

18R3 Veeva Align - Product Release Webinar - Q&A -

Q: When you download a Preview, does that show Targets as well as individual Account Assignments?? A: Yes it does. A downloaded Preview consists of four CSV files:

1. **Unique Assignment Previews** - a list of account territory assignments for each territory and account.
2. **Targets** - a list of all of the territories, cycle plan interaction goals, and targets included in the preview.
3. **Exclusions** - A list of all of the accounts excluded from the territories in the preview.
4. **Exclusive Assignments** - A list of all accounts with conflicting Exclusive Assignments.

Q: When the rep is providing feedback on a future cycle plan, can they filter the accounts based on Specialty?? A: Yes they can. The Search bar searches all columns that are displayed to the rep. Therefore, provided that the Specialty column is exposed to the rep, then they can use the Search bar to type the name of the Specialty. Veeva Align will then automatically refine the results to match the search text.

Q: Can I still use the mapping functionality, even if I use Bricks instead of Postcodes? A: Yes you can. Brick shapes can be loaded into Align, and then subsequently used to visualize Territories on the map.

Q: Can an existing Cycle be cloned into a Model? A: Yes it can. Any existing production Cycle can be cloned. These can be cloned either directly into production, or into a Model.

Q: Which objects can be used as data sources for Custom Rollup Metrics? A: Currently, the following objects can be used as data sources for Custom Rollup Metrics:

- Accounts
- Product Metrics
- MC Cycles

Q: When performing a Clone, which aspects of the MC Cycle get copied? A: The following aspects of the MC Cycle get copied during a Clone:

- MC Cycle
- Channels
- Products
- Targeting Rule

Q: Does Veeva Align's targeting functionality work with CRM's "classic" Cycle Plan functionality as well as Multichannel Cycle Plans? A: Veeva Align's Targeting capability is designed to work with Veeva CRM's Multichannel Cycle Plan functionality.

