needed. The Product Catalog tab allows users to view, create and edit product records.

Each Product Catalog record is assigned a product type. The product type determines the use of the product record throughout the application. The out-of-the-box product types in Veeva CRM are described below:

Product Type	Definition
Detail	Represents the product detailed, or discussed, during sales rep calls. This is the main product type. Access to other types of products is driven by alignment of users to the Detail level product, via the My Setup page. Other product types are associated to a Detail product via the Parent Product field.
Sample	Represent samples that are disbursed as free products to physicians during calls.
BRC – Business Reply Cards	Represent requests to ship product samples to an HCP.
Promotional Item	Any non-sample item given to an Account free of charge. Examples include educational brochures and pamphlets, pens, USB drives, etc.
Alternative Sample	A product sample that does not require a lot number for disbursement (e.g.: co-pay cards, vouchers). Alternative samples require both a valid license status and an HCP signature.
High Value Promotional Item	Any high value marketing or sales aid requiring an HCP's signature when left at a call location. (e.g.: medical books, models, demonstration devices).
Detail Group	This special type is used to represent a group of Detail level products. Unlike other types, this type does not have a detail level product as its parent.
Detail Topic	Represents a topic of discussion relating to a Detail Group.

## My Setup Products

Each user is granted access to the Detail products that they need to work with through the My Setup Products custom Veeva object. The My Setup tab allows Administrators to configure the products that a user has access to by selecting each product.

My Setup Product selections can be maintained for each user via the user interface (My Setup tab) or data loaded in bulk into the My Setup Products object.

### Working with Products

Once a user has been granted access to a Detail product, product types related to the detail product will appear in different parts of the application.

The Detailing Priority section on the call report page displays each Detail product the user has access to, allowing them to select the products that are detailed during the call.

Detailing Priority		
Common	<input type="checkbox"/> Labrinone	<input type="checkbox"/> Restolar
<a href="#">Add Other...</a>		

The Samples and Promotional Materials section of the call report page displays the products of type Sample, BRC, Alternate Sample, and High Value Promotional to which the user has access.

Samples and Promotional Materials		
<input checked="" type="checkbox"/> Restolar 1 mg		
<input type="checkbox"/> Restolar Video		
Qty	Lot #	
Restolar 1 mg	5	1234567

The Ratings and Evaluations section of the Account detail page displays company and competitor Detail products that the user has access to along with any product metrics that have been configured.

▼ Ratings and Evaluations						
Common						
	Awareness	Segment	Movement	Speaker Skills	Investigator Readiness	Engagements
Labrinone						2
Restolar						3

## Demo: Use My Setup to Give Users Access to Products

In this demo, we will give the Administrator and Sara Jones access to Detail products using the My Setup tab.

1. Login as the Administrator.
2. Go to All Tabs → My Setup.

The **My Setup Products For** field defaults to the user who is currently logged in.

3. Click the **Edit** button.

My Setup displays products in two sections. The first section contains the products of type Detail that have been marked as Company product in the Product Catalog. This list drives the Products available for Call Reporting and Product Metrics for a specific User.

The second section contains all competitor products for which the Company product flag has not been marked in the Product Catalog record. The selected competitor products are displayed in the user's Product Metrics.

4. In the **Company Products** section, select the checkbox for **Labrinone**.
5. In the **Competitor Products** section, select the checkbox for **ARO**.
6. Click the **Save** button.
7. To give **Sarah Jones** access to the same two products, select her name in the **My Setup Products For** field.
8. Click the **Edit** button.
9. In the **Company Products** section, select the checkbox for **Labrinone**.
10. In the **Competitor Products** section, select the checkbox for **ARO**.
11. Click **Save**.

Now we will test the configuration and make sure Sarah has access to the products.

1. Login as Sarah Jones.
2. In the **Recent Items** section of the sidebar, click the link for **Melany Segnit** to view her account detail page.
3. Scroll down to the **Ratings and Evaluations** section of the Account detail page.  
You should see both ARO (competitor product) and Labrinone (company product) listed. Company products display in bold letters.
4. Click the **Record a Call** button.  
The **Detailing Priority** section of the Call page should display Labrinone but not ARO.
5. Click **Cancel**.
6. Logout as Sarah Jones.

## Detail Favorites

The detail favorites functionality allows users to select favorite products. Favorites are indicated by a yellow star icon, which can be selected or deselected in the edit mode of My Setup as shown below:

Product	Favorite (Yellow Star)	Product	Favorite (Yellow Star)	Product	Favorite (Yellow Star)
AMX	★	AKK OXHES N4A	★	AKK OXHES S6A EXH	★
BirdPro	★	CABASES	★	CEKANCE	★
				Cholecap	★

This feature is useful for users who work with many products. For example, Animal Health users often work with dozens of products. Having so many products makes it cumbersome to select products detailed on the Call page layout. So, instead of having dozens of products default on the Call page, they can mark some of the products they have been given access to in the My Setup as favorites. The products marked as favorites display on the Call page by default. Other products they have access to can still be searched and added to the Call.

Users can manage their favorite products but cannot manage the products they have access to in My Setup. Users typically manage their own favorites but the Administrators can also do it for the users.

## Favorites Configuration

 To enable the Favorites functionality, grant the appropriate user profile(s) the following access:

- Default On or Default Off access to the My Setup tab
- Read and Edit (CRED) custom object permission for the My Setup Products object
- Field Level Security access (edit) to the Favorite field in the My Setup Products object

### Independent Exercise #12 – Create a Product and Configure Product Favorites

In this exercise, you will create a new detail product and then add the product to the Administrator's and Sarah Jones's My Setup. This detail product will serve as the parent or brand product for additional products such as samples and promotional products. You will also modify a picklist field in the Product Catalog object.

1. Login as the Administrator.
2. Create a new product in the Product Catalog with the following information:

Field Name	Value
Product Name	BirdPro
Product Type	Detail
Therapeutic Area	Analgesics
Therapeutic Class	Pain Relief
Company Product	Checked (by default)
Manufacturer	Choose one
External Id	BP123

3. Give the Administrator and Sarah Jones access to BirdPro in their My Setup.
  4. Test the new product by logging in as Sarah Jones and recording a call for Melany Segnit. Make sure BirdPro displays on the **Detailing Priority** section of the call page.
    - a. If it doesn't display, make sure the product type is set to Detail and that Sarah has access to it in her My Setup.
  5. Add the value **My Company** to the **Manufacturer** picklist in the **Product Catalog** object.
    - a. Edit the BirdPro product and set the Manufacturer field value to My Company.
  6. Enable the detailing Favorite functionality for both the System Administrator and the VExample Primary Care Sales – Platform profiles. Refer to the Favorites Configuration section of this module for the configurations necessary to enable this functionality.
  7. Clear the Veeva Cache and test the Favorite functionality as an end user.
    - a. Login as Sarah Jones.
    - b. Go to All Tabs → My Setup. There should be a star icon next to each product. **Note:** If you don't see the stars, make the user profile(s) have edit access to the Favorites field in the My Setup Products object.
    - c. Click the **Edit** button.
- The stars are not active for the products to which the user does not have My Setup access. Also notice the user is not allowed to check/uncheck products in My Setup.

- d. Select the star to favorite **BirdPro** and **Cholecap**.

Company Products	
<input checked="" type="checkbox"/> AMX	★ <input type="checkbox"/> AKK OXHES N4A
<input checked="" type="checkbox"/> BirdPro	★ <input checked="" type="checkbox"/> CABASES
	★ <input type="checkbox"/> CEKANCE
	★ <input checked="" type="checkbox"/> Cholecap

- e. Click the **Save** button.

8. Test the favorite products by recording a call.

- a. In the **Recent Items** section of the sidebar, click the link for **Melany Segnit** to view her account detail page.
- b. Click the **Record a Call** button. You should see the BirdPro and Cholecap products in the Detailing Priority section. Only products marked by the user as Favorites will be displayed on the call page for selection.
- c. Select the checkbox for BirdPro.
- d. To add another product not marked as a Favorite, click the **Add Other...** link.
- e. In the search window type the letter **A**. You should be able to search for all other products the user has access to in his/her My Setup.
- f. Select AMX and click **Add**. You should see the two products being detailed on the call page as in the screenshot below:

Detailing Priority	
<input checked="" type="checkbox"/> BirdPro	<input type="checkbox"/> Cholecap
<b>1 BirdPro</b>	<u><a href="#">Del</a></u>
<b>2 AMX</b>	<u><a href="#">Del</a></u>
<u><a href="#">Add Other...</a></u>	

- g. Click **Cancel** to close the call page.

- h. Logout as Sarah Jones.

## Detail Topics

A Detail Topics is something other than a product users discuss with Doctors during a call, for example, an Imminent New Indication Approval or Clinical Trials. Users select Detail Topics on the call page just as they select a product they detail during the call. Detail Topics are created in the Product Catalog with a Product Type of Detail Topic and behave just like any other Detail product. Once created it needs to be assigned to users via My Setup.

## Detail Groups

Detail Groups are used to group Detail and Detail Topics based on indication groups, molecules, or species in animal health. As with Favorites, Detail Groups are especially useful when users work with many products. Detail Groups simplify the My Setup page because when a Detail Group is selected, the products in the group displays in the list of products in My Setup. This is helpful when an Administrator is giving access to many products to a user.

Detail Groups	
<input checked="" type="checkbox"/> Cardiology	<input checked="" type="checkbox"/> Oncology
Detail Topics	
<input checked="" type="checkbox"/> Clinical Trials	★
Cardiology, Oncology	
Company Products	
<input checked="" type="checkbox"/> AMX Oncology	★
	<input checked="" type="checkbox"/> AKK OXHES N4A
	★
	<input checked="" type="checkbox"/> AKK OXHES S6A EXH
	★
<input checked="" type="checkbox"/> BirdPro Cardiology	★
	<input checked="" type="checkbox"/> CABASES
	★
	<input checked="" type="checkbox"/> CEKANCE
	★

Detail Groups also simplify the Call page by displaying the products to which users have access organized by groups.

Detailing Priority	
Common	<input type="checkbox"/> Labrinone
Cardiology	<input type="checkbox"/> Clinical Trials <input type="checkbox"/> BirdPro
Oncology	<input type="checkbox"/> Clinical Trials <input type="checkbox"/> AMX
	<input type="checkbox"/> Cholecap <input type="checkbox"/> CABASES

Detail Groups are created in the Product Catalog with a Product Type of Detail Group. Once Detail Groups are created, then Detail or Detail Topic products can be assigned into the Detail Groups via the Product Groups related list on the Product Catalog page.

## Follow Along Exercise: Create Detail Topics and Detail Groups

1. Login as the Administrator.
2. Go to All Tabs → Product Catalog.
3. Create a new product of type Detail Topic with the following information:

Field Name	Value
Product Name	Clinical Trials
Product Type	Detail Topic
Company Product	Checked (default)
External ID	DT123

4. Click the **Save** button.

Create a Detail Group as a product in the Product Catalog. Then add product groups to the Detail Group.

5. Go to All Tabs → Product Catalog.
6. Create a new product of type Detail Group with the following information:

Field Name	Value
Product Name	Cardiology
Product Type	Detail Group
Company Product	Checked
External ID	DG123

- Click the **Save** button.

Add products to the Cardiology detail group.

- On the **Cardiology** detail group product page, scroll down to the **Product Groups (Product Catalog)** related list.
- Click the **New Product Group** button and create a product group with the following information:

Field Name	Value
Product Group Name	Cardiology - Cholecap
Product Catalog	Cardiology (already selected)
Product	Cholecap (Detail)

- Click the **Save** button.
- Click the **Cardiology** link to view its detail page.

## Independent Exercise #13 – Create Detail Topics and Groups

The Cardiology detail group has one product that you added in the follow along demo. You will now add additional products to it.

- Add the following 2 products to the Cardiology detail group product:
  - Name = Cardiology – BirdPro and Product = BirdPro (Detail)
  - Name = Cardiology – Clinical Trials and Product = Clinical Trials (Detail Topic)
- The Product Groups (Product Catalog) related list for the Cardiology detail group product should look like the screenshot below:

Product Groups (Product Catalog)		New Product Group	Product Groups (Product Catalog) Help ?		
Action	Product Group Name	Product	Start Date	End Date	
Edit   Del	Cardiology - Cholecap	Cholecap			
Edit   Del	Cardiology - Bird Pro	BirdPro			
Edit   Del	Cardiology - Clinical Trials	Clinical Trials			

Create a second Detail Group product called Oncology and add products to it. Remember only products of type Detail or Detail Topic can be added to Detail Groups.

- Create a new product of type Detail Group with the following information:

Field Name	Value
Product Name	Oncology
Product Type	Detail Group
Company Product	Checked (default)
External Id	DG1234

- Add 3 products to the Oncology detail group product. The Product Groups (Product Catalog) related list for the Oncology detail group product should look like the screenshot below:

Product Groups (Product Catalog)		New Product Group	Product Groups (Product Catalog) Help ?		
Action	Product Group Name	Product	Start Date	End Date	
Edit   Del	Oncology - AMX	AMX			
Edit   Del	Oncology - Clinical Trials	Clinical Trials			
Edit   Del	Oncology - CABASES	CABASES			

Now that the Detail Groups and Detail Topics have been created in the Product Catalog, users will need access to them in My Setup.

- Go to All Tabs → My Setup.
- You should see the Cardiology and Oncology Detail Groups as in the screenshot below:

Detail Groups							
<input type="checkbox"/> Cardiology	<input type="checkbox"/> Oncology						
Detail Topics							
Company Products							
<input type="checkbox"/> AKK OXHES N4A	★	<input type="checkbox"/> AKK OXHES S6A EXH	★	<input type="checkbox"/> AKK OXHES S6A OXC	★	<input type="checkbox"/> CEKANCE	★
<input type="checkbox"/> CKASIXYN OXC	★	<input type="checkbox"/> DUSOGESIC D XSANS	★	<input type="checkbox"/> KAMICXAK	★	<input type="checkbox"/> KAPAKE	★

- In the **My Setup Products For** field, make sure **Training Attendee** is selected.

Since the Cardiology and Oncology Detail Groups are not selected in the user's My Setup at this point, the Detail Topics and Products within these Detail Groups are not visible on the My Setup page.

- Click the **Edit** button.
- Select the checkbox for both **Cardiology** and **Oncology** detail groups.

Notice that the Detail Topics and Company Products now display. The detail group name also displays for the products as in the screenshot below.

Company Products							
<input type="checkbox"/> AMX	★	<input type="checkbox"/> AKK OXHES N4A	★	<input type="checkbox"/> AKK OXHES S6A EXH	★	<input type="checkbox"/> AKK OXHES S6A OXC	★
<input type="checkbox"/> Oncology		<input type="checkbox"/> BirdPro	★	<input type="checkbox"/> CABASES	★	<input type="checkbox"/> CEKANCE	★
		<input type="checkbox"/> Cardiology		<input type="checkbox"/> Cholecap		<input type="checkbox"/> Cholecap	★
				<input type="checkbox"/> Oncology		<input type="checkbox"/> Cardiology	

- Check the checkboxes for the following products:
  - Detail Topic: Clinical Trials

- b. Company Products: AMX, BirdPro, CABASES, CEKANCE, Cholecap, Labrinone, and Restolar
7. Click to select the stars to mark the following products as favorites:
- a. Detail Topic: Clinical Trials
  - b. Company Products: AMX, BirdPro, CABASES, Cholecap, and Labrinone
8. Click the **Save** button.
9. In the **My Setup Products For** field, select **Sarah Jones** and give her access to the following products.
- a. Detail Groups: Cardiology and Oncology
  - b. Detail Topic: Clinical Trials
  - c. Company Products: AMX, BirdPro, CABASES, CEKANCE, Cholecap, Labrinone, and Restolar
10. Click the **Save** button.
11. Test Detail Groups and Detail Topics on a call report as the Administrator.
- a. Search for the **Melany Segnit** account and view her detail page.
  - b. Click the **Record a Call** button. The Detailing Priority section of the call page should look like the screenshot below:
- | Detailing Priority           |  |
|------------------------------|--|
| <b>Common</b>                | <input type="checkbox"/> Labrinone   |
| <b>Cardiology</b>            | <input type="checkbox"/> Clinical Trials<br><input type="checkbox"/> BirdPro <input type="checkbox"/> Cholecap |
| <b>Oncology</b>              | <input type="checkbox"/> Clinical Trials<br><input type="checkbox"/> AMX <input type="checkbox"/> CABASES      |
| <a href="#">Add Other...</a> |  |
| <a href="#">Add Section</a>  |  |
- c. Click the **Cancel** button to close the call page.
12. Select favorite products as Sarah Jones.
- a. Login as Sarah Jones.
  - b. Go to All Tabs → My Setup.
  - c. Click the **Edit** button.
  - d. Click to select the stars to mark the following products as favorites:
    - i. Detail Topic: Clinical Trials
    - ii. Company Products: AMX, Cholecap, and Labrinone
  - e. Click the **Save** button.
13. Test the Detail Groups and Detail Topics by recording a call report.
- a. Search for the **Melany Segnit** account and view her detail page.
  - b. Click the **Record a Call** button. The Detailing Priority section of the call page should only show the products marked as favorites.
  - c. Click the **Cancel** button to close the call page.

# Module 12: Product Metrics Configuration

## OBJECTIVES

- Overview of Product Metrics Functionality
- Create a Product Metrics Field
- Create Metrics Configuration Records

### What are Product Metrics?

The Product Metrics section on the Account detail page displays product-specific attributes for an account. For every product (both Company and Competitor products) selected in their My Setup, users are able to view and update various key product metrics for that account. Values can be entered by users or your organization can data load 3rd party data.

The Ratings\_vod S-Control can be added to the desired account page layout(s) to allow users to view and / or edit Product Metrics for Products that they have access to through My Setup.

#### ▼ Ratings and Evaluations

Common										
<table border="1"><thead><tr><th>Awareness</th><th>Segment</th><th>Movement</th></tr></thead><tbody><tr><td> Prefers</td><td> Grow</td><td> 4.00% </td></tr><tr><td> Aware</td><td> Maintain</td><td> 2.00% </td></tr></tbody></table>	Awareness	Segment	Movement	Prefers	Grow	4.00%	Aware	Maintain	2.00%	
Awareness	Segment	Movement								
Prefers	Grow	4.00%								
Aware	Maintain	2.00%								
<table border="1"><thead><tr><th>Awareness</th><th>Segment</th><th>Movement</th></tr></thead><tbody><tr><td> Prefers</td><td> Grow</td><td> 4.00% </td></tr><tr><td> Aware</td><td> Maintain</td><td> 2.00% </td></tr></tbody></table>	Awareness	Segment	Movement	Prefers	Grow	4.00%	Aware	Maintain	2.00%	
Awareness	Segment	Movement								
Prefers	Grow	4.00%								
Aware	Maintain	2.00%								

### Product Metrics Object

The Veeva Product Metrics object contains the metrics fields. Custom fields can be created as needed. Use FLS on the Product Metrics object fields to give different user profiles access to different sets of product metrics, for example:

- Primary Care: Awareness, Segment, Decile, Movement (Rx)
- Managed Markets: Selling Stage, Formulary Status, Payer Rx
- MSL: Speaker Skills, Trial Readiness

Best Practice: Limit the number of metrics to 5 or 6 on Account page layouts.

