Veeva CRM
Release 21R3.3

Agenda

Objectives

21R3.3 Release Timeline

21R3.3 Enhancements

Announcements

Legend

(thumbs up icon)	Features On By Default
(wrench icon)	Features Enabled By Configuration

B	Browser (Classic)	(phone icon)	iPhone
I	iPad	A	Align
W	Windows	V	Vault
EA	Engage App	(lightning icon)	Lightning

Orange = Applicable

Grey = Not Applicable

Light Orange = Parity item

Objectives

- Provide a detailed explanation of new features in the latest Veeva CRM release that may be of interest to our customers

- Details include:
  - Overview of how the feature functions
  - Business justification of why the feature was developed
  - Considerations for enabling the feature
  - Configuration notes for an overall sense of level of effort

Deep Dive makes the release notes more consumable

21R3.3 Release Timeline

Full Sandbox

Thursday, **February 24**, 2022
between 8 pm ET and 1 am ET

Production

Thursday, **March 3,** 2022
between 8 pm ET and 1 am ET

A sandbox refresh occurring between **February 24, 2022,** and **March 3, 2022,** will result in reverting the sandbox org **BACK to Veeva CRM 21R3.2**

Feature Areas

- Standard Metrics
- Approved Notes
- Align
- Events Management

Standard Metrics

- Windows Tablet Call Channel Parity

Windows Tablet Call Channel Parity

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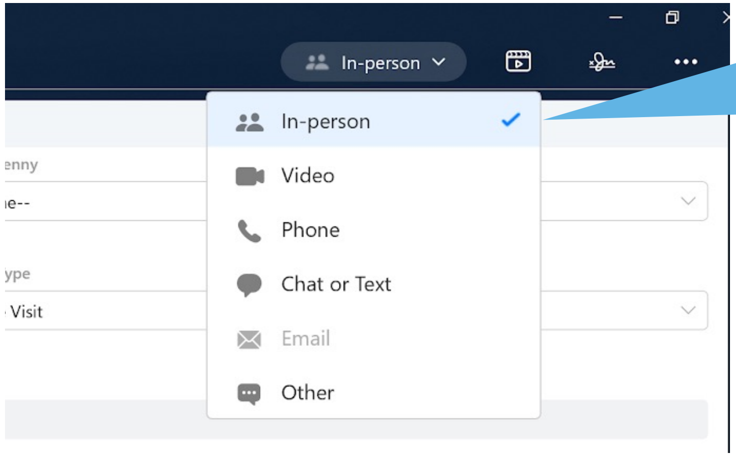
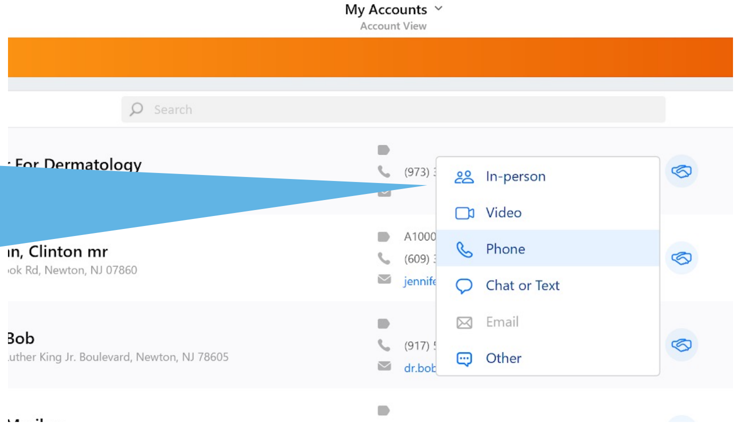
- Overview
  - CRM for Windows Tablet now supports Standard Metrics for Call Channel functionality
  - Support for the following Call Channel functions are now available
    - Greying out unsanctioned channels
    - Auto-populating the OOTB Call Channel Field
    - Call Channel validation on submit
- Business Justification
  - This enhancement will enable your organization to adopt its Standard Metrics Call Channel strategy on Windows Tablets

Call Channel Parity for Windows Tablet



Identical to the iPad, Windows Tablet users will now benefit Standard Metrics related UI enhancements



