20R1 Veeva CRM and Events Management Questions and Answers

Q: Will it be possible to configure the Third Party Authentication URL if we start using the AppStore version?

A: Yes, the App Store version of Veeva CRM will support Third Party Authentication URL. Customers will have to use their MDM to configure the feature.

Q: Can we manage the app update schedule for when users can upgrade?

A: This depends on whether or not you are using an MDM Solution to manage App Deployment and your particular MDM's settings and capabilities. In general, most MDMs will allow admins to push the most recent version of the CRM application at their own schedule. However, whether or not users can directly download the application from the App Store itself is based on MDM settings.

Q: How does Touch ID and Face ID work with single sign-on for field rep users?

A: Touch ID and Face ID are supported for Third Party Authentication URL but not for OAuth2.0.

Q: Can the Veeva app still be downloaded through Veeva CRM Online via Safari?

A: Yes, customers that have not migrated to the new App Store process can continue to download the Veeva App through Veeva CRM Online.

Q: Is the PDF feature applicable for Documents folder documents?

A: The PDF features are for viewing PDFs from within CLM media.

Q: Can we create reports on Dynamic Attributes with Accounts combination?

A: Yes, the Dynamic Attribute object where the values are stored is a child object to Account. You can use standard Salesforce reporting to create reports.

Q: Are there any new pre-built MyInsight reports coming with the Write feature like we have for KAM?

A: Because the potential use cases are so varied, there is no OOTB dashboard that is specific for this feature. Customers are encouraged to explore how this feature can be applied to their business problems with Veeva Services or a MyInsights Partner.

Q: Is Dynamic Attributes available in Veeva CRM Online?

A: Viewing and editing Dynamic Attributes from the Account Detail page Online is now available in 20R1.

Q: Where do you envision using MyInsights write back feature vs. surveys?

A: There are two basic use cases for MyInsights visualizations which write to the database. One is to allow customers to save preferences for a specific visualization. The other is to allow reps to quickly input data directly from a visualization. In the preview webinar, we demonstrated this with a custom object which is made available to reps. Surveys has built in publishing logic, OOTB UI, segmentation scoring, and more already available in Veeva CRM. Customers should consider the effort, maintenance, and risk when deciding to pursue custom MyInsights visualizations.

Q: For my MyInsights, can we edit records on custom objects (initially only available in Veeva CRM Online) in iPad if we create a MyInsight for that Object?

A: Yes, customers can create MyInsights pages that both display and update records of custom objects. When creating these MyInsights pages, think deeply about the needs of the user and present the data and interactivity in a way that facilitates the users natural workflow.

Q: Can you please confirm if the Dynamic attributes would be available in reports?

A: Standard Salesforce reporting can be done on the Dynamic_Attributes_vod__c object.

Q: Will Dynamic Attributes be available in reports?

A: Standard Salesforce reporting can be done on the Dynamic_Attributes_vod__c object.

Q: Which functionalities are turned on automatically/out of the box and which ones need to be turned on by IT?

A: Please see the release notes information here:
https://crmhelp.veeva.com/doc/Content/CRM_topics/ReleaseNotes/20R1/New_in_Veeva_CRM_20R1.htm#20R1

Q: Are accounts not aligned to user's territory visible under "My accounts"? Does a download into iRep increase sync time?

A: Accounts are not downloaded, just the relationships between accounts. These relationships will be requested on demand every time that the user accesses their Sphere of Influence or Account Hierarchy and removed when they exit. Sync time is not affected.

Q: Is it available offline?

A: It is available on the mobile devices but requires internet connection to retrieve information outside the rep's territories.

Q: When using Global Account Browse, does it only include accounts in Veeva CRM or does it also include Veeva Network?

A: It only includes relationships coming from CRM.

Q: Global Account Browse looks nice. Are you planning to add an enhancement to be able to align the customer from the hierarchy or SoI directly without having to go to global account search to find the customer?

A: Aligning the customer is already available for customers utilizing Veeva Network or Veeva OpenData. It is on our roadmap to bring this capability for all customers of CRM.

Q: Global Account Browse seems available offline. Will the new feature bring/sync more account data to iRep?

A: It does not have any impact on sync. Relationships are requested on demand and then removed from the local device when the user navigates away from Sphere of Influence or Account Hierarchy.

Q: How does Global Account Browse impact the members and members of related lists?

A: It does not have any impact on related lists. The information can only be seen from the Sphere of Influence and the Account Hierarchy.

Q: Can users be alerted in real-time if they are typing something non-compliant while they are saving information?

A: No, users will not be alerted upon typing anything non-compliant. There is no difference in end user experience as part of implementing Approved Notes.

Q: Is Global Account Browse configurable? Can it be turned on or off? Can we control visibility?

A: Global Account Browse can be turned on or off. Once turned on the levels of affiliation are not configurable. The amount of navigation available depends on the structure of the data. From the source account, if the relationship to a destination account exists, you can access it.

Q: Will Approved Notes work if words are misspelled?

A: No, v1 of Approved Notes flags a note only if the keywords provided are properly spelled.

Q: Is Veeva CRM for the iPad on the roadmap for customers not using Network or OpenData?

A: Global Account Browse is available for CRM customers. The ability to 'Add to Territory' is currently only available to Network and OpenData customers. Adding accounts to territory from Global Account Browse for CRM customers is part of our roadmap.

Q: Will Call Monitoring work in iRep?

A: Approved Notes can monitor data as long as the field is of type Text. The Call record needs to sync to the server for the Approved Notes job to monitor the data in it.

Q: Can you configure “field to be monitored” at the Account object level or only through the Call Report?

A: It is open to other objects, so it can be configured at Account object level too.

Q: Does Approved Notes use translation workbench to do translations? Do we need to set up a set of rules per market and language?

A: Approved Notes does not automatically translate keywords and phrases to be monitored. Customers need to create separate rules per language.

Q: Is the hierarchy search for event attendees only available in Lightning?

A: The attendee hierarchy feature is available Online in both classic and Lightning.

Q: Is the attendee hierarchy available on the iPad?

A: The attendee hierarchy feature is available on both the Online and iOS platform.

Q: Will attendees be able to see other pre-registered people?

A: The names of the attendees are only viewable by the other attendees attending the event. This is the same as a paper sign in sheet today. With digital sign in either on the iPad or with QR, attendees first search in order to see a list of potential matches in the search screen, then the full list displays by default. Also, the information that is displayed on the name cards is limited to the name and the office location of the professional, which is public information.

Q: Can the welcome message be customized to give the HCP name instead of say “Enjoy event, attendee”?

A: In the production release the system will display a standard "Enjoy the event!" message.

Q: How will the QR Code be shared with the attendees?

A: The QR code can be generated via Veeva CRM Online (via the web browser) and also on the iPad. The QR code is an image that can be downloaded and saved/added to the camera roll. It can be printed out, projected, or displayed directly from the iPad.

Q: Can the signatures be used to capture attendance during meals?

A: When attendees sign into an event via QR code or the sales representative's iPad, they can indicate if they are joining a meal or not. This is a configurable feature of Veeva CRM Events Management.

Additional questions?

Contact your customer support representative.