ABC PHARMA

Veeva

Veeva Medical Online Quick Reference Card

Create an Account List

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

1. From the Tab bar, click **My Accounts**
2. Select a **View** from the View drop-down
3. Select the **checkbox(es)** next to the Accounts you want to add to the List
4. Click **More Actions**
5. Click **Add to List**
6. Select **<New List>**
7. Click **OK**
8. Give the List a **name** and select a **color**
9. Click **OK**

The new List can be accessed from the View drop-down.

Delete Accounts from an Account List

1. Select the **Account List** from the View drop-down
2. Select the **checkbox(es)** next to the Account(s) you want to delete
3. Click **More Actions**
4. Click **Remove from List**

Edit or Delete an Account List

1. Select the **Account List** from the View drop-down
2. Click **Edit**
3. Edit the List **Name** and click **Save**, OR
4. Click **Delete**, then click **OK** to confirm

Search/Edit Accounts

1. Enter the **Account Name** in the Search bar
2. Click **Accounts** on the left to filter search results
3. Click an Account **Name link** to open the profile

Edit an Account Profile

1. Click **Edit**
2. Edit information as desired
3. Click **Save**

***Note**: Fields requiring a Data Change Request are indicated with a key icon.*

Record a Call

1. Search for the desired Professional or Business
2. Click the **name link** to open the profile
3. Click **Record a Call**
4. Select the correct **Address**
5. Select **Stakeholder** type
6. Update the **Datetime**, if necessary
7. Enter **Duration**
8. Enter **Total External Attendees**, if applicable
9. Select **Call Channel**

Add Attendees

1. If applicable, click the **checkbox** to the left of all Attendee names in the *Attendees* section

***Note**: Click Search to search for an Attendee not listed.*

2. Enter **First** and **Last Name** if Other Attendees were present, if applicable

***Note**: Other Attendees are the Total External Attendees that do not have a profile in Veeva.*

Educational Activity

1. Select **Educational Activity**

Product Detailing

1. Select **Add Discussion**
2. Select **Discussion Type**
3. Select **Subtopic**, if applicable
4. Repeat for additional Discussion Topics

Media

1. Select Available **Media**
2. Click right arrow to move to **Chosen**
3. Select and click left arrow to return to **Available**

Complete the Interaction

1. Click **More Actions**
2. Click **Save** to save the MSL Meeting Brief to be reviewed or edited at a later time, **OR**
3. Click **Submit** to submit the MSL Meeting Brief . No additional edits will be permitted

Help & Support Contact:

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Add/Create Accounts

Business and Person Accounts can be added to Veeva.

1. From the tab bar, click the **App Launcher**
2. Click **View All**
3. Click **Org-wide Account Search**
4. Enter **Search Terms**
5. Click **Search**

Note: *Filters can be applied to narrow search results.*

6. Select the **Account** from the search results and click **Add Account to Territory**
7. Select **Territory**

Create New Professional Account

New Accounts can be created if a search is performed and the desired result does not appear.

1. From **My Accounts**, click **New**
2. Perform a **Search**
3. Click **New**
4. Select **Professional** as the Record Type

Note*: Other Account Types can be created using this method.*

5. Click **Continue**
6. Enter **Required Information**
7. Deselect '**Create from existing parent account?**' and enter the address, **OR**
8. Click the **magnifying glass** next to the Primary Parent field to search for an existing Institution with which to affiliate the new Professional
9. Enter **Notes** of all other known information, along with phone number to help steward this Account
10. Click **Submit**

Create a Medical Inquiry

1. Search for and open the desired **Professional** profile
2. Click **Medical Inquiries** Related list
3. Click **New**
4. Confirm **Account** name
5. Select **Delivery Method**
6. Select **Address**, **Phone**, **Fax**, **Email**, as applicable
7. Select **Status**, as applicable
8. Select **Product**
9. Enter **Inquiry Text**
10. Click **Submit**

Note: *Can create MIR through Call Report to link to Interaction.*

Create a Medical Insight

Viewing Medical Insights

1. Search for and open the desired **Professional** profile
2. Click the **Medical Insights** Related list
3. Click a **Medical Insight Name** to view details

Creating Medical Insights

1. Search for and open the desired **Professional** profile
2. Click the **Medical Insights** Related list
3. Click **New**
4. Enter **Date**
5. Select **Topic**
6. Select **Subtopic**

Note: *Subtopics are dependent upon Topic chosen.*

7. Enter **Insight**
8. Confirm **Account**
9. Select **Stakeholder Role**
10. Click **Save** to save the Medical Insight to be reviewed or edited at a later time, **OR**
11. Click **Submit** to submit the Medical Insight

Note: *Please include only one Insight per submission. Key Medical Insights are only used by and visible to the Medical Team.*

Add Survey Targets

1. Search for and open the desired **Professional** profile
2. Click the **Survey Targets (Account)** Related list
3. Click **New Survey Target**
4. Select the **Survey**
5. Click **Add Survey Target**
6. Enter **answers** to the survey questions
7. Click **Submit**

Note: *Clicking **Save** does not submit the survey answers to Home Office. Submitted surveys can be unlocked for updates.*

Email Opt In

1. Search for and open the desired **Professional** profile
2. Click the **More** drop-down
3. Click **Email Opt In**
4. Confirm or update **email address**
5. Select **checkbox** to consent to receive email
6. Click **Save**

The Professional will receive an email with an Opt-In link.