- Considerations
  - If your organization is already configured for Standard Metrics Call Channel for iPad, Windows Tablet will inherit these settings
  - Page layout modification should be considered if leveraging Auto-Populate functionality

Field Level Security	Page Layout	Object Permission	Custom Settings	VF/Apex	VMOCs	Tab/Data
			X			

Approved Notes

- Job History Table

Job History Table for Approved Notes

- Overview
  - The Job History Table allows admin users to review the results of each job run in the last 90 days for Approved Notes. This makes it easy to quickly find and resolve any errors that may occur
- Business Value
  - Alice Adams views the last 90 days in the Job History table and sees that the most recent run of the Approved Notes process failed. She quickly reviews the error message associated with the failure and addresses it to ensure future runs complete correctly
  - If additional detail is needed, the successes and failures data can be downloaded as a CSV file by clicking on the hyper-linked number in the appropriate column

Job History

Last Updated	Job Id	Job Status	Successes	Failures	Error Message
1/26/2022, 03:29 PM	123	ERROR			Error: Integration user is missing field permission to Monitored_Phrase_vod__c.Phrase_vod__c.
1/26/2022, 03:23 PM	122	ERROR			Error: Integration user is missing field permission to Monitored_Phrase_vod__c.Match_Type_vod__c.
1/26/2022, 03:15 PM	121	ERROR			Error: Integration user is missing field permission to Monitored_Phrase_vod__c.Match_Type_vod__c;;Monitored_Phrase_vod__c.Phrase_vod__c.
1/26/2022, 01:55 PM	120	COMPLETE	2	0	
1/26/2022, 01:12 PM	119	COMPLETE			No flagged records detected.

Job History Table for Approved Notes

- Viewing Job History
  - The Job History table is visible in the Approved Notes Admin tab below the Veeva CRM Connection Management section
- Considerations
  - This feature does not require configuration
  - The Approved Notes Job History Table is supported in both Browser (Classic), Browser (Lightning)
  - Note: The legacy Reviewer Central does not support downloading job Successes and Failures data

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Align

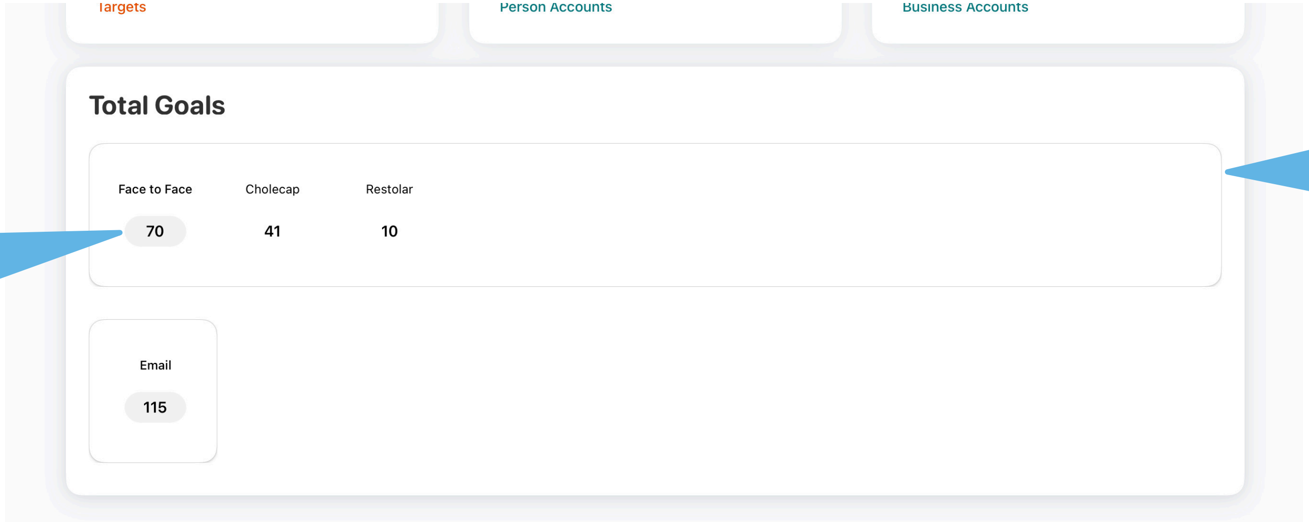
- Total Goals Metrics in Territory Feedback

Total Goals Metrics in Territory Feedback

- ## Overview
  - iPad users can now view Total Channel and Product goals for their upcoming cycle from the Territory Dashboard in Territory Feedback. These metrics enable users to submit more useful feedback on their upcoming cycle by informing them of their expected total interactions.

