



Account Object Configuration

Veeva Professional Services

Module Objectives

- **Define Veeva Account record types**
 - Business Account
 - Person Accounts
- **Define custom Accounts fields**
 - Place custom fields on specific account page layout(s)
- **Create custom page layout and record types**
- **Create a custom Account button**
- **Display the View User Territory custom link**



Veeva Account Record Types



Account Record Types

■ Business Accounts:

- Hospital
- Pharmacy
- MCO
- Practice
- Wholesaler

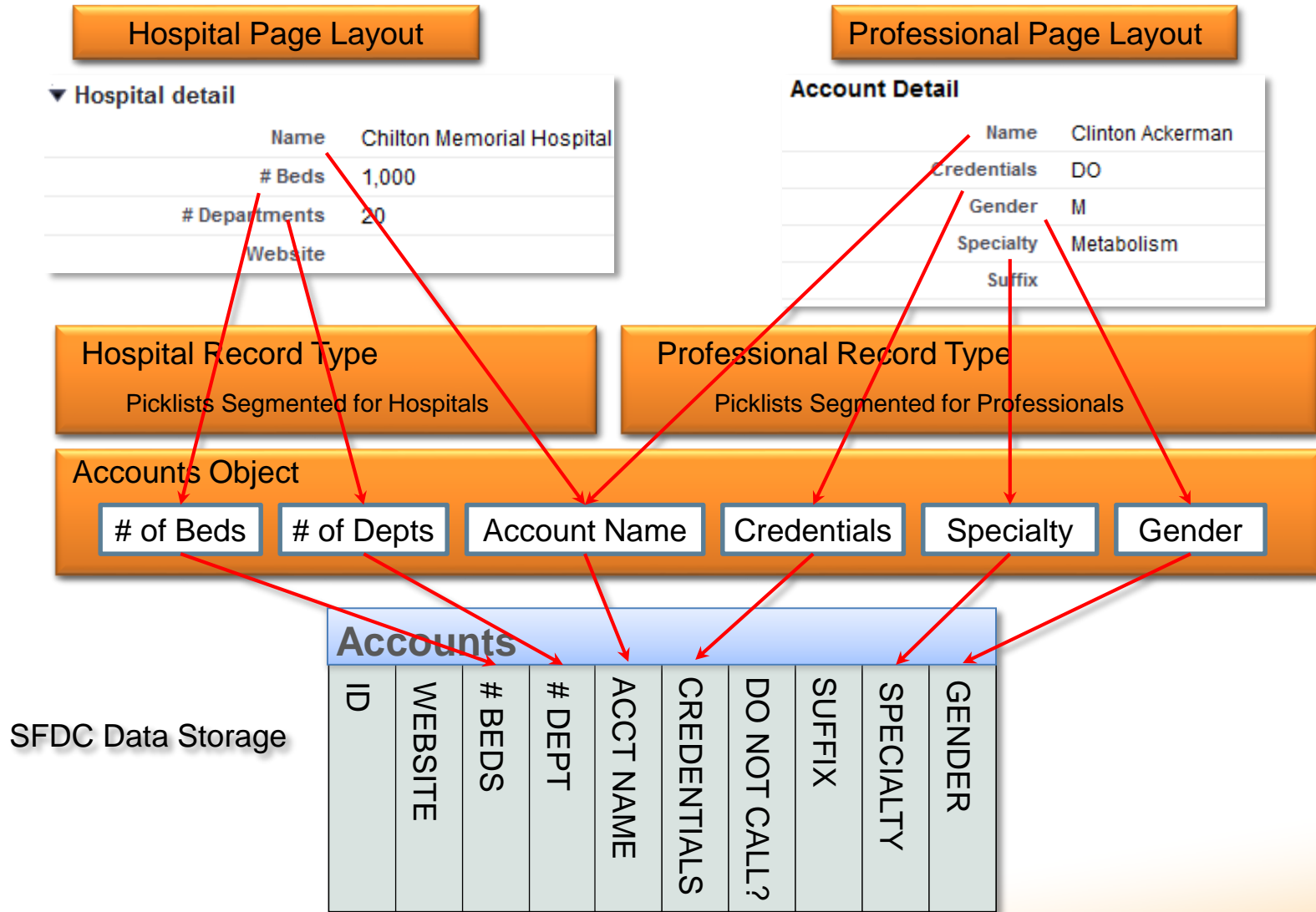


■ Person Accounts:

