

# Veeva Release Deep Dive

## CRM Order Management Enhancements



# Agenda

Demonstration Video – UX

Review latest enhancements

Fixed Multiples Enhancement

Demonstration Video – talk through features

Q&A

| Order Lines (21)                  | Seasonability | Last Invoice Date | List Price | Free Goods | Net Price |
|-----------------------------------|---------------|-------------------|------------|------------|-----------|
| <b>Must Stock Products (7)</b>    |               |                   |            |            |           |
| EZ Breathe Nasal Spray<br>EZB001  | Spring        | 2/1/2021          | EUR 3.50   | 0          | EUR 3.50  |
| EZ Breathe Tab 30<br>EZB001       | Spring        | 2/1/2021          | EUR 1.20   | 0          | EUR 1.20  |
| EZ Breathe Tab 60<br>EZB002       | Spring        |                   | EUR 1.80   | 5          | EUR 1.71  |
| Nomorpain Bottle x1<br>NMPx1      | Autumn        | 2/1/2021          | EUR 1.20   | 0          | EUR 1.20  |
| Nomorpain Bottle x5<br>NMPx5      | Autumn        | 2/1/2021          | EUR 3.00   | 0          | EUR 3.00  |
| Nomorpain Cuesta Max              | Autumn        |                   | EUR 2.00   | 0          | EUR 2.00  |
| Nomorpain Solution<br>NMP Sol     | Autumn        | 2/1/2021          | EUR 2.00   | 0          | EUR 2.00  |
| <b>All Others (14)</b>            |               |                   |            |            |           |
| Cholecap 10mg*<br>Chole10 - 23333 | All Seasons   | 2/1/2021          | EUR 10.00  | 0          | EUR 10.00 |
| Cholecap 20mg*<br>Chole20 - 23334 | All Seasons   |                   | EUR 20.00  | 0          | EUR 20.00 |
| Cholecap 30mg*<br>Chole30 - 23335 | All Seasons   |                   | EUR 30.00  | 0          | EUR 30.00 |
| Cholecap 50mg*<br>Chole50 - 23336 | All Seasons   |                   | EUR 15.00  | 0          | EUR 15.00 |
| Nicotinette 1mg 96<br>NC001       | All Seasons   |                   | EUR 6.00   | 0          | EUR 6.00  |

Order Total Quantity: 82 | Order List Amount: EUR 944.00 | Order Total Discount: 0.00% | Order Net Amount: EUR 944.00 | Order Total Profit: EUR 56.00





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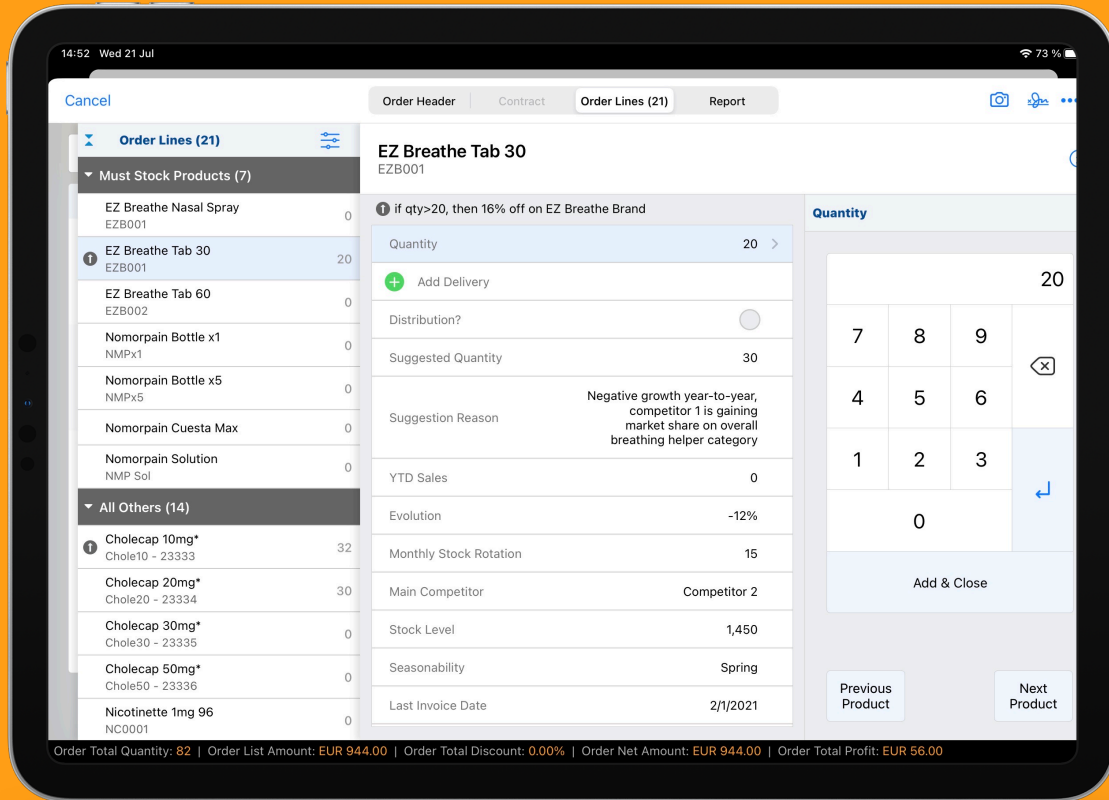
Solution Consultant