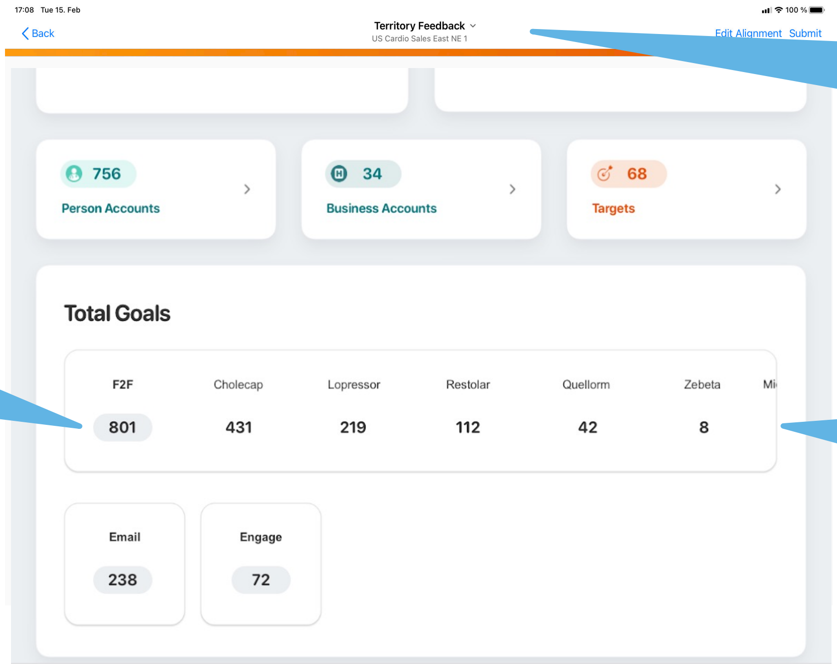
- ## Business Value
  - It is common for Managers to provide guidance on the total number of activities the Reps should be aiming towards. When reps are providing feedback, they want to know how many activities they should plan, so that they can adhere to basic guidance given by management. This new data widget will ensure Reps and Managers will have visibility of those Total Goals metrics as they provide feedback

The new widget is at bottom of dashboard and requires users to scroll down to view entire widget



Vertical scrolling is also a new feature of the dashboard

Total Goals Metrics in Territory Feedback



Align Tip: Users can view the Instructions field by tapping on the header

Metrics are grouped by channel goals, then by product goals.

Users can scroll horizontally to view all product metrics when necessary

- Considerations
  - This feature does not require configuration
  - The data that is displayed is dependent on your configuration, it can display Channels only, or Channels and Products, or a mix of both
  - The Total Counts are 'smart' in that they take into consideration all challenges and the status of those challenges, for example, the goals against a pending or approved "Remove Target" Challenge would not be counted
  - The Total Goals widget only displays if the territory has an associated Multichannel Cycle
  - Total Goals metrics are not currently available in Manager Territory Feedback

Events Management

- Sorting by Furigana
- Limit Attendees by Meals and Topic

Sorting by Furigana

- Overview
  - User’s can now enter Furigana when searching for Attendees and Speakers or when working with the Digital Sign-In sheet

- Business Justification
  - By supporting the Japanese reading aid Furigana in Attendee, Speaker, QR and Digital Sign-in search, users can easily identify the correct attendee/speaker record they want to work with

Sorting by Furigana

- Considerations
  - If the feature is not enabled, CRM searches and sorts records only by their Formatted Name.
  - On CRM for iPad, if child accounts are enabled, users can search and sort both parent and child accounts by furigana.
  - The search and sort features support both half-width and full-width furigana.