- Professional
- MD, RN
- KOL
- Staff

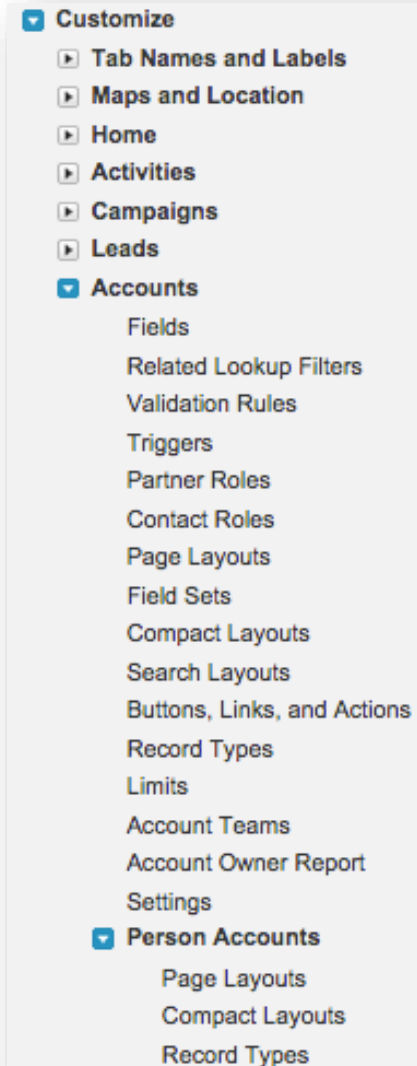


Account Record Types



Account Object Configuration

- **To access the Accounts object:**
 - Setup → Customize → Accounts
- **Common configuration:**
 - Add custom Account fields
 - Add related lists to page layouts
 - Add Veeva s-controls to page layouts
- **Create custom record types and corresponding page layouts**
- **Best Practice**
 - Add Record Type field to Account page layouts