### No Metrics

Use the No Metrics field on the Product Catalog object if you would like to have products available for detailing via the My Setup page but do not want the product to display in the Ratings control. By selecting the No Metrics checkbox for a product record, the organization can prevent the product from displaying in the Ratings s-control regardless of which products are selected in the users' My Setup.

Product Catalog Detail		Edit	Delete	Clone
Product Name	BirdPro	External ID	BP123	
Parent Product		Veeva External Id		
Product Type	Detail	Manufacturer	My Company	
Therapeutic Area	Analgesics	Product Info		
Therapeutic Class	Pain Relief	Distributor		
Description		Consumer site		
Display Order		No Details	<input type="checkbox"/>	
Sample Quantity		No Metrics	<input checked="" type="checkbox"/>	
Quantity Per Case		No Cycle Plans	<input type="checkbox"/>	

## My Accounts and Product Metrics

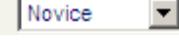
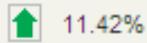
Product Metrics is one of the objects from which the My Accounts tab can display data. You can create views in the My Accounts tab to filter by and display metrics data. For example, you can create a view in the My Accounts tab that shows the Awareness metric value for Cholecap.

<a href="#">Download to Excel</a>				
	<a href="#">New</a>	<a href="#">Mass Update</a>	<a href="#">Schedule a Call</a>	<a href="#">More Actions ▾</a>
<input type="checkbox"/> <a href="#">Name ▲</a>	<a href="#">Target?</a>	<a href="#">Street Address</a>	<a href="#">City</a>	<a href="#">Cholecap-Awareness</a>
<input type="checkbox"/> <a href="#">Ackerman, Clinton</a>	<input checked="" type="checkbox"/>	967 Millbrook Rd	Newton	Aware
<input type="checkbox"/> <a href="#">Adler, Kathleen</a>	<input type="checkbox"/>	42 Van Horn Rd	Newton	Prefers
<input type="checkbox"/> <a href="#">Allen, Henry</a>	<input type="checkbox"/>	97 W Parkway	Pompton Plains	Advocate

## Metric Configuration Object

In addition to creating the fields in the Product Metrics objects you must create the corresponding Metric Configuration entry for each product metric field to control how it will display in the user interface.

There are five types of supported Product Metrics:

Metric Type	Definition
Box Picklist 	Displays a visual indicator in the form of boxes with colors ranging from red to green. Use a Box Picklist to indicate progress along with a text value such as Product Awareness Rating. Up to 10 picklist values are supported.
Text Picklist 	Displays a text value. Use a Text Picklist metric to display a text value as a conventional picklist.
Number 	Displays a number. Use a Number metric to display a quantity such as Engagements or a currency.
Arrows 	Displays up, horizontal, and down arrow indicators in red, yellow, or green. Use Arrows metric to display change in numeric data, such as Movement.
Checkbox 	Displays a check box. Use a Check box metric to display a true/false indicator such as Target or Speaker.

## Demo: Create a Custom Product Metric Field

Your Primary Care users would like to be able to have a custom Product Metric field to store whether a Professional (HCP) is an Advocate of a specific product.

In this demo, we will create and configure a custom product metrics field to support this requirement.

1. Login as the Administrator.
2. Go to **Setup → Create → Objects → Product Metrics**.
3. Create a new field of type **Checkbox**.
4. In the Field Label, type **Advocate**.

5. In the Field Name, type **TR\_Advocate**. Best practice is to add your company's initials as a prefix to the Name of the custom field.
6. Click **Next**.
7. Make this field Visible (editable) for the **System Administrator** profile and for the **VExample Primary Care Sales – Platform** profile. **Note:** Only Primary Care users need to view and edit this field.
8. **Save** the new field.
9. Highlight the API Name **TR\_Advocate\_c** for the new field, right click and select **Copy**. You will need this API Name value in the next step.

Define the corresponding metric configuration for the custom metric field. This is necessary in order for the new field to appear correctly in the Ratings s-control.

1. Go to **All Tabs → Metric Configurations**.
2. Click the **New** button and create a Metric Configuration record with the following information:

Information		
Metric	TR_Advocate_c	
Display Order	1	
Detail Topic	<input type="checkbox"/>	
Detail Group		
Applies To	<b>Available</b> All Practice_vod Pharmacy_vod MCO_vod	<b>Chosen</b> Professional_vod
Active	<input checked="" type="checkbox"/>	
Metric Type	Checkbox_vod	
Red/Yellow		
Yellow/Green		

3. Click **Save**.
4. Clear Veeva Cache.

Test the configuration by entering values in the new Advocate metric for a professional (HCP) account.

1. Login as Sarah Jones.
2. Click the **Home** tab and then click the link to view **Melany Segnit's** detail page. You should see the new Advocate metric listed in the Ratings and Evaluations section as in the screenshot below:

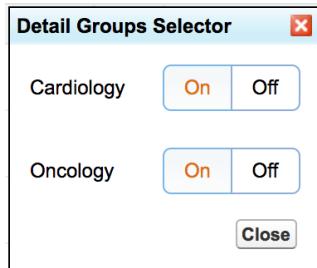
	Awareness	Advocate	Segment
FEM	<span style="background-color: orange; border: 1px solid black;">■</span> <span style="background-color: orange; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span>	<input type="checkbox"/>	<span style="background-color: orange; border: 1px solid black;">■</span> <span style="background-color: orange; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span>
CEKANCE	<span style="background-color: orange; border: 1px solid black;">■</span> <span style="background-color: orange; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span>	<input type="checkbox"/>	<span style="background-color: yellow; border: 1px solid black;">■</span> <span style="background-color: yellow; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span>
Labrinone	<span style="background-color: green; border: 1px solid black;">■</span> <span style="background-color: green; border: 1px solid black;">■</span> <span style="background-color: green; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span>	<input type="checkbox"/>	<span style="background-color: yellow; border: 1px solid black;">■</span> <span style="background-color: yellow; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span>
Restolar	<span style="background-color: yellow; border: 1px solid black;">■</span> <span style="background-color: yellow; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span>	<input type="checkbox"/>	<span style="background-color: orange; border: 1px solid black;">■</span> <span style="background-color: orange; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span> <span style="background-color: white; border: 1px solid black;">■</span>
XYKEX	<span style="background-color: green; border: 1px solid black;">■</span>	<input type="checkbox"/>	<span style="background-color: green; border: 1px solid black;">■</span>

3. Since Sarah's profile has edit permission on the Advocate field, she should be able to select the checkboxes for the products for which she thinks the HCP is an advocate.
4. Logout as Sarah Jones.

Create Detail Group and Detail Topic Metrics. **For this part of the lab to work you must have completed independent exercise 13.** Create metric configuration records for Detail Topics and Detail Groups.

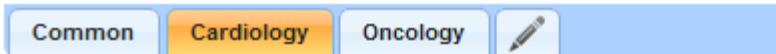
1. Login as the Administrator.

2. Click the **Home** tab.
3. Click the link to view Melany Segnit's detail page.
  - a. In the **Ratings and Evaluations** section, click the  tab.
  - b. Click the **On** button for both **Cardiology** and **Oncology** detail groups tabs as in the screenshot below:



- c. Click the **Close** button.
- d. In the Ratings and Evaluations section, click the Cardiology tab. The metric configuration records for this product group have not been created yet, so you should see the following message:

#### **▼ Ratings and Evaluations**



There are no metrics currently selected for the Ratings Control.

Configure the metric configuration records so that they will appear for the Detail Groups and Detail Topics.

1. Go to **All Tabs → Metric Configurations**.
2. Click the **Go** button to view all metric configuration records.
3. Click the link to go into the details of the **TR\_Advocate** metric.
4. Click the **Clone** button to make a copy of the **TR\_Advocate** metric.
5. Set the **Detail Group** field to **Cardiology**.
6. Click the **Save** button.
7. Click **Clone** button again to make another copy of the **TR\_Advocate** metric.
8. The Detail Group field should already be set to Cardiology. In addition, click to select the **Detail Topic** checkbox.
9. Click the **Save** button.

Test the product metrics for an account.

1. Click the link to view Melany Segnit's detail page.
2. In the Ratings and Evaluations section, click the **Cardiology** tab. You should see the Advocate metric listed for the Detail Topic (Clinical Trials) and for the products in the Detail Group (Cardiology).

## Independent Exercise #14 – Configure Product Metrics

Your organization is releasing two new products: CatPro and DogPro. Home office will be providing Decile information as a number (0 – 10) for both products on a monthly basis. Generally, HCPs are deciled into ten groups based on their prescription writing patterns, and higher deciled HCPs are more aggressively targeted than lower deciled HCPs. You have a requirement for users to see this information in the Ratings and Evaluations section for Professional accounts only. Display the Decile information for the System Administrator and VExample Primary Care Sales – Platform profiles. Here are the highlevel steps you need to complete for this exercise:

1. Login as the Administrator.
2. Add the two new products to the Product Catalog: CatPro and DogPro. Set the Product Type to Detail for both products.
  - a. Set other attributes as you like and save the new products.
3. Add the two new products to the Training Attendee # and Sarah Jones's My Setup.
4. Click the link to view Melany Segnit's detail page. You should see the new products listed in the Ratings and Evaluations section.
5. Create a custom Product Metrics field called Decile of type Number (Length = 2, Decimal Places = 0).
  - a. In the Name field, type TR\_Decile.
  - b. Make this field Visible (editable) for the System Administrator profile and **Read-only** for the VExample Primary Care Sales – Platform profile. End users do not need to update Decile information through the user interface.
  - c. After saving, highlight the API name (TR\_Decile\_\_c) for the new field, right click and select Copy. You will need it in the next step.
6. Create a new Metric Configurations record for the new field with the following information:

The screenshot shows the 'Metric Configuration' screen. On the left, there are several input fields: 'Metric' (set to 'TR\_Decile\_\_c'), 'Display Order' (set to '1'), 'Detail Topic' (unchecked), 'Detail Group' (empty), and 'Applies To'. Under 'Applies To', there are two lists: 'Available' (containing 'All', 'Practice\_vod', 'Pharmacy\_vod', and 'MCO\_vod') and 'Chosen' (containing 'Professional\_vod'). On the right, there are configuration options: 'Active' (checked), 'Metric Type' (set to 'Number\_vod'), and color-coded fields for 'Red/Yellow' and 'Yellow/Green'.

5. Clear Veeva Cache.

Test the configuration as the Administrator.

1. In the **Home** tab, click the link to view Melany Segnit's detail page. You should see the new Decile metric listed in the Ratings and Evaluations section.
2. As the administrator, you can enter values in the Decile field. Click the pencil icon and enter the Decile values.

Test the configuration as an end user.

1. Login as **Sarah Jones**.

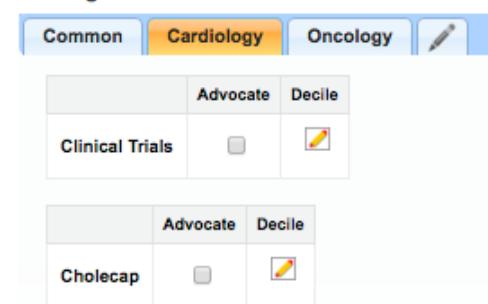
2. Click the link to view Melany Segnit's detail page.
3. In the Ratings and Evaluations section, there should be no edit button  for the Decile product metric since end users can only view and not edit the Decile metric.
4. Logout as Sarah Jones.

Configure Decile Metric Configurations records so it displays both Detail and Detail Topics products in the Cardiology metrics tab.

4. Clone the Decile Metric Configurations record and set the Detail Group to Cardiology.
5. Clone the Decile Metric Configuration record and set the Detail Group to Cardiology and check to select the Detail Topic checkbox.

Test the configuration as the Administrator and as the end user and make sure Decile metric displays in the Cardiology metrics tab as in the screenshot below:

▼ Ratings and Evaluations



	Advocate	Decile
Clinical Trials	<input type="checkbox"/>	
Cholecap	<input type="checkbox"/>	

# Module 13: Call Reporting Configuration

## OBJECTIVES

- Overview of Call Reporting Functionality
- Review the Call Data Model
- Configure Marker Fields
- Configure Key Messages for Call Reporting
- Configure Section Signals
- Configure Attendee Specific Fields
- Restrict Calls by Account Type

## Call Reporting

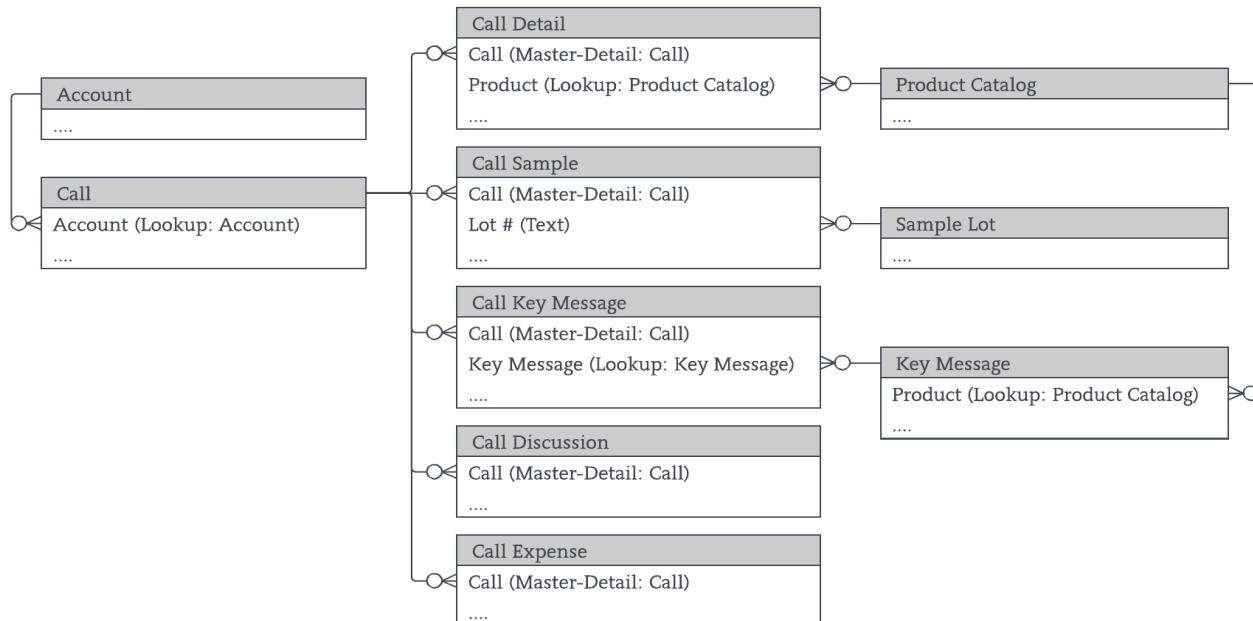
Veeva's Call Reporting module allows users to capture every aspect of their interactions with HCPs. The call reporting functionality can be easily configured to meet specific business needs using several configuration options. Users can record products detailed with priority order, Product Discussions, and Key Messages. Call Reports seamless integration with Closed Looped Marketing (CLM) provides quick access to CLM presentations and ensures proper tracking of the content being shown.

Using the Samples and Promotional items functionality, users can capture any samples, educational and promotional items distributed to accounts. Veeva's one-touch signature capture provides a quick way to collect signatures for samples.

The Call Reporting module can be configured to use other components of Veeva CRM such as Account Plans, Product Plans, Call Objectives, and Sample Limits. Additionally, Call Reports can be a starting point for other Account related activities such as Medical Inquiries, Orders, and Approved Email.

## Data Model

The Call Reporting module is comprised of a parent Call object, child Call objects, and other objects that the Call functionality depends on, such as Account, Product Catalog, and Sample Lot. The diagram below depicts relationships between some of the primary objects in the Call reporting data model.



## Call Page Layout Assignment

The Call object has many record types and each record type has a default page layout out-of-the-box. It is important for you to be aware of which page layout is assigned per record type and user profile. Doing so helps you to identify which page layout you'd have to configure based on specific requirements. For example, if you're asked to modify the Call page layout associated with the Call\_Report\_vod record type and the VExample Primary Care – Sales – Platform profile, then you'd have to do a bit of investigating to find the name of the page layout to modify to meet this requirement.

## Marker Fields

Marker Fields are special fields used when configuring page layouts for Call Reporting and Meeting Briefs. Unlike other standard and custom fields, no data is ever stored in Marker Fields. Placing a Marker field in a 1-column section of the Call Report page layout instructs the system to execute code that draws the functionality in that section.

Two examples of Marker Fields are zvod\_detailing and zvod\_expenses. Including zvod\_detailing\_vod on a call reporting page layout tells Veeva CRM to include the Product Details section on the call report. Likewise, including zvod\_expenses on a call reporting page layout tells Veeva CRM to include the Expenses section on a call report. Marker Fields always include the prefix “zvod\_” and the suffix “\_vod” in the field name.

You cannot delete, rename or change the data types of Marker fields. You can give user profiles visibility to the necessary Marker Fields and add them to or remove them from Call Reporting page layouts.

## Section Signals

Section signals are strings appended to the end of a section name on a Call Report page layout. These section signals communicate configuration instructions to change the behavior of the Marker Field in the specific section. Section signals are mostly used when configuring the Call functionality but are also used when configuring Medical Inquiries.

For example, by default when users record a group call such as a call for a hospital, they must also select attendees for the call. However, in some cases, Veeva users will need record a group call without selecting attendees. To configue this you would place the section signal **--ao** (attendee optional) in the title of the attendee section of the Call page layout.

### Commonly Used Section Signals

A full list of section signals and how they are used can be found on the Veeva CRM Online Help. These are commonly used section signals for Call configuration.

Section Signal	Call Report Section	Description
--ao	Attendees	Attendees Optional: Makes attendees a non-required field
--nnc	Attendees	No New Contact: Hides the New Contact button which is displayed by default when calls are recorded online
--su	Attendees	Search Users: Includes Veeva CRM users in search results for adding attendees
--paa	Attendees	Person Account Attendees: Displays the attendees section for person (individual) calls
--rd	Detail	Require Details Optional: User must select at least one product detailed

--sd	Detail	Sign for Details: Capture signatures for detail only calls
--np	Sampling and Promotional Items	No Promo Items: Does not include promotional items in the sample section
--nab	Address	No New Address for Business Accounts: Prevents the <Add New Address> option from displaying in the drop down list for business (group) calls
--nap	Address	No New Address for Person Accounts: Prevents the <Add New Address> option from displaying in the drop down list for person (individual) calls

## Demo: View Call Report Page Layout Assignments

1. Login as the Administrator.
2. Go to **Setup → Create → Objects → Call**. Scroll down to the **Page Layouts** section and click the **Page Layout Assignment** button.
3. For the **Call\_Report\_vod** record type, notice that the **Primary Layout** is being used for the VExample Primary Care – Sales – Platform profile and all other profiles. You would configure the Primary Layout to meet this requirement.

**Note:** From here you can click the Edit Assignment button to assign a different Call page layout for different user profiles.

## Demo: Configure Key Messages for Call Reporting

Key Messages allow users to identify the specific messages that are delivered for each product or detail topic selected in the detailing section of the Call page. Users can choose Key Messages defined in the Key Message object that are visible to them through the Key Message's designated product, language or sharing rules. In this demo, we will configure Key Messages to display on the Call Report page layout.