Field Level Security	Page Layout	Object Permission	Custom Settings	VF/Apex	VMOCs	Tab/Data
x	x					

Limit Attendees by Meals and Topic

- Overview
  - 'Meal Opt-In Attendance Limit Rule' & 'Cross Event Meal Opt-In Attendance Limit Rule’ have been enhanced to support Event Topics
- Business Justification
  - Leveraging the Event Topics functionality will further aid in meeting compliance guidelines
  - Coordinators can be alerted when there is HCP repeat attendance on event topics where a meal is provided
- Considerations
  - Modifying any existing Meal or Cross Event Meal rules to support topics will enable the rules to work retroactively
  - Once triggered, alerts can be configured to either warn or prevent users from adding attendees to Events

Field Level Security	Page Layout	Object Permission	Custom Settings	VF/Apex	VMOCs	Tab/Data
	X		x			

Announcements

New

- 22R1 Release Calendar
- Engage Meeting Group Administration Update
- New Video Tutorials
- Authentication Change for SAP Concur Integration
- Ending ASSMCA Validation

Reminders

- Veeva CRM Standard Metrics
- CRM Desktop (Windows) Support
- Lightning: Time to Migrate
- Salesforce Reminders
  - Salesforce.com MFA Requirement
  - Salesforce Retirement Announcements

Upcoming Release Dates

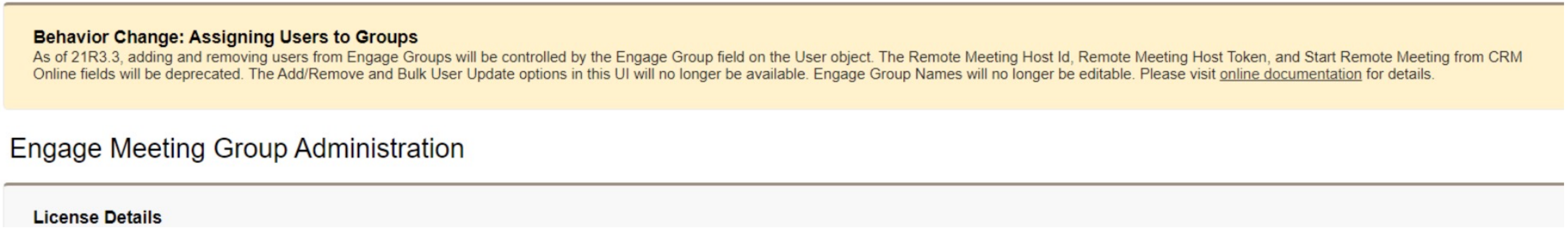
22R1 – March – April 2022

Mon	Tue	Wed	Thu	Fri
21	22	23	• Release announcement • Release notes available 24	25
28	29	30	• Sandbox Upgrade 31	1
4	5	6	7	8
11	12	13	• Production Upgrade 14	15

