



Sample Management

Veeva Professional Services

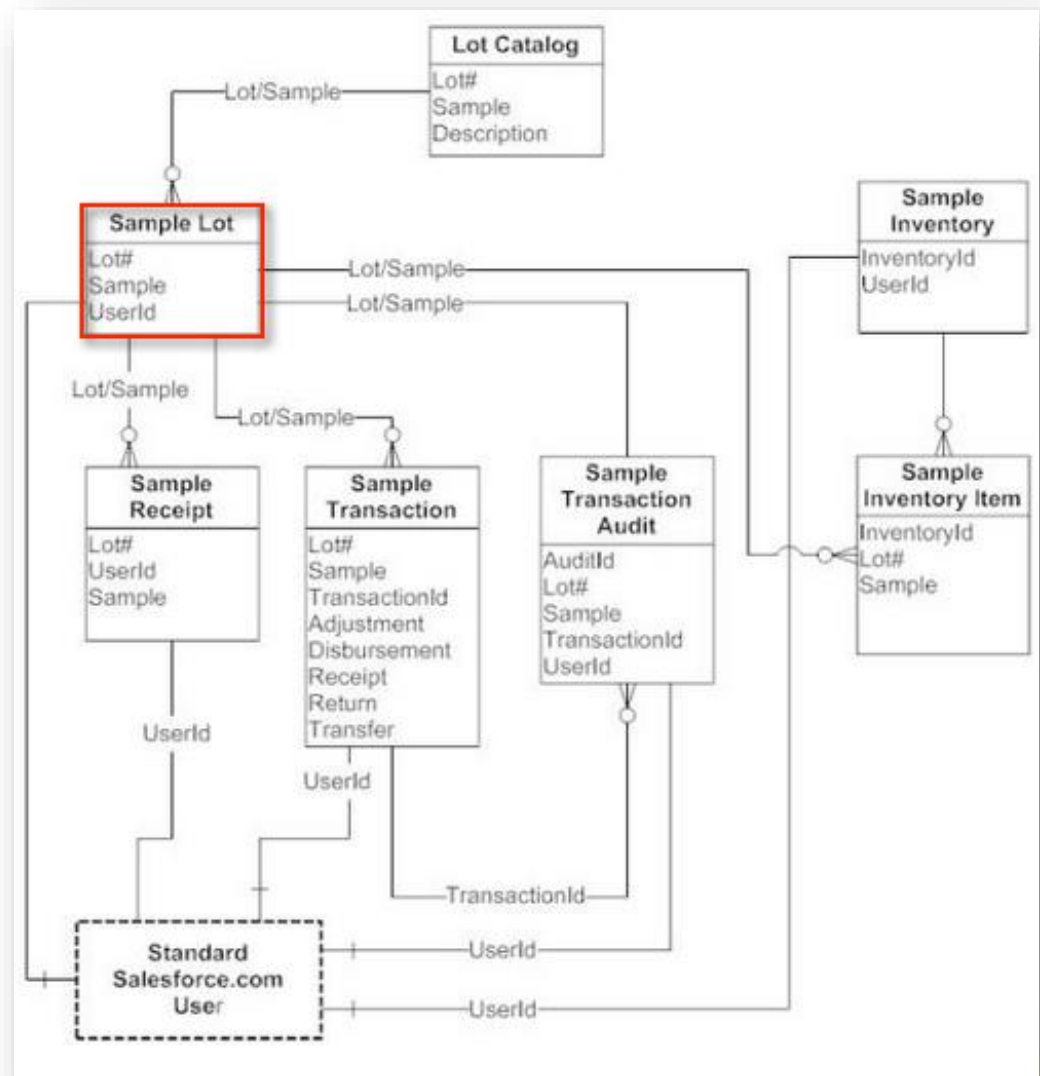
Module Objectives

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



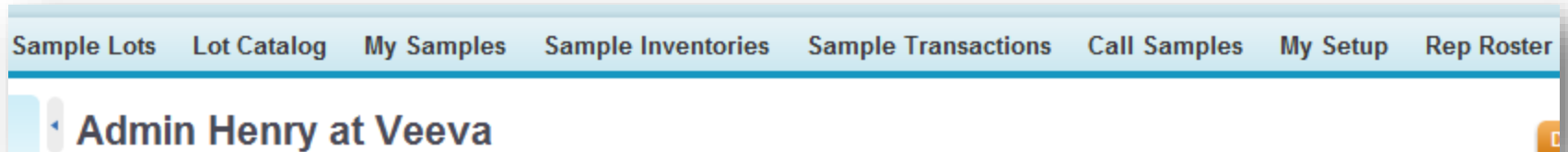
Samples Management ERD

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



Sample Admin Application

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

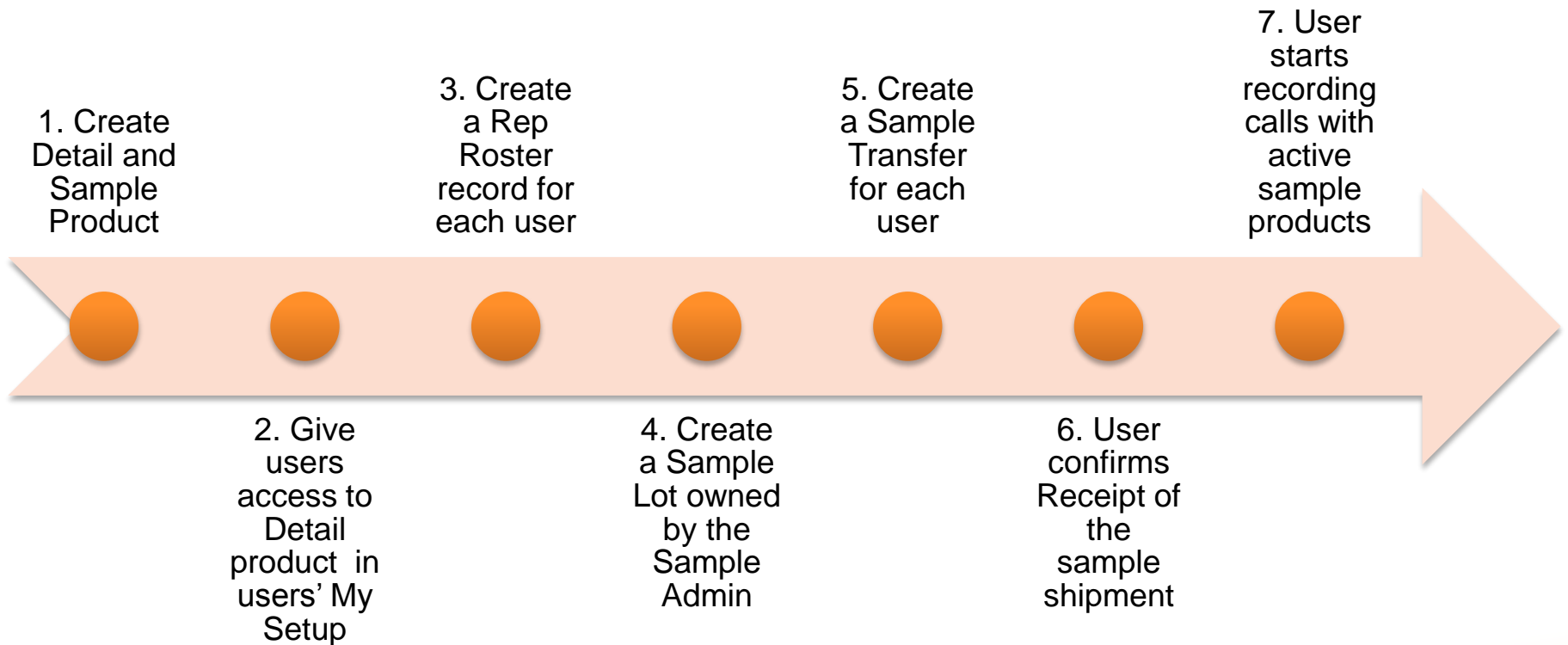


- **Make visible to System Administrators and other users who may need to perform sample administration tasks**



Manual Sample Setup

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