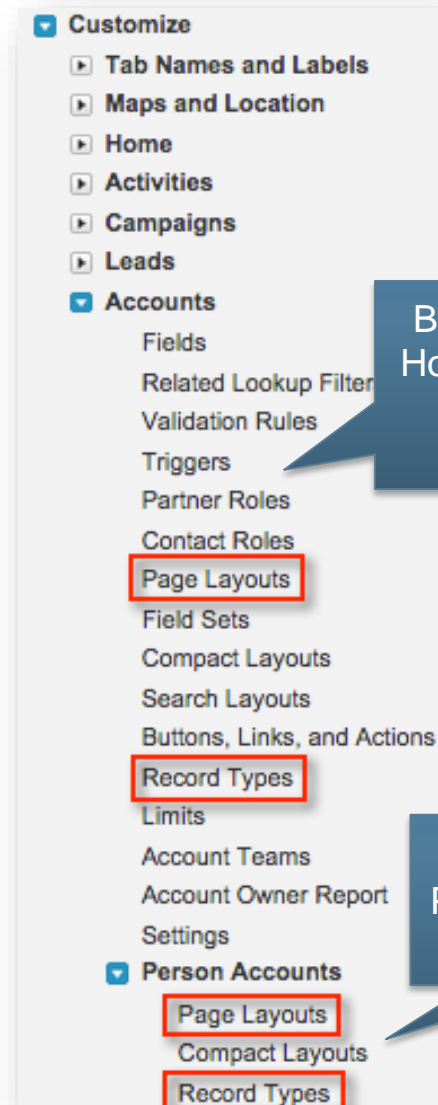
Accounts Page Layouts and Record Types

- **To access the Business Accounts object page layouts and record types:**

- Setup → Customize → Accounts → Page Layout / Record Types

- **To access the Person Accounts object page layouts and record types:**

- Setup → Customize → Accounts → Person Accounts → Page Layout / Record Types



Business Accounts:
Hospitals, Pharmacy,
MCO, Hospital
Departments

Person Accounts:
Professionals, KOL,
Person



Custom Account Fields



Scenario: Create New Custom Fields

- **Users may be required to show a badge when they visit doctors in hospitals**
- **Display on the Hospital page layout:**
 - Whether a badge is required for a specific hospital
 - If the users have a valid badge
- **Since the Accounts object does not have fields which can be used for this purpose:**
 - Create the new custom fields
 - Place them on the page layout for hospital accounts



Custom Account Fields

- **To create custom fields for the Accounts object:**
 - Setup → Customize → Accounts → Fields
- **Create the needed custom fields:**
 - Badge Required – Checkbox
 - Badge Status – Picklist (Needed, Active, Expired)
 - **Note:** If Accounts are aligned to multiple territories, this field would need to be created in the TSF object instead
- **Specify which user profile(s) will have access to the custom fields:**
 - Ex: Only System Administrator and VExample Primary Care Sales – Platform profiles should have access
- **Place the custom fields on only the hospital page layout:**
 - Create a section on the page layout called Badge Info
 - Place the badge fields in the Badge Info section



Hospital Accounts Custom Fields



Account

Chilton Memorial Hospital

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

« [Back to List: Profiles](#)

[Addresses \[1\]](#) | [Members \[2\]](#) | [Calls \(Account\) \[8\]](#) | [Territory Fields \(Account\) \[4\]](#) | [Account Plans \[1\]](#) | [Benefit Designs \[0\]](#) | [Notes & Attachments \[0\]](#) | [Open Activities \[2\]](#) | [Activity History \[1\]](#) | [Approval History \[0\]](#) | [Training Intances \[0\]](#)

Account Detail

[Edit](#) [Delete](#) [Record a Call](#) [New Professional](#) [Account Summary](#) [View Hierarchy](#) [Calendar](#)
[Assign Territory](#)

▼ Hospital detail

Name	Chilton Memorial Hospital [View Hierarchy]	Primary Parent	
Parent Account		Account Record Type	Hospital [Change]
Segmentations	High Prescribers	Territories	101 [Change]
Website	http://www.chilton.com		
Total Number of Trainings	0		

▼ Badge Info

Badge Required	<input checked="" type="checkbox"/>
Badge Status	Active

▼ Key Indicators

Target?	<input checked="" type="checkbox"/>
Call Class	
Call Frequency	
YTD Calls ?	10



Custom Page Layouts and Record Types



Scenario: Create a New Record Type

- **The Organization needs to keep track of interactions users have with staff members such as receptionists for business accounts**
- **Since Veeva does not have a “Staff” record type and page layout out-of-the-box:**
 - Create a “Staff” record type and “Staff” page layout



Custom Page Layout

- To create custom person Account page layout:
 - Setup → Customize → Accounts → Person Accounts → Page Layouts
- Create a page layout called Staff based on the Professional page layout and display the following info:

The screenshot displays the 'Person Account Sample' detail page in Salesforce. The page title is 'Person Account Sample'. Below the title, there's a section 'Person Account Detail' with standard buttons (Edit, Delete, Enable As Partner, Disable Customer Portal Account, Disable Partner Account) and custom buttons (Record a Call, Calendar). A red box highlights the 'Account Information' and 'Contact Information and Preferences' sections. Below these, there's a 'Custom Links' section (header not visible) and an 'Addresses' table.

