



Call Management

Veeva Professional Services

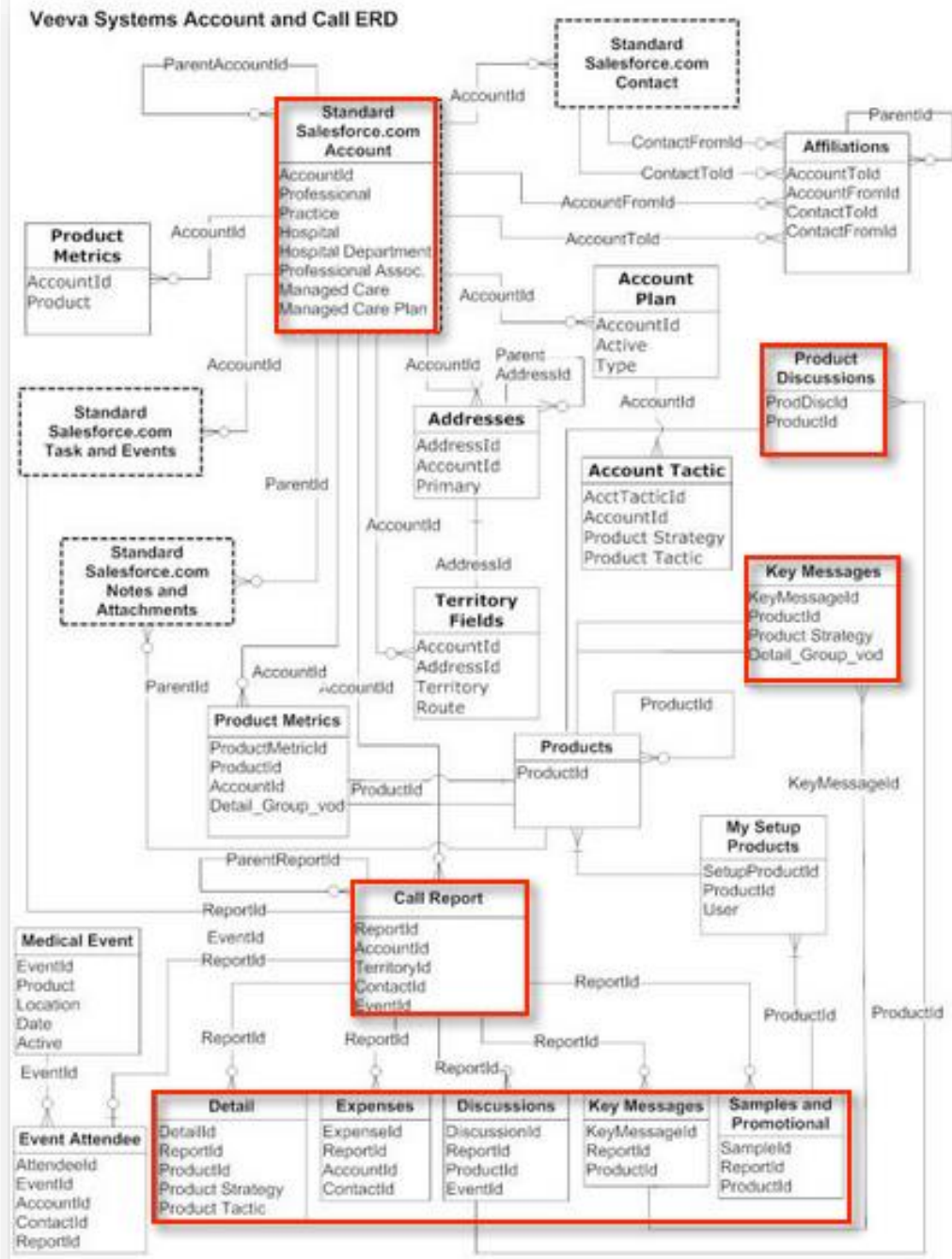
Module Objectives

- **Overview of Call Data Model**
- **Review Marker Fields and Section Signals**
- **Define call page layout sections including**
 - Call Attendees
 - Key Messages
 - Pre and Post Call Notes
- **Configure call page layout assignment**
- **Restrict and default Call record types by Account record types**



Veeva Call ERD

- **Calls and Accounts are the center of the Veeva data model**
- **Call Report object stores the main call header information**
 - Lookup relationship to Account object
 - Related objects are Call Detail, Call Expense, Call Discussion, Call Key Message, Call Sample