# Introduction

# Order Negotiation



## Negotiation Styles vary

- Size of the portfolio
- Seasonal pre-sales vs regular order
- Customer ordering system
- Style of the rep

## Enhancements designed to

- Find the correct product quickly
- Increase efficiency in data entry
- Allow rep flexibility in entry based on portfolio and customer need



# OM Enhancements

## Latest Release

- Order Line Table View as default view
- Configurable Order Line column width
- Product Search from Order Line Table View
- Order Entry Panel buttons now have text labels
- Plus and Minus shortcut buttons on Order Entry Panel for Products with fixed multiples

## Recent Releases

- Store Check Driven Discounts and Data pull through
- Advanced Product Views



Demo



Latest Release



# Order Line Table View

| Order Lines (21)                  | Seasonability | Last Invoice Date | List Price | Free Goods | Net Price |
|-----------------------------------|---------------|-------------------|------------|------------|-----------|
| <b>Must Stock Products (7)</b>    |               |                   |            |            |           |
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| Nomorpain Bottle x5<br>NMPx5      | Autumn        | 2/1/2021          | EUR 3.00   | 0          | EUR 3.00  |
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| Cholecap 50mg*<br>Chole50 - 23336 | All Seasons   |                   | EUR 15.00  | 0          | EUR 15.00 |
| Nicotinette 1mg 96<br>NC0001      | All Seasons   |                   | EUR 6.00   | 0          | EUR 6.00  |

Order Total Quantity: 82 | Order List Amount: EUR 944.00 | Order Total Discount: 0.00% | Order Net Amount: EUR 944.00 | Order Total Profit: EUR 56.00

## Overview

- Default to Order Line Table View when Mass Add Products is enabled
- When in Table View, editable fields are displayed in Blue, read-only fields in Black

## Business Justification

- Enhancement enables sales rep to go directly into a Table View that resembles a traditional paper Order Form.
- Sales rep can quickly find the Order Line of interest, click directly on field that needs updating (quantity, discount, etc), update field via the Order Entry Panel that automatically opens, and then return directly to the Table View to continue order capture process.

# Enable Product Search from Order Line Table View

| Order Lines (21)                     | Suggestion Reason   | YTD Sales | Evolution | Monthly Stock |
|--------------------------------------|---|-----------|-----------|---------------|
| Cholecap 10mg*<br>Chole10 - 23333    | Contractual value not attained YTD                            | 0         | 2%        | 8             |
| EZ Breathe Nasal Spray<br>EZB001     | Negative growth year-to-year, competitor 1 is gaining ma...   | 0         | -12%      | 16            |
| EZ Breathe Tab 30<br>EZB001          | Negative growth year-to-year, competitor 1 is gaining ma...   | 0         | -12%      | 15            |
| Nomorpain Bottle x1<br>NMPx1         | Competitor B will run a commercial on painkillers in Sprin... | 0         | -12%      | 30            |
| Nomorpain Bottle x5<br>NMPx5         | Competitor B will run a commercial on painkillers in Sprin... | 0         | -12%      | 32            |
| Nomorpain Solution<br>NMP Sol        | Sales drop alert year-to-year!...                             | 0         | -90%      | 24            |
| Painlasher 200mg<br>PSR0003          | Competitor C gaining market share on painkiller category...   | 0         | 10%       | 45            |
| Painlasher Maclaritin Max<br>PSR0004 | Competitor C gaining market share on painkiller category...   | 0         | 5%        | 18            |
| SaulClean Cream 15g<br>SC0001        | Negative growth year-to-year, competitor 1 is gaining ma...   | 0         | -12%      | 10            |
| SuperFrost Vaccine<br>SC0002         | Push on vaccines, Covid-19 will consume refrigerated sp...    | 0         | -12%      | 20            |