The full year release schedule can be found on Veeva's Online Help

Engage Meeting Group Administration Update

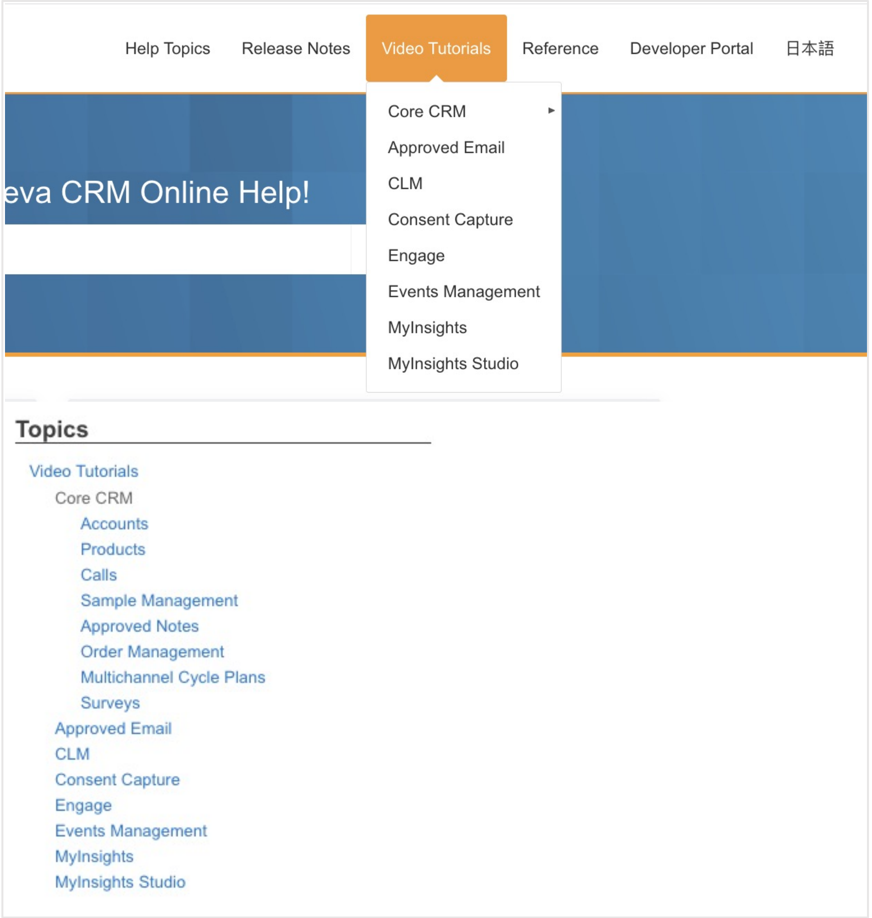
- The Engage Meeting Group Administration management process will be updated in the 22R1 release (April 2022), allowing admins to control user assignment to Engage Groups via the User object
- This will allow user assignment to be controlled via data loading, improves user management in organizations, and ensures newly licensed users have immediate access to Engage Meeting
- **Administrators will not be able to add or remove users from Engage Meeting groups for a 7-hour time period during the following dates:**
  - **Friday, April 1 – Only sandbox orgs**
  - **Friday, April 15 – Both sandbox AND production orgs**
- Engage Meeting functionality will not be interrupted during these times.
- In the 21R2.3 release, a banner announcing the forthcoming change was added on the Engage Meeting Group Administration page



CRM Help

New Video Tutorials Available

- [Office Best Times for Accounts]()
- [Creating Custom Presentations]()



Authentication Change for SAP Concur Integration

- SAP Concur will change how authentication works for integrations with partner software, including Veeva CRM
- Any customers with CRM environments connected to SAP Concur will need to reconnect and authenticate from within Concur's App Center
- This change will be available in the 22R1 (April '22) release
- If connections are not updated by June 30th, 2022 customers may see authentication related errors within their integration
  - See SAP Concur Overview for more information.

Ending ASSMCA Validation

- Beginning in 22R1 (April ‘22), ASSMCA licenses will no longer be validated in Veeva CRM
- Since Puerto Rico no longer requires ASSMCA license validation for controlled substance sampling to HCPs, ASSMCA_vod and Ship_ASSMCA_vod fields will no longer be validated, stamped, or displayed on signature pages

CRM Standard Metrics

Required by 22R1 (April 2022) - Next Release!