Call Reporting Functionality

Account
information

Call report details

Products detailed

Product
discussions

Key messages

Sample &
promotional item
disbursements

Pre-call and next
call notes

Follow-up
activities

The screenshot displays the 'Call Report' form in Veeva, organized into several sections:

- Professional Information:** Includes fields for Account (Makem Segal), Credentials (MD), Address (250 West 13th Street, New York, NY 10011), Date/Time (10/17/2017, 9:00 AM), Call Conflict Status (checked), Status (None), Call Type (None), and Sample Card Reason (None).
- Detailing Priority:** Features checkboxes for 'NEW', 'CHOLECAP', and 'ROCKMART', with a list showing '1 Cholecap' and '2 Restolar'.
- Cholecap Section:** Contains dropdowns for Product (Cholecap), Indication (Indication 1), and Discussion Topics (Alpaca).
- Restolar Section:** Contains dropdowns for Product (Restolar), Indication (Primary RLS), and Discussion Topics (Ad Effect).
- Key Messages:** Includes checkboxes for General Comment and Cholecap, with a table listing messages such as 'Sample First' and 'Product for Training Purposes'.
- Sample and Promotional Materials:** Features checkboxes for Cholecap items and a table with columns for City, Lot#, and a quantity field.
- Call Notes:** Includes text areas for Pre-Call Notes and Post-Call Notes.
- Follow-up Activities:** Includes an 'Add Line' button.

Call Report Configuration Overview

- **Configure any Call Page Layout**
 - Create your own Call record types and corresponding page layouts
 - Every call page layout is composed of a set of sections and standard or custom fields
- **Use Veeva CRM Marker Fields for specific functionality**
 - Call Attendees
 - Products Detailed
 - Samples
 - Key Messages
 - Expenses



Marker Fields

- Contain custom code that renders the user interface within a section of Call page layouts
 - Stores no data, only adds functionality to call page layouts
- Mainly used in the Call object
 - Also used in the Medical Inquiry and Cycle Plan objects
- Denoted with the prefix “zvod_” and the suffix “_vod”

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

Field Information

Field Label	zvod_Key_Messages	Object Name	Call
Field Name	zvod_Key_Messages_vod	Data Type	Checkbox
API Name	zvod_Key_Messages_vod__c		
Description	Marker field used to place Key Messages section on layout.		
Help Text			
Created By	demo user7 , 7/27/2011 3:33 AM	Modified By	Admin Henry , 7/27/2011 3:33 AM

Don't...

- Delete them
- Edit the name or data type field

You can only...

- Add or remove them from page layouts

Call Page Layout Configuration

- Identify the call page layout to be modified
- To edit a call page layout:
 - Setup → Create → Objects → Call → Page Layouts section
 - Click the Edit link for the desired page layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Custom S-Controls
- Related Lists

Quick Find Field Name

+ Blank Space	Activity Type	Address Line 1	Attendees
+ Section	Add Detail	Address Line 2	Attendee Type
Account	Add Key Message	Allowed Products	Call Name
Account Plan	Address	ASSMCA	Call Quality

Attendee Type Sample Attendee Type

Detailing Priority
zvod_Detailing ✓

Product Discussions (Header not visible)

Samples and Promotional Materials --np
zvod_Samples ✓

Key Messages --cat
zvod_Key_Messages ✓

- Create 1-column sections
- Place Marker fields in their perspective sections
- Use Section Signals to change the behavior of the Marker field

Section Signals

- **Used to configure the behavior of Marker fields**
 - Each Marker field has its own section signal(s)
- **Denoted by “--”**
 - Example: --nnc to hide the New Contact button in the Attendees section
 - For additional section signal examples, refer to the [Veeva CRM Online Help](#)
 - Can include multiple section signals in a single section property

The screenshot displays a Veeva CRM interface with two sections highlighted by red boxes. The first section, titled "Attendees --nnc", includes a sub-label "zvod_Attendees" and a checked checkbox. The second section, titled "Attendee Specific Fields --asf", contains a table with four columns: "Attendee Type", "Sample Attendee Type", "Subject", and "Sample Subject".

