Veeva Release Deep Dive

CRM Order Management Enhancements

Agenda

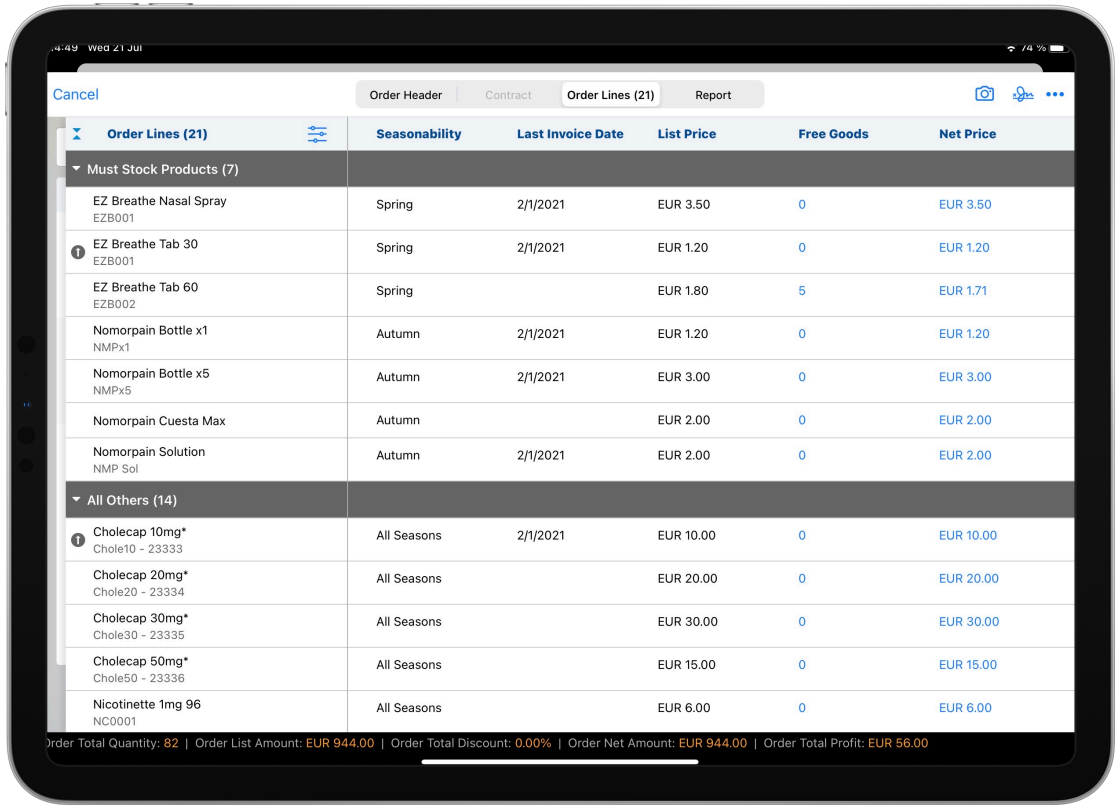
Demonstration Video – UX

Review latest enhancements

Fixed Multiples Enhancement

Demonstration Video – talk through features

Q&A



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Rohan Poole
Director - Commercial Strategy