1. Product Catalog

- **Create Detail and Sample products**

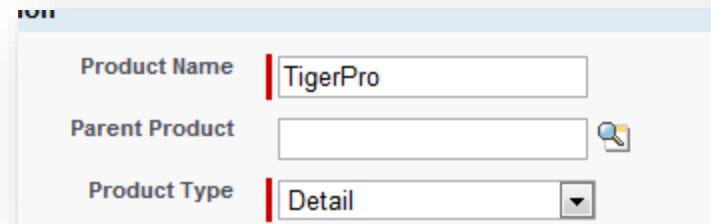
- Go to All Tabs → Product Catalog

- **Create a product of type Detail**

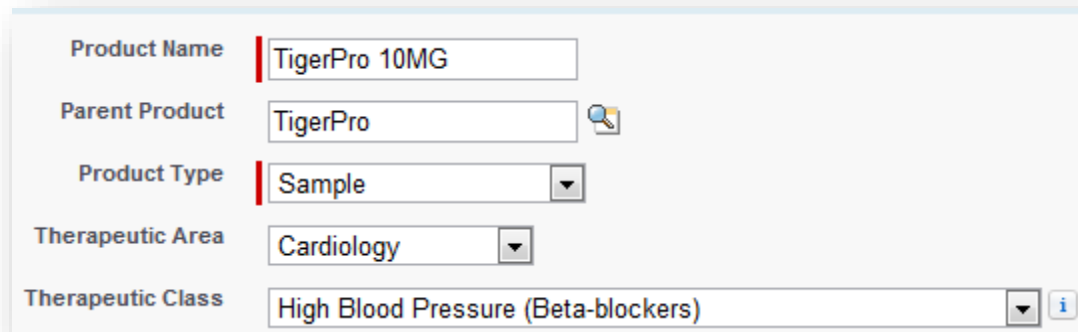
- Leave Parent Product blank

- **Create a product of Type Sample**

- Set the Parent Product to the Detail product



A screenshot of a web form titled "ion" (partially visible). The form has three fields: "Product Name" with the value "TigerPro", "Parent Product" which is empty with a magnifying glass icon to its right, and "Product Type" which is a dropdown menu set to "Detail".