Attendee Type	Sample Attendee Type	Subject	Sample Subject
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Section Signals Examples

Attendees Section

- **--ao:** To make attendees optional
- **--nnc:** To hide the New Contact button
- **--su:** To include users when searching for attendees

Detail Section

- **--rd:** To require a user to select a detail in order to submit a call
- **--sd:** To capture signature for detail-only calls

Promotional Items Section

- **--ns:** No sampling
- **--np:** No Promotional Items

Always **Clear Veeva Cache** after configuring call page layouts with Marker Fields and Section Signals



Call Status

Professional Information

Account Clinton Ackerman Datetime 8/27/2012 8:00 AM

Credentials

Address 967 Millbrook Rd, Newton, NJ 07860

Sample Card #

Record Type Call Report

Call Conflict Status ✓

Status --None--

Call Type

Sample Card Reason

Planned

- Call is scheduled using the My Schedule call scheduler

Saved

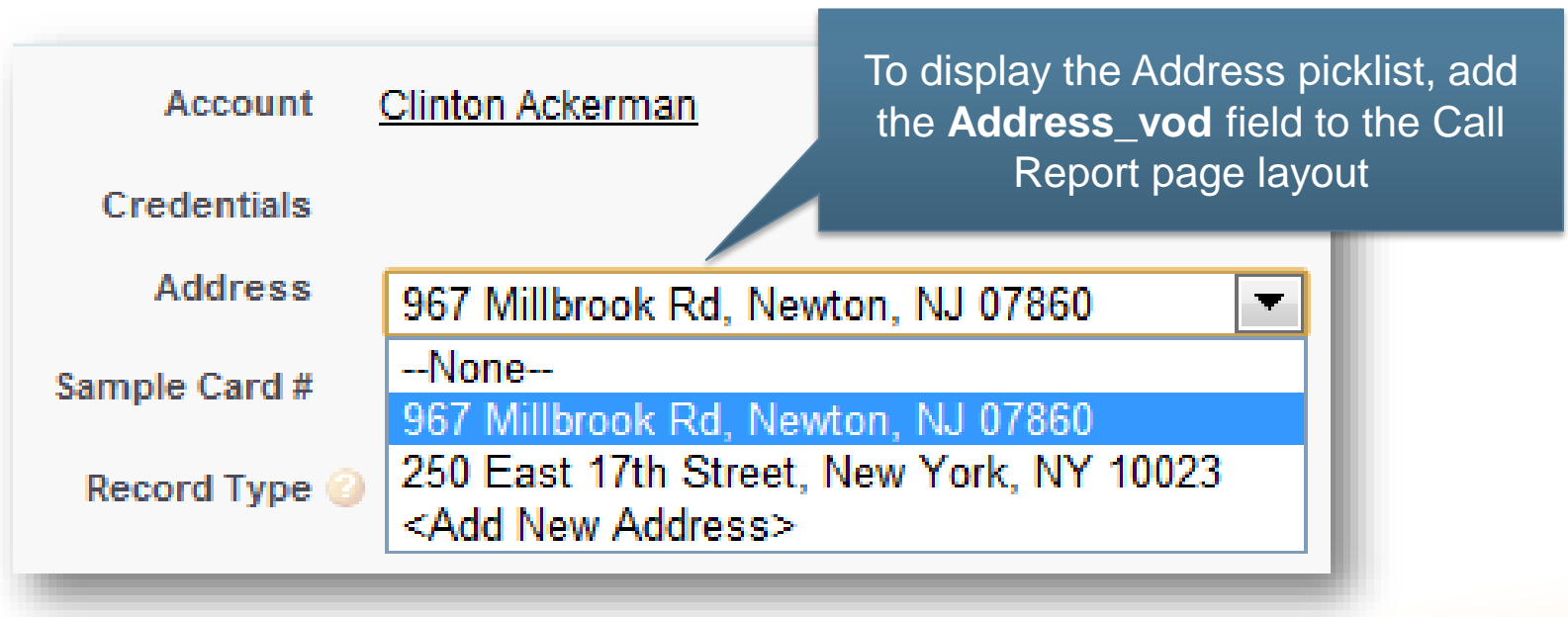
- Set once the user has saved the call by clicking the Save button on the call report

Submitted

- Call is completed
- All fields are locked and cannot be edited
- Must be unlocked for further editing

Call Address

- **Select address for the call from the address picklist**
 - Displays all **active** addresses for the selected Account
 - Selected address will be set as the Preferred Address in the user's TSF record



The screenshot shows a form with the following fields:

- Account**: Clinton Ackerman
- Credentials**
- Address**: A dropdown menu is open, showing the following options:
 - 967 Millbrook Rd, Newton, NJ 07860 (selected)
 - None--
 - 967 Millbrook Rd, Newton, NJ 07860
 - 250 East 17th Street, New York, NY 10023
 - <Add New Address>
- Sample Card #**
- Record Type** ?