Bastien Mauclaire
Director CRM Product Managment

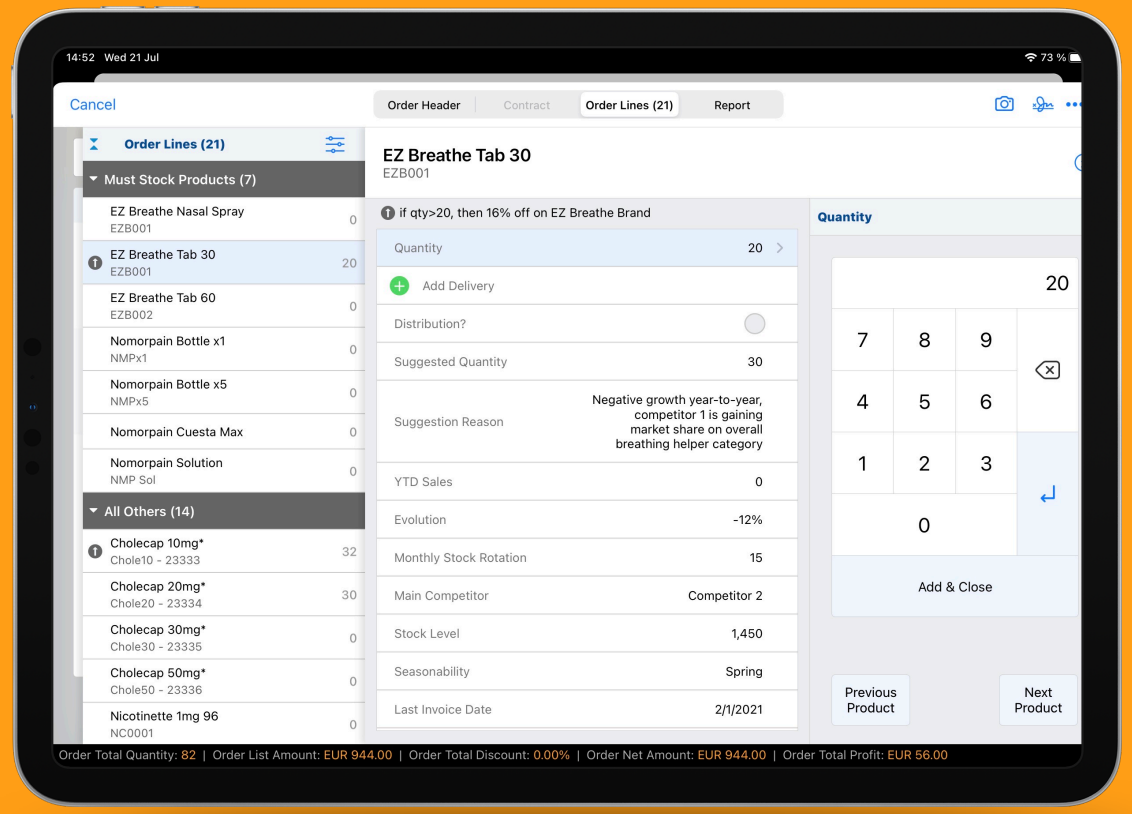
Guiseppe Ceraolo
Professional Services Domain Lead

Remy Tonin
Solution Consultant

Veeva

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

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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

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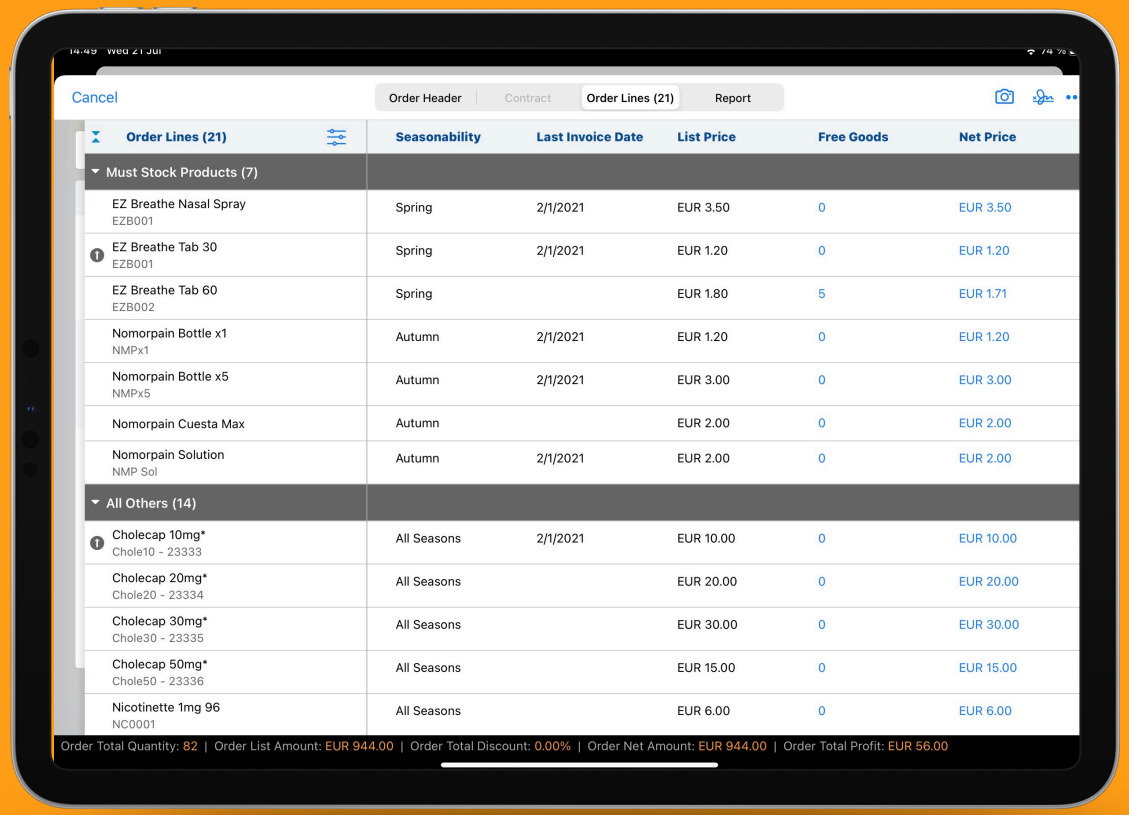
Demo