Person Account Detail

Standard Buttons: Edit, Delete, Enable As Partner, Disable Customer Portal Account, Disable Partner Account

Custom Buttons: Record a Call, Calendar

Account Information (Header visible on edit only)

★ Account Name	Sample Account Name	Account Record Type	Sample Account Record Type
Middle	Sample Middle	Birthdate	8/12/2011
Preferred Name	Sample Preferred Name	Gender	Sample Gender

Contact Information and Preferences

Phone	1-415-555-1212	Email	sarah.sample@company.com
Mobile	1-415-555-1212	Website	www.salesforce.com

Custom Links (Header not visible)

Addresses

Street Address	City	Zip	Country	Map	Phone 1	Primary	Appt. Required
Sample Street Address	Sample City	Sample Zip	Sample Country	Sample Map	1-415-555-1212	✓	✓

Custom Record Type

- **To create custom person Account record type:**
 - Setup → Customize → Accounts → Person Accounts → Record Type
- **Create a new record type called Staff based on the Professional_vod record type:**
 - Enable it only for the System Administrator and the VExample Primary Care Sales – Platform



Custom Staff Page Layout



- From the My Accounts tab, create a new Staff record
- The new custom Staff Account page layout should look like the screenshot below:

Account Detail


EditDeleteRecord a CallCalendar

Name	John Staff	Account Record Type	Staff [Change]
Middle	Mark	Birthdate	8/12/2011
Preferred Name	Mark	Gender	M

▼ Contact Information and Preferences

Phone	 (212) 555-5555 	Email	john@staff.com
Mobile		Website	

EditDeleteRecord a CallCalendar

 **Addresses**

New Address

[Addresses Help ?](#)

Action	Street Address	City	Zip	Country	Map	Phone 1	Primary	Appt. Required
Edit Del	5 Main Street	New York	10011	us	map		<input checked="" type="checkbox"/>	<input type="checkbox"/>


Disable License Number

- When users create a Staff record, the wizard displays a License # section which does not apply to Staff accounts

New KOL
Chilton Emergency Department

Save Cancel

Required Information

Record Type of new record  KOL
Territory VoD KOL
Pharmacy Staff
Professional
Staff

First Name --None--
Last Name

Address

Select	Address	Primary
<input checked="" type="checkbox"/>	123 Main Street Jersey City, 10223	<input checked="" type="radio"/>
<input type="checkbox"/>	250 West 19th Street New York,	<input type="radio"/>

License #

License #
License Expiration Date

Disable License Number

- To remove the License # section from the Wizard:
 - Use custom Veeva Message:
NEW_ACCOUNT_TYPES_DISABLE_LICENSE_INFO
 - List record types: Staff,Pharmacy Staff
 - Clear VOD Cache

VoD Message Edit
NEW_ACCOUNT_TYPES_DISABLE_LICENSE_INFO

VoD Message Edit [Save] [Save & New] [Cancel]

Verticals onDemand Information - Do Not Change

Message Name	NEW_ACCOUNT_TYPE	Category	Account
Description	Contains a comma-delimited list of non-translated Account Record Types (denoted	External ID	Custom_Account-NEW

Customer Editable Information

Active	<input checked="" type="checkbox"/>
Language	en_US
Text	Staff,Pharmacy Staff

Account Record Types Best Practice

- Never change the label of out-of-the-box record types directly in the Account object
- Use the Translation Workbench to provide custom values for Account record types labels instead
 - Go to Setup → Translation Workbench → Translate

The screenshot shows the Veeva Translation Workbench interface. At the top, there are three dropdown menus: 'Language' set to 'English', 'Setup Component' set to 'Record Type', and 'Object' set to 'Account'. Below these is a green success message: 'Your changes have been saved'. At the bottom, there is a table with two columns: 'Master Record Type Label' and 'Record Type Label Translation'.

