

19R1 Veeva CRM

Questions and Answers

Q: Is there a recommended maximum number of timeline events to ensure we don't bog down the sync?

A: The decision on how much data is synced should be based on your business requirements and how much data is actually useful for your users. We don't recommend updating your VMOCs to try and show more data in the timeline now that we have this feature in place. We created this feature so that users are able to see all the data they are already downloading right now in the timeline view, since previously we only showed 4 months and some customers do download more than 4 months of data.

Q: For the More Months, if we have set up our VMOC so we only have, say 3 months of calls, would we need to expand this so the timeline will show more months? or does this enhancement only show the header of the calls?

A: See answer above. In addition, how the calls display on the timeline is not changing with this feature. We display the call node and if you select it, it expands to display more info about the Call. You can also drill directly into the full Call itself.

Q: Do you need connectivity to the internet to scroll beyond 3 months?

A: No, the timeline displays data already downloaded to the device.

Q: Is the timeline view configurable? If yes then until what time, how many months in the past?

A: The ability to display more months on the timeline is enabled by default in 19R1. Configuration is not needed.

Q: Can you access notes by clicking on the call?

A: The timeline view does not display Call Notes. You can tap directly into the full Call from the timeline view to see the Call Notes.

Q: After the upgrade, will timeline be showing historical data back from the start or from last 3 months?

A: The timeline displays all data already downloaded to the device.

Q: Would Windows Sunrise UI be available for CLM too?

A: Yes, CLM is included in the UI changes with Windows Sunrise.

Q: Microsoft is phasing out Edge.

A: Yes, we are aware of Microsoft's announcements about Edge. We will work with them as they provide further details on the impact the changes may have.

Q: Is it possible to create a new contact within a new call?

A: Currently, it is possible to create new contacts from a call only on the Online platform.

Q: What if my organization is not Windows 10 enabled yet? What is the recommendation?

A: We recommend you work with your IT teams to get upgraded to Windows 10. Users cannot upgrade to the 19R1 version if they are not on the minimum version of Windows 10. Users can continue to use the 18R3 version, but we no longer provide bug fixes or other support.

Q: What are the differences between Windows and iOS views? is iRep the same on both platforms?

A: The UI on Veeva CRM on Windows and iPad is very similar.

Q: What is an example of a 3rd party app?

A: It's anything that isn't Veeva CRM on iOS. Examples are Powerpoint, Safari, Qlick and Microstrategy apps.

Q: Engage indicator, is it on by default?

A: The indicator requires FLS to one existing field. Engage Meeting users should already have FLS to that field. Non-Engage Meeting users likely do not.

Q: For Engage, are there plans to further indicate the type of meeting on my schedule? (lunch, group, etc.)

A: Currently, users can see the Call Record Type when they select on a call from My Schedule. Please provide us with more info about what you'd like to see by logging a product suggestion on the Community Portal.

Q: How would authentication work from 3rd party app to Veeva in deep linking?

A: If the user is not logged in to Veeva CRM when attempting to do the deep linking, they need to login before navigation to the Account page.

Q: Will there be an indicator / icon showing on the account card whether an active/valid consent (like Approved Email) exists?

A: No, the Account card will not display the consent status for Approved Email. There can be multiple email addresses and subsequently consent can be configured at Product level. So it is possible that my account has granted consent for Product A for work email but not for Product B. Or my account has granted consent for Product A for work email but not for personal email.

Q: Does it support group call?

A: Yes the Engage Meeting indicator shows against a call record regardless of whether it is an individual or group call.

Q: To be clear, deep linking brings you into Veeva online, not a client (iPad or Windows)?

A: Deep linking is for Veeva CRM on iPad.

Q: What if I am sampling a new doctor?

A: The behavior is the same as it is on our other offline devices i.e iPad/Windows. In the scenario when a HCP is created offline with the license information, the License valid to sample formula field is empty. This field gets the value after sync. License valid to sample field is used while validating State license information. Because this is empty (considered invalid) for a new HCP, the HCP will not be sample-able.

Q: What is the limit of disclaimer limit for the signature page in iPhone for sampling?

A: The disclaimer text limit is same as iPad/Windows i.e. 5000 characters. The whole text displays without pop out and the screen scrolls to accommodate the whole text.

Q: How many levels of survey branching is supported on the iPad?

A: Survey branching supports 1 level of branching. You can have a parent question with child questions. However, those child questions cannot have their own children.

Q: Does Windows mean desktop or windows tablet?

A: Veeva CRM on Windows refers to our native Windows application. It is not referring to the online version.

Q: Does branching work when you hit survey from email?

A: Surveys sent via Approved Email do not currently support Survey Branching.

Q: Will Survey Branching increase the limit of questions?

A: The out-of-the-box limit is 25 questions per Survey. In an earlier release, we raised the limit to 100 as a configurable enhancement. Survey Branching respects the question limit in your org (25 or 100) counting both the parent and child questions.

Q: Is Survey Branching available on the Windows version?

A: Windows CRM does not currently support Survey Branching. We've heard this request from other customers. Support for Branching on Windows is under consideration, but not currently targeted for a release.

Q: Can we control question to display only after responding to the current question?

A: A Survey Designer can create Child Survey questions in a Survey. These questions are only visible when a specific answer choice is selected from the Child's Parent question. A Parent question can be either a Picklist or Multi-select question.

If you are looking for a different behavior please reach out to your Veeva contact so we can follow up. I also encourage you to submit an enhancement request in the Veeva CRM Community Portal under Product Suggestions so we can investigate this use case further.

Q: Could you gather analytics for surveys?

A: The Survey Management page does a high level aggregate report of Survey Target responses. Additional reporting can be done with SFDC reports or MyInsights or an external BI tool.

Q: Can we force a sync of the remote device?

A: A manual sync button will still be available with real-time sync.

Q: Will there be a recording of this event stored for us to access later on?

A: Yes, a recording of this will be posted on the Community Portal.

Q: Please confirm that CLM content will now be available to be shown on Windows, i.e. on laptop.

A: CLM content has always been available through our Veeva CRM on Windows application which runs on laptops.

Q: Is Real-time Sync available for Windows in 19R1?

A: The Survey Management page does a high level aggregate report of Survey Target responses. Additional reporting can be done with SFDC reports or MyInsights or an external BI tool.

Q: Will manual sync still force download latest KM's or will those KM downloads happen only "regular intervals"

A: The first iteration of real-time sync in 19R2 still requires users to select a Sync button to download media.

Q: Does real-time sync include media presentations?

A: The first iteration of real-time sync in 19R2 still requires users to select a Sync button to download media.

Q: Will account card on iPad display if valid consent for approved email is granted?

A: The Account card will not display the consent status for Approved Email. There can be multiple email addresses and subsequently consent can be configured at Product level. So it is possible that my account has granted consent for Product A for work email but not for Product B. Or my account has granted consent for Product A for work email but not for personal email.

Additional questions?

Contact your customer support representative.