A screenshot of a web form for creating a product. It contains six fields: "Product Name" with the value "TigerPro 10MG", "Parent Product" with the value "TigerPro" and a magnifying glass icon, "Product Type" which is a dropdown menu set to "Sample", "Therapeutic Area" which is a dropdown menu set to "Cardiology", and "Therapeutic Class" which is a dropdown menu set to "High Blood Pressure (Beta-blockers)" with an information icon to its right.

2. Update My Setup

- Give users access to Detail products

- Go to All Tabs → My Setup
- Search for and edit each user's My Setup
- Select the product the user is allowed to detail on call reports

- The object is called My Setup Products


Company Products		
<input checked="" type="checkbox"/> AMX Oncology	★	<input type="checkbox"/> AKK OXHES N4A ★
<input checked="" type="checkbox"/> BirdPro Cardiology	★	<input checked="" type="checkbox"/> CABASES Oncology ★
<input checked="" type="checkbox"/> Cholecap Cardiology	★	<input checked="" type="checkbox"/> CatPro ★
<input type="checkbox"/> KAMICXAK ★		<input type="checkbox"/> CKASIXYN OXC ★
<input checked="" type="checkbox"/> Labrinone ★		<input type="checkbox"/> DogPro ★
<input type="checkbox"/> KAPAKE ★		<input type="checkbox"/> KEPPSA ★
<input type="checkbox"/> MISAPEXIN ★		<input type="checkbox"/> NEOCKASIXYN ★
<input type="checkbox"/> OXHES N2 ★		<input type="checkbox"/> PASKODEK ★
<input type="checkbox"/> PISIXON OXC ★		<input type="checkbox"/> Restolar Cardiology ★
<input type="checkbox"/> SEQUIP2 ★		<input type="checkbox"/> SEQUIP ★
<input type="checkbox"/> SOKPADOK ★		<input checked="" type="checkbox"/> TigerPro ★

3. Rep Roster

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

Username

sjones@veeva.com

 Rep Roster

Sarah Jones

[Back to List: Analytic Markets](#)

Rep Roster Detail

Edit View Signatures


User Name	Sarah Jones	Territory	101
Username External Id	sjones@veeva.com	Owner	Admin Student1 [Change]

▼ Contact Information

Address Line 1	123 Main St	Home Phone	(973) 555-4567
Address Line 2		Mobile Number	
City	Newark	Fax Number	
State	NJ		
Zip	01863		

Sample Lots

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

New Sample Lot		Change Owner			
				A B C D E F G H I J	
<input type="checkbox"/>	Action	Lot # ↑	Sample	Owner Alias	Expiration Date
<input type="checkbox"/>	Edit Del	123456	Cholecap 10mg	AStud	12/21/2023
<input type="checkbox"/>	Edit Del	123456	Cholecap 10mg	siones	12/21/2023
<input type="checkbox"/>	Edit Del	123Dalian	SnakePro 10MG	AStud	6/12/2013
<input type="checkbox"/>	Edit Del	123Dalian	 SnakePro 10MG	siones	6/12/2013
<input type="checkbox"/>	Edit Del	789012	Restolar 1 mg	AStud	12/23/2023
<input type="checkbox"/>	Edit Del	789012	Restolar 1 mg	siones	12/23/2023
<input type="checkbox"/>	Edit Del	TP1234	TigerPro 10MG	AStud	8/31/2012

4. Create Sample Lot(s) as Admin

- **While logged in as the Administrator**

- Go to All Tabs → Sample Lots → click the New button

- **Create the Sample lot which will then be used to transfer Samples to users**

- Use either the Sample or Product (lookup) to associate the Sample Lot to the Sample Product

Sample Lot Edit [Save] [Save & New] [Cancel]

Information

Lot # [TP1234]

Sample [TigerPro 10MG]

Product [TigerPro 10MG] [lookup icon]

U/M [Cases] [dropdown arrow]

Expiration Date [10/31/2017] [10/10/2015]

Active [checked]

Take this field off the page if using the Product lookup

5. Transfer Samples to Users

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

Sample Transfer Submit Cancel

Information = Required

Transaction Id

Type Transfer

Transferred From Admin Student1

Submitted Date

Transferred Date 6/15/2012

Comments Transfer to Sarah.

Receipt

Transfer To Information

Transfer To Sarah Jones

City Newark

Address Line 1 123 Main St

State NJ

Address Line 2

Zip 01863

Sample Information

Sample TigerPro 10MG

U/M Box

Lot # TP1234

* Quantity 50

Address information populates automatically based on user's Rep Roster

- Click the Submit button



6. User Confirms Sample Receipt

- **Login as the end-user and confirm sample receipt**

- Go to My Sample tab → Pending Sample Receipts section
- Click the Confirm link
- Enter the Confirmed Quantity and click Save

Action	Sample	Lot #	Transferred Date
Confirm	TigerPro 10MG	TP1234	6/15/2012

Confirm Receipt

Transferred From

Admin Student1

Shipment ID

ST-0000054

Sample

TigerPro 10MG

Lot #

TP1234

Quantity

50

U/M

Box

Comments

Transfer to Sarah.

