17R1 CRM Preview Webinar Q & A

Q: Is there a way to tie call expenses to the new budget module for events so expenses recorded on a call can be deducted from a budget

- A: It is on our long-term roadmap to enable using the Event expense and budget objects with the Call report.

Q: Ship to Pharmacy - Does pharmacy to be affiliated to account where call is detailed or can a rep pick any account where samples should be shipped?

- A: The Ship to Location must be associated to the Primary Account, Call Location, Or Sample Recipient either via the Account Hierarchy or Sphere of Influence.

Q: What is the source for ""Allowed Products"" on that window? Is it from My Setup or from allowed products field on the TSF object?

- A: The information displayed is based on the user's My Setup access and the information stored in Account.Restricted_Products_vod__c and TSF_vod__c.Allowed_Products_vod__c

Q: For Account Plan Dashboard, is this an out of the box dashboard with the ability to modify as needed?

- A: Yes, you can use the dashboard as is or you can adjust the html/javascript/css to meet your specific needs.

Q: Can you assign a call objective to a certain team member to fulfill and only that Rep can see the call objective for the account?

- A: This can be achieved through using a private data model and sharing rules at this time. It is on our longer term roadmap to build an easier way to manage this into the product

Q: Future Alignment - Let us say we do not use vAlign for a particular country. Can I still use Future alignment by loading future alignment data into an object?

- A: Future alignments will require a Veeva Align license as the data comes directly from Veeva Align (not Veeva CRM platform).

Q: With the enhancement for concur to capture receipt image is this also possible using medical events?

- A: This can be used for Call Reports that are created for Medical Events. Medical Events by itself does not have this capability. Events Management will also support receipt attachments in the future along with a native integration to Concur.