18R2 Veeva Commercial CRM Frequently Asked Questions

Advanced Coaching Report Rep Feedback

Q: Is Advanced Coaching Report a new object? or using existing coaching report object?

A: Advanced Coaching Report is based off of the Surveys framework and has completely different configuration than the classic Coaching Report functionality. See online documentation for how to configure Advanced Coaching Reports:
https://crmhelp.veeva.com/doc/Content/CRM_topics/Accounts/Account_Planning_and_Execution/AdvancedCoachingReports.htm

Q: What is the difference between Coaching Report and Advanced Coaching Report?

A: Classic Coaching Reports uses the Coaching Report object, while Advanced Coaching Report is based off of the Surveys framework. See online documentation for more information. Advanced

Coaching Reports:
https://crmhelp.veeva.com/doc/Content/CRM_topics/Accounts/Account_Planning_and_Execution/AdvancedCoachingReports.htm

Q: Is this functionality is default On?

A: Rep feedback requires an administrator to enable the feature.

Q: Is there an upcharge in the license fee to use coaching?

A: There is no additional fee to use Advanced Coaching Reports or Coaching Reports.

Q: If coaching report uses survey - can we configure products to see KPIs?

A: At this time, Advanced Coaching Reports results can be viewed within each individually submitted Coaching Report (Survey Target record), or exported to an external BI tool. If you have more questions, please submit a Support ticket or reference the online documentation.

Advanced Coaching Report:
https://crmhelp.veeva.com/doc/Content/CRM_topics/Accounts/Account_Planning_and_Execution/AdvancedCoachingReports.htm

Q: Does the short text field in Adv. Coaching Report now display the full text entered by the manager to the rep? Past version, the short text field did not display fully.

A: Enabling users to see the full text in a short text question is on our roadmap.

Q: Can we enable approval process in coaching report?

A: Advanced Coaching Reports allows a Coach to fill out a Coaching Report and send it to Rep so the Rep can review it and comment on it (if Employee Commenting is configured). We are investigating additional approval workflows to expand the capabilities of Advanced Coaching Reports. If you have specific ideas, please submit a request to your CSM or on the CRM Community Portal.

Q: Would we need to create the coaching report from scratch if moving from existing Coaching Report configuration to the new Advanced CR?

A: Yes, you will need to recreate coaching reports if you switch from classic Coaching Reports to Advanced Coaching Reports.

Q: Is it available on iPhone?

A: Advanced Coaching Reports is not currently available on the iPhone.

Q: Are there reporting capabilities?

A: At this time, there are no reporting capabilities beyond standard SFDC reporting. However, the data is structured in a way that can be easily exported into in-house BI tools.

CLM

Q: Can we configure the columns in CLM presentation view? Can we add expiration date field?

A: Yes, you can configure what columns display in the table view for CLM by populating the CLM_Presentation_Grouping Veeva Message. Yes, you can add the expiration date field if it's a field on CLM Presentations.

Q: In addition to the CLM presentation view, can "favorite" a specific slide in a presentation?

A: At this time, you can only favorite a presentation and cannot favorite a specific slide.

Q: Do we still have the Media "Save for later" feature?

A: Yes, Save for Later still exists.

Q: There are some CLM presentation where no product is assigned, How is that?

A: In Veeva CRM, CLM Presentations do not have to have a product assigned to them. However, an administrator can configure the product field to be required. You should follow up with your company administrator if you have additional questions.

Q: Will local admins be able to enter keywords for each CLM presentation?

A: Yes, admins can populate the keyword field for each CLM presentation

Q: How long are the recently shown ISAs available under RECENT?

A: They will remain until there are more than 128 presentations in the Recents view. After 128 presentations, the most recently viewed will replace the oldest presentation.

CLM for Engage Meetings Hosted Online

Q: Will desktop CLM media player be available to non-Engage customers?

A: At this time, the desktop CLM media player is only available for use with Engage Meeting.

Q: Can the CLM content can be re-used for engage?

A: The majority of existing CLM HTML content must be adapted to render properly on the CRM Engage desktop Media Library. Veeva recommends that customers test content in the CRM Engage App media player to evaluate how it renders. Content created through Vault's Create Presentation or Single Doc will work natively.

Q: When will Remote meeting be active from the iPad?

A: Engage Meeting is already available from the iPad. Please contact your Account Executive if you would like to acquire licenses.

Q: The download use to be automatic for all pieces. Will it be on demand right now - only download the ones you need?

A: The CRM Engage App media player allows users to download a specific presentation. They can also choose to download all presentations at one time. If a user has previously downloaded a presentation and it has changed, the app will automatically download the update to that presentation.

Q: Will the download content be editable when downloaded to desktop?