Tap to automatically open the Product Selector screen

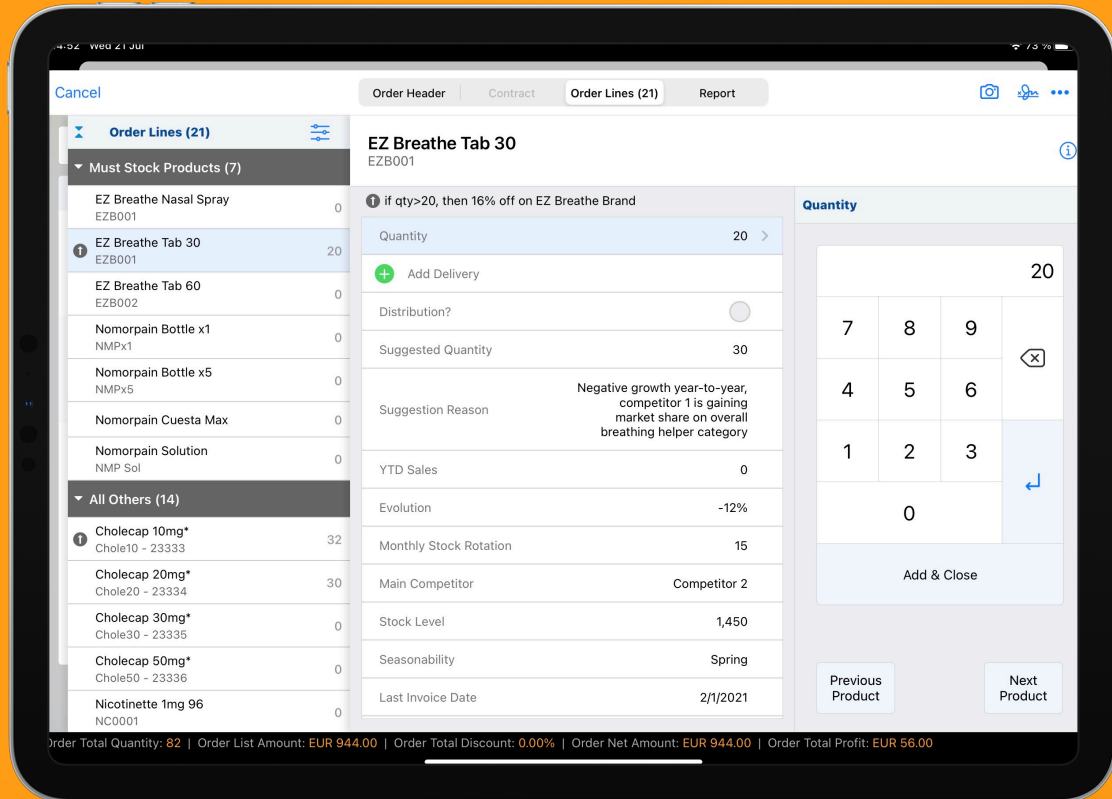
## Overview

- Product Search (or filter by Product) from Order Line Table View now possible
- Tapping on the active/inactive filter icon on the Order Lines automatically opens the Product Selector screen. After selecting desired Product, tapping on the filter icon automatically returns user to the Table View.

## Business Justification

- This enhancement enables faster data entry, by reducing the total number of clicks for the Sales Rep to create the order
- Table View is particularly useful when a previous order is cloned to expedite new order capture or when reviewing large complex orders by providing users with all available options at once.