Master Record Type Label	Record Type Label Translation
Wholesaler_vod	Manufacturer
Publication_vod	Publication
Professional_vod	HCP

Custom Account Button



Scenario: Create a New Button

- **The Organization needs a button displayed on the Hospital Department page layout to allow users to create either a Staff or a Professional account**
 - The existing New Professional button allows you to create professional but not staff
- **Define a custom New Professional / Staff button and place it on the Hospital Department page layout**



Create a Custom Button

- To create custom button in the Accounts object:
 - Setup → Customize → Accounts → Buttons and Links
- Create a new button with following information:

Edit Account Custom Button or Link
New Professional / Staff

Custom Button or Link Edit Save Quick Save Preview Cancel

Label

Name i

Description

Display Type

- ☐ Detail Page Link [View example](#)
- ☒ Detail Page Button [View example](#)
- ☐ List Button [View example](#)

Behavior View Be

Content Source

Content

Save Quick Save Preview Cancel

Name must be a **well named** button (see Admin Guide) for button to appear offline

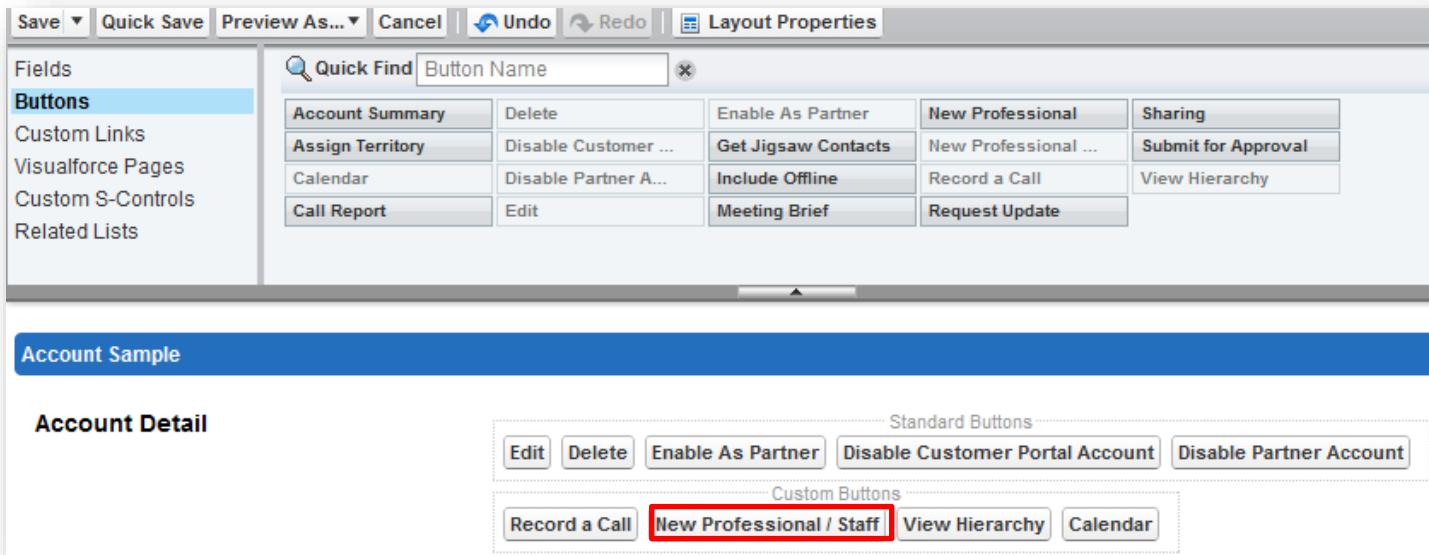
Display as **Detail Page Button**

Use the **New Account [New_Person_vod]** S-Control



Create a Custom Button

- To place the custom button on the Hospital Department page layout:
 - Setup → Customize → Accounts → Page Layouts
 - Edit the Hospital Department page layout
 - Remove the New Professional button from the page layout
 - Place the New Professional / Staff button on the page layout