A blue callout box points to the dropdown menu with the text: "To display the Address picklist, add the **Address_vod** field to the Call Report page layout".

Group Call - Attendees

- A list of all person Accounts associated through the Sphere of Influence and/or the Account Hierarchy with the selected business Account are available as potential attendees
 - Search for other Accounts to add as attendees or create new a Account

The screenshot shows a web interface titled "Attendees". At the top left, there are buttons for "Search" and "New Contact". Below these are several checkboxes with names: ☐ Ackerman, Clinton; ☐ Allen, Henry; ☒ ALONSO, SERGIO; ☐ Orlandoni, Enrico; and ☒ Segnit, Melany. Below the checkboxes are links for "Add All..." and "Remove All...". Under "Add All..." is a "Sample" section with a radio button and the text "ALONSO, SERGIO" and "Segnit, Melany". A blue callout box with a pointer to the "ALONSO, SERGIO" checkbox contains the text: "To display Attendees, place **zvod_attendees** marker field on the Call Report page layout".

- Separate call record is created for every attendee on the group call
 - Call record for the business Account becomes the parent for each attendee call record

Group Call - Attendee Specific Fields

- Ability to enter information specific to each attendee call record on a group call
- Create a section on the call page layout and with the --asf section signal
 - Add attendee specific fields as needed
- Renders section for each attendee

The screenshot displays the Veeva Group Call interface. At the top, there is a toolbar with buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below the toolbar is a 'Fields' panel on the left with a 'Quick Find' search bar. The 'Fields' panel lists: Buttons, Custom S-Controls, and Related Lists. The 'Quick Find' search bar is empty. To the right of the search bar is a table of fields:

Field Name	Field Name	Field Name	Field Name	Field Name
Blank Space	Activity Type	Address Line 1	Attendees	Call Type
Section	Add Detail	Address Line 2	Attendee Type	City
Account	Add Key Message	Allowed Products	Call Name	CLM
Account Plan	Address	ASSMCA	Call Quality	Color

Below the fields panel is the 'Attendees' section. It contains a list of attendees: Ackerman, Clinton, Allen, Henry, ALONSO, SERGIO, Orlandoni, Enrico, and Segnit, Melany. The 'Orlandoni, Enrico' attendee is selected. Below the list is a table of attendee-specific fields:

Attendee Type	Subject
Person_Account_vod	Cholecap
Contact_vod	AMX

A red box highlights the 'Attendee Specific Fields --asf' section header and the 'Attendee Type' and 'Subject' fields for the 'Segnit, Melany' attendee. A red arrow points from the 'Attendee Type' field of the 'Segnit, Melany' row to the 'Attendee Type' field of the 'Attendee Specific Fields --asf' section header.

Group Call – Unique Activities

- **Attendee specific activities on group calls can be captured**
- **Enables users to capture unique information for each HCP marked as an Attendee**
 - This allows the Business Account Call page to act as a hub to capture the details for each attendee call
 - Attendee specific details include:
 - Detailing, Sampling, Media, Call Objectives
- **This feature only pertains to Group Calls for Business Accounts**
 - Give FLS access to and add the `zvod_Unique_Activities_vod` marker field to the desired Call page layout in the section containing the `zvod_Attendee_vod` field
- **Available online in view only mode and offline**



Group Call – Unique Activities

Users can jump from attendee to attendee call and view summary call details. Can also perform attendee specific actions such as send email, create a medical inquiry, sample/capture signature, etc.

Cancel Group Call Media Sign

Attendees

Add All Remove All Search

<input checked="" type="checkbox"/>	Aulicino, Patricia	<input checked="" type="checkbox"/>	Godin, Willis E	<input type="checkbox"/>	Jones, Janet
<input checked="" type="checkbox"/>	Rubenstein, Jay L	<input checked="" type="checkbox"/>	Schultz, Diane	<input type="checkbox"/>	Smith-Brinton, Marcia
<input type="checkbox"/>	Yegya-Raman, Sivaraman				

Record Details

Aulicino, Patricia
2 3

Godin, Willis E
2 1

Rubenstein, Jay L
2 3

Schultz, Diane
2 1 Signed

Other Non-HCP Attendees

Other Attendees +

Call Notes

Icon provides access to the Attendee Call

Cancel Jump to Schultz, Diane Media Sign

Jump to

Rubenstein, Jay L
2 3

Aulicino, Patricia
2 3

Godin, Willis E
2 1

Respira

Add Other...