Confirmed Quantity

50

Confirmed Comments

Save

Cancel

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

7. User Records a Call with Samples

- Record a call to make sure the sample product displays

Detailing Priority

Common	<input type="checkbox"/> Labrinone	<input checked="" type="checkbox"/> TigerPro
Cardiology	<input type="checkbox"/> Clinical Trials	
	<input type="checkbox"/> Cholecap	
Oncology	<input type="checkbox"/> Clinical Trials	
	<input type="checkbox"/> AMX	

1 TigerPro
[Add Other...](#)
[Add Section](#)

[Copy](#) [Del](#) Product: Indication:

[Add Section](#)

Key Messages

<input type="checkbox"/> General Comment	<input type="checkbox"/> General Comment 1	<input type="checkbox"/> General Comment 2	<input type="checkbox"/> General Comment 3
--	--	--	--

Surveys

Samples and Promotional Materials

<input type="checkbox"/> Ship Cholecap 10mg (BRC)		
<input type="checkbox"/> Cholecap 10mg	<input type="checkbox"/> Restolar 1 mg	<input checked="" type="checkbox"/> TigerPro 10MG
<input type="checkbox"/> Cholecap Ed Poster	<input type="checkbox"/> Restolar Video	

	Qty	Lot #
TigerPro 10MG	<input type="text"/>	<input type="text" value="--None--"/> +



Sample Transactions



My Samples

- Veeva custom tab to perform sample related tasks

My Samples

Sample Transactions
Use the sample transaction links below to record sample mo

[View Transactions](#)
[New Adjustment](#)
[New Transfer](#)
[New Return](#)
[Print Transfer Worksheet](#)

View and create different types of sample transactions

Sample Storage Location
The following is your official Sample Storage Location. Please click the link to manage your Sample Storage Location information.

[Sarah Jones](#)
123 Main St
Newark, NJ 01863

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

Action	Sample	Lot #	Transferred Date	Transferred From
Confirm	Restolar 1 mg	789012	12/23/2013	Admin User

[View Sample Inventory Orders](#)

Sample Transactions

- **My Samples tab → View Transactions link**
- **Stores all the different types transactions in the system**

- Receipts
- Adjustments
- Transfers
- Returns
- Disbursements

<input type="checkbox"/>	Edit Del	ST-0000051	Adjustment	SnakePro 10MG	123Dalian	-5
<input type="checkbox"/>	Edit Del	ST-0000052	Return	SnakePro 10MG	123Dalian	10
<input type="checkbox"/>	Edit Del	ST-0000053	Disbursement	Cholecap 10mg	123456	10
<input type="checkbox"/>	Edit Del	ST-0000054	Transfer	TigerPro 10MG	TP1234	50
<input type="checkbox"/>	Edit Del	ST-0000055	Receipt	TigerPro 10MG	TP1234	50
<input type="checkbox"/>	Edit Del	ST-0000056	Disbursement	TigerPro 10MG	TP1234	5

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

Transfer from One User to Another

- **My Samples → New Transfer link**

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

Sample Transfer Submit Cancel

Information | = Required

Transaction Id		Type	Transfer
Transferred From	Sarah Jones	Submitted Date	
Transferred Date	6/15/2012	Status	--None--
Comments			

Transfer To Information

Transfer To	Steve Martin	City	Allentown
Address Line 1	2 Main Street	State	NJ
Address Line 2		Zip	08514

Sample Information

Sample	TigerPro 10MG	U/M	Box
Lot #	TP1234	Quantity	20


Sample Returns

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

Sample Return Submit Cancel

Information = Required

Transaction Id

Adjust For 

Adjusted Date

Type

Submitted Date

Status

Comments

Return Address Information

Return To

Address Line 1

Address Line 2

City

State

Zip

Sample Information

Sample

Lot #

Quantity

Rep Roster record must exist for each Return To picklist value, e.g., HQ

Sample Adjustments – Sample Lot Quantity

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

Sample Adjustment Submit Cancel

Information = Requ

Transaction Id		Type	Adjustment ▼
Reason	Lost ▼	Submitted Date	
Adjust For	Sarah Jones 🔍	Status	--None-- ▼
Adjusted Date		Comments	<div></div>

Sample Information

Sample	--Select Sample-- ▼	Quantity	0
Lot #	--Select Lot-- ▼		

Sample Adjustments – Unlock Call

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



Sample Adjustments – Unlock Call

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




Sample Inventory

- Create a physical inventory count of all the Sample Lots that are marked as Active for specific Users
- Managers can create inventories for other Users
 - My Samples → Sample Inventories section → New Inventory link

