

18R3 Veeva Commercial Align Webinar Q&A

Q: Can you load data into the custom metrics or is it just based in the UI input and/or other fields already mapped in Align or CRM?

A: Customers can dataload custom metrics to any territory in Align. With the new custom metrics feature, Align calculates metrics automatically based on the underlying data within the territory and the rollup logic you define in the admin user interface. For example, you may define a custom rollup to count the number of segment A accounts in each territory. In this example, this segment value can be imported automatically from CRM, or dataloaded directly into Align.

Q: Are post code shapes compatible with customer-provided shapes?

A: Yes. The Veeva provided post code shapes are used as default shapes, but can be overridden by providing your own shapes in the mapshape__aln field.

Q: Is there a limit on the number of custom metrics that you can create?

A: No. You can create as many metrics as you want.

Q: Can custom metrics be used in modeling?

A: Yes. Custom metrics created for the Territory destination object also apply to territory models, as long as the target fields exist on territory models.

Q: How can we tell when exclusive assignments might have been created?

A: The CSV files available through the downloadable preview feature include a list of conflicting assignments that would violate assignment exclusivity: one of the files includes a list of all accounts that could be shared between territories and the reasons for which this account might be assigned to each of those territories. Users can then use this list to address these reasons by changing the rules, moving geographies around, or end-dating or creating manual assignments as necessary.