1. Cholecap
2. Labrinone

Promotional Items

Sample

Alternative Sample

High Value Promotional

Recipient Schultz, Diane

Item Qty



Group Call – Unique Activities

- When using group call unique activities, to capture Attendee Specific Fields
 - Add a new section to the Call page named Unique_Person_Fields_vod
- Fields contained within this section display on attendee call pages for group calls and on individual call pages

This screenshot shows the configuration for a group call page. It consists of three sections, each with a red border:

- Attendees**: Contains `zvod_Attendees` (checked) and `zvod_Unique_Group_Activities_vod` (checked).
- Unique_Person_Fields_vod**: Contains `Favorite Sport` and `Sample Favorite Sport`.
- Detailing Priority**: Contains `zvod_Detailing` (checked).

This screenshot shows the call page for "Allen, Hank". The "Unique_Person_Fields_vod" section is highlighted with a red border and contains the following fields:

- Account**: A text field containing "Hank Allen".
- Favorite Sport**: A dropdown menu with "Basketball" selected.

A red arrow points from the "Unique_Person_Fields_vod" section in the configuration above to this section on the call page.

Product Details

- Allows users to indicate which products were detailed and in what order
 - User's My Setup controls which detail products are available for selection
- Products selected automatically have corresponding line(s) in the Product Discussions and Key Messages sections

Detailing Priority

☐ AMX ☒ Cholecap ☒ Restolar ☒ XYKEX

1 Cholecap
↑ 2 XYKEX
↑ 3 Restolar

To activate Product Details, add **zvod_detailing** marker field to the Call Report page layout

Key Messages

- **Branded marketing messages associated with product strategies and product tactics**
 - Usually determined by Marketing team and approved by Legal

Key Messages		
<input type="checkbox"/> General Comment (Efficacy)	<input type="checkbox"/> General Comment 1	<input type="checkbox"/> General Comment 3
<input type="checkbox"/> General Comment (Safety)	<input type="checkbox"/> General Comment 2	
<input type="checkbox"/> Cholecap	<input checked="" type="checkbox"/> Cholecap Message - High Prescr...	<input type="checkbox"/> Cholecap Message
Product	Message	Description
Cholecap	Cholecap Message - High Prescriber	High Prescriber message

General Key Messages not related to a product can be displayed

Key Messages associated with each product detailed are automatically added to the call

Key Messages Configuration

- To enable Key Messages, place the `zvod_key_messages` marker field on the Call page layout

Key Messages

☐ General Comment (Efficacy) ☐ General Comment 1 ☐ General Comment 3

☐ General Comment (Safety) ☐ General Comment 2

☐ Cholecap ☒ Cholecap Message - High Prescr... ☐ Cholecap Message - No Sebement...

Product	Message	Description	Vehicle	Reaction
Cholecap	Cholecap Message - High Prescriber	High Prescriber message	Document	Positive

Hide the Reaction field by removing FLS access to the it on the Call Key Message object

Key Messages

■ All Tabs → Key Messages

Key Message Detail		Edit	Delete	Clone	Sharing	Submit for Approval
Message	Safety First	Owner	Admin Student10 [Change]			
Description	Created for training purposes.	Media File CRC				
Product	Cholecap	Media File Name				
Product Strategy		Category	Efficacy			
Display Order	1	Active	<input checked="" type="checkbox"/>			
Status		Segment				
		Slide Version				

Go to All Tabs → Key Messages to create a new key message and associate with a product

■ All Tabs → Product Catalog

Product Catalog Detail		Edit	Delete	Clone
Product Name	Cholecap	External ID	1001	
Parent Product		Manufacturer	Verte BioTech, Inc.	
Product Type	Detail	Product info		
Therapeutic Area	Cardiology	Distributor		
Therapeutic Class	High Cholesterol (Statins)	Consumer site		
Description		No Details	<input type="checkbox"/>	
Display Order		No Metrics	<input type="checkbox"/>	
Sample Quantity		No Cycle Plans	<input type="checkbox"/>	
Quantity Per Case		User Aligned	<input type="checkbox"/>	
Sample U/M		Restricted	<input type="checkbox"/>	
Sample Quantity Bound	<input type="checkbox"/>	Restricted States		
		Require Key Message On Detail	<input checked="" type="checkbox"/>	

Go to Product Catalog to indicate whether a Key Message is required when a product is detailed via the **Require Key Message On Detail** checkbox

Pre-Call and Next Call Notes

- **Next Call Notes recorded on a call will automatically appear in the Pre-Call Notes field for the next call**
 - My Schedule also displays the Pre-Call Notes field
- **Gives insight into the activities or action items that were recorded on the previous call**

The screenshot shows a 'Call Notes' section with two text input fields. The 'Pre-Call Notes' field contains the text 'Showed great interest in Restolar'. The 'Next Call Notes' field contains the text 'Bring Restolar promotional items.' Below each field is a blue callout box with white text. The callout for the Pre-Call Notes field says 'Use FLS to hide Pre Call Notes from the Call & My Schedule'. The callout for the Next Call Notes field says 'Remove Next Call Notes from the page layout to hide the field'.