# Order Entry Panel buttons now have text labels



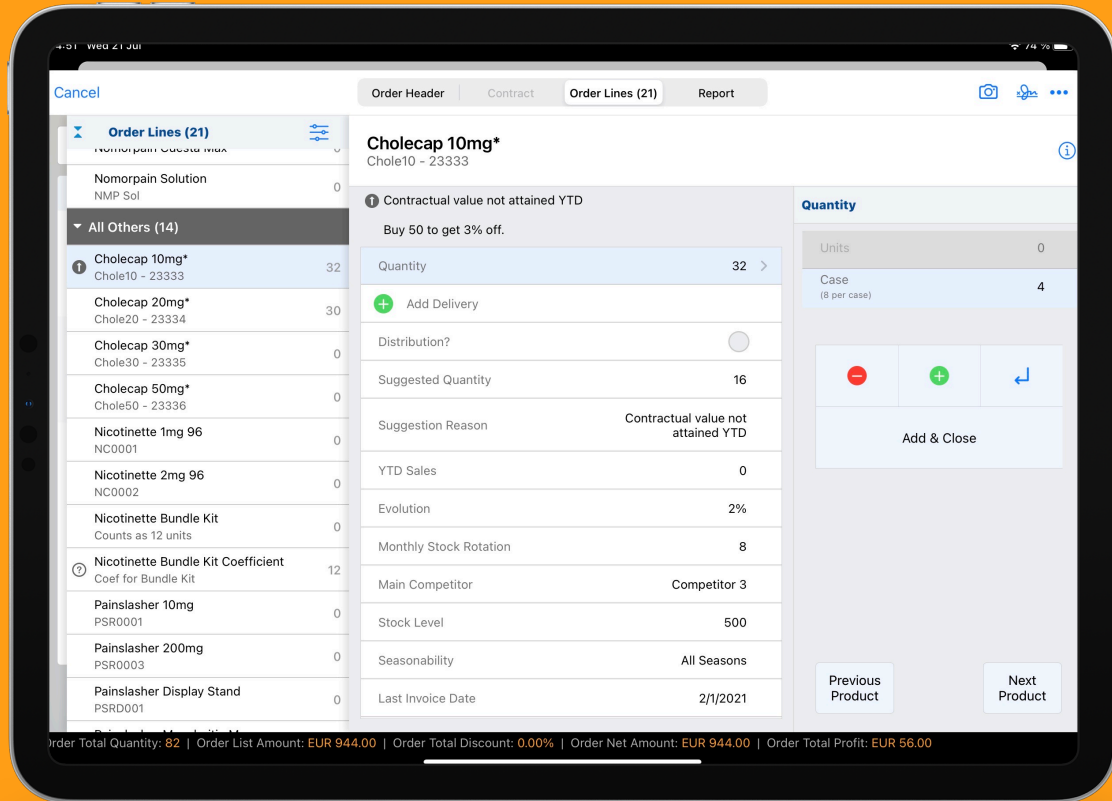
## Overview

- User Interface changes help clarify the purpose of buttons on the Order Entry panel
- 'Previous Product', 'Next Product', and the 'Add & Close' buttons now have clear text labels instead of icons

## Business Justification

- Clear button labels make order entry faster and more intuitive for sales reps.
- When entering many products, Sales Rep can go back to "Previous Product", forward to add 'Next Product' or simply add this product and stop data entry by clicking on 'Add and Close'.

# Plus and Minus buttons for Products with fixed multiples



## Overview

- Customers use pre-packaging to manage stock and shipments of certain products only sold in fixed multiples, ex; two shampoo bottles shrink-wrapped and sold as a single package
- With this enhancement, when the sales rep taps '+' button, the system automatically adds one package of two bottles.
- When the sales rep taps '-' button, the system automatically removes one package of two bottles.