Sample Inventory Save Cancel Submit

Information | = Required

Inventory For Sarah Jones 

Inventory Name

Submitted Date

Inventory From Date

Inventory Type Monthly

Inventory Date Time 6/15/2012 9:00 AM

Status Saved

Inventory Items

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

Best Practice: Users submit Inventory immediately after confirming Sample Receipts

Sample Send Address Restriction

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

The screenshot displays two overlapping panels from the Veeva Systems interface. The left panel, titled 'License Information', contains a table with the following data:

License #	1234567890
License Expiration Date	12/31/2020
License Status	Valid
License Valid To Sample	Valid
Sample Status	Valid
Sample Send Status	Valid_vod

The right panel, titled 'Samples and Promotional Materials', shows a list of products with checkboxes. The 'Ship Cholecap 10mg (BRC)' checkbox is checked and highlighted with a red box. Below this, there is a table with columns for 'Qty' and 'Ship To Address'. The 'Ship Cholecap 10mg (BRC)' row has a quantity of 10 and a ship-to address of '250 West 19th Street, New York, NY 10011', which is also highlighted with a red box. Other products listed include Cholecap 10mg, Cholecap Ed Poster, Restolar 1 mg, Restolar Video, and TigerPro 10MG.

Sample Receipt Grouping

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

Pending Sample Receipts						
The following samples have been transferred to you. Please click the link to confirm the quantity received.						
Confirm	Shipment ID	ST-0000036				
	Sample	Lot #	Transferred Date	Transferred From	Quantity	U/M
	Restolar 1 mg	789012	10/28/2009	Henry Almeida	200	Box
Confirm	Shipment ID	123				
	Sample	Lot #	Transferred Date	Transferred From	Quantity	U/M
	Cholecap 10mg	123456	9/19/2012	Henry Almeida	40	Cases
	TigerPro 10MG	1234	9/19/2012	Henry Almeida	50	Cases
Confirm	Shipment ID	ST-0000047				
	Sample	Lot #	Transferred Date	Transferred From	Quantity	U/M
	TigerPro 10MG	1234	9/19/2012	Henry Almeida	50	Cases

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

Sample Information								
Sample	Lot #	Quantity	U/M	Transferred Date	Transferred From	Comments	Confirmed Quantity	Confirmed Comments
TigerPro 10MG	1234	50	Cases	9/19/2012	Henry Almeida		<input type="text"/>	<input type="text"/>
Cholecap 10mg	123456	40	Cases	9/19/2012	Henry Almeida		<input type="text"/>	<input type="text"/>

Sample Receipt Grouping

■ To enable Sample Receipt Grouping

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

The screenshot displays the 'Sample Transfer' form in Veeva. The form is divided into three main sections: Information, Transfer To Information, and Sample Information. In the 'Information' section, the 'Shipment Id' field is highlighted with a red rectangle and contains the value '123'. Other fields in this section include Transaction Id, Transferred From (Henry Almeida), Transferred Date (9/19/2012), Comments, Type (Transfer), Submitted Date, Status (--None--), and Receipt Comments. The 'Transfer To Information' section includes Transfer To (Sarah Jones), Address Line 1 (123 Main St), Address Line 2, City (Newark), State (NJ), and Zip (01863). The 'Sample Information' section includes Sample (TigerPro 10MG), Lot # (1234), U/M Cases, and Quantity (50). The form has 'Submit' and 'Cancel' buttons at the top right.


Information	
Transaction Id	
Transferred From	Henry Almeida
Transferred Date	9/19/2012
Comments	
Shipment Id	123
Type	Transfer
Submitted Date	
Status	--None--
Receipt Comments	


Transfer To Information	
Transfer To	Sarah Jones
Address Line 1	123 Main St
Address Line 2	
City	Newark
State	NJ
Zip	01863

Sample Information	
Sample	TigerPro 10MG
Lot #	1234
U/M Cases	
* Quantity	50

High Value Promotional Items and Alternative Samples

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

Information	
Product Name	<input type="text" value="Medical Book"/>
Parent Product	<input type="text" value="Cholecap"/> 
Product Type	<input type="text" value="High Value Promotional"/>
Therapeutic Area	<input type="text" value="Cardiology"/>

Information	
Product Name	<input type="text" value="Co-Pay Voucher"/>
Parent Product	<input type="text" value="Cholecap"/> 
Product Type	<input type="text" value="Alternative Sample"/>
Therapeutic Area	<input type="text" value="Oncology"/>

High Value Promotional Items and Alternative Samples

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

Samples and Promotional Materials

☐ Ship Cholecap 10mg (BRC)