Call Notes

Pre-Call Notes Showed great interest in Restolar.

Next Call Notes Bring Restolar promotional items.

Use FLS to hide Pre Call Notes from the Call & My Schedule

Remove Next Call Notes from the page layout to hide the field

More Actions

- A button and dropdown menu called More Actions can be added to the Call Report page layout
 - Allow users to create a new Medical Inquiry, a new Order, and Send an Approved Email directly from a Call Report

Call Report
New Call Report

<< My Schedule

Call Report

Save Save & New Submit Cancel More Actions ▼

Professional Information

Account Henry Allen

Credentials

Address 97 W Parkway, Pompton Plains, NJ 07444 ▼

Sample Card #

Datetime 7/29/2011 8:00 AM ▼

Status --None-- ▼

Call Type

Record Type Call Report ▼

Sample Card Reason --None-- ▼

New...
Medical Inquiry

Call Submission Cutoff Date


- **Configure a cutoff date for call submission**

- Prevents users from submitting calls recorded in the previous month after a set date in the current month

- **Configure the Call Submission Monthly Window Veeva Message**

- Syntax: Month,Day;

Call Submission Monthly Window 1,10;2,10;3,10;4,10;5,10;6,10

 Call Report
C000003145

<< My Schedule

Call Report

Save Save & New Submit Cancel More Actions ▼

Errors

You may not submit a call past 2/10/2014 for calls placed in January

Professional Information

Account

Glennora Broadwell

Preferred Name

Credentials

Address

103 Cedar Dr, Newton, NJ 07860 ▼

Record Type

Call Report ▼

Status

Planned

Call Type

Call Only

Datetime

1/13/2014 10:00 AM

Call Conflict Warning

- To avoid call planning conflicts, display a warning sign according to call conflict date thresholds
- Helps identify calls on accounts for which other calls have already been scheduled within a specified time period
- Warning is visible on My Schedule and within a Call Report

Professional Information

Account	<u>Clinton Ackerman</u>	Datetime	4/1/2015	9:00 AM
Credentials		Call Conflict Status	⚠	
Address	967 Millbrook Rd, Newton, NJ 07860	Status	Planned	
Sample Card #		Call Type	Call Only	
Record Type	Call Report	Sample Card Reason	--None--	

Call Conflict Warning Configuration

- Add the **zvod_Call_Conflict_Status_vod** field to the desired Call page layouts
- Set the **Call_ScheduleConflict_Threshold_vod** Veeva Setting to the desired value
- Value must be between 0 and 3:
 - 0 = no conflict control
 - 1 = system checks if another call is present on the selected date
 - 2 = system checks if another call is present 1 day before or after the selected date
 - 3 = system checks if another call is present within 2 days before or after the selected date
- This feature is supported on the online and offline



Call Page Layout – Record Type

- Assign a Call page layout for specific Call record type to appropriate profile using the page layout assignment matrix in the Call object
 - Setup → Create → Objects → Call → Page Layouts section and click the Page Layout Assignment button

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment				
Profiles	Record Types			
	Master	Call Report vod	Event vod	Meeting Brief vod
Contract Manager	Specialty Layout	Primary Layout	Event Layout	Managed Markets Layout
EMEA - Managed Markets Sales - Platform	Specialty Layout	Primary Layout	Event Layout	Managed Markets Layout
EMEA - Primary Care Sales - Platform	Specialty Layout	Primary Layout	Event Layout	Managed Markets Layout
EMEA System Administrator	Specialty Layout	Primary Layout	Event Layout	Managed Markets Layout
Managed Markets Director	Specialty Layout	Primary Layout	Event Layout	Managed Markets Layout
Managed Markets Director - Platform	Specialty Layout	Primary Layout	Event Layout	Managed Markets Layout
Managed Markets Sales	Specialty Layout	Primary Layout	Event Layout	Managed Markets Layout
Managed Markets Sales - Platform	Specialty Layout	Primary Layout	Event Layout	Managed Markets Layout