Add the Key Messages marker field to the Primary call page layout so end users can select a key message when recording a call.

1. Go to **Create → Objects → Call → Page Layouts**.
2. Click the **Edit** link next to **Primary Layout**.
3. Drag the **Section** button to add a new **1-Column** section named **Key Messages** below the **Product Discussions** section.
4. In the **Quick Find** field at the top of the page type **zvod**.
5. Drag the **zvod\_Key\_Messages** field into the **Key Messages** section of the page layout.
6. **Save** the page layout.
7. Clear Veeva Cache.

Since the Key Message object has been configured as Private in the OWD (Organization Wide Default) Sharing Settings in the training environment we will first change the OWD setting for the Key Message object to Public Read. OWD controls the visibility to data in each object and will be explained in detail in a later module.

1. Go to **Setup → Security Controls → Sharing Settings**.
2. Click the **Edit** button.
3. Set the **Default Internal Access** for the **Key Message** object to **Public Read Only**.

4. Click the **Save** button.

Go to the Key Messages tab to create a new key message.

1. Go to All Tabs → Key Messages.
2. Click the **New Key Message** button.
3. Type **Cholecap Safety for Training** in the **Message** field.
4. Type **Safety message created for training** in the **Description** field.
5. Select **Cholecap** as the **Product**. Be sure to select the Cholecap product record with type Detail.
6. Select **Cardiology** as the **Detail Group**. This must be set since Cholecap is in the Cardiology Detail Group.
7. Verify the **Active** checkbox is selected.
8. Type **High Prescribers** in the **Segment** field. This will make the key message visible only when recording calls for accounts that have the same value in the **Segmentations** field designating an account as a high prescriber.
9. Click the **Save** button.

Test Key Messages by logging in as a user and recording a call.

1. Login as **Sarah Jones**.
2. Click the link for Melany Segnit's account. Notice the value in the **Segmentations** field is **High Prescribers**.
3. Click the **Record a Call** button.
4. Select **Cholecap** in the **Detailing Priority** section.
5. In the **Key Messages** section, select the checkbox for **Cholecap | Cardiology**. Notice you have the option to select a Reaction for each Key Message.
6. Click the **Submit** button. Once the call is submitted, the system executes code that locks the call page. Only users who have FLS access to the **Unlock** field can unlock submitted Call records.
7. Logout as Sarah Jones.

## Demo: Configure Section Signals

In this demo we will configure a section signal to make attendees optional when recording a group call.

1. Login as the Administrator.
2. In the sidebar search for **Chilton Memorial Hospital**.
3. Click the link to view the detail page for **Chilton Memorial Hospital**.
4. Click the **Record a Call** button.
5. Click the **Submit** button. A message displays saying, "**Call Attendee is a required field.**" This validation is accomplished with the custom code in the Attendees section of the Call Report page.
6. Click the **Cancel** button.

Now we will configure a Call page layout and make attendees optional when recording a group call.

1. Go to **Setup** → **Create** → **Objects** → **Call** → **Page Layouts**.
2. Click the **Edit** link next to **Primary Layout**.
3. Click the **Section Properties (wrench)** icon for the **Attendees** section.

4. In the **Section Name** field add **--ao**. **Note:** Always enter one space, 2 dashes, and the section signal.
5. Click **OK**.
6. Click the **Save** button.
7. Clear Veeva Cache.

Test the configuration by logging in as a user and recording a group call.

1. Login as **Sarah Jones**.
2. Click the link to view the detail page for **Chilton Memorial Hospital**.
3. Click the **Record a Call** button.
4. Click the **Submit** button. The “**Call Attendee is required field**” message should not display this time and the call is submitted and locked.

## Attendee Specific Fields

The Attendees section can be configured to collect information specific to each attendee on a call using the Attendee Specific Fields feature. When configured, a new section displays for each attendee that is selected.

For Example, when a user records a call for a Hospital and selects 3 attendees, a total of 4 calls, one for the hospital and one for each attendee is created in the database. You may need to specify a different value for certain fields on each of the separate call records.

Attendee specific fields are enabled by creating a new section in the call report page layout with the --ASF section signal appended to the section title. Any fields added to this section display in a new section specific to each attendee selected on the call. The section supports one or two column layouts as well as fields of any data type, except multi-select picklists.

## Demo: Configure Attendee Specific Fields

1. Login as the Administrator.
2. Go to **Setup → Create → Objects → Call → Page Layouts**.
3. Click the **Edit** link for the **Primary Layout**.
4. Create a new 2-column section below the **Attendees** section and name it **Attendee Specific Fields**.
5. Add the Section Signal **--ASF** in the **Attendee Specific Fields** section title.
6. Click **OK**.
7. Drag and drop the **Subject** field to the new section.
8. **Save** the page layout.
9. Clear Veeva Cache.

Test the configuration by recording a call.

10. Record a call for Chilton Memorial Hospital.
11. Select Melany Segnit and Clinton Ackerman under the **Attendees** section.
12. You should see the Subject field display for each selected Attendee.
13. Click the Cancel button to close the call page.

## Independent Exercise #15 – Configure a Call Page Layout

1. Your organization would like to keep track of expenses Primary Care users incur during calls. Configure the call page layout per the instructions below.
  - a. Add a new 1-Column section to the Primary Layout Call page layout named Call Expenses. Place the section above the Samples and Promotional Materials section.
  - b. Add the zvod\_Expenses marker field to the new section.
  - c. Clear Veeva cache after configuring the Call page layout.
  - d. Test the configuration as Sarah Jones by recording a call for Chilton Memorial Hospital. On the call page select attendees and enter a couple of expenses.
2. Your organization would like to restrict users from recording calls for Hospital Departments. This can be configured by restricting account types for specific call types. Use the following Veeva Message to control this functionality.

ALLOWED\_CALL\_RECORD\_TYPES – limits account record types to specific call record types on the call page layout. Multiple record types are separated with a double semi-colon.

Example:

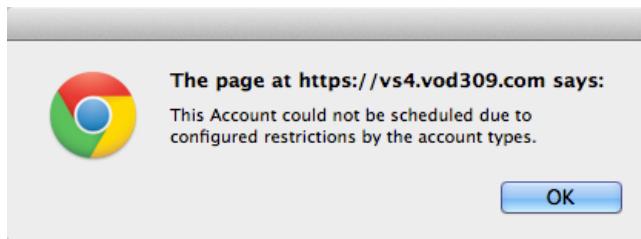
<ACCOUNT\_RECORD\_TYPE1>,<CALL\_RECORD\_TYPE1>,<CALL\_RECORD\_TYPE2>;

- a. Follow the Veeva Message configuration best practices (deactivate/clone the original Veeva Message and enter a new external id) and modify the ALLOWED\_CALL\_RECORD\_TYPES Veeva Message. Add the syntax below:

**Hospital Department\_vod**

**Note:** There is no underscore between Hospital and Department.

- b. Login as Sarah Jones and test the configuration by recording a call for **Chilton Emergency Department**. **Note:** On the iPad, the **Record a Call** menu will not display for Hospital Department accounts. Online, you should see the following error:



3. You have a requirement to enable the **More Actions** functionality on the Primary Layout call page layout. The More Actions functionality allows users to create a new Medical Inquiry, Order, Inventory Monitoring, or Send Approved Email directly from an individual call page.
  - a. Modify the Primary Layout call page layout and add the **zvod\_More\_Actions** field to the zvod\_buttons section of the page.
  - b. Login as Sarah Jones and test the configuration by recording a call for **Melany Segnit**. **Note:** For this functionality to work you must record a call for a person account not a business account.
  - c. You should see the **More Actions** button on the call page. The options that display under More Actions will depend on the org's configuration and the user's permissions.

# Module 14: Sample Management

## OBJECTIVES

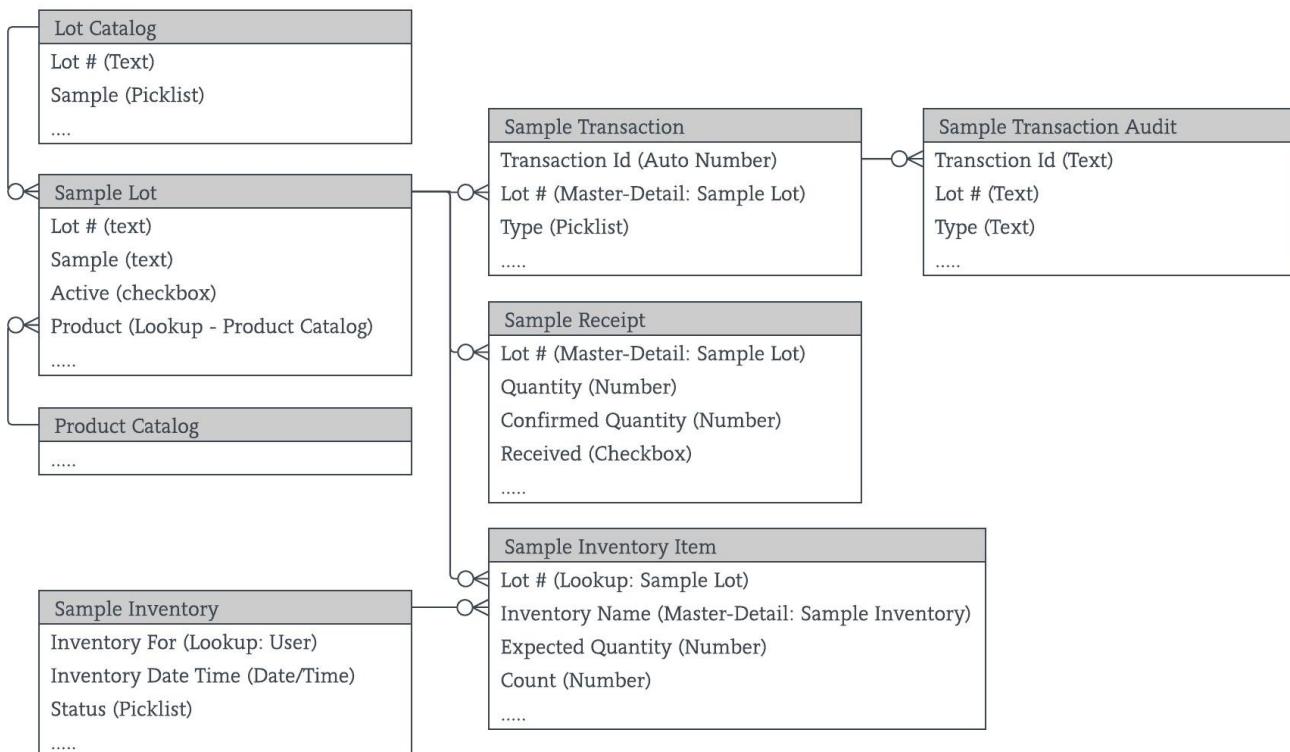
- Overview of Sample Management Functionality
- Review Sample Management Data Model
- Create Sample Products
- Configure Rep Roster Records
- Create Sample Lots
- Transfer Samples
- Record Sample Calls

## Sample Management

The Veeva CRM Samples and Promotional Items module of the Call Report enables organizations to distribute samples, promotional, and other items to Accounts. These items may be hand distributed via sales representatives, or may be distributed as a BRC (Business Reply Card) via common carrier directly to an Account. For a given Call Report, a user is able to select specific products, quantities, and if applicable, lot numbers disbursed.

If an organization is utilizing any of the Veeva CRM offline devices, the Samples and Promotional Items functionality can be used electronically to capture a signature for the products and quantities disbursed.

## Data Model



The most important object for Sample Management is the Sample Lot object. Users must have an active sample lot that they own for a sample product in order to be able to sample it from the call page. Sample lots can be created by Sample Administrators via the Sample Lots tab or data loaded. Users must confirm the sample lot receipt before the sample lot becomes active when sample lots are created through the user interface. If sample

lot distribution is being handled outside of Veeva, then sample lots can be data loaded in bulk or via an integration as active so users don't have to confirm them in Veeva.

Every time users record a call with samples a disbursement transaction is created in the Sample Transaction object that stores the account, sample lot and quantity dispensed.

When users confirm the receipt of sample lots, the system automatically inserts Sample Inventory records indicating the initial quantity in each lot for each user. As users record calls with samples from their lots the system automatically updates the inventory quantity for the lots. This enables the inventory reconciliation functionality within Veeva.

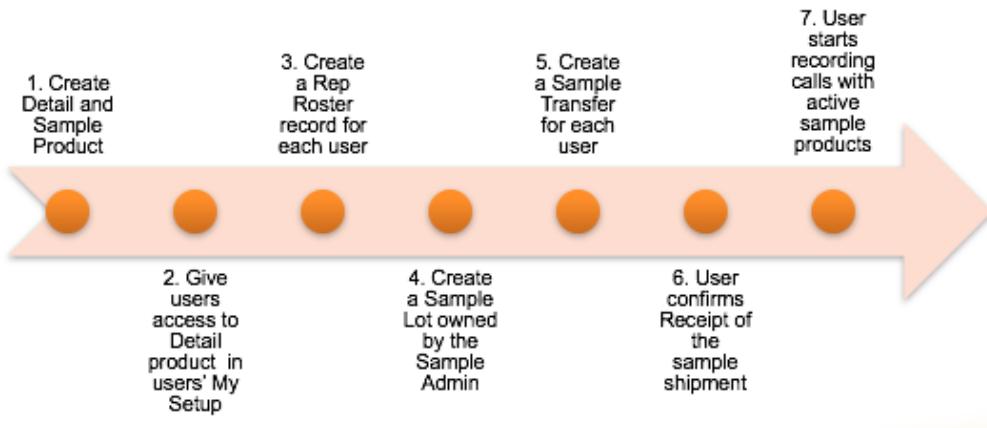
## Sample Setup Steps

There are several configuration steps you will need to complete to make sample products visible in the Samples and Promotional Materials section of a call page layout including:

- Creating the product in the Product Catalog with product type of Sample and Detail Product set as Parent Product
- Defining a Rep Roster for the users who will be recording calls with samples
- Defining a new entry for the product in the Sample Lot tab
- Creating an initial Sample Transfer and Sample Receipt transaction
- Configuring the Call page layouts to support Sampling, Sample Card #, and Signature capture
- Entering a valid Sample License for the address associated with the Professional Account

In addition to manually performing these steps, sample data can be loaded using the data loader or through an integration.

The screenshot below lists the steps for setting up a sample lot for a new product:



## Rep Roster and Initial Lot Transfer

The Rep Roster object stores the relationship between users and territories, as well as user-related HR information, for example address, asset tag, etc.

The Username External Id field on the Rep Roster must match the Name field for the corresponding record for the Rep in the User object. This value is the login id for the User. The Username External Id field utilizes the Transfer Sample Transaction to identify the Address for a Transfer Sample Transaction based on the Address fields within the Rep Roster object.

The Address fields in Rep Roster are utilized to maintain Sample Storage information for all Sampling Reps to meet compliance regulations.

You can add custom fields to this object.

Before you can create the initial sample transfer to an end user, you first must define a Rep Roster for the user. All users who will be recording calls with samples will need to have a Rep Roster.

## Demo: Configure Rep Roster Record

In this demo, we will define a Rep Roster record for Sarah Jones.

1. Login as the Administrator.
2. Click the **My Samples** tab.
3. Click the **New Transfer** link.
4. Set the **Transfer To** field to Sarah Jones. Notice the address fields do not populate because Sarah does not have a Rep Roster defined correctly yet.
5. Click the **Cancel** button.

The Rep Roster record must match the Username of the user's record exactly for the address to populate. Go to the user's record to copy the Username value.

1. Go to **Setup → Manage Users → Users**.
2. Click the **Jones, Sarah** link to access her user account detail page.
3. Select and copy her **Username**.
4. Go to **All Tabs → Rep Roster**.
5. Click the **Go** button.
6. Click the **Edit** link for **Sarah Jones**.
7. Paste Sarah Jones's username into the **Username External Id** field. The user's Username must match exactly the Username External Id in the Rep Roster.
8. Click the **Save** button.

View the signature(s) that have been collected by Sarah Jones.

9. On Sarah Jones's Rep Roster Detail page, click the **View Signatures** button. You should see a signature record.

## Demo: Create Sample Lots and Transfers

In this demo, we will setup a new sample lot for an existing sample product and transfer samples from the new sample lot to an end user. Once the sample lot is transferred, we will login as the end user and confirm it was received.

1. Login as the Administrator.
2. Go to **All Tabs → Sample Lots**.
3. Create a new sample lot entry with the following information (Note that the Sample and Product need to be named the same):

Field Name	Value
Lot #	1234567
Sample	Cholecap 10mg (normally used if the Product lookup field is not being used)
Product	Cholecap 10mg

Field Name	Value
U/M	Box
Expiration Date	Pick a date 2 years from today
Active	Checked

10. Click the **Save** button.

We will now transfer sample products to Sarah Jones.

11. Click the **My Samples** tab.

12. Click the **New Transfer** link.

13. Set the **Transferred Date** to today's date.

14. Set the **Transfer To** field to Sarah Jones.

15. Do you see the address related fields populate automatically? \_\_\_\_\_

a. Why or why not? \_\_\_\_\_

16. In the Sample Information section, enter the following to transfer 100 boxes to Sarah Jones:

Field Name	Value
Sample	Cholecap 10mg
Lot #	1234567
Quantity	15

17. Click the **Submit** button.

Now login as Sarah Jones to confirm the receipt of the sample transfer.

1. Login as Sarah Jones.
2. Click the **My Samples** tab.
3. In the **Pending Sample Receipts** section, click the **Confirm** link next to the **Cholecap 10mg** sample.
4. Verify the information is correct and click the **Save** button. End users perform this task so the new sample lot can be used for dispersing samples to customers.
5. Click the browser's refresh button to refresh the page.
6. Scroll to the bottom of the **My Samples** tab.
7. In the **Sample Lots** section, the Cholecap 10mg lot 1234567 should be in the list of Active Sample Lots for the user.

Calls with Samples can only be recorded for accounts that have a valid license number stored on the account address. This is a critical step for testing the sampling functionality. Verify the Sample Status for an account's address is "Valid."

1. Click the link for Melany Segnit's account.
2. Scroll down to the **Address** related list and click the link for the **555 First Avenue** address.
3. In the License Information section, make sure the **Sample Status** is **Valid**.

4. From the **Chilton Memorial Hospital** account, click the **Record a Call** button.
5. In the **Attendees** section, select **Segnit, Melany**.
6. Select Melany Segnit as the sample recipient.
7. In the **Detailing Priority** section, next to Common, select **Cholecap**.
8. In the **Samples and Promotional Materials** section, select **Cholecap 10mg**, enter Quantity of 5 and select the Lot # **1234567**.
9. Go back to the top of the page and enter **Sample Card #** of 1234.
10. In the **Sample Card Reason** field, select **Laptop Unavailable**.
11. Click the **Submit** button.
12. Click **OK**. The call is submitted with no errors and becomes read-only.
13. Logout as Sarah Jones.