☐ Cholecap 10mg

☒ Co-Pay Voucher

☒ Medical Book

☐ Cholecap Ed Poster

☐ Restolar Video

Qty

Co-Pay Voucher

Qty **Recipient**

Medical Book Ackerman, Clinton ▾

Sample and Promotional Items Limits

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



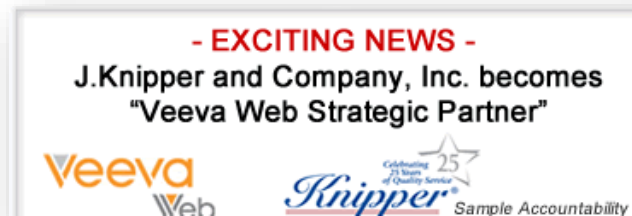
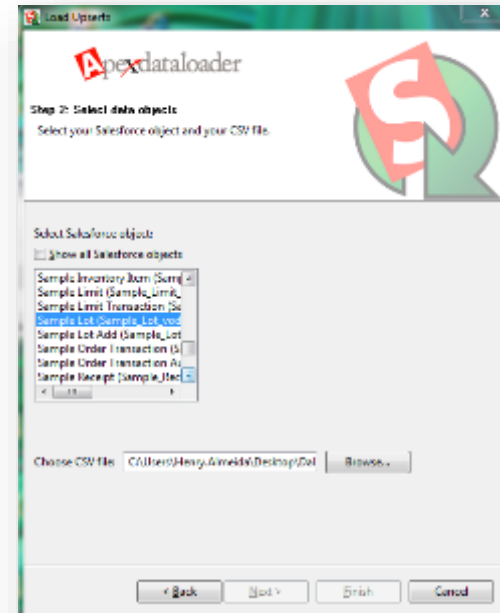
Controlled Substances Sampling

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



Sample Setup via Integration or Data Loader

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



Module Summary

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



Labs

For more information,
see Appendix

Configure Sample

- Create new sample product

- Create new lot catalog

- Create new sample lot

- Perform sample transactions

Appendix

Sample Limits



Sample Limit Template

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



Configuring Sample Limits

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

Sample Limit Detail Edit Delete Clone

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

▼ Sample Limit Template

Account Types	Professional_vod	Template in Use	<input checked="" type="checkbox"/>
Template Group		Template Unique Key	Professional_vod_2_a00Z000000GGZ81IAH_2013-01-01 00:00:00_2099-12-31 00:00:00_null

▼ Rolling Sample Limits Info

Rolling Period	24	Split Period	Year
----------------	----	--------------	------

Sample Limits and Dates

■ Fixed Limits

- Start and end dates do not change
- System copies the start and end date of the template to generate the Sample Limit record dates

■ Rolling Limits

- Start date becomes the date of the first sample disbursement of the product for that Account
- End date becomes [(start date) + rolling period (months) – 1 day]

■ Split Periods – several Sample Limit records will be created

- One for each corresponding period as long as the template is valid



Fixed Start - End Date Limits

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

Sample Limit Detail Edit Delete Clone

Sample Limit Name	Fixed Start-end Date Limit	Owner	Henry Almeida [Change]
Product	Cholecap 10mg	Disable Txn Create	<input type="checkbox"/>
Limit Quantity	5	Enforce Limit	<input checked="" type="checkbox"/>
Account		Limit Per Call	<input type="checkbox"/>
User		Disbursed Quantity	0
Start Date	1/1/2013	Remaining Quantity	5
End Date	12/31/2013	Group Id	__a00
Sample Limit Type	Account	External Id	

Sample Limit Type populates automatically

Becomes active after the first sample limit record is generated from this template

Sample Limit Template

Account Types	Professional_vod
Template Group	

Makes this a Template and must match the Account record type name

Rolling Sample Limits Info

Rolling Period	Split Period
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Template in Use ☐

Template Unique Key	Professional_vod_2_a00U0000005puDHIAAY_2013-01-01 00:00:00_2013-12-31 00:00:00_null
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Rolling Limits with no Split Period Scenario

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

Sample Limit Detail		Edit	Delete	Clone
Sample Limit Name	Rolling with no Split Period	Owner	Henry Almeida [Change]	
Product	Cholecap 10mg	Disable Txn Create	<input type="checkbox"/>	
Limit Quantity	10	Enforce Limit	<input checked="" type="checkbox"/>	
Account		Limit Per Call	<input type="checkbox"/>	
User		Disbursed Quantity	0	
Start Date	1/1/2013	Remaining Quantity	10	
End Date	12/31/2099	Group Id	_a00U0000005puN8IAI_	
Sample Limit Type	Account	External Id		

Sample Limit Template	
Account Types	Professional_vod
Template Group	
Template in Use	<input type="checkbox"/>
Template Unique Key	Professional_vod_2_a00U0000005puN8IAI_2013-01-01 00:00:00_2099-12-31 00:00:00_null

Rolling Sample Limits Info	
Rolling Period	36
Split Period	

Rolling period 36 months

Split Period is null

Rolling Limits with Split Period of Type Year

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

Sample Limit Detail		Edit	Delete	Clone	
Sample Limit Name	Rolling Limit with Yearly Split Period			Owner	Henry Almeida [Change]
Product	Cholecap 20mg			Disable Txn Create	<input type="checkbox"/>
Limit Quantity	10			Enforce Limit	<input checked="" type="checkbox"/>
Account				Limit Per Call	<input type="checkbox"/>
User				Disbursed Quantity	0
Start Date	1/1/2013			Remaining Quantity	10
End Date	12/31/2099			Group Id	__a00U0000005puDIIAY__
Sample Limit Type	Account			External Id	