## Business Justification

- Faster and more accurate order capture for Products with fixed multiples or units of measure

# Customer Success

## Increase/decrease buttons for Products with fixed multiples

Order Header | Contract | Order Lines (12)

Cholecap 20mg\*

|                     |              |
|---------------------|--------------|
| Quantity            | 300 >        |
| + Add Delivery      |              |
| List Price          | EUR 20.00    |
| Free Goods          | 0 >          |
| Line Discount       | 0.00% >      |
| Brand Discount Rule | 2.00%        |
| Total Discount      | 2.00%        |
| Net Price           | EUR 20.00 >  |
| Net Amount          | EUR 5,880.00 |

Quantity

|                   |   |
|-------------------|---|
| Box               | 0 |
| Case (8 per case) | 0 |

|   |   |   |   |
|---|---|---|---|
| 7 | 8 | 9 | ⌫ |
| 4 | 5 | 6 |   |
| 1 | 2 | 3 | ↵ |
| - | 0 | + |   |

Add & Close

Previous Product | Next Product

6,000.00 | Order Total Discount: 2.00% | Order Net Amount: EUR 5,880.00

### Overview

- Some customers have large quantities and fixed multiples
- Consequence of the product release: rep has to hit the + button many times
- Reduced efficiency rather than improving it.

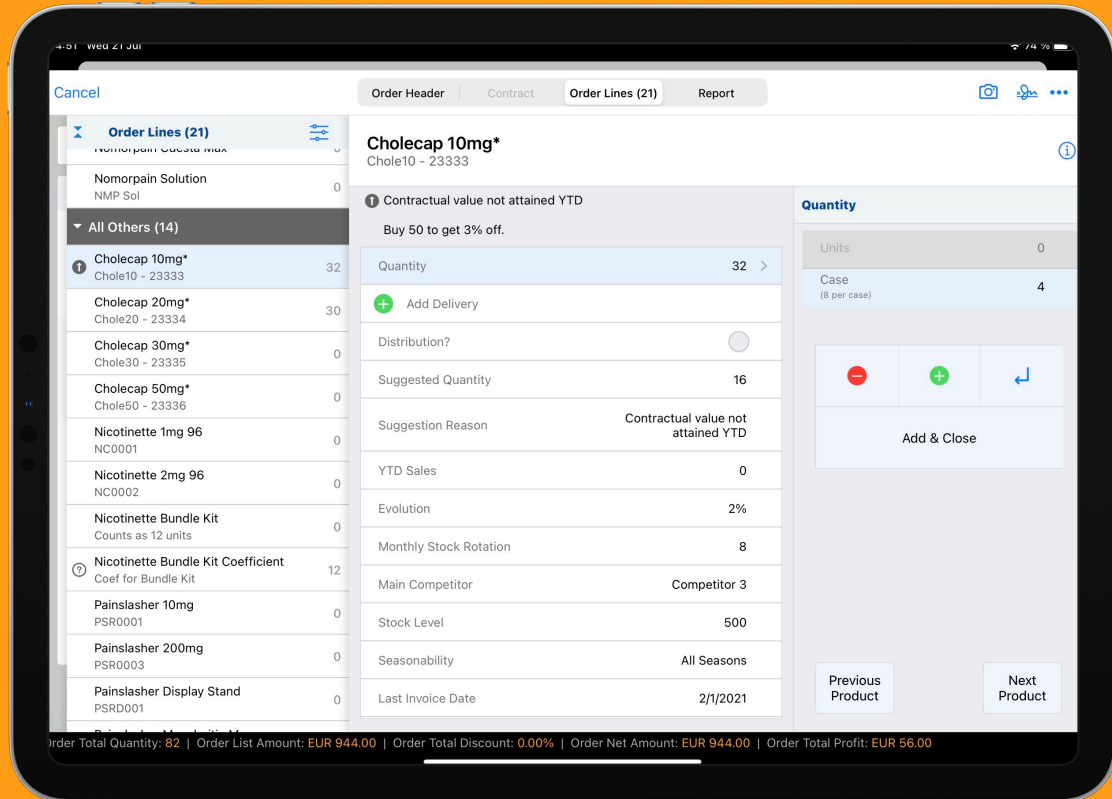
### Amendment

- The numeric data entry pad will be reintroduced **alongside** +/- buttons
- **Estimated release 21R2.2: 7<sup>th</sup> October SBX**