## Independent Exercise #16 – Create a New Product and Sample Lot

Your organization is releasing a new product named SnakePro. Samples of this product will be disbursed by Sales Reps during calls. Create the new products in the product catalog and define the sample lots per the instructions below:

1. Create a new detail product called SnakePro to be used as the parent product for the SnakePro 10mg sample product.
2. Create a new sample product named SnakePro 10mg. This product will appear in the Samples and Promotional Materials section of a call page layout. Be sure to set the SnakePro detail product as the parent product.
3. Since Sarah Jones will need to add SnakePro as a detail product when she records a call, enable this new product in her My Setup and mark it as one of her favorite products.
4. Create a sample lot owned by the System Administrator for the SnakePro 10mg sample.
5. Transfer 100 SnakePro samples to Sarah Jones.
6. As Sarah Jones, confirm the receipt of the SnakePro 10mg samples.
7. As Sarah Jones, record a call and give Melany Segnit 10 SnakePro 10mg samples.

## Create a Developer Pro Sandbox

In a later lab, you will be configuring a sandbox. You will initiate the creation of the sandbox now since it may take a few hours for the sandbox to be generated. Creating it now will ensure it is ready for use in the later exercise.

To create a configuration environment:

1. Log in as the Administrator.
2. Go to **Setup → Data Management → Sandboxes**.
3. Click the **New Sandbox** button.
4. For the sandbox name enter **Config1**.
5. Click **Next** under **Developer Pro**. Ignore that it says zero available.
6. Leave Apex Class blank and click the **Create** button.

7. You can now continue doing other work. The request is sent to Salesforce.com.
8. Once the Sandbox is created, you should see the Login link next to the Sandbox name as in the screenshot below:

The screenshot shows the 'Sandboxes' tab selected in the navigation bar. A 'New Sandbox' button is visible above a table. The table has columns for Action, Name, Status, Copied On, Location, and Type. One row is shown with the following data:

Action	Name	Status	Copied On	Location	Type
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Refresh</a>   <a href="#">Login</a>	Config1	Completed	10/17/2013 12:38 PM	CS14	Developer Pro

# Module 15: Cycle Plan Configuration

## OBJECTIVES

- Overview of Cycle Plan Functionality
- Review the Cycle Plan Data Model
- Configure Cycle Plan Permissions
- Configure Cycle Plan Page Layouts
- Configure Cycle Plan Custom Fields
- Create Cycle Plans

### What are Cycle Plans?

Cycle Plans provide the ability to guide users with a list of Targets (Accounts) within their Territory to properly promote company brands and messages over a specified period. Cycle Plans are sometimes referred to as Plans of Action (POA). Veeva CRM offers two different modules for Cycle Plans. The two Cycle Plan modules are independent; they have separate data models, functionality and calculation technologies. In this class, we will cover the Cycle Plans module only.

### Cycle Plan Module

The Cycle Plan module provides basic Cycle Plan functionality for activities from the Call2\_vod object only. This module is supported Online and on the iPad. This is the module that we will be reviewing in this course.

### Multichannel Cycle Plan Module (MCCP)

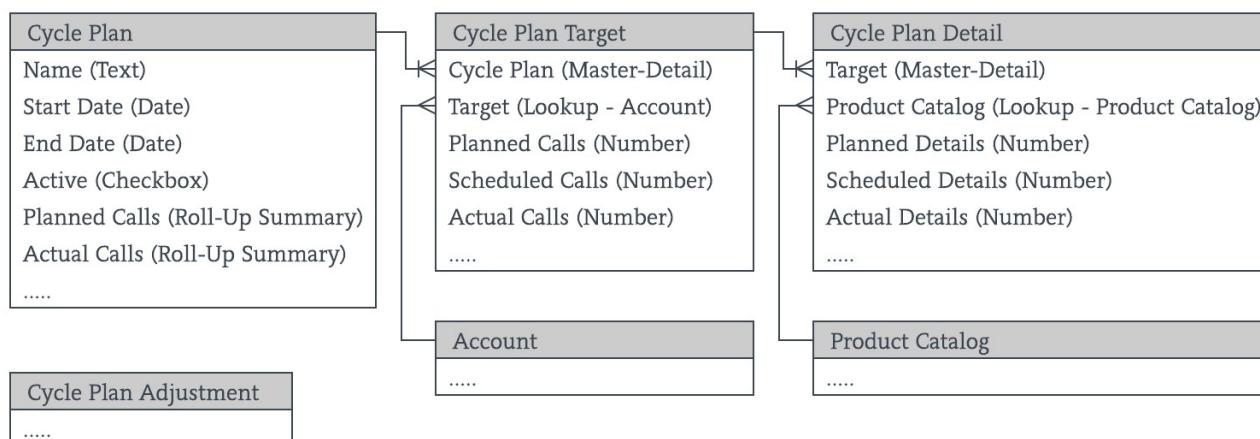
The Multichannel Cycle Plan module provides a different approach to Cycle Plans with the ability to plan and monitor activities from multiple channels. Channels can be created for the following objects:

- Call2\_vod
- EM\_Event\_vod
- Medical\_Event\_vod
- Multichannel\_Activity\_vod
- Sent\_Email\_vod

The Multichannel Cycle Plan module is supported Online, the iPad, and on Windows devices.

The Multichannel Cycle Plan module is covered in the Veeva Multichannel Vault to CRM Integration course.

### Cycle Plan Data Model



The Cycle Plan data model consists of 3 main objects:

- **Cycle Plan:** Cycle plan header object. Fields include cycle plan name, start date, end date, owner, and territory.
- **Cycle Plan Target:** Contains the list of Targets (Accounts) for the cycle plan. Fields include the cycle plan, target account, planned calls, scheduled calls and remaining schedule.
- **Cycle Plan Detail:** Contains the number of planned and actual calls, per product, for each Cycle Plan Target. Fields include target, product, planned details, schedule details and remaining.
- **Cycle Plan Adjustment:** Stand alone object. Does not store data but is needed to support real time Cycle Plan calculations.

## Understanding Cycle Plan Calculations

Below is a screenshot of a Cycle Plan as it displays on the Cycle Plan tab.

**Cycle Plan**

**Information**

Name	Test 101 Plan	Owner	<a href="#">Admin User</a>
Start Date	12/1/2016	Active	<input checked="" type="checkbox"/>
End Date	1/31/2017	Attainment	58%
Territory	101		

**System Information**

Created By	<a href="#">Admin User</a> , 11/30/2016 11:03 AM	Last Modified By	<a href="#">Training Attendee 1</a> , 12/2/2016 9:02 AM
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**Cycle Plan Target**

Action	Target	My Calls					Cholecap				Restolar			
		A	P	S	%	Rs	A	P	S	%	A	P	S	%
<a href="#">Edit Del</a>	<a href="#">Clinton Ackerman</a>	4	5	1	80%	0	3	4	0	75%	1	4	0	25%
<a href="#">Edit Del</a>	<a href="#">Jorge Almoquera</a>	1	4	3	25%	0	2	4	0	50%	1	3	0	33%
total:		2		5	56%	0	5	8	0	63%	2	7	0	29%

**Buttons:** New Target, Apply List, Schedule Calls

Below are descriptions of the calculations displayed in each column of the Cycle Plan Targets related list:

- **A (Actual Calls):** # of calls the user has submitted to date against his/her targeted accounts. This value can be configured to be updated real time online or offline on the iPad.
- **P (Planned Calls):** # of calls the user is supposed to make during the Cycle plan's time period.
- **S (Scheduled Calls):** # of calls currently scheduled by the user for the specific target (account).
- **% (Percentage Attainment):** Progress towards scheduled calls (Actual Calls / Planned Calls).
- **Rs (Remains to be Scheduled):** # of calls remaining to be scheduled (Planned Calls – Actual Calls – Scheduled Calls).

## Cycle Plan Permissions

Cycle plans have two main types of users:

- **Sales Ops / Managers** – End users who create and manage cycle plans. This can be an integration user if the Cycle Plans are being created and managed outside of Veeva.
- **Rep/User** – End users who monitor their Cycle Plans attainment towards their targets.

 Depending on the business requirements, users will need different levels of permissions to the Cycle Plan Objects, based on who should have access to create and modify Cycle Plans.

- **Cycle Plan:** All users working with Cycle Plans should have Read access for this object. Users who are able to create new Cycle Plans should have Create access and users who are able to modify the Cycle Plan header details should have Edit access.
- **Cycle Plan Target:** All users working with Cycle Plans should have Read access for this object. Users who are able to add and edit existing targets for the cycle plan should have Create and Edit access.
- **Cycle Plan Detail:** If using the Product Details functionality for tracking call counts at the product level for each target, all users should have Read access for this object. Users who are able to modify this information should have Create and Edit permissions.
- **Cycle Plan Adjustment:** If real time calculations are being used, all users should have full CRED permissions for this object.

The Cycle Plan tab uses custom Veeva VisualForce pages. To view and edit Cycle Plans, users need access to the following VisualForce pages:

- View\_Cycle\_Plan\_vod
- Edit\_Cycle\_Plan\_vod

## Cycle Plan Page Layouts

There are a few different page layouts to configure when working with Cycle Plans.

- **Cycle Plan Layout (Cycle Plan Object):** This page layout controls the fields that display in the Information and System Information sections at the top of the Cycle Plan page. Common fields include Name, Start Date, End Date, Territory, Active, and Remaining.
- The Cycle Plan Targets Related List on this page layout is where the columns that display in the Cycle Plan Targets grid are configured. Common fields include: Target, Actual Calls, Actual Total Calls, Attainment, and Total Attainment.
  - Adding the zvod Display Product Details field will display call activity columns for each Product Detail a user has access to in My Setup (unless the No Cycle Plans flag is enabled on the Product Catalog record)
- **Cycle Plan Target Layout (Cycle Plan Target Object):** This page layout controls the buttons that display on the Cycle Plan Targets related list. Buttons include New Target, Apply List and Schedule Calls.
- **Account Layout(s) (Account Object):** To display Cycle Plan attainment information on the Account detail page, add the Account Cycle Plan S-Control to the necessary Account page layouts.

## Demo: Configure Cycle Plan Page Layouts

1. Login as the Administrator.

Grant full CRED permission for the Cycle Plan objects.

2. Go to **Setup → Manage Users → Profiles**.
3. Click the **Edit** link for the **VExample Primary Care Sales – Platform** profile.

4. Scroll down to the **Custom Object Permissions** section.
5. For the Cycle Plans, Cycle Plan Details, Cycle Plan Targets, and Cycle Plan Adjustment objects, give Create, Read, Edit and Delete permissions as in the screenshot below:

<b>Cycle Plans</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Cycle Plan Adjustments</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Cycle Plan Details</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Cycle Plan Targets</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

6. Click the **Save** button.

Modify the Cycle Plan page layout and add the necessary fields.

1. Go to **Setup → Create → Objects → Cycle Plan**.
2. Scroll to the **Page Layouts** section and click the **Edit** link for the **Cycle Plan Layout**.
3. Add the **Remaining** field to the page layout.
4. Click the Related List Properties button (Wrench).
5. Make the following changes to the **Cycle Plan Targets** related list:
  - a. Remove the **Name** field. This is an auto-number field which is not necessary.
  - b. Add the **zvod Display Product Details** field. Use this field only if tracking product specific attainment.
  - c. Click **OK** to close the Related List Properties window.
6. Click **Save**.

Configure the Cycle Plan Target Layout page and add the necessary buttons to it.

7. Go to **Setup → Create → Objects → Cycle Plan Target**.
8. Scroll to the **Page Layouts** section and edit the **Cycle Plan Target Layout** page layout.
9. Add the **Apply List** and **Schedule Calls** buttons to the page layout. These buttons will display in the Cycle Plan Target related list online to allow Sales Ops or Manager profiles to edit the Cycle Plans.
10. Click **Save**.

Test the configuration and make sure the Cycle Plan page looks correct.

11. Clear Veeva Cache.
12. Click the **Cycle Plans** tab.
13. Click the **Go** button.
14. Click the link to go into **Test 101 Plan**.
15. Click the **Unlock** button. Use FLS on the **Lock\_vod** field in the Cycle Plan object to allow only certain user profiles, typically the System Administrator profile, to unlock Submitted Cycle Plans.

The cycle plan displays like the screenshot below:

Cycle Plan		<a href="#">Edit</a>	<a href="#">Delete</a>
<b>Information</b>			
Name	Test 101 Plan	Owner	Admin User
Start Date	1/1/2013	Active	<input checked="" type="checkbox"/>
End Date	1/30/2013	Remaining	36
Territory	101		
<b>System Information</b>			
Created By	Admin User , 11/23/2016 5:15 AM	Last Modified By	Training Attendee 1 , 12/2/2016 10:53 AM
<b>Cycle Plan Target</b>		<a href="#">New Target</a>	<a href="#">Apply List</a>
<a href="#">Schedule Calls</a>		<input checked="" type="radio"/> My Calls	<input type="radio"/> Total Calls
<input type="checkbox"/> Action	<input checked="" type="checkbox"/> Target	My Calls	AMX BirdPro CABASES CEKANCE Cholecap Labrinone
		A P S % Rs	A P S % A P S % A P S % A P S % A P S % A P S %
<input type="checkbox"/> Edit Del	Carmen Buenaventura	0 3 1 0% 2	0 4 0 0%
<input type="checkbox"/> Edit Del	Chilton Memorial Hospital	2 3 0 67% 1	0 0% 0 0% 1 2 0 50%

To display Cycle Plan attainment for specific accounts, add the Account Cycle Plan S-Control to Account page layouts.

1. Go to **Setup** → **Customize** → **Accounts** → **Page Layouts**.
2. Click the **Edit** link for the **Hospital** page layout.
3. Create a new **1-column** section named **Cycle Plans** below the **Hospital details** section.
4. Add the **Account Cycle Plan** S-Control to the new **Cycle Plans** section.
5. Click the **Save** button to save the page layout.
6. Clear Veeva Cache.
7. Search for Chilton Memorial Hospital to see that the cycle plan s-control has been added to the page. It reads "No active cycle plan". There is no cycle plan in place to view data now.

## Configure Cycle Plan Target Custom Fields

You can display additional information for Cycle Plan Targets by adding custom fields to the Cycle Plan Target object with a specific format. Custom fields can be added to display values of fields from the Account, Address, and Territory Field objects in the Cycle Plan Target Related list to make it easier to identify each Account target.

For example, you may want to add the City field from the Address object as in the screenshot below.

Cycle Plan Target		<a href="#">Schedule Calls</a>	<input checked="" type="radio"/> My Calls	<input type="radio"/> Total Calls
<input type="checkbox"/> Target	City	My Calls	AMX BirdPro CABASES CEKANCE Cholecap	
		A P S % Rs	A P S % A P S % A P S % A P S % A P S % A P S %	
<input type="checkbox"/> Ladislav Habina	Wayne	0 3 0 0% 3	0 0% 0 0% 0 0% 0 0% 0 0%	
<input type="checkbox"/> Linda Harrigan	Newton	0 0 0 0% 0	0 0% 0 0% 0 0% 0 0% 0 0%	
<input type="checkbox"/> Lourdes Alonso Barber	New York	0 0 0 0% 0	0 0% 0 0% 0 0% 0 0% 0 0%	
<input type="checkbox"/> Melany Segnit	New York	0 4 0 0% 4	0 0% 0 0% 0 0% 0 0% 0 0%	
total: 4		0 7 0 0% 7	0 0 0 0 0 0 0 0 0 0	

To configure custom fields:

1. Create the desired custom fields on the Cycle Plan Target object. Follow this naming convention:
  - a. Field Label: Whatever you want users to see as the label, for example, City.

- b. Field Name: zvod\_[Object reference]\_[Field Name] -- (not the API Name). Where Object Reference must be one of the following:
  - i. ADDRESS, ACCOUNT, or TSF
  - ii. Example: zvod\_ADDRESS\_City\_vod

The data type of the custom field on the Cycle\_Plan\_Target\_vod object must match the data type of the corresponding field from the referenced object.

If the referenced object's corresponding field is a formula field, the custom field on the Cycle Plan Target object should match the formula's return type.

The following field types are not supported: Long Text Area, Text Area (Rich), and Hyperlink Formula

2. Make sure the Cycle Plan is unlocked.
3. To display the custom field, go into the Cycle Plan object, modify the Cycle Plan Layout page layout and add the custom field to the Cycle Plan Target related list Selected Fields.
4. Clear Veeva Cache.

## Display Remaining Call Count

Instead of displaying the percentage attainment (%) column, the Cycle Plan Target related list can be configured to display the total remaining call count instead. This provides a clear measurement of a user's current progress towards meeting their target plans.

Cycle Plan Target		New Target	Apply List	Schedule Calls		
	Target	City	My Calls			
			A	P	S	R
<input type="checkbox"/>	<a href="#">Edit</a> Chilton Memorial Hospital	New York	0	3	1	3
<input type="checkbox"/>	<a href="#">Edit</a> CIGNA HealthCare of Arkansas	Phoenix	0	4	2	4
<input type="checkbox"/>	<a href="#">Edit</a> Clinton Ackerman	Newton	1	5	4	4
<input type="checkbox"/>	<a href="#">Edit</a> Enrico Orlandoni	Lake Hopatcong	0	4	2	4
<input type="checkbox"/>	<a href="#">Edit</a> Kathleen Adler	Newton	0	4	2	4
<input type="checkbox"/>	<a href="#">Edit</a> Michael Burroo, Md	Wayne	0	3	2	3
<input type="checkbox"/>	<a href="#">Edit</a> Miller & Miller	Short Hills	0	3	2	3
total:			1	26	15	25



The remaining (R) call count column is enabled using the ENABLE\_CYCLE\_PLANS\_REMAINING Veeva Setting.

## Independent Exercise #17 – Create a Cycle Plan

In this exercise, you will create a view in the My Accounts tab and then use it to insert Accounts into a Cycle Plan. You will then create and test a new Cycle Plan.

1. From the My Accounts tab, create a new view and name it Target Accounts to display Professional (HCP) accounts where the Account's Target? field equals to true. Display your desired columns. Make this view accessible to everyone.
2. On the My Accounts tab, make sure the new Target Accounts view is being used and select 101 from the Territory dropdown. You should see a filtered list of Accounts. These are the Accounts you want to use in a cycle plan.
3. Select every record in the view and then click More Actions → Add to List → New List. Name the new list 101 Targets.

Create a new cycle plan and apply the new 101 Targets list to add targets to the cycle plan.