Call Channel

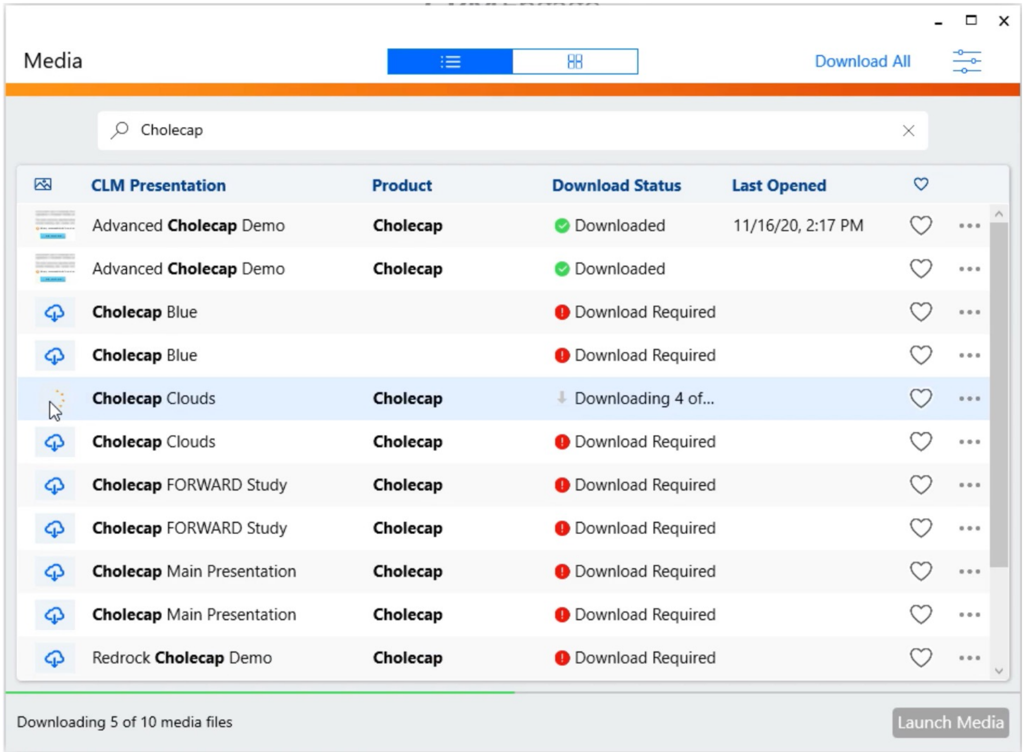
User Type

User Country

Plan, Pilot & Prepare!

CRM Desktop (Windows) Support

- Starting in 22R1 (April '22), the CRM Desktop (Windows) app will have the following restrictions and requirements:
  - Only WebView2 will be supported
  - Windows 8 will no longer be supported
  - Only the 64-bit version of Windows 10 or higher will be supported



Lightning: The Time to Migrate is Now

Enhancing the Desktop Experience

Veeva innovation will be in Lightning

Salesforce innovation is in Lightning

End of Veeva Classic Support with 23R3

Salesforce.com MFA Requirement

- Salesforce.com will require the use of MFA – deadline extension through Q2 2023
- Review the MFA admin guide to learn about
  - Why MFA is important
  - How MFA works
  - Verification methods
  - Rollout considerations
- Refer to Authentication Overview on Veeva CRM Help for guidance on configuring MFA with Veeva CRM

Salesforce Retirement Announcements

- Legacy API and S- Control Retirement
  - S-Controls with API versions below 20.0 are no longer supported by Salesforce, and Salesforce is requiring customers who have S-Controls with these API versions to upgrade them before the Summer '22 release (May 2022). Salesforce Documentation
  - Veeva Product-owned S-controls will be replaced with Visualforce components with the 21R3 release, before Salesforce's May 2022 deadline
  - Several Veeva customers have their own customized S-Controls, which will **not** be automatically upgraded with the 21R3 release. Please review with your team if you have custom S-Controls that require attention before May 2022
- Process Builder and Workflow Rules Retirement
  - Salesforce announced the retirement of Process Builder and Workflow Rules for the Winter '23 Release (August/September 2022) to make Flow will be the 'future' of automation tools
  - Salesforce has **no plans** to force a migration or stop currently running rules
  - Calendar of Events:
    - Spring '22 Release: Launch migration tool for Workflow Rules
    - Summer '22 Release: Launch migration tool for Process Builder
    - Winter '23 Release:
      - Disable the option to create new Process Builder or Workflow rules
      - Will retain the ability to edit existing rules

Default On Features

CRM Default On Features

Feature	Condition	Browser	iPad	Win	iPhone	Visible to Users
Windows Tablet Call Channel Parity	If already enabled for iPad			X		X
Total Goals Metrics in Territory Feedback	Veeva Align customers		X			X
Job History Table for Approved Notes	Approved Notes admins	X				

Questions

Thank you