Call Record Type

- The Record Type field can be placed on the Call page layout allowing users to change a Call's record type
 - Add the Record Type field to all Call page layouts
 - The Call page layout redraws when a different record type is selected

The screenshot displays the 'Call Report' form in a web application. At the top, there are buttons for 'Save', 'Save & New', 'Submit', and 'Cancel'. The form is divided into sections: 'Professional Information' and 'Attendees'. Under 'Professional Information', there are fields for 'Account' (Chilton Memorial Hospital), 'Address' (123 Main Street, Allentown 08514), 'Sample Card #' (empty), 'Sample Card Reason' (--None--), 'Datetime' (8/15/2011 8:00 AM), 'Status' (--None--), and 'Call Type'. The 'Record Type' field is highlighted with a red box, and its dropdown menu is open, showing options: 'Call Report' (selected), 'Call Report', 'Event', 'MSL Meeting Brief', and 'Meeting Brief'. The 'Attendees' section at the bottom has a 'Search' button.

Call Report [Save] [Save & New] [Submit] [Cancel]

Professional Information

Account: Chilton Memorial Hospital

Datetime: 8/15/2011 8:00 AM

Address: 123 Main Street, Allentown 08514

Status: --None--

Sample Card #:

Sample Card Reason: --None--

Call Type

Record Type ?
Call Report
Call Report
Event
MSL Meeting Brief
Meeting Brief

Attendees

Search

Restricting Call Type by Account Type

- **Removing the Record a Call button from Account pages only affects calls recorded online**
 - Record a Call menu still appears offline for all Account record types
- **Restrict the Call record types available when recording a call for specific Account record types both online and offline**
 - When recording a call for hospitals, only allow calls of type Call Report
 - Prevent users from recording calls for Hospital Departments both online and offline



Restricting Call Type by Account Type

Use the **ALLOWED_CALL_RECORD_TYPES** Veeva Message/Veeva Setting to configure – enter the account and call type labels



Ex: For Hospital Accounts, only allow calls of type Call Report

Hospital_vod,Call Report_vod;;



Ex: Prevent calls of any type from being recorded for Hospital Departments

Hospital Department_vod;;

Defaulting Call Type by Account Type

- **Default the Call record type based on the selected Account record type for the call**
 - Overrides the default record type defined in the user's profile

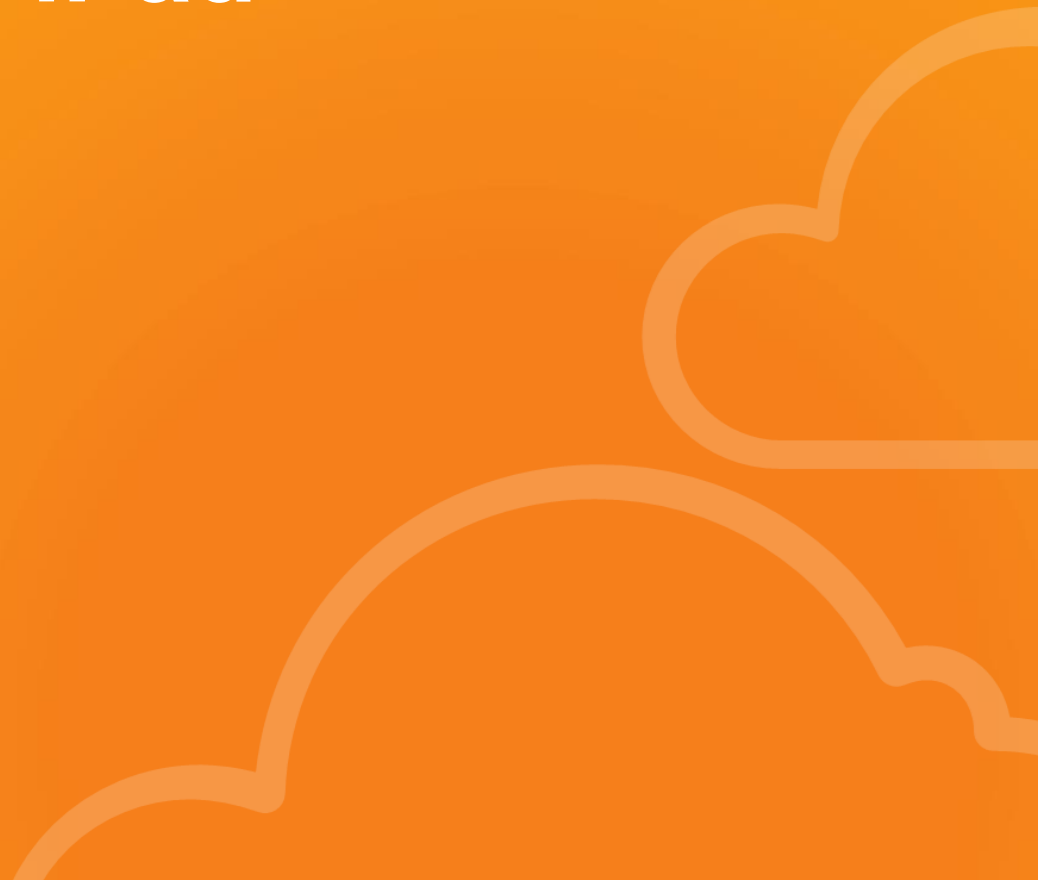
Use the `DEFAULT_CALL_RECORD_TYPE` Veeva Message/Veeva Setting to configure