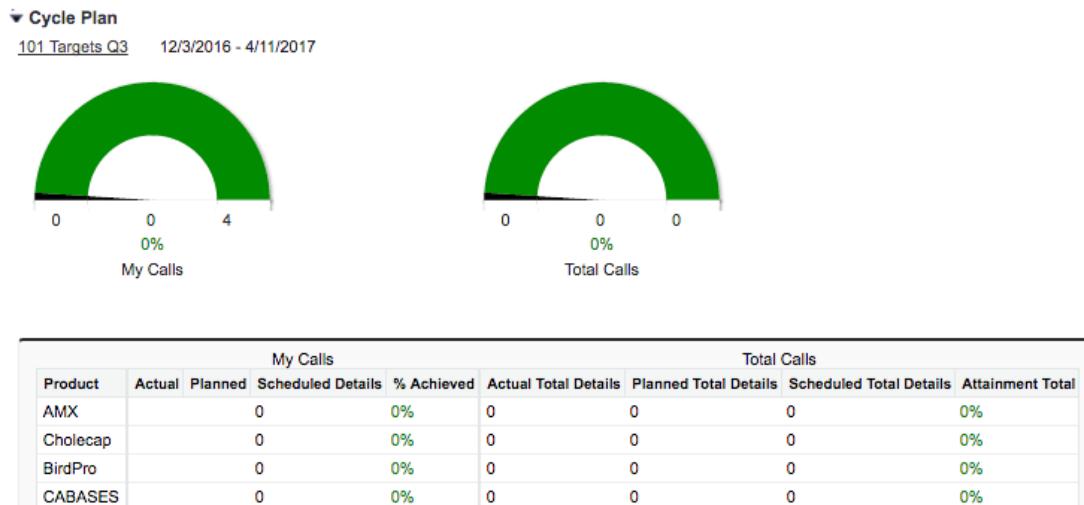
- First, go to the Cycle Plans tab and **deactivate** the existing Test 101 Plan cycle plan by editing it and unchecking the Active checkbox. You're doing this because you're about to create a Cycle plan for territory 101 and only one cycle plan can be active for a territory at a time.
- From the Cycle Plans tab, click the New button. Create a cycle plan with the following information:

Field Name	Value
Name	101 Targets Q3
Start Date	One day prior to current date
End Date	3 months in the future
Territory	101
Active	Checked

- In the Cycle Plan Target section, click Apply List, select the 101 Targets list and click OK. You can also use the New Target button to select individual accounts for the cycle plan. **Note:** If you did not add the Apply List button to the Cycle Plan Target page layout in the earlier demo, you will need to do that before completing this step.
- Click the Edit link for Melany Segnit (or any of the other account). Enter the desired Planned Calls number. Click Save when done.
- Repeat the previous step to add planned calls information for a couple of other accounts.
- When finished building the Cycle Plan, click the Edit button in the Cycle Plan section and then click the Submit button.

Login as an end user to test and view the cycle plan you just created.

- Login as Sarah Jones.
- Go to the Cycle Plans tab and click the link to view the details of the 101 Targets Q3 cycle plan.
- Click the link for Melany Segnit. If the user has an active cycle plan, you should see gauges in the Cycle Plans section as in the screenshot below. Otherwise, it will say No Active Cycle Plan.



- Logout as Sarah Jones.

# Module 16: Data Loading

## OBJECTIVES

- Overview of the Data Loader
- Understand use of External IDs in Data Loading
- Load Accounts
- Load Addresses
- Load Affiliations

### Independent Exercise 18: Install Data Loader

If you have not done so already, download and install the data loader. If you have already installed it you can skip this exercise.

1. If needed, login as the Administrator.
2. Go to **Setup → Data Management → Data Loader**.
3. Download and install Data Loader.
4. After it is installed, double click the Data Loader shortcut on your desktop.
5. Click **Cancel**.

## What is the Data Loader?

Data Loader is one of many tools you can use to manipulate data in bulk. You can use it to insert, update, delete, or export Salesforce (Veeva) records.

When importing data, Data Loader reads, extracts, and loads data from comma separated value (CSV) files or from a database connection. When exporting data, it outputs CSV files.

The Data Loader offers the following features:

- An easy-to-use wizard interface
- Support for large files with up to 5 million records
- Drag-and-drop field mapping
- Detailed success and error log files in CSV format

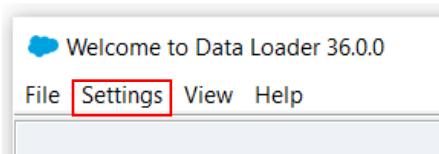
## Data Loader Operations

Operation	Description
Export	<ul style="list-style-type: none"><li>• Recommended to always start by exporting data</li><li>• Allows you to learn what data is stored in objects and how the data is structured</li><li>• When loading certain objects, such as Accounts, that have multiple record types, you will need to provide the Record Type ID for each record when loading data. To obtain the necessary Record Type IDs, you would first export the data from the Record Type object.</li></ul>
Insert	<ul style="list-style-type: none"><li>• Inserts new records</li><li>• May create duplicates</li></ul>

Update	<ul style="list-style-type: none"> <li>Updates existing records</li> <li>Matches on SFDC IDs</li> </ul>
Upsert	<ul style="list-style-type: none"> <li>Preferred method for loading data into Veeva</li> <li>Inserts if matching record is not found</li> <li>Updates if matching record is found</li> <li>Matches on SFDC IDs or External IDs</li> </ul>
Delete	<ul style="list-style-type: none"> <li>Deletes records</li> <li>Matches on SFDC IDs</li> </ul>

## Data Loader Settings

The Data Loader Settings menu is used to configure operation settings for the Data Loader.



Below are descriptions of some of the important Data Loader settings.

Setting	Description
Server Host	For production environments: <a href="https://login.salesforce.com">https://login.salesforce.com</a> For sandbox environments: <a href="https://test.salesforce.com">https://test.salesforce.com</a>
Batch size	In a single insert, update, upsert, or delete operation, records moving to or from Salesforce are processed in increments of this size. The maximum value is 200. We recommend a value between 50 and 100. The maximum value is 10,000 if the Use Bulk API option is selected. Recommended batch size for loading Veeva data: <ol style="list-style-type: none"> <li>Account - 200</li> <li>Affiliation – up to 30</li> <li>Call - 15</li> <li>Address - 50</li> <li>Child Account - 25</li> </ol>
Insert null values	Select this option to insert blank mapped values as null values during data Insert null values operations. Note that when you are updating records, this option instructs Data Loader to overwrite any existing data in mapped fields.
Allow field truncation	Select this option to truncate data in the following types of fields when loading that data into Salesforce: Email, Multi-select Picklist, Phone, Picklist, Text, and Text (Encrypted).
Use Bulk API	Select this option to use the Bulk API to insert, update, upsert, delete, and hard delete records. The Bulk API is optimized to load many records asynchronously. It's faster than the default SOAP-based API due to parallel processing and fewer network round-trips.

Proxy host	The host name of the proxy server, if applicable.
Proxy port	The proxy server port.

## Demo: Verify Server Host and Batch Size Settings

1. Open the Data Loader.
2. Click the **Settings** menu.
3. Verify the Server Host field is set to <https://login.salesforce.com> or set it accordingly. (If in the future, you need to login to a sandbox, then you would change the server host to <https://test.salesforce.com>.)
4. Make sure the Batch size is set to 200.
5. Click **OK** or press the **Enter** key on your keyboard to save the settings.

## Demo: Extract Record Type Object Data

In this demo, we will extract the Record Types object and then use it to update the CSV file containing the training Accounts you will be loading later in this exercise.

1. If needed, open the Data Loader.
2. On the Data Loader window, click **Export**.
3. Select **Password Authentication**.
4. Login as the Administrator. It is the same login credentials as your training org login.  
Outside of training, you may need a security token appended to the password to login, e.g., PasswordXXXXXXXX (where XXXXXXXX is the security token.) If needed, you can request a security token from the **Setup → My Personal Information**.
5. Once you're logged in successfully, click the **Next** button.
6. Check the **Show all Salesforce objects** checkbox.
7. Scroll down and select the **Record Type** object.
8. Click the **Browse** button and select the Desktop. You can select any other folder to save the extracted file into.
9. Click **Save**.
10. Rename the extract file and call it **RecordTypeExtract.csv** and save it to your Desktop (or a folder of your choice). Remember where you are saving this file.
11. Click **Next**.
12. In the Choose the query fields below box select the following fields:
  - a. Id, Name, and SObjectType.
  - b. The SOQL query should read: **Select Id, Name, SObjectType FROM RecordType**.
13. Click **Finish** and then click **Yes** to proceed.
14. When the operation is finished, click **OK**.
15. Navigate to and open the **RecordTypeExtract.csv** file in Excel.
16. Sort the SOBJECTTYPE column in ascending order.

This is important because you will be copying the ID of various record types for the Account object. In some cases, the record types have the same name but are in different objects. So be careful not to copy the ID of the incorrect record type when preparing files for data loading.

17. Keep this file open. You will use this file in the next demo to import Account records.

## Demo: Load Accounts

Before we load the Accounts, we need to prepare the source Account file with the correct record type ids for the accounts being loaded.

1. Prepare the TrainAccounts.csv file with the correct Account record type IDs in your org.
  - a. Open the **TrainAccounts.csv** data file provided with your training material.
  - b. If needed, open the **RecordTypeExtract.csv** file.
  - c. Copy the **ID** for the **Hospital\_vod** (Account) record type.
  - d. Paste the ID into the **RecordTypeId** column in the **TrainAccounts.csv** file by replacing the values Hospital\_vod as shown below:

Name	Primary_Parent_vod	RecordTypeId	Sp
Abbeville General Hospital		01241000000qDYAAA2	M
Abilene Regional Medical Center		01241000000qDYAAA2	A
Baylor Medical Center		01241000000qDYAAA2	Al
2. Once you are finished entering the appropriate Record Type ids for all the Accounts, save and close the TrainAccounts.csv data file.

Now you will upsert accounts. The accounts you are importing are structured in an account hierarchy where professional accounts belong to hospital departments, pharmacies, etc., and those belong to hospitals. Since hospitals are at the top of the hierarchy, they should have a primary\_parent\_vod of null. Hospital departments, pharmacies, and emergency rooms will have a primary\_parent\_vod relating to the hospitals. Lastly, all the person accounts (records with first and last names) will have a primary\_parent\_vod relating to departments in the hospital.

3. In the Data Loader window, click **Upsert**.
4. Select the **Account (Account)** object.
5. Browse and select **TrainAccounts.csv** file which you updated with Record Type IDs.
6. Click **Next**. The Data Loader will read the file and displays a message showing the number of rows it will import.
7. Click **OK**.
8. Set the field for matching on Account to **External\_ID\_vod\_c**.  
This step allows you to specify how the Data Loader will check to see if a record in the source file already exists in the database.
9. Click **Next**.
10. We will do the first pass to upsert the accounts without the hierarchy structure (Primary Account) to get their external ids into the system. Leave all the fields as <Not selected>.
11. Click **Next**.
12. Click **Create or Edit a Map** and then click **Auto-Match Fields to Columns**.

13. Because we are not loading the primary parent yet, remove the Primary\_Parent\_vod\_c field mapping by clicking on the Primary\_Parent\_vod field then dragging and dropping it to the top fields section.
14. Make sure the **Primary\_Parent\_vod\_c** field is **not** mapped as shown below:

Drag the Salesforce fields down to the column m	
File Column Header	Name
Do_Not_Call_vod_c	Do_Not_Call_vod_c
External_ID_vod_c	External_ID_vod_c
FirstName	FirstName
Gender_vod_c	Gender_vod_c
ID_vod_c	ID_vod_c
LastName	LastName
Middle_vod_c	Middle_vod_c
Name	Name
<b>Primary_Parent_vod_c</b>	
RecordTypeId	RecordTypeId

15. Click **OK** and then click **Next**.
16. Click the **Browse** button and select your **Desktop** (or any other folder) to save the log files.
17. Click **Finish** and then click **Yes**.
18. The Accounts should load without errors. Once the loading is completed, click **OK**.
19. Login as the Administrator.
20. Click the **My Accounts** tab.
21. Since the accounts are not yet assigned to a territory, you must select **All Accounts** from the **Territory** dropdown.
22. Select **My Accounts** from the View dropdown.
23. You should see some of the Accounts loaded such as Abbeville General Hospital.

## Independent Exercise #19 - Load Accounts, Addresses, and Affiliations

If you have not done so already, you must complete the steps in the 3 previous demo exercises in order to complete the initial upload of Account records in your org. Once you have completed the 3 demo exercises, you can continue with this exercise.

In this exercise you will continue to load data by performing the second upsert of Accounts to resolve the account hierarchy relationship. You will also load the Addresses and Affiliations for the provided training accounts.

1. In the Data Loader window, select **Upsert**.
2. Select the **Account** object.
3. Browse and select the provided **TrainAccounts.csv** data file, click **Next** and then click **OK**.
4. Set the field for matching on account to **External\_ID\_vod\_c**.
5. Click **Next**.
6. Set **Primary\_Parent\_vod\_r** to **External\_ID\_vod\_c** as in the screenshot below:

Primary_Parent_vod_r	External_ID_vod_c
Parent	<Not selected>
Business_Professional_Person_vod_r	<Not selected>

7. Click **Next**.
8. Click **Create or Edit a Map** and then click **Auto-Match Fields to Columns**.
9. To map the Primary Parent to the Account's External ID (and not the SFDC ID), map **Primary\_Parent\_vod\_c** to **Primary\_Parent\_vod\_r:External\_ID\_vod\_c** by dragging this from the top section to the fields list as in the screenshot below:

File Column Header	Name
LastName	LastName
Middle_vod_c	Middle_vod_c
Name	Name
Primary_Parent_vod_c	Primary_Parent_vod_r:External_ID_vod_c
RecordTypeId	RecordTypeId

10. Click **OK**.
11. Click **Next**.
12. Click **Finish** and then click **Yes**. If you start seeing errors, cancel and look at the error file to see why the errors are happening.
13. To make sure the accounts were imported, login to as the Administrator, then go to My Accounts and look at a list of all accounts. Since the accounts are not yet assigned to a territory, you must select All Accounts from the Territory dropdown and select My Accounts from the View dropdown.
  - a. Do you see the Abbeville General Hospital account?  
\_\_\_\_\_
  - b. Click the link to display the Abbeville General Hospital detail page.  
\_\_\_\_\_
  - c. Click the **View Hierarchy** button. You should see the account hierarchy structure.  
\_\_\_\_\_
  - d. Go back to the detail page. Does it have an address associated with it?  
\_\_\_\_\_

## Load Addresses Data

Your organization allows Sales Representatives to change addresses in the system. In Veeva, that means the address record type is Rep Maintained instead of Company Maintained.

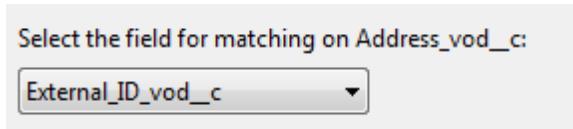
Before loading the addresses, fix the data file by replacing the Record Type Id for Rep Maintained. Then change the batch size to 50 which is the recommended size for Addresses.

1. Update the provided TrainAddress.csv file and set the Record Type Id for all addresses to Rep Maintained. Copy the Rep Maintained (Address) record type ID from the record type extract file you exported earlier.
2. In the Data Loader window, click the **Settings** menu.
3. Change the **Batch size** to **50** as in the screenshot below:

The screenshot shows a portion of the Data Loader interface under the 'Settings' menu. It features three input fields: 'Batch size' with the value '50' entered, 'Insert null values:' with an unchecked checkbox, and 'Assignment rule:' with an empty text input field.

4. Click **OK**.
5. In the Data Loader window, click **Upsert**.

6. Login as the Administrator.
7. For the Object to load select Address (Address\_vod\_\_c).
8. Upsert the Addresses in the updated **TrainAddresses.csv** data file.
9. Match the Address on External Id as in the screenshot below:



10. Click **Next**.
11. Match the **Account\_vod\_\_r** on **External\_ID\_vod\_\_c**.
12. Click **Next**.
13. Click **Create or Edit a Map** and then click **Auto-Match Fields to Columns**.
14. When loading child records (such as Addresses) that have a lookup or master-detail relationship with a parent (Accounts), the external ID can be used to associate the child record with the parent record. Map Account\_vod\_\_c to Account\_vod\_\_r:External\_ID\_vod\_\_c as in the screenshot below:

Drag the Salesforce fields down to the column mapping. To remove a mapping, see the trash icon.

File Column Header	Name
Account_vod__c	Account_vod__r:External_ID_vod__c
Address_line_2_vod__c	Address_line_2_vod__c
City_vod__c	City_vod__c
Country_vod__c	Country_vod__c

15. Click **OK**.
16. Click **Next**.
17. Click **Finish**.
18. Click **Yes**.
19. Click **OK**.
20. The Addresses should load with 2 errors. **Bonus Exercise:** Fix the errors and reload. (Hint: Make sure the External IDs in the source file are unique.)
21. Login as the Administrator, then go to My Accounts and look at a list of all accounts. Since the accounts are not yet assigned to a territory, you must select All Accounts from the Territory dropdown and select My Accounts from the View dropdown. You should now see address information for the Accounts that have been data loaded, for example, Abbeville General Hospital account.

## Load Affiliations Data

In this exercise, you will load the Account Affiliations. Affiliations drive the Sphere of Influence for accounts in Veeva. The instructions for this exercise are not detailed.

1. Change the batch size to 1 for loading Affiliations.
2. Upsert the records from the TrainAffiliations.csv data file.
3. Match existing records on External Id. Match both To Account and From Account columns on External Id.

4. Complete the import of Affiliations.
5. If needed, login as the Administrator, then go to My Accounts and look at a list of all accounts. Since the accounts are not yet assigned to a territory, you must select All Accounts from the Territory dropdown and select My Accounts from the View dropdown.
6. Find and click on the link for Baylor Medical Center.
7. Click the View button in the Sphere of Influence section. You should see many affiliations for this hospital.
8. Change the batch size back to 200.

# Module 17: Record Access Management

## OBJECTIVES

- Overview of Record-Level Access
- Configure Organization Wide Default (OWD) Sharing Settings
- Configure Sharing Rules
- Review Role and Territory Hierarchies
- Review the Account Visibility Data Model
- Use ATL to Align Accounts
- Use Zip to Terr to Align Accounts (Reference Only)

### Record-Level Access

Record-level access is the mechanism used to control visibility to individual data records. Veeva uses Salesforce's Organization-Wide Defaults (OWD) Sharing Settings to control access to data in all objects except the Account object. Veeva uses territories to control access to Account records.

### Organization-Wide Defaults (OWD)

Record ownership and Organization-Wide Default (OWD) Sharing Settings are the fundamental elements that control how data is shared in Salesforce. All records in the system must have an owner. By default, the owner of a record is the person who creates the record. The record owner will always be able to see the record.

Organization-wide defaults (OWD) set the baseline security for records. The table below describes the different levels of organization-wide default settings that can be set for each object.

Setting	Description
Private	Allows only the record owner to view and edit a record for the object.
Public Read	Allows all users to view (read) records for the object regardless of record ownership.
Public Read/Write	Allows all users to view and edit records for the object regardless of record ownership.
Controlled by Parent	Takes the OWD setting of the parent object.

### Sharing Private Records

Private data can be shared in two ways:

**Vertically** – Managers automatically see private data owned by their direct or indirect reports as defined in Territory or Role hierarchies.

**Horizontally** – Private data can be explicitly shared with other users using sharing rules.

### Public Groups

Public groups consist of a set of users. A group can contain individual users, other groups, or the users in a particular role or territory. It can also contain the users in a particular role or territory plus all the users below that role or territory in the hierarchy.

Administrators can create public groups and then use them to share data in any of the private objects.

## Record Visibility Best Practices

Lock down data to the most restrictive level and then use sharing rules to selectively give users the ability to edit data.

For example, if all users need to read Medical Events but some users need to edit them, then set the OWD for Medical Events to Public Read and then grant user groups Read/Write Access permission on the Medical Event object via a sharing rule.

## Role Hierarchy

The Role Hierarchy gives managers visibility to private data owned by their direct and indirect reports.

Administrators can add, edit, or delete roles as well as assign users to roles from:

- **Setup → Manage Users → Roles**

## Territory Hierarchy

The Territory Hierarchy is used to assign Veeva Accounts to users. Managers will get visibility to the Accounts in their own, and in their direct and indirect reports territories.