Previous Releases

# Inventory Monitoring Pull through Store Check Driven Discounts



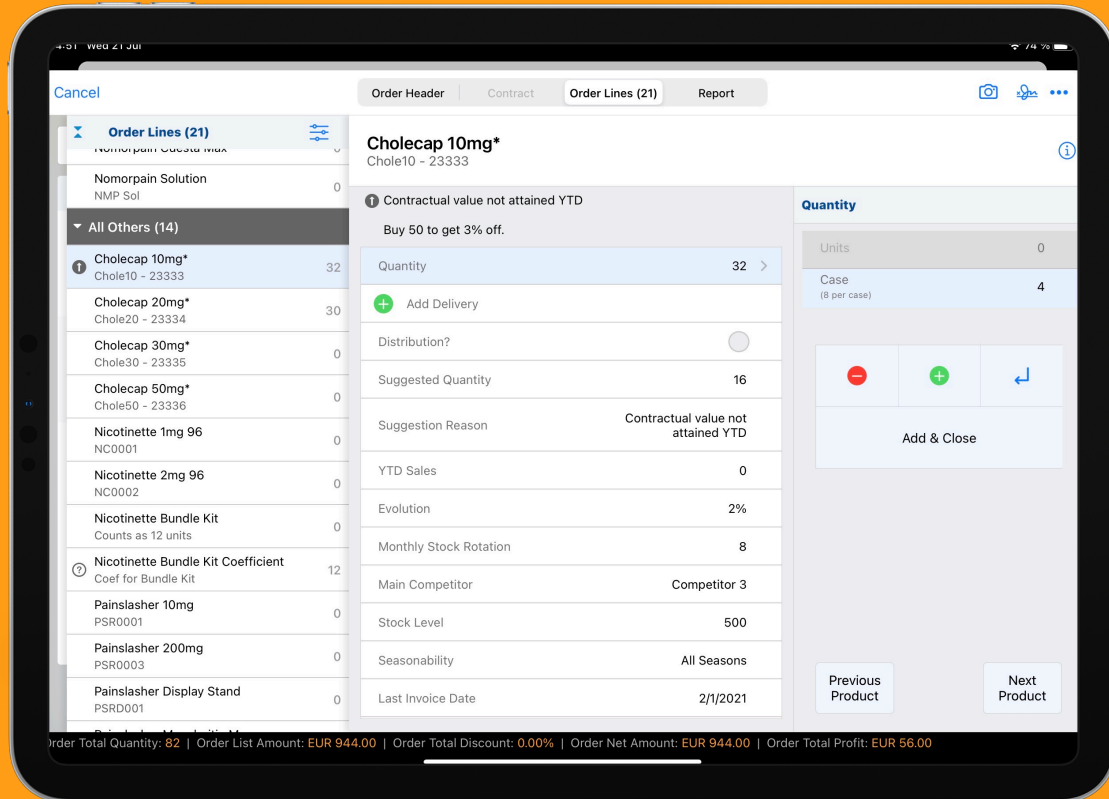
## Overview

- Sales reps capture data during a store check that can be useful to expose during order negotiation. For example highlight products out of distribution
- Many customers grant period end off invoice rebates for store check compliance over time, other customers seek to immediately pay for performance, and grant on invoice discounts for store check compliance
- This new discount type grants or refuses a discount on order line based on compliance of captured Inventory Monitoring data.

## Business Justification

- Integrate IM and OM to drive store performance linking sell out data to drive sell in.

# Advanced Product Filters



## Overview

- Filter the products in the product selector or order line views
- Customers can create multiple filters based on any field in the Product Information or Product table.
- Examples include: only products in stock, or products not ordered in a given time.

## Business Justification

- Increase speed and accuracy in finding the correct product .





Demo

Slow walk through



Q&A



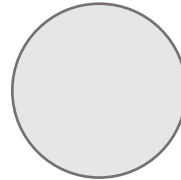
# New OM Features

## 21R2 Implementation Remarks

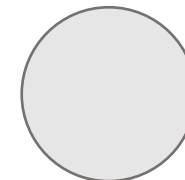
Optional configuration required for activation

Impact on previously existing features

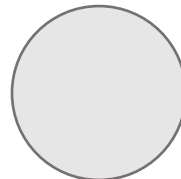
Helicopter View of Order Lines



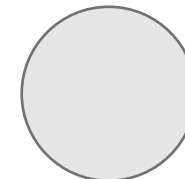
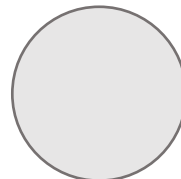
Configurable Order Lines Column Width