A: Downloaded content is not editable.

Q: Will you be able to share CLM content without needing Engage? If not, is it on the roadmap?

A: At this time, the desktop CLM media player is only available for use with Engage Meeting. It is not on the roadmap to decouple it from Engage Meeting at this time but we will continue to evaluate additional use cases.

Q: Is it possible to send the remote meeting link to an customer without Opt In already approved?

A: Users can send an invitation to an Engage Meeting without having captured an Opt-In record. Since Engage Meetings are transactional in nature, it does not need to have consent to send the link.

Q: Will the HCP be required to install anything on their own laptop or computer?

A: HCPs can join an Engage Meeting through the browser without having to download anything. HCPs can also install the HCP Engage App from the Android or iOS store and join from their mobile devices.

Q: Can user interact with the content in the viewable area or are these just static slides?

A: Users can interact with the content while presenting to the HCP. HCPs cannot interact with the content they are viewing.

Q: Is CRM Engage app needed on the PC prior to click on Start in online call?

A: If it is not installed yet, when the user clicks the Start button, the download of the app will begin and the user will need to install.

Q: How do we / when can we install the Engage Meeting Online Player?

A: The Engage Meeting Online Player will be available shortly after the 18R2 Production release. An install link can be configured for the CRM Online home page, or the first time a user clicks the Start button, the app will automatically download.

Q: When will meetings be available on the iPhone?

A: Engage Meetings on the iPhone is not currently targeted for a specific release.

iPhone

Q: Is the account limit for iPhone is still 15K records?

A: The account limit for iPhone is the same as for iPad. We recommend a max of 15,000 accounts.

Q: Is there a new record type on VMOC for iPhone?

A: There is a new pick list value in the Device Type field for iPhone.

Q: Is the Veeva CRM for iPhone app a separate .ipa or thee same app?

A: Veeva CRM on iPhone is the same .ipa as Veeva CRM on iPad.

Q: Assume reps need to synch iPhones & iPads independently to view information across devices?

A: Yes, in 18R2, users will need to sync iPhones and iPads independently. We are targeting to have real time architecture in place during the 18R3 release. At that time, users will no longer need to manually keep the devices in sync.

Q: Is landscape mode available in the iPhone app?

A: The iPhone UI is only in portrait mode at this time.

Q: Can I see spear of influence - Affiliation data?

A: Affiliation data can be reviewed through the Account Related Lists or through a custom My Insights visualization. The Sphere of Influence control is not yet available on the iPhone.

Q: Is this an offline or online app for iPhone, and does it take up storage space?

A: Veeva CRM on iPhone works similarly to iPad and can be used when the user has no internet connection. It does take up storage space.

Q: Can signature be captured for calls created on iPhone?

A: Signature capture is not yet available for the iPhone.

Q: If I have to describe CRM on iPhone features to business in one line, what is supported on iPhone?

A: The first version of CRM on iPhone supports Accessing Account Lists and Views, viewing the Account Detail page, viewing related lists, Call Reporting Basics (Attendees, Detailing, Key Messages, Product Discussions), My Schedule Agenda view, My Insights, and iOS Push Notifications.

Q: When will Meetings be available on the iPhone and will approval flow work correctly

A: Events Management on the iPhone is not currently targeted for a specific release.

My Schedule Maps

Q: With the map view - can you limit it to just show the primary address for a given HCP - or will they show up on the map based on all their active address in CRM?

A: The map view will only display on address per Account. If Primary Address exists, this is the address that will be plotted on the map.

Q: Is the map works for all the regions?

A: Yes, the map works for all regions.

Sunrise

Q: The auto sync in Sunrise....does it auto sync when connected to Wi-Fi or both Wi-Fi and SIM card? If both can I turn off the ability to sync via SIM card even if the SIM is active?

A: Real Time Architecture is currently targeted for the 18R3 release. Users can use standard iOS settings to control Veeva CRM's data usage.

Q: Do you need to have MyInsights licenses to make the Sunrise Quick Start Guide available?

A: Yes, users need to have MyInsights license to use the MyIngishts Sunrise Quick Start Guide.

Q: In My Account tab Map View, Is there any option to search for accounts?

A: Users can search for accounts in the My Schedule maps view. Searching is not available from the My Accounts map view.

Q: In the list of accounts, we saw that one has to scroll to the right to see the action button. Why not put the button for actions on the left of the view, frozen for access all the time and to make navigation easier?

A: Thanks for your feedback. We will take it into consideration as a future product improvement.

Q: When will 18R2 release be available on the Windows devices?

A: The 18R2 release goes out to all devices at the same time. Sunrise UI for Windows is currently targeted for the 19R1 release

Additional questions?

Contact your customer support representative.