Accounts are aligned to one or more territories. Users are assigned to one territory. It is also possible that a user is temporarily assigned to more than one territory.

Administrators can add, edit, or delete territories as well as assign users to territories from:

- **Setup → Manage Territories → Territory Hierarchy**

## Territories and Roles Best Practice

In Veeva implementations the territory and role hierarchies are usually identical. You should focus on defining the territory hierarchy and then make the role hierarchy exactly the same. Having the territory and role hierarchy identical simplifies maintenance and integration.

Role Hierarchy	Territory Hierarchy
	

## Change Account Owner Workflow

The Veeva My Accounts tab displays an Account if:

- The Account belongs to the user's territory
- The user created and therefore owns the Account

If a user created an Account and therefore owns it, he/she will see it even if it isn't in his/her territory. This can be an issue when companies perform territory realignments.

The best practice in situations where users can create new Accounts is to also define a time-based workflow that will set the owner id field on the Account record to a designated Admin user. Most Veeva implementations will have this workflow, or something similar, so check to make sure it already exists before you create one.

## Demo: Review Organization-Wide Default Sharing Settings

1. Login as the Administrator.
2. Go to **Setup → Security Controls → Sharing Settings**.
3. The **Default Internal Access** column stores the OWD value for each object.
4. What is the setting for CLM Presentations? \_\_\_\_\_

## Demo: Create a Public Group and Sharing Rule

In this demo, we will create a public group and then create a sharing rule for sharing private CLM Presentations. We will not actually test this configuration, the purpose of the demo is to show you how to configure a public group and a sharing rule.

1. Go to **Setup → Manage Users → Public Groups**.
2. Click the **New** button.
3. Enter **US Users** for the label.
4. For the **Search** dropdown select **Territories**.
5. Select and add a few territories to the group.
6. Click the **Save** button.

To use a public group in a sharing rule for a private object:

1. Go to **Setup → Security Controls → Sharing Settings**.
2. Scroll down to the Sharing Rules towards the bottom of the page and find the **CLM Presentation Sharing Rules** section.
3. Click the **New** button and create a new sharing rule with the following information:

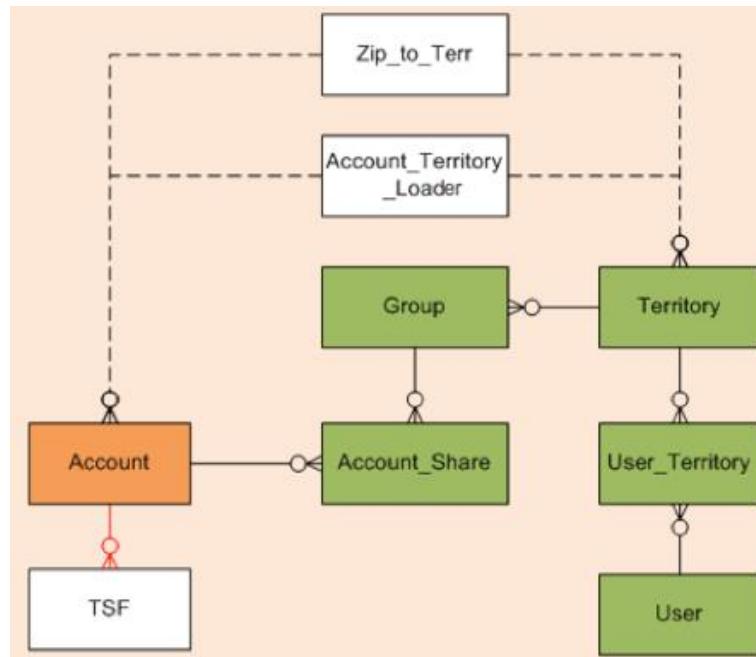
Field	Value
Label	US Presentations
Based on criteria (radio button)	Field = Keywords / Operator = Contains / Value = United States
Share with	Public Groups / US Users
Access Level	Read Only

4. Click the **Save** button.

5. Click **OK**.

## Account Visibility Data Model

The Account visibility data model involves the following objects:



**Territory** – Standard SFDC object. Stores the territory hierarchy. You can create territories either through the user interface or data load them directly into this object.

**User** – Standard SFDC object. Stores all users in the system.

**User Territory** – Standard SFDC object. Stores the association between users and their territories.

**Account Share** – Standard SFDC object. Stores the actual alignment of an Account to a territory.

**Zip to Terr** – Veeva object – Stores a list of territories for each zip code. This is a reference object used only when using geographic Zip to Terr alignment in Veeva.

**Account Territory Loader (ATL)** – Veeva object. Stores the account to territory alignment. When records are loaded into the ATL object, triggers populate the Account Share object with the actual account to territory alignment.

Veeva provides several different methods for aligning Accounts to Territories:

- Align (Veeva global territory management tool built on the Vault platform)
- Account Territory Loader (ATL)
- Zip-to-Terr / Brick-to-Terr

## Account Territory Loader (ATL)

If the processing that does the actual alignment of the accounts to territories is done by a third-party system outside of Veeva, then use the Account Territory Loader to load the alignments into Veeva.

The following permissions are needed for ATL to work:

- Create permission on the Account Territory Loader object

- Users must **not** have Edit permission on the Territory\_vod field on the Account object

The Account Territory Loader object contains the following fields:

- **Account** [Lookup to Account] – Contains the Account SFDC 18-character Id for the account to be aligned.
- **External ID** [Text] – Must contain the Account SFDC 18-character Id for the account to be aligned.
- **Territory** [Long Text Area 1500] – Contains a semicolon-delimited list of territories to assign to the account.
- **Territory to Add** [Text 255] – Contains a semicolon delimited list of territory names. Used to assign one or more territories to the account for incremental alignments.
- **Territory to Drop** [Text 255] – Contains a semicolon delimited list of territory names. Used to remove one or more territories from the account for incremental alignments.

An ATL source file will look like the screenshot below:

Account_vod_c	EXTERNAL_ID_VOD_C	Territory_vod_c
001A000000cxo27IAA	001A000000cxo27IAA	;1002A;2002A;3002A;
001A000000cxo26IAA	001A000000cxo26IAA	;1002A;2002A;3002A;
001A000000cxo21IAA	001A000000cxo21IAA	;1002A;
001A000000cxo25IAA	001A000000cxo25IAA	;1002A;
001A000000cxo28IAA	001A000000cxo28IAA	;1002A;
001A000000cxo29IAA	001A000000cxo29IAA	;1002A;
001A000000cxo2AIAQ	001A000000cxo2AIAQ	;1002A;2002A;3002A;

## ATL Best Practices

There should only be one ATL record for each Account. After the initial load, to perform subsequent incremental or full alignments, upsert to the ATL object and match on the External ID. Incremental alignments can utilize the Territory to Add or Territory to Drop fields to simplify single add or drop operations.

## ATL Updates Via User Interface

Administrators can add the ATL related list to Account page layouts to enable ATL mini territory alingnments via the user interface.

## Demo: Create an Account Territory Loader Record

In this demo, we will create an Account Territory Loader record from the online user interface for an Account. We will then see how to use the various Account Territory Loader fields to subsequently update alignments for the Account.

1. Login as the Administrator.
2. Search for **Baylor Medical Center** and click the link to view its detail page. This is one of the accounts you imported in the data loading exercises.

In the Hospital detail section, notice there is no value in the **Territories** field. The reason is because this account is not aligned to any territory yet. This field is only populated once an alignment for the account exists in the Account Share object.

3. Click the **Account Territory Loaders** link at the top of the page.
4. Click the **New Account Territory Loader** button.

5. Enter any value for the **External ID**.
6. In the **Territory List** field type **;101;102;**
7. Click **Save**. At this point trigger in the ATL object run and populate the Account Share object with this new alignment.
8. Click the Baylor Medical Center link to view the account's detail page again. Notice now the Territories field shows the list of territories to which the account is aligned.
9. Click the **Account Territory Loaders** link at the top of the page.
10. Click the **Edit** link next to the ATL record.
11. In the **Territory to Add** field, type **103**.
12. In the **Territory to Drop** field, type **102**.
13. Click the **Save** button.

Notice now the Territories field shows the updated list of territories to which the account is aligned.

## **Zip to Terr**

Organizations often align Accounts based on zip code within Veeva using Zip to Terr. Zip code is an attribute of the Address object and standard Salesforce assignment rules are not able to check attributes of the address to make the alignment.

The Zip to Terr object stores the zip to territory data used for processing territory alignment in Veeva. It is used to populate the Territory\_vod\_c and Territory\_Test\_vod\_c fields for each Veeva account. Once territory values exist for these two fields on the Account, you can run territory rules which will process the alignment of accounts to territories and populate the Account Share object with the alignment.

Aligning Accounts using Zip to Terr includes the following steps:

1. Create Territory Hierarchy.
2. Upload Zip-to-Terr file. This step creates / updates Zip to Terr object records.
3. Use the Territory Utilities tab to:
  - a. Rebuild vod Territory rules. This step creates Veeva Rules for the entire Salesforce Territory Hierarchy structure.
  - b. Run test assignment. This step updates the Territory\_Test\_vod field on the Account object.
  - c. Run mass assignment. This step updates the Territory\_vod field on the Account object.
4. Run Assignment Rules in Territory Hierarchy to finalize the zip to terr alignment. This step updates Account Share object records.

## **Independent Exercise #20 – Align Accounts using ATL**

The steps to align accounts using ATL include:

- Define or load the Territory object with the correct territory hierarchy information. This has already been completed in our training org.
- Load Accounts into the Account object. This has already been completed in our training org.

- Prepare the account territory alignment data file to import the alignment into Veeva and use the Data Loader to upsert the alignment records into the ATL object. You will complete this step as part of this exercise following the instructions provided below.

Note that in a typical deployment, the accounts also exist in an external system. A third-party tool is used to align accounts to territories. The data team will extract the SFDC ID of the Veeva accounts and provide the Veeva Admin the ATL file you are going to build in the following exercise.

For this exercise, you will start by exporting the Accounts object to get the SFDC Id for each account:

1. Open the Data Loader to export the Account object and export only the Id field.
2. Make sure you save the extract file as Accounts\_extract.csv with file extension .csv to a specified folder.

Next, you will prepare the CSV file for loading Account Territory Loader records:

3. Open the Accounts\_extract.csv file.
4. Rename the Id column heading to Account\_vod\_\_c. The column headings must match the field names in the Account Territory Loader object.
5. Add a second column heading called External\_ID\_vod\_\_c.
6. Copy and paste the values from Account\_vod\_\_c to populate the External\_ID\_vod\_\_c so that both columns have the same values. Best practice is to have the External IDs the same as the Account SFDC IDs.
7. Add a third column heading called Territory\_vod\_\_c to enter the territory that each account is aligned to.
  - a. Enter ;101; into the Territory\_vod\_\_c column for the first 500 accounts.
  - b. Enter ;102; into the Territory\_vod\_\_c column for the remaining accounts.
8. Open the Data Loader and verify the Batch Size setting is 200.
9. Upsert the Accounts\_extract.csv file into the Account Territory Loader object. Be sure to select the External\_ID\_vod\_\_c field for matching on Account\_Territory\_Loader\_vod\_\_c. Then auto-map the three fields.
10. Finish the upsert.

Now that the account territory alignment is upserted, check that the accounts have been assigned to territory 102.

11. Navigate to the **My Accounts** tab.
12. Select **My Accounts** in the **View** dropdown.
13. Select 102 from the **Territory** filter. Notice that accounts have been added to this territory.

## Independent Exercise #21 - Align Accounts using Zip to Terr (Optional)

In this exercise, you will perform territory alignment using Zip to Terr.

First look at a hospital account to see the existing territory assignment.

1. Login as the Administrator.
2. Click the **My Accounts** page.

3. Find the **Chilton Memorial Hospital** account and go into its detail page.
4. Scroll to the **Territory Assignment** section. Do you see values for the **Territory VoD** and **Territory Test VoD** fields?

---

These fields are populated after you load the Zip to Terr object records using the Data Loader and run the Test and Mass territory assignment utilities. The accounts will be aligned to territories after you run the territory rules from the top of the Territory hierarchy and the Account Share object is updated.

5. Is there a value for the **Exclude from Zip to Terr Processing**?

---

If the Exclude from Zip to Terr Processing checkbox is checked, the account will not have the Territory VoD and Territory Test VoD fields updated when running Zip to Terr.

Upsert the Zip to Terr file to the Zip to Terr object.

To use the Data Loader to upload Zip to Terr data, you need a .csv file with the following 3 columns of data:

- **Name:** Stores the zip code value. Note: If the zip code starts with a zero you have to precede the zero with a single quote, i.e., '08514
  - **Zip\_Id\_vod\_\_c:** The external ID for upserting into this object
  - **Territory\_vod\_\_c:** Stores the territories associated with each zip code in a semicolon separated format, i.e., ;101;102;
6. Use the TrainZipToTerrs.csv data file provided with your training material and upsert the data to the Zip to Terr object using the Data Loader.

Now complete the territory alignment in Veeva by going to the Territory Utilities tab.

7. Go to **All Tabs → Territory Utilities** tab.
8. Click the **Rebuild VoD territory rules** button. This will rebuild all the territory rules.
9. Click the **Test Territory Assignment** button. This will populate the Territory\_Test\_vod fields on Accounts so you can review and validate results.
10. Click the **Run Mass Assignment** button. This will populate the Territory\_vod field on Accounts.  
Note: There will be some Accounts that error in this step because they do not have any assigned addresses in the training environment.
11. Go to **Setup → Manage Territories → Territory Hierarchy**.
12. Click the link to go into the **Corp** territory.
13. Run the Salesforce Account Assignment Rules from the top (Corp) of the territory hierarchy by clicking the Run Rules button.

The Zip to Terr Process Alignment button provides a way to assign territories based on selected zip codes. This functionality works the same as the Run Mass Assignment button on the Territory Utilities tab, except on a more granular level.

Follow the steps below to place the Process Alignment button on the Zip to Terr list view that is located under the search layouts of the Zip to Terr object.

1. Go to **Setup → Create → Objects** and click the link for the **Zip to Terr** object.
2. Click the **Search Layouts** link at the top of the page.

3. Click the **Edit** link for the **Search Results** layout.
4. In the **Custom Buttons** section, add the **Process Alignment** button to the **Selected Buttons** list.
5. Click the **Save** button.

Next, you will modify the “All” list for the Zip to Terrs result page.

6. Go to **All Tabs → Zip to Terrs**.
7. Click the **Go** button to display the search results page.
8. Click the **Edit** link to modify the **All** list (currently displayed).
9. In Step 3, move the **Territories**, **Zip Code**, and **Zip ID** fields to the **Selected Fields** list.
10. Leave all other options and click **Save**.
11. In the Search Result list, select 3 different zip code records that also exist in the .csv data loading file and click the **Process Alignment** button.
12. The Assign Territories Result page is displayed with updated accounts, which indicates you have successfully assigned accounts to territories using the Zip to Terr object.

# Module 18: Offline Configuration (iPad)

## OBJECTIVES

- Configure the Offline Home Page
- Configure the Timeline View
- Configure Offline Menu Visibility
- Understand VMobile Object Configurations (VMOC)
- Understand the Synchronization Process

## Configuring Veeva CRM for iPad

Whether your organization is using the iPad or Surface, the configuration is done once using the CRM online configuration setup menus as we have seen throughout this course. In this module we will review some of the additional configurations that apply specifically to the offline platforms.

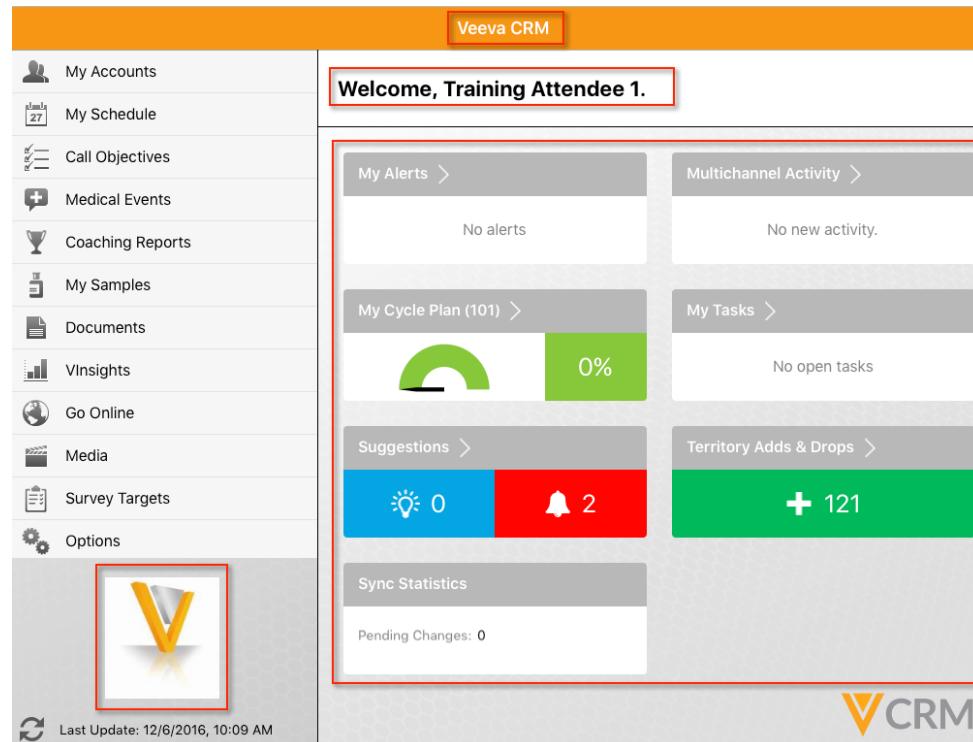
### Configure CRM Home Page for Veeva CRM Offline Install

The CRM for iPad or Windows device installation link can be displayed on the home page left sidebar so Administrators can install Veeva offline on their devices.

In addition to using the install link from the home page, organizations can also push the Veeva offline installation to users' devices remotely using third-party tools such as VMware AirWatch.

### Offline Home Page

The home page provides a snapshot of actionable information that helps Sales Reps shape their daily activities. The home page consists of an app name, a salutation, a company logo, and a series of tiles that correspond to one of many components that can be added and positioned on the page.



## Offline Home Page Configuration

**App Name** – The app name (Veeva CRM) can be configured using the IPAD\_APP\_NAME Veeva Messages. Organizations can rename their application something other than Veeva CRM.

**Logo** – The login and home pages can be configured to display a custom image. To use a company logo, upload an image named **vmobile-image-home.XXX** to the images folder in the **Documents** tab where XXX represents the image file extension. Supported file types are JPG, PNG and GIF. The recommended size is 500px X 250px.