Shortcut Entry buttons using Fixed Multiples



Enable Product Search from Order Lines



## Helicopter View of Order Lines

### Impact:

- The feature impacts the Order Line Entry Mode for users which have Mass Add Entry Mode activated
- When Mass Add is activated, the Order Line Table view (Grid) is defaulted instead of the entry panel

### Implementation Remarks:

- Configuration is not required for feature activation
- The feature is available for all Order Line Entry modes (Single Line Entry vs Mass Add Entry)
- Defaulting the Order Line Grid View requires users to have Mass Entry mode activated
- Mass Entry Mode is activated through the Veeva Setting: OM Touch Mode Veeva (*ORDER\_TOUCH\_ENTRY\_MODE\_VOD*) = 1
- Label for “Add & Close” button may be customised in a Veeva Message: *OM\_AUTO\_CLOSE\_ENTRY\_PANEL*

## Configurable Order Lines Column Width

### Impact:

- The feature does not have a direct impact on previously existing Veeva functionalities
- Enhances Helicopter View feature by granting greater flexibility in customising the Order Line Table view

### Implementation Remarks:

- Optional configuration is required for feature activation
- Column width is defined in pixels. Default columns are approximately 150px wide
- The column width for the Product Name (*Product\_vod\_\_c*) field cannot be changed
- Order Line Column width are managed through a Veeva Message: *OM\_ORDER\_LINE\_COLUMN\_WIDTH\_vod*
  - Populate the Text field on the message with the following format: *FIELD\_API\_NAME:PIXELS*

## Shortcut Entry buttons using Fixed Multiples

### Impact:

- The feature impacts the entry panel usability for products that have fixed multiples (fixed unit of measure)
- The new plus (+) and minus (–) buttons display to increase/decrease case quantity

### Implementation Remarks:

- Configuration is not required for feature activation
- The new buttons display only for products that have fixed multiples
- To enforce fixed multiples on a product, the following fields on the Product Catalog record must be set:
  - *Fixed\_UM\_vod\_\_c* = TRUE
  - *Quantity\_Per\_Case\_vod\_\_c* = X (number of the multiple to be enforced)

## Enable Product Search from Order Lines

### Impact:

- The feature does not have a direct impact on previously existing Veeva functionalities
- Enhances Helicopter View feature by facilitating the transition from the Order Line Table view to the Product Selector

### Implementation Remarks:

- Configuration is not required for feature activation
- The feature is available for all Order Line Entry modes (Single Line Entry vs Mass Mass Entry)

# CRM Release Resource Center – Europe

- View upcoming release information and access on-demand content through our new Veeva&U release tab

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# Veeva & U

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## Veeva CRM Release Updates

This page highlights recent feature updates and enhancements in Veeva CRM. For additional detail and release notes, visit [Veeva CRM Online Help](#).

Veeva CRM is moving to a continuous delivery cycle, with 9 scheduled monthly releases including new features and maintenance items,

### Why do we need a change?

- Customer Success
  - Respond to the industry needs
  - Better alignment with Customer release / project cycles
  - Reduce release administration workload
- Speed & Agility
  - Faster innovation
  - Faster product evolution with shorter release cycles
  - Tighter feedback loops to react and learn
- Solutions for common problems
  - Moving features across releases instead of moving release dates

<https://www.veeva.com/eu/commercial-hub/releases/>





# Default On Features

21R2.0



# CRM Default On Features

| Feature   | Condition   | Online | iPad | Win | iPhone | Engage App | Visible to Users |
|---|---|--------|------|-----|--------|------------|------------------|
| Order Line Table View as Default                          | Mass Add Feature (OM Touch Mode) is enabled   |        | X    | X   |        |            | X                |
| Order Entry Panel button labels                           |   |        | X    | X   |        |            | X                |
| Product Search from Order Lines                           |   |        | X    | X   |        |            | X                |
| Configurable Order Line Column Widths                     | Optional configuration to increase or reduce the width of specific columns                  |        | X    | X   |        |            |                  |
| Shortcut Entry buttons for Products using Fixed Multiples | Products only sold in multiples have Quantity_per_Case_vod field defined in Product Catalog |        | X    | X   |        |            | X                |





Thank you