ABC PHARMA

Veeva

Veeva CRM Quick Reference Card

Searching / Editing Accounts

1. Tap **My Accounts**
2. Tap the **Account View/Lists** drop-down to select a pre-defined View or Account List

Searching for Accounts

1. Use any of the following methods:
   - Tap the **Filter** button to view only Person Accounts or Business Accounts
   - Use the **Letter Initializer** to jump to Accounts starting with a specific letter
   - Tap in the **Search** field and enter at least **2 characters** to search by Account name or address
   - Swipe up or down to locate the desired Account
2. Tap the **Account name** to access the Account profile

Editing an Account Profile

1. Navigate to the **Account** profile, then tap **Edit**
2. Update the information, as needed
3. Tap **Save**

Note: *Fields indicated with a key icon require a Data Change Request (DCR). These updates will be verified and approved for the changes to remain in Veeva.*

Submitting Data Change Requests

1. After editing fields with a key, tap **Save**
   - The Data Change Request form displays
2. Enter **Notes** about the Data Change Request
3. Tap **Submit**

Sphere of Influence

Sphere of Influence is the informal relationships between Accounts in Veeva. Affiliated Accounts display as Suggested Attendees on the Call Report.

Creating an Affiliation

1. Navigate to the first **Professional's Account** profile
2. Tap **Sphere of Influence** then Tap **+**
3. Search for and select the **Professional** you want to Affiliate

Note: *A minimum of two letters are needed for the Search field.*

5. Select **Influence and Relationship Strength**
6. Select **Role**, then tap **Save**

Note: *Affiliations are reciprocal and visible on both Accounts.*

Editing/Deleting an Affiliation

1. Tap the **icon** of the Account to be edited or deleted
2. Edit the **Influence**, **Relationship Strength**, and/or **Role** > tap **Save**, OR
3. Tap the **More Actions** button then tap **Delete** > tap **Yes** to confirm

Recording Calls

1. Navigate to the desired **Account** profile
2. Tap the **Record a Call** button
3. Select or confirm the correct **Address**
4. Select **Activity Type**
5. Tap **calendar icon** to update the **Datetime**, if necessary

Attendees

1. Tap **Add Accounts**
2. Select the **radio button** beside desired Attendee(s)
3. Tap **Done**

Note: *Use the Search field to search for and select Accounts not listed.*

Launching Media

1. Tap the **Start Media** button
2. Select a **Presentation**
3. Navigate through the Presentation
4. When finished, tap the **More Actions** button
5. Tap **Done**

Note: *When a Media Presentation is captured on the Call Report, slides shared display in the Presentation Details section of the Call Report.*

Detailing Priority

1. Select **Product**
2. Select **Discussion Topics**

Note: *Tap 'Add Topic' to add additional Product Topics*

Key Messages

1. Tap **Add Key Messages**
2. Select **Message(s)**
3. Tap **Done**
4. Select **Document Type**
5. Select **Reaction**

Items Distributed

1. Tap **Add Promotional**
2. Select **Product**
3. Select **Item**
4. Select **Recipient**, if applicable
5. Select **Quantity**
6. Tap **Done**

Note: *If multiple Attendees, tap 'Done and New' and select the additional Professional(s) for whom Promotional Materials were provided.*

Completing the Call

1. Tap the **More Actions** button
2. Tap **Save** to save the Call as a draft to complete at a later time, OR
3. Tap **Submit** to submit the Call as final

Note: *Review My Schedule daily to assure that all saved Calls have been submitted.*

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Adding New Accounts

Business and Person Accounts can be added to Veeva. You must first search the Veeva Network before adding new Accounts to avoid duplicate records.

Searching the Veeva Network

1. Tap **My Accounts**
2. Tap **+** (upper right corner)
3. Enter **Search Terms** and **Location**
4. Select **Account Type** (HCP or HCO)
5. Tap **Search**

Adding an Account to Your Territory

1. Tap the **Account** you wish to add to your Territory
2. Tap **Add Account**
3. Select **Parent Account**, if prompted, then tap **Done**

Note: *Veeva begins to Synchronize*

Creating a New Account

1. Perform a **Search** for the Account
2. Tap **New Account**
3. Select **Institution** or **Professional**
4. Enter the **Account Required Information**
5. Search for and select the **Primary Parent** > select **Address >** Tap **Done**, OR
6. De-select **Create from existing Parent Account?**, then enter **Address Required Information**
7. Tap **Save**
8. Complete the **Data Change Request** form
9. Tap **Submit**

Updating Hierarchy

Hierarchy represents the formal relationships between Professionals and the Institutions where they work.

1. Navigate to desired **Person Account** profile
2. Tap **Member Of (#)** Related list
3. Tap **Create**
4. Search for and select **Parent Account** (Institution)
5. Select **Network Relationship Type**
6. Tap **Save**
    - The Data Change Request form displays
7. Enter **Notes**, then tap **Submit**

Note: *Veeva begins to Synchronize. The new relationship will be added to Veeva immediately and will be confirmed by the Data Steward.*

Help and Support

Sending an Approved Email

The HCP must have an Email in Veeva CRM and be opted in to receive Approved Emails from Veeva CRM.

1. Navigate to the desired **Professional Account** profile
2. Tap the **More Actions** button
3. Tap **Send Email**
4. Customize the Email template, if applicable

Updating an Email Address

1. Tap the **Recipients** tab (person icon)
2. Select the correct **Email** from the drop-down OR
3. Tap **More Actions** > **Manage Email Addressees** > enter or update the **Primary Email** > tap **Done**
4. Tap anywhere outside the Recipients tab to close it

Adding Attachments

1. Tap the **paperclip** button
2. Select the desired **Document(s)**
3. Tap anywhere outside the Documents window to close it

Sending the Email

1. Tap, hold, and drag the **slide to send** button
2. Tap **Close**

Note*: View sent email from the* ***Sent Email*** *Related list on the Account Profile*

Creating an Account List

Account Lists are manually created and maintained. You can add and remove Accounts from the List at any time.

1. Tap **My Accounts**
2. Tap the **Account View/Lists** drop-down to select a pre-defined View or Account List
3. Tap **Select** (top left) and select the **Accounts** you wish to add to a List
4. Tap **Create New List**

Note*: You can also add Accounts to previously created Lists.*

5. Enter a List **Name** and select a **Label** color
6. Tap **Create**

Removing Accounts from an Account List

1. Select the desired **View/List**
2. Tap **Select** (top left)
3. Select the **radio button** beside the Account(s) you wish to remove, then tap **Remove**

Editing/Deleting an Account List

1. Tap the **Account Views/Lists** drop-down
2. Tap **Edit Lists**
3. Edit the list **Name** and/or **Label** color > tap **Save**, OR
4. Tap the **red delete** button beside the List you wish to delete > tap **Delete** > tap **Save**