We have an example of this configuration in our training org. To view it:

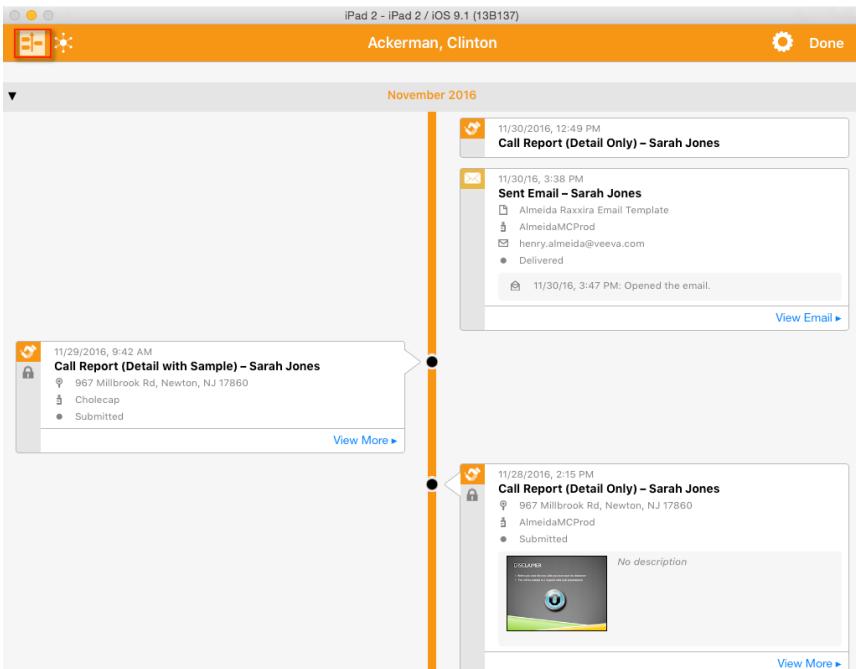
1. Login as the Administrator.
2. Go to **All Tabs** → **Documents**.
3. If needed, select the **images** folder and click the **Go** button.
4. Click the link to go into the **vmobile-image-home.gif** file. Administrators can upload custom images with these same parameters to use as the company logo.

**Components** – To add or remove components on the home page, add the marker fields to the VMobile Home Page Layout object page layout.

1. Login as the Administrator
2. Go to **Setup** → **Create** → **Objects** → **VMobile Home Page Layout**.
3. Under **Custom Fields and Relationships**, notice the various zvod (Marker) fields available for the home page.
4. Scroll down to the Page Layouts section and click the **Edit** link for the **VMobile Home Page Layout**.
5. Since you will not be using it, remove the **zvod\_suggestions\_vod** marker field from the page.
6. Click the **Save** button.
7. Remember to clear Veeva cache and then sync to view the changes offline.

## Account Timeline View

To aid in planning calls and to view account activity, reps can view historical data in a timeline view both online and offline. The timeline button displays offline if the user profile has Read access to the Account\_Overview\_Layout\_vod object. The timeline button displays in the Account header. When tapped, the timeline view displays in full screen as shown below:



## Account Timeline Configuration

The Timeline view is delivered enabled by default.

To enable the Timeline for the Online platform, add the **View Overview** button to the desired Account page layout and provide visibility to the **Account\_Operation\_vod** VisualForce page for the user's profile.

To control the types of activity to display in the timeline:

1. Login as the Administrator.
2. Go to **Setup** → **Create** → **Objects** → **Account Overview Layout**.
3. Under **Custom Fields and Relationships**, notice the various zvod (Marker) fields available for the timeline. Each marker field is used to control the type of activity you can display in the timeline view.
4. Scroll down to the Page Layouts section and click the **Edit** link for the **Account Overview Layout**.
5. Since you will not be using medical inquiries, remove the **zvod\_Timeline\_MI\_vod** marker field from the page.
6. Click the **Save** button.
7. Remember to clear Veeva cache and then sync to view the changes offline.

## Offline Menu Visibility

Each menu item on the Home page offline can be configured as visible or hidden.

Menu	Visible when...
<b>My Accounts</b>	User profile has Read privileges to the <b>Account</b> object
<b>My Schedule</b>	User profile has Read privileges to the <b>Account</b> and <b>Call2_vod</b> objects
<b>Medical Events</b>	User profile has Read privileges to the <b>Medical_Event_vod</b> object

<b>Coaching Reports</b>	User profile has Read privileges to the <b>Coaching_Report_vod</b> object
<b>My Samples</b>	<b>ENABLE_IPAD_MYSAMPLES</b> Veeva setting is set to True
<b>Documents</b>	There is at least one file available for offline viewing in a visible folder
<b>MyInsights</b>	User profile has Read privileges to the <b>Sales_Transaction_vod</b> object
<b>Go Online</b>	Value exists in the <b>Online_Tab_URL</b> custom setting
<b>Media</b>	User profile has Read privileges to the <b>CLM_Presentation_vod</b> object
<b>Options</b>	Always displayed; cannot be configured

## VMobile Object Configuration (VMOC)

The VMobile Object Configuration object controls what objects and records are synced to offline devices. An active VMOC record with **Device\_vod** set to **iPad\_vod** must exist for each object utilized in Veeva CRM (iPad). Custom objects should be related to the Account object to have its data synced automatically.

Administrators can create a VMOC with specific instructions using a WHERE clause. For example, to limit the Calls synced to the last 90 days, the Where Clause for the Call2 object would be:

```
WHERE (Account_vod__r.Name !=null OR User_vod__r.Name !=null OR
Medical_Event_vod__r.Name !=null OR Contact_vod__r.Name!=null) AND (Status_vod__c =
'Planned_vod' OR (Call_Date_vod__c >= LAST_N_DAYS:90 and Call_Date_vod__c <=
NEXT_N_DAYS:30))
```

VMOCs exist by default for all Veeva objects but may need to be activated. To activate a VMOC:

1. Login as the Administrator.
2. Go to All Tabs → **VMobile Object Configurations**.
3. Click the **Go** button.
4. Click the **Active** column heading to sort. You should see the inactive VMOCs in the org.
5. Click the **Edit** link next to one of the inactive VMOCs.
6. Click the **Active** checkbox.
7. Click **Save**.
8. Remember to clear Veeva cache and then sync to view the changes offline.

## Offline Validation Rules

Salesforce validation rules are normally only enforced while using the online application and are not enforced offline. Validation error displays after syncing and then needs to be fixed.

Object	Type	Operation	Error
New	Call2_vod_c	Create	When company sponsored study = true then enter study.

Administrators can configure validation rules in most objects to be enforced offline immediately at save, submit, and sign.

The screenshot shows a 'Call Report' form with various fields like Account, Credentials, Address, Sample Card #, Record Type, Medical Event, Call Conflict Status, Status, Call Type, Sample Card Reason, Study (which has a red box around it), and Territory. The 'Company Sponsored Study' checkbox is checked and highlighted with a red box. A validation rule message 'When company sponsored study = true then enter study.' is displayed above the Study field, also highlighted with a red box.

To learn more about offline validation rules, refer to the [CRM Online Help](#)

## Synchronization

Users should sync daily to ensure up-to-date data and content are always available.



When users tap the sync button offline, the system starts the sync process. Data will sync first and then media, such as CLM presentations.

Calls and Medical Inquiries will sync immediately at submit when the device detects a network connection:

### Sync Interruption

What happens if the sync is interrupted before it can be completed?

- If the sync is interrupted by the user switching to another app

- Sync is paused and will continue from where it stopped when the user returns to Veeva CRM
- If the sync is cancelled by the user or the device loses connectivity during sync
  - Then next time it will restart from the beginning

## Troubleshooting Sync Errors

Sometimes Administrator will need to review the sync log for specific users to help troubleshoot sync errors.

To access the sync error log file for a specific user:

1. Login as the Administrator.
2. Go to **Setup → Manage Users → Users**.
3. Click the link to go into the user with the sync error, for example, click the link for **Sarah Jones**.
4. In the **User Config Log Links** section, click the **Download Last Day** link.
5. You would then examine the log file to help identify the sync error and fix it.

## Sync Tracking

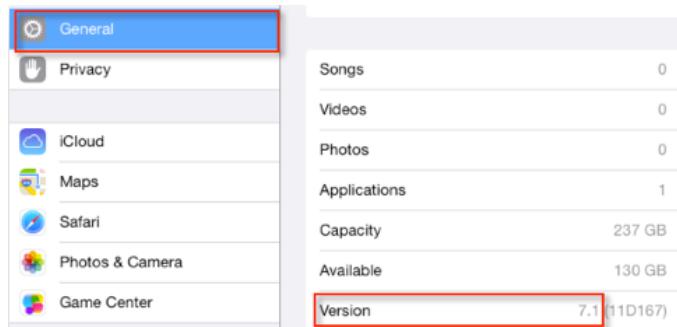
Veeva Keeps track of all user sync activity in the Synchronization Tracking object. You can create a report on user sync activity to see who has and has not synced.

Full Name	Phone	Sync Start Datetime	Sync Completed Datetime	Successful Sync	Media Processed	VlInsights Processed
Monty Livingston	-	5/17/2012 11:43 AM	5/17/2012 11:44 AM	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Joe Slade	-	5/17/2012 12:44 PM	5/17/2012 12:45 PM	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Joe Slade	-	5/17/2012 11:38 AM	5/17/2012 11:40 AM	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Chad Stout	-	5/17/2012 1:48 PM	5/17/2012 1:49 PM	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Konstantine Tsimberg	-	5/18/2012 7:21 AM	5/18/2012 7:22 AM	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Reporting is covered in detail in our 1-Day CRM Reporting class.

## iOS Supported Versions

Veeva supports the current iOS versions plus two n.n previous versions. Users will see a warning during CRM (iPad) login if their iPad is running on unsupported version.



# Module 19: Environment Management

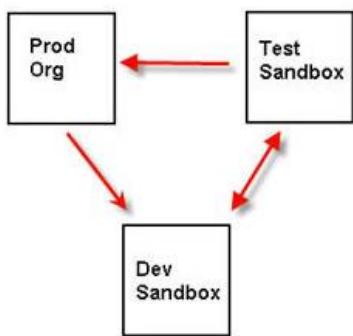
## OBJECTIVES

- Overview of Environment Management
- Veeva-tize Sandboxes
- Migrate Configurations between Orgs

### What is Environment Management?

Environment management is the strategy and process for capturing, building, and deploying Veeva configuration change requests within an organization.

Once a Veeva implementation is live, users will continue to request changes to configuration to support their business needs. Change requests are captured and documented carefully. The Veeva implementation team configures change requests in Veeva sandboxes and deploys the new configuration to one or many production environments.



## Sandboxes

A sandbox is a Veeva org created from a production org that is not used by the Sales Reps to record their daily activities.

Sandboxes are typically used for:

- Configuring change requests
- Testing new features
- Training

Veeva Customers normally use 3 types of sandboxes: Full, Developer Pro, and Developer

Veeva license include 1 free Full, 5 Developer Pro, and 15 Developer but no Partial Copy sandboxes. Customers can purchase additional Full or Partial Copy sandboxes if needed. The Main difference between the types of sandboxes is the refresh interval, capacity, and components included by default. Only the full sandboxes can include object data records.

Developer	Developer Pro	Partial Copy	Full
Refresh Interval: 1 Day	Refresh Interval: 1 Day	Refresh Interval: 5 Days	Refresh Interval: 29 Days
Capacity: 200 MB	Capacity: 1 GB	Capacity: 5 GB	Capacity: Same as Source
<b>Includes:</b> <ul style="list-style-type: none"> <li>Configuration</li> <li>Apex &amp; Metadata</li> <li>All Users</li> </ul>	<b>Includes:</b> <ul style="list-style-type: none"> <li>Configuration</li> <li>Apex &amp; Metadata</li> <li>All Users</li> </ul>	<b>Includes:</b> <ul style="list-style-type: none"> <li>Configuration</li> <li>Apex &amp; Metadata</li> <li>All Users</li> <li>Records (sample of selected objects)</li> <li>Sandbox Template Support</li> </ul>	<b>Includes:</b> <ul style="list-style-type: none"> <li>Configuration</li> <li>Apex &amp; Metadata</li> <li>All Users</li> <li>Records (all or selected objects)</li> <li>Sandbox Template Support</li> <li>History &amp; Chatter Data (optional)</li> </ul>

## Sandbox Login

To login to sandboxes go to <https://test.salesforce.com>

- Append the user name with the name of the sandbox
- Initial password is the same as in the production org

Please enter your password.

Username

henry.almeida@train.net.config1

Password

.....

**Log In to Sandbox**

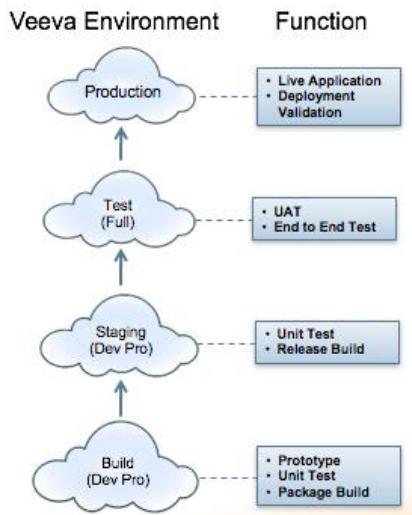
Remember me

[Forgot Your Password?](#)

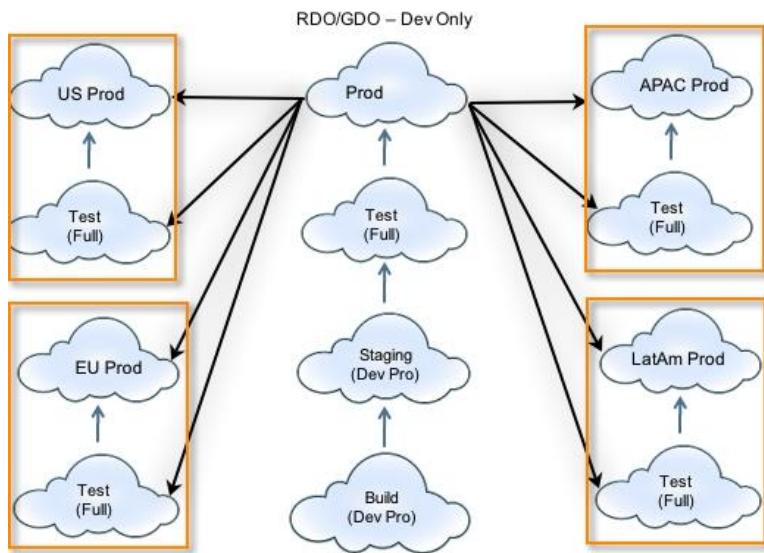
[Use Custom Domain](#)

## Single vs. Multiple Prod Org Implementations

A single production org implementation works well where there are few business units who share similar business rules. A single production org implementation environment will normally include the following setup:



If a company has users in many different countries with distinct business processes, in most cases, Veeva will recommend they have multiple production orgs perhaps one for each country. Veeva can provide the customer with a production RDO/GDO (Regional or Global Deployment Org) in which they will build and configure new features but to which no users connect.



When there are many production orgs the customer must decide how much autonomy to give the local System Admins. Should they have complete control of their orgs, no control at all, or partial control?

- If they have complete control then they may build too much custom functionality and the company loses track of what each country's orgs have, this can lead to issues in the future specially with upgrades.
- If they have no control at all then local business users may be unhappy due to their local needs not being met in the application.
- If they have partial control, then there can be a happy medium where the "core" functionality is pushed down from the RDO/GDO but the local System Admins can build anything in addition to the "core".

The new features can be deployed from the RDO/GDO to all local production orgs.

## Migrating Components

Migration includes two main components:

- Data - Products, Key Messages, Veeva Messages
  - Migrated with Data Loader
- Metadata - Anything configured using the Setup menu such as fields, objects, record types, page layouts, workflows
  - Migrated with either Change Sets or other migration tools such as Force.com IDE

Salesforce provides many tools for migrating both data and metadata.

For a complete list of Tools and Toolkits:

1. Login as the Administrator.
2. Go to **Setup → Develop → Tools**.
3. Click the **Force.com Tools and Toolkits** link.

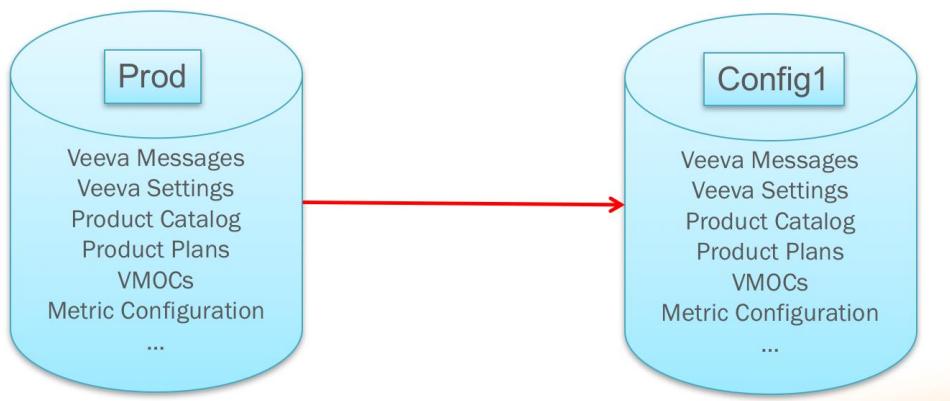
The Force.com IDE is an Eclipse based plugin you can use to code and deploy customizations between any orgs.

## Veeva-tizing Sandboxes

When you login to a new Developer Pro or Developer sandbox that has not been Veeva-tized you will notice strange things such as null values for application labels. This is caused by the absence of required Veeva Messages and Settings. For example, the My Accounts tab will display as shown below:

The screenshot shows the Salesforce interface with the 'My Accounts' tab selected. The search bar shows 'null' results. The account list displays several entries with labels like 'null' for Name, Corp for Type, and various null values for other fields. The Veeva CRM tab is active in the top right.

Veeva-tizing is the process of data loading the standard and custom Veeva application data into a Developer Pro or Developer sandbox to support Veeva specific functionality. Use Data Loader and export application data from a source org such as the production org and load it into a target sandbox.



## External IDs

You should populate External ID values in the source and target orgs for all objects as much as possible. This best practice makes moving application data to various environments less laborious because the same .csv file containing records with External IDs of related records can be used to upsert the data into various target sandboxes without the need to change referenced SFDC IDs to resolve relationships.

When exporting data containing master-detail or lookup relationships, replace the SFDC IDs with External IDs to export the External IDs of the referenced records and not the SFDC IDs.

For example, when exporting products from the Product Catalog using Data Loader:

Replace Parent\_Product\_vod\_\_c with Parent\_Product\_vod\_\_r.**External\_ID\_vod\_\_c**

## Change Sets

Use change sets to send customizations from one Veeva org to another. For example, you can create and test new objects in a Veeva sandbox org, then send it to the Veeva production org using a change set.

To use changes sets the following steps must be performed:

- Define deployment connections
- Create outbound change sets
- Deploy inbound change sets

### Deployment Connections

A deployment connection is required between two Veeva orgs to send change sets from one org to another. Create connections between all orgs affiliated with a production org.

For example, if you have a production org and two sandboxes, a deployment connection is created between production and each sandbox and between the two sandboxes.

To define deployment connections:

1. Login to each org as the Administrator.
2. Go to **Setup → Deploy → Deployment Settings**.

### Outbound Change Sets

Outbound change sets are created in the Veeva org in which you are logged in and that have the components you want to send to another org. You typically use an outbound change set for customizations created and tested in a sandbox and that are then sent to a production org.

To create outbound change sets

1. Login to the source sandbox.
2. Go to **Setup → Deploy → Outbound Change Sets**.
3. Create a new change set and select the components you need to migrate.

### Inbound Change Sets

An inbound change set is a change set that has been sent from another Veeva org to the org you are logged into. A change set must be deployed for the changes to take effect.