Create a Custom Button

- From the My Accounts tab, go into the Chilton Emergency Department account
- Click the New Professional / Staff button

New KOL
Chilton Emergency Department

Save Cancel

Required Information

Record Type of new record ⓘ KOL

Territory VoD

First Name --None--

Last Name

Address

Select ☒ Main Street ☐ Primary

City, 10223

Street

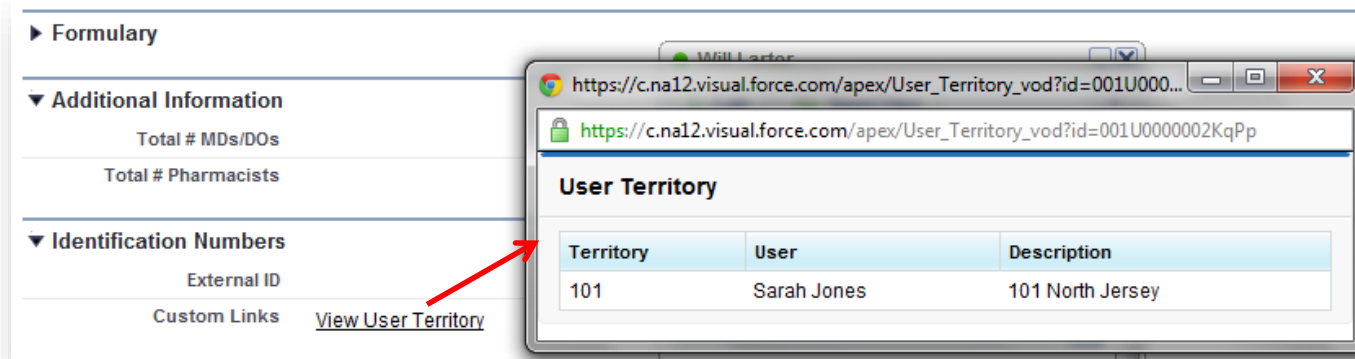
Since the button uses the New Person Account s-control, the **Record Type of new record** picklist displays

View User Territory Info

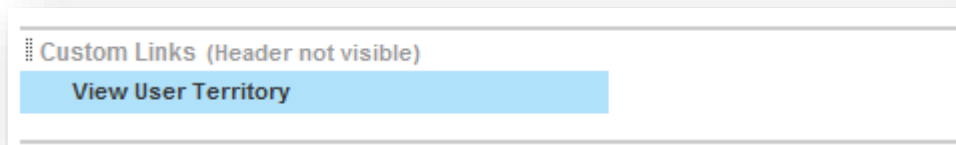
A stylized, light orange cloud graphic is positioned in the bottom right corner of the slide. It consists of several overlapping, rounded shapes that create a soft, billowy appearance.

View User Territory Custom Link

- Displays all the users aligned to the territory for the account



- Modify the needed Account page layout and add the View User Territory custom link under Custom Links



- User Profiles need access to User_Territory__vod Visualforce page
 - Setup → Develop → Pages → Security

Territory Field - Offline

- The View User Territory custom link only works online
- The Territory field shows territory information for an account offline

The screenshot shows the Chilton mobile app interface. On the left, a sidebar menu includes 'Hospital detail', 'Name', 'Parent Account', 'Website', and 'Territory'. The 'Territory' field is highlighted with a red box and displays the value '101, Corp'. A modal window titled 'Territory' is open, showing a table with the following data:

Territory	User	Description
101	Sarah Jones	101 North Jersey
Corp	Training Attendee 1, Admin User	Corporate

Module Summary

- **Defined Veeva Account record types**
 - Business Account
 - Person Accounts
- **Defined custom Accounts fields**
 - Place custom fields on specific account page layout(s)
- **Created custom page layout and record types**
- **Created a custom Account button**
- **Displayed the View User Territory custom link**



Labs

Create Accounts custom fields

Create custom page layout and record type

Create a custom button