Sample Limit Template	
Account Types	Professional_vod
Template Group	
Template in Use	<input type="checkbox"/>
Template Unique Key	Professional_vod_2_a00U0000005puDIIAY_2013-01-01 00:00:00_2099-12-31 00:00:00_null

Rolling Sample Limits Info	
Rolling Period	24
Split Period	Year

Rolling period 24 months

Split Period is Year

Rolling Limits with Split Period of Type Year

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

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



Rolling Limits with Split Period of Type 12-Month

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

Sample Limit Name	Rolling with Split Period of 12-Month	Owner	Henry Almeida [Change]
Product	<u>Restolar 1 mg</u>	Disable Txn Create	<input type="checkbox"/>
Limit Quantity	4	Enforce Limit	<input checked="" type="checkbox"/>
Account		Limit Per Call	<input type="checkbox"/>
User		Disbursed Quantity	0
Start Date	1/1/2013	Remaining Quantity	4
End Date	12/31/2099	Group Id	__a00U0000005puDNIAY__
Sample Limit Type	Account	External Id	

▼ Sample Limit Template

Account Types	<u>Professional_vod</u>	Template in Use	<input type="checkbox"/>
Template Group		Template Unique Key	Professional_vod_2_a00U0000005puDNIAY_2013-01-01 00:00:00_2099-12-31 00:00:00_null

▼ Rolling Sample Limits Info

Rolling Period	24	Split Period	12Months
----------------	----	--------------	----------

Rolling period 24 months

Split Period is 12Months



Rolling Limits with Split Period of Type 12-Month

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

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



Sample Limits Notes

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



Sample Limit Template Important Notes

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



Global Sample Limits

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



Enabling Global Sample Limits

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

Product Catalog Detail


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

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

Enabling Global Sample Limits

- **Go to the Product Group tab:**

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

 **Product Group**
Cholecap group Catalog
[Back to List: Product Groups](#)

[Edit Layout](#)

Product Group Detail [Edit](#) [Delete](#)

Product Group Name	Cholecap group Catalog	End Date	5/31/2012
Product Catalog	Cholecap Catalog	Start Date	5/1/2012
Product	Cholecap 40mg		
Created By	V15 V15@v15.com , 5/3/2012 1:26 AM	Last Modified By	V15 V15@v15.com , 5/3/2012 1:26 AM

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

Limits for Sample Product Group

■ Account / Sample Product Group Limit / Call:

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



Limits for Sample Product Group

- **Account / Sample Product Group Limit:**

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



Sample Product Restrictions

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



Sample Product Restrictions Configuration

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



Sample Product Restrictions Configuration

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

Samples State Credential Settings
SSCS-000000
[« Back to List: Custom Object Definitions](#)

Samples State Credential Settings Detail [Edit](#) [Delete](#) [Clone](#)

Samples State Credentials Settings Name	SSCS-000000	Owner	Training Attendee 1 [Change]
Restricted Products	Cholecap	State	NJ
		Credential	NP
Created By	Training Attendee 1 , 4/10/2014 4:31 PM		Last Modified By
			Training Attendee 1 , 4/10/2014 4:31 PM

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

- **Configure a custom tab for the Credential Settings object, assign the tab to the appropriate profile(s) and application(s)**
- **... when in doubt... Clear The Cache!**

Appendix

Package Labels &
Signature Receipts



Package Labels

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

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Transaction Id : ST-0000045
Territory :

FROM :

TO :
SARAH JONES
123 MAIN ST
NEWARK, NJ 01863

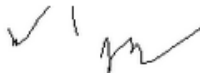

Fold Here

Viewing Signatures by Rep Roster or Account

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

Most recent signatures (Maximum 50 calls)

Call Signatures

Call Name	Account	Call Date	Signature Date	Signature
C000004345	Jorge Almoquera	12/9/2014	12/9/2014 6:09 PM	
C000004444	Frank Pepitone	6/15/2012	6/15/2012 2:18 PM	

Call Date

Go!

June 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
Today						


Print Sample Receipt

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

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

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

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



Call: C000004444
Name: Sarah Jones
Territory: Corp

Print Sample Inventory Worksheet

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

Inventory For: Admin Henry

Territory Name: Corp, EMEA

Employee #:

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

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

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

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Print Sample Transfer Worksheet

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

Transfer From: Admin Henry

Territory Name: Corp, EMEA

Employee #:

Transfer Date: _____

Address: _____

Transfer To: _____

_____, ____

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



Appendix

Inventory Ordering




Sample and Promotional Item Ordering

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



Inventory Order Allocations

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

 **Inventory Order Allocation**
Cholecap for Sarah
[« Back to List: Inventory Order Allocations](#)

[Customize Page](#) | [Printable](#)

[Inventory Order Allocations \[0\]](#) | [Inventory Order Lines \[1\]](#)

Inventory Order Allocation Detail

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


Inventory Order Entry

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

Inventory Order Detail Clone

Information

Inventory Order Number	IO-0000004	Total Order Quantity	20
Order Create Date	12/29/2011	Approved	<input checked="" type="checkbox"/>
Order For User	<u>Sarah Jones</u>	Approved Date	
Order Status	Submitted	Approved By	
Order Type		Approver	<u>Veeva Train DOT</u>
Order Submit Date	12/29/2011	Require Approval	<input type="checkbox"/>

 **Inventory Order Lines**

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

Clone

Product Order Allocations

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

Allocation Date

12/29/2011

User

Sarah Jones

Product

Cholecap 10mg

Show Inactive Values?