To deploy inbound change sets:

1. Login to the org receiving the change set.
2. Go to **Setup → Deploy → Inbound Change Sets**.

## Independent Exercise #22 – Veeva-tize a Sandbox (Reference Only)

This lab is meant for future reference only. You do not need to perform it in class.

A sandbox was created in an earlier exercise – you will “Veeva-tize” that sandbox here. If you did not create the Developer Pro sandbox you will need to create one first.

1. Using the Data Loader, export Veeva-specific objects from your student production org and store the extracted files locally on your PC.

**Note:** When extracting products replace Parent\_Product\_vod\_\_c with Parent\_Product\_vod\_\_r.External\_ID\_vod\_\_c so the products have the external ids for the parent product in the extract file. Do the same with the lookup fields when extracting Preferences but you might have to populate the External IDs for the Views in production before you extract Preferences. Also, you can extract all fields.

Production Item	Production object name	Extract File Name
<b>Required</b>	<b>Must import</b>	
Product Catalog	Product_vod__c	Extract_Product_vod__c
Views	View_vod__c	Extract_View_vod__c
Preferences	Preferences_vod__c	Extract_Preferences_vod__c
Veeva Messages	Message_vod__c	Extract_Message_vod__c
Veeva Settings	Veeva_Settings_vod__c	Extract_Veeva_Settings_vod__c
Veeva Common	Veeva_Common_vod__c	Extract_Common_vod__c
Metric Configurations	Metric_Configuration_vod__c	Extract_Metric_Configuration_vod__c
VMobile Object Configurations	Vmobile_Object_Configuration_vod__c	Extract_Vmobile_Object_Configuration_vod__c
<b>Optional</b>	<b>Time permitting</b>	
My Setup	My_Setup_Products_vod__c	Extract_My_Setup_Products_vod
Key Messages	Key_Message_vod__c	Extract_Key_Message_vod__c
Product Plans	Product_Plan_vod__c	Extract_Product_Plan_vod__c
Product Strategies	Product_Strategy_vod__c	Extract_Product_Strategy_vod__c
qProduct Tactics	Product_Tactic_vod__c	Extract_Product_Tactic_vod__c

Load Application Data into Sandbox.

1. “Veeva-tizing” the Sandbox: Upsert the above extracted files into your **Sandbox**. Remember, when loading data into Veeva, upsert using the foreign key (External\_ID\_vod\_\_c), not the Salesforce.com ID field.
  - a. When loading the Product Catalog there are parent-child relationships that must be resolved, this will require a two-step load procedure.
    - i. Step 1 – load all products. Upsert using External\_ID\_vod\_\_c, and do not map Parent\_Product\_vod\_\_c field.

- ii. Step 2 – load all products again relating them to the appropriate parent product by upserting using the External\_ID\_vod\_\_c, and mapping the Parent\_Product\_vod\_\_c field to Parent\_Product\_vod\_\_r:External\_ID\_vod\_\_c.
- b. When loading Preferences make sure the Views referenced in the lookup fields reference the Ids of the views in the sandbox not the old ids from the production environment.

## Independent Exercise #23 – Use Change Sets (Reference Only)

**This lab is meant for future reference only. You do not need to perform it in class.**

In this exercise, you will create a custom object in your sandbox and then migrate the custom object and all its dependent components from your sandbox to your production org. **Note:** This lab requires a Veeva-tized sandbox, which you created in the previous lab.

1. If needed, log in to your sandbox as the Administrator.
2. Go to **Setup → Create → Objects** and create a custom object named Training with the information in the screenshot below:

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Training	Example: Account
Plural Label	Trainings	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Training_TR	Example: Account
-------------	-------------	------------------

Description

Created to keep track of training sessions for Accounts.

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a custom s-control
<input type="radio"/> Open a window using a Visualforce page

Content Name

--None--

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the always called "Name" when referenced via the API.

Record Name	Training Number	Example: Account Name
Data Type	Auto Number	
Display Format	TR-{0000000}	Example: A-{0000} <a href="#">What Is This?</a>
Starting Number	1	

**Optional Features**

Allow Reports  
 Allow Activities  
 Track Field History

**Deployment Status**

In Development  
 Deployed

**Object Creation Options (Available only when custom object is first created)**

Add Notes and Attachments related list to default page layout  
 Launch New Custom Tab Wizard after saving this custom object

3. Create the tab for the Training object and make it only accessible (Default On) for the **System Administrator** and the **VExample Primary Care Sales – Platform** profiles. Add the tab only to the **Veeva CRM Application**.
4. Create the following custom fields for the Training object and make it only accessible to the **System Administrator** and the **VExample Primary Care Sales – Platform** profiles.
  - a. Account – Master-Detail to Account – Put the Trainings related list only on the Professional page layout.
  - b. Start Date – Date field.
  - c. Status – Picklist field (values Open, Closed, Cancelled).
  - d. Mobile\_ID\_vod – Text (100) Unique/External\_ID Note: This field is required for users to be able to create Training records on iRep. Do not add this field to the Training page layout.
5. Test your new Training object by creating a new Training record.
  - e. Your sandbox does not have any accounts. From the My Accounts tab, create an Account named Melany Segnit.
  - f. Create a new Training record as in the screenshot below:

Training Edit  
TR-0000001

**Training Edit**

**Information**

Training Number	TR-0000001
Account	Melany Segnit
Start Date	5/28/2013 [5/28/2013]
Status	Open

Save Save & New Cancel

### Use Change Sets to Migrate Metadata from Sandbox to Production

- Allow inbound Change Sets in your Production org.
- Create and upload an outbound Change Set from your Sandbox.
- Validate and deploy the Change Set in your Production Org.
- Manually adjust “create”, “read”, “edit”, “delete” object permissions for the Training object.

In Production: Allow inbound Change Sets.

1. Login to the **Production** org as the Administrator.
2. Go to **Setup → Deploy → Deployment Settings** (select the “Don’t show this page again” checkbox) and **Continue**.
3. Click **Edit** beside your Sandbox name and select the **Allow Inbound Change Sets** checkbox.
4. Click **Save** and logout of Production.

In your Sandbox: Create and upload an outbound Change Set called Training Change Set.

1. If needed, login to the Sandbox as the Administrator.
2. Determine what components need to be moved.
3. Go to **Setup → Security Controls → View Setup Audit Trail** to determine what components should be included to the outbound Change Set. In this example, you’re only moving a single custom object.

Create the outbound Change Set.

1. Go to **Setup → Deploy → Outbound Change Sets** (again, select the “Don’t show this page again” checkbox) and **Continue**.
2. Click **New** and name the change set **Training Change Set**. Enter a description that will remind you what this Change Set is used for.
3. Click the **Save** button.

Add the Training custom object to the change set.

4. Click **Add** under **Change Set Components**, select **Component Type: Custom Object**, and check the box for the **Training object**. Finally, Click **Add to Change Set**.

Select the appropriate profiles that require visibility into the Training object when it is moved into Production.

5. Click the **Add Profiles** button under the **Profile Settings For Included Components** section and add the following profiles to the change set:
  - a. VExample Primary Care Sales – Platform
  - b. System Administrator
6. Add the remaining components including the all fields and page layouts to your changes. **Hint:** Clicking the View/Add Dependencies button in the Change Set Components section can help ensure all required pieces are included.
7. Make sure you add all dependent components to your change set including the Training tab and the Professional - Account page layout. Your change set component list should look like the screenshot below:

Change Set Components				
Action	Name	Parent Object	Type	API Name
Remove	<a href="#">Account</a>	Training	Custom Field	Account_TR
Remove	<a href="#">All</a>	Training	List View	All
Remove	<a href="#">Mobile ID_vod</a>	Training	Custom Field	Mobile_ID_vod
Remove	<a href="#">Professional</a>	Person Account	Page Layout	Professional
Remove	<a href="#">Start Date</a>	Training	Custom Field	Start_Date_TR
Remove	<a href="#">Status</a>	Training	Custom Field	Status_TR
Remove	<a href="#">Training</a>	Training	Tab	
Remove	<a href="#">Training</a>		Custom Object	Training_TR
Remove	<a href="#">Training Layout</a>	Training	Page Layout	Training Layout

Upload the Training Change Set.

8. Click the **Upload** button in the **Change Set Detail** section.
9. Select your **Production** org as the target and click the **Upload** button.
10. When the transfer is complete, the Administrator requesting the transfer will receive an email notifying him/her that the transfer is complete.

Validate and deploy the Change Set into Production. Keep in mind that it may take up to 30 minutes before the new change set can be validated.

1. Logout of the Sandbox.
2. If needed, login as the Administrator to production.
3. Validate and deploy the Change Set by going to **Setup → Deploy → Inbound Change Sets**.
4. Click the link for the **Training Change Set** change set.
5. Click **Validate** in the **Change Set Detail Section** and then click **OK**.
6. If your change set validated successfully, click **Deploy** and then click **OK** to deploy the Change Set into Production.
7. Go to **Manage Users → Profiles** and give the **VExample Primary Care Sales - Platform** profile full CRUD rights on the **Trainings** object.

Territory Fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Time Off Territory	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Trainings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Veeva Analytics Processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Test your changes in Production.

1. Log into Production as Sarah Jones.
2. From All Tabs, select the **Training** tab, create a new Training record as follows:

The screenshot shows the 'Training Edit' screen with a yellow header bar. At the top left is a dice icon, followed by the text 'Training Edit'. To its right is the identifier 'TR-0000000'. On the far right of the header are three buttons: 'Save', 'Save & New', and 'Cancel'. Below the header is a section titled 'Information' with a yellow background. This section contains four data entries: 'Training Number' with the value 'TR-0000000', 'Account' with the value 'Melany Segnit' and a magnifying glass icon for search, 'Start Date' with the value '5/28/2013' and a date range selector, and 'Status' with the value 'Open' and a dropdown arrow. There are also two small navigation arrows at the bottom of the 'Information' section.

3. Click **Save**.
4. Confirm the relationship to Melany Segnit by navigating to Melany Segnit's Account record and viewing the Training related list.

# Appendix 1: Survey Configuration (Reference Only)

## OBJECTIVES

- Define Surveys
- Define the Survey Data Model
- Create and publish a Survey

### What are Surveys?

Surveys are groups of questions that users answer about their accounts. Surveys are created to help users better understand their accounts by building a profile of the account, and are also used to gather information for market research to help brand messaging and to allocate sales resources.

The Survey module is designed specifically for business users to be able to create a Survey, add questions, define weights and segments, define target lists, and publish the Survey to end users online and offline, all without assistance from the IT department.

### Survey Data Model



### Survey Objects

**Survey:** The Survey record, containing header information such as name, start and end dates, and assignment rules.

**Survey Question:** Question records related to an individual Survey.

**Survey Target:** linking table between a Survey and an account. Ownership of this record is also used to determine which end user should complete the Survey for an account.

**Question Response:** Question response records for each question on a Survey, tied to the Survey Target record.

**Question:** The Question Bank. Records in this object can be used on multiple Surveys

Surveys can be either open or closed:

**Open Surveys** – users are allowed to administer the survey to any of their Accounts. Example: Surveys intended to ask generic questions to profile a doctor.

**Closed Survey** – users are only allowed to administer the survey to the Accounts defined as survey targets within the survey. Example: Surveys intended for HCPs who are Oncologists.

### Survey Configuration

Surveys have two main types of users:

**Designer** – end users who create and publish surveys.

**Rep/User** – end users who administer the surveys to their accounts (HCPs).

## Survey Permissions

To give users access to Surveys configure user profiles with the following permissions:

Objects for Survey	Designer	Rep/User
Survey_vod	R/C/E/D	R
Survey_Target_vod	R/C/E/D	R/C*/E
Question_vod	R/C/E/D	R
Survey_Question_vod	R/C/E/D	R
Question_Response_vod	R/C/E	R/C/E

\*Only if using open surveys.

## Page Layout Configuration

Place all necessary fields in the page layout for all 5 survey related page layouts.

### Visualforce Page Access

Enable all Survey related visualforce pages for the Survey Designers.

Sales Reps need access to the Survey Target Execution and Add Target visualforce pages.

### Tab Access Configuration

Enable custom object tabs for the Survey, Question, and Survey Target for the Survey Designers and the Survey Target tab for the Sales Reps.

## Demo: Create a Survey

In this demo, we will create a survey and then perform the steps to publish it. Most of the Survey accesss configuration has been performed in our training org.

1. If needed, login as the Administrator.
2. Select the **Survey Admin** application from the application dropdown. **Note:** This application has been defined in the training org. It is a good idea to create applications and group the tabs needed to perform certain tasks, such as Survey administration.
3. Click the **Surveys** tab.
4. Click the **New** button.
5. Select **Recurring** as the record type for the new record.
6. Click **Next**.

## Survey Record Types Configuration

There are four record types associated with Surveys and Survey Targets. When a Survey Target record is created, it takes the same record type as the related Survey.

**One Time** - one-time surveys can be submitted once per account per user.

**Recurring** - recurring surveys can be submitted multiple times before the end date.

**Coaching Report** – used for internal coaching reports surveys.

**User Survey** – used for surveying employees such as the Sales Reps.

You can add or remove the access to specific record types to user profiles to enable or disable access to record types.

7. Create a Survey with the following information:

<b>Field Name</b>	<b>Value</b>
Survey Name	Training Survey
Start Date	Yesterday's date
End Date	A month from today
Account Types	Professional – this will prevent the survey from being available for all other types of accounts.
Channels	CRM – this will make the survey available from within CRM. If you select CLM, then the Survey would be available from within CLM presentations.
Language	English – Survey questions in the selected country will be available for the Survey.
Product and Territory Product	Territory – this will make the Survey visible based on user territory.
Allow users to choose target?	Checked – this will make the Survey “Open”. Users will be allowed to administer the Survey to any of their Accounts. Closed Surveys would be available only to Accounts defined as Survey Targets within the Survey.
Included User Territory	Expand Corp and East District territories then select territories 101, 102, and 103. This will make the Survey and Survey targets visible to the users in the selected territories. Click the <b>Insert Selected</b> button.

8. Click the **Save** button.

Now that the Survey header is completed, we will continue to build the Survey by entering Survey Questions, Segments, and Survey Targets.

Create a new Survey Question and save it into the Question bank to be used again in future Surveys.

9. Click the **New Survey Question** button and create a question with the following information:

<b>Field Name</b>	<b>Value</b>
Type	Radio
Question Text	Does your office have Wifi access?
Answer Choices	Yes – Weight – 10 No – Weight - 0

10. Click the **Save and Add to Question Bank** button.

Add more questions from the Question bank.

11. Click the **Question Bank** button. **Note:** Our training org has been loaded with over 70 Survey Questions.

12. Select 1 Radio, 1 Picklist, and 1 Multiselect question and then click the **Add Selected (3)** button.

13. Close the **Question Bank** window.

Add Survey segments. The minimum and maximum weights of each selected question is summed to provide a Min Score and Max Score for the Survey. You can define Survey segments to categorize each Account surveyed into a segment. This can be useful when reporting. For example, you can run a report to show all Accounts that scored “high” on a Survey for targeting purposes.

14. In the **Segment** section, click the **Edit** button.

15. Click the **Add New Segment** button and add 3 segments.

- a. Low – from 0 to 1/3 of the max score.
- b. Med – from 1/3 + 1 to 2/3 of the max score.
- c. High – from 2/3 + 1 to Max Score.

Add Survey Targets into the survey. This is an optional step for this Survey since we marked it as an “open” Survey. The Survey Targets inserted into the Survey will be assigned to users based on the assignment criteria product or territory product.

16. In the Survey Targets section, click the **New Survey Target** button.

17. Select **My Accounts** from the view (**All**) dropdown. **Note:** You can define views in the My Accounts tab to filter the accounts based on specific criteria, such as specialty, and then use it to filter the accounts you want to add as Survey Targets.

18. Select the first 7 accounts and click the **Add Selected** button.

19. Close the **Add Survey Target** window.

Once a Survey is ready to be pushed to the field, the Survey Designer can publish it. Before you can publish Survey, you will need to enable the Multichannel Engine (MC Engine).

20. Go to **Setup → Develop → Custom Settings**.

21. Click the **Manage** link for **Veeva Settings**.

22. Click the **Edit** button.

23. Verify that the **Survey Publish Apex** Veeva Setting is set to **1**.

24. Click **Save**.

25. Clear Veeva Cache.

26. Click the **Survey Administration** tab.

27. In the Salesforce Credentials section, click the **Edit** button.

28. Enter the Administrator **User** and **Password**. **Note:** This is the credential the MC Engine will use to login back to CRM to update the Survey Targets assignments after it finishes the publishing process.

29. Click **Save**.

30. Click the **Validate Credentials** link and make sure the credentials are valid.

Publish your training survey.

31. Click the **Surveys** tab.

32. Click the **Go** button.
33. Click the link to go into the **Training Survey**.
34. Click the **Publish** button.
35. Click **OK**. It will take a few moments for the publishing to complete.
36. Refresh the browser window until the **Status** changes to **Published**.

Review the publishing log to verify the Survey Targets were assigned. This is only necessary if the Survey has Survey Targets.

37. Click the **Survey Administration** tab.
38. Check the **Publishing Jobs** section to see how many Survey Targets were assigned and how many were not assigned.
39. You can download the publishing logs and check them to see the reason targets are not assigned.
40. Click the **Survey Targets** tab.
41. Click the **Go** button.
42. Which Survey Targets for your Training Survey were assigned to Sarah Jones (sjones)?

---

Login as Sarah Jones and administer the Training Survey to an account.

1. Login as Sarah Jones.
2. Search for **Clinton Ackerman** (or one of the accounts you listed in step 41).
3. Scroll down to the **Survey targets** related list.
4. You should see the **Training Survey** listed as one of the Survey Targets.
5. Click the link to go into the **Training Survey**.
6. Provide responses to the questions and click the **Submit** button.
7. Select **Veeva CRM** from the applications dropdown menu.

## Independent Exercise #24 – Configure and Create a User Survey

Veeva customers are able to administer Surveys for feedback and analysis from internal users (employees).

Different than Surveys for external users, Survey Targets are users, not accounts, and can automatically be created based on selected Territories and Products. The user targeted for the Survey is also the owner of the Survey.

Configure internal surveys.

1. Give the Survey Designer user profile, in this case the System Administrator profile, access to the User Survey record type in the Survey object.
2. Add the Automatically create target records field in the Survey object to the User Survey Layout page layout. When selected, targets are automatically created based on territories and products selected for the survey.
3. Activate User\_Survey\_vod record type in the Survey Target object. **Note:** When Veeva releases new record types in existing objects, the new record types often will need to be made active before you can use them.

4. Give the Survey Designer, in this case the System Administrator profile, access to the User Survey record type in the Survey Target object.
5. Add the User lookup field in the Survey Target object to the Survey Target Layout page layout.
6. Clear Veeva Cache.

Create an internal survey.

7. As the Survey Designer (Administrator), create a user survey named “Internal Survey” with the following details:
  - a. Auto assign the survey based on user territories and include territories 101, 102, and 102.
  - b. Add three questions of your choice to the survey
  - c. Add two segments – low and high
  - d. Add Sarah Jones to the Survey Targets list.
8. Publish the survey.
9. Complete and submit the Internal Survey as Sarah Jones.