Make Meeting Brief calls the default record type for Hospital calls

```
Hospital_vod,Meeting Brief_vod;;
```

Call Reports on iPad



Call Reports

- On a call report, users can record products detailed and key messages, capture signature for sampling, display media and capture customer reactions

The screenshot displays the Veeva Navigator application interface. On the left is a sidebar with a 'Views' section containing 'All Accounts', 'Hospital Departments', 'Hospitals', and 'My Accounts' (highlighted in blue). The main area is titled 'My Accounts' and lists two accounts: 'A Center For Dermatology' and 'Ackerman, Clinton'. A callout box points to the 'A Center For Dermatology' account, showing a context menu with three options: 'New Call' (highlighted with a red border), 'Launch Media', and 'Send Email'. A blue speech bubble above the menu contains the text: 'Tap the actions button on the account and then select New Call'.

Navigator	
Account Type	My Accounts
Business Accounts ✓	
Person Accounts ✓	
Views Account Lists	
All Accounts	A Center For Dermatology 39 Newton Sparta Rd Newton, NJ 07860 (973) 383-7979
Hospital Departments	
Hospitals	Ackerman, Clinton 967 Millbrook Rd Newton, NJ 07860
My Accounts	

Call Reports - Products

- Products marked as “Favorites” in My Setup will display by default under specified Detail Groups
- Products not in a Detail Group will be listed under Common

Detailing Priority

<input type="checkbox"/> AlmeidaCLMProd	<input type="checkbox"/> Cardiocap	<input type="checkbox"/> Cert Product
<input checked="" type="checkbox"/> Cholecap	<input type="checkbox"/> Respira	<input type="checkbox"/> Restolar
<input type="checkbox"/> Supemra		

1. Cholecap

Add Section

Call Objectives

CLM Details

Surveys

Presentation ID	Product	Key Message	Track Element Description	Answer
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Samples and Promotional Materials

Sample +

Item	Lot #	Qty
Cholecap 10mg	123456	2

Call Reports - Signature Capture

- Users can capture signature when dropping samples
- Click the Sign button on the call report to open the signature page
- Disclaimer text can be displayed before signature
 - Enable the Position_Disclaimer_Above_Signature_vod custom setting

The screenshot shows a software interface for signature capture. At the top left, it displays 'Cholecap 10mg (2, Cases)', 'Lot # 123456', and 'Manufacturer Veeva Biotech, Inc.'. On the right, a blue callout bubble says 'Click **Accept** after signature is captured'. Below this, the user's name 'Clinton Ackerman' is shown with a profile icon, followed by their address '967 Millbrook Rd, Newton, NJ 07860' and license '43ZA00048000'. There are 'Accept' and 'Cancel' buttons. Below the user info, the date and time 'January 24, 2013, 5:18 PM' are shown, along with a 'Request Receipt' checkbox and a 'Clear' button. A large signature box contains a handwritten signature and a large orange 'X'. A blue callout bubble points to the signature with the text 'Doctor signs for the sample'. At the bottom, a disclaimer text reads: 'I hereby certify that I have requested the listed Samples and Quantities and all information pertaining to my License is valid and accurate.' A blue callout bubble points to this text with the label 'Disclaimer after signature'.

Disclaimer after
signature

Module Summary

- **Reviewed Call Data Model**
- **Defined Marker Fields and Section Signals**
- **Defined call page layout sections including**
 - Call Attendees
 - Call Discussion
 - Key Messages
 - Pre and Post Call Notes
- **Configured call page layout assignment**
- **Restrict and default Call types by Account record types**



Labs

Account Call Report Configuration