Allocation Details

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

Sample and Promotional Item Ordering

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



Sample and Promotional Item Ordering

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



Enabling Sample and Promotional Item Ordering

■ General Configuration

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



Sample and Promotional Item Ordering

■ User/DM Security Profile Configuration

- Provide full permission to Inventory_Order_vod and Inventory_Order_Line_vod
- Provide Read access to Inventory_Order_Allocation_vod
- Grant access to Inventory Order tab or utilize the links available on the “My Samples” page
- Grant access to the following VisualForce pages
 - Edit_Inventory_Sample_Order_vod
 - New_Inventory_Sample_Order_vod
 - View_Inventory_Sample_Order_vod
 - Clone_Inventory_Sample_Order_vod
 - Inventory_Order_Reallocate_vod (optional for Users)



Appendix

BRC and Lot Catalog



Alignment of Promotional Items and BRC by User

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



Lot Catalog (Optional)

- **Update the Sample picklist in the Lot Catalog object**

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

Picklist Values				New	Reorder	Replace	Printable View
Action	Values	Default	Chart Colors				
Edit Del	Cholecap 10mg	<input type="checkbox"/>	Assigned dynamically				
Edit Del	Cholecap 20mg	<input type="checkbox"/>	Assigned dynamically				
Edit Del	Cholecap 40mg	<input type="checkbox"/>	Assigned dynamically				
Edit Del	Cholecap 80mg	<input type="checkbox"/>	Assigned dynamically				
Edit Del	Restolar .5mg	<input type="checkbox"/>	Assigned dynamically				
Edit Del	Restolar 1mg	<input type="checkbox"/>	Assigned dynamically				
Edit Del	SnakePro 10MG	<input type="checkbox"/>	Assigned dynamically				
Edit Del	TigerPro 10MG	<input type="checkbox"/>	Assigned dynamically				

Lot Catalog (Optional) – Continued

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

The screenshot shows the 'Lot Catalog Edit' form. At the top right are buttons for 'Save', 'Save & New', and 'Cancel'. Below is the 'Information' section. The 'Lot #' field contains 'TP1234'. The 'Sample' field is a dropdown menu showing 'TigerPro 10MG'. The 'Expiration Date' field shows '8/31/2012' with a calendar icon and '[6/15/2012]' next to it. The 'U/M' field is a dropdown menu showing 'Box'. The 'Active' field has a checked checkbox. The 'Sample Description' and 'Item Id' fields are empty, with '123xyz' visible below the 'Item Id' label.

Lot Catalog Edit	
Information	
Lot #	TP1234
Sample	TigerPro 10MG
Expiration Date	8/31/2012 [6/15/2012]
U/M	Box
Active	<input checked="" type="checkbox"/>
Sample Description	
Item Id	123xyz

Sample Lot from Lot Catalog

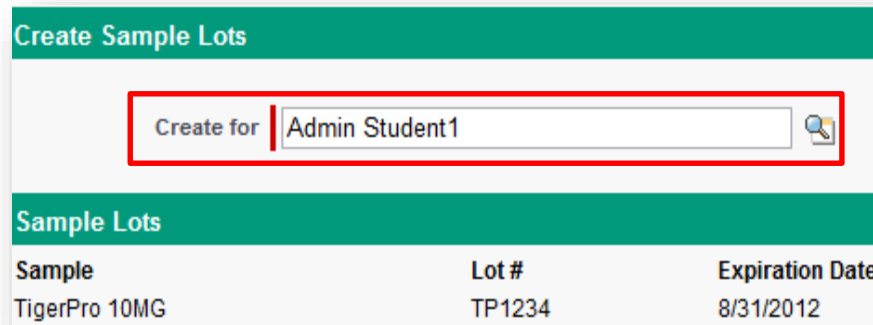
- **Create a Sample Lot for the Sample Admin**

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


New Lot Catalog		Create Sample Lots				A B C D E F G H I J K L	
<input type="checkbox"/>	Action	Lot # ↑	Sample	Sample Description	Expiration Date	Active	
<input type="checkbox"/>	Edit Del	<u>123456</u>	Cholecap 10mg		12/21/2023	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Edit Del	<u>123Dalian</u>	SnakePro 10MG		6/12/2013	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Edit Del	<u>789012</u>	Restolar 1mg		12/23/2023	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Edit Del	<u>TP1234</u>	TigerPro 10MG		8/31/2012	<input checked="" type="checkbox"/>	

Sample Lot from Lot Catalog – Continued

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



Create Sample Lots

Create for 

Sample Lots

Sample	Lot #	Expiration Date
TigerPro 10MG	TP1234	8/31/2012

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