Latest Release

Order Line Table View



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.

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Enable Product Search from Order Line Table View

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.

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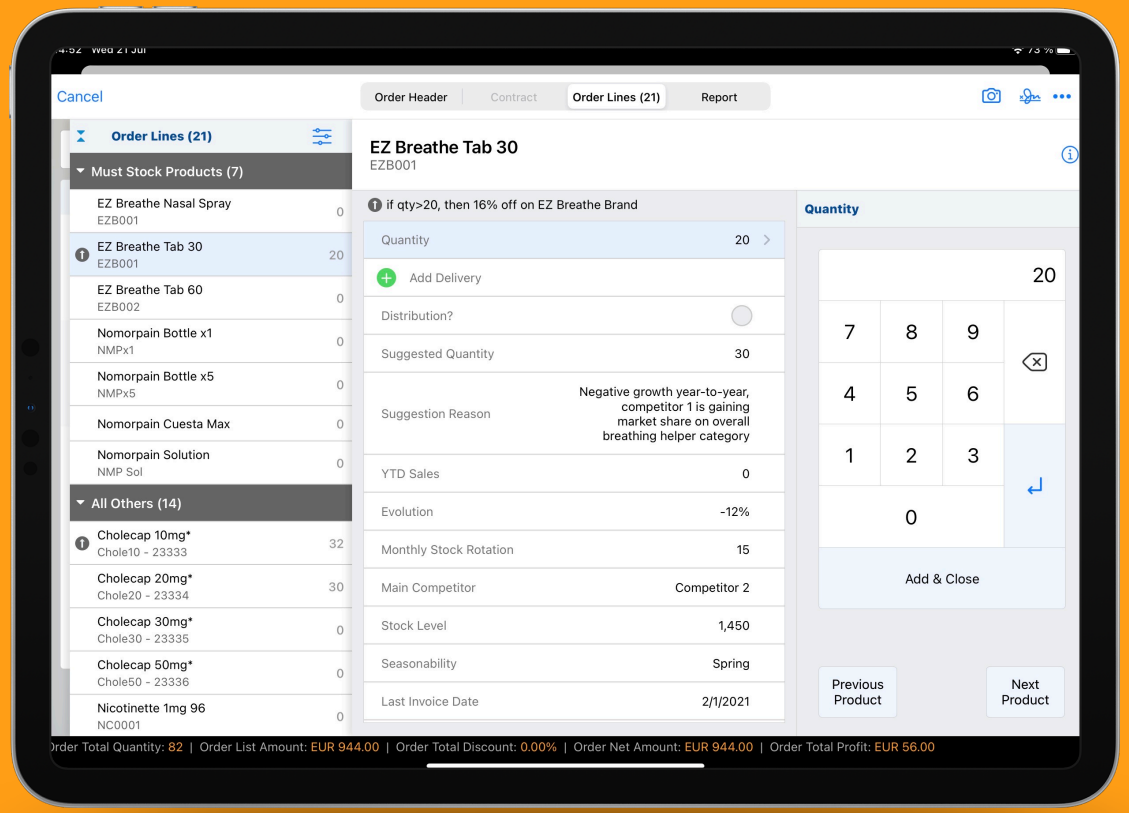
Order Entry Panel buttons now have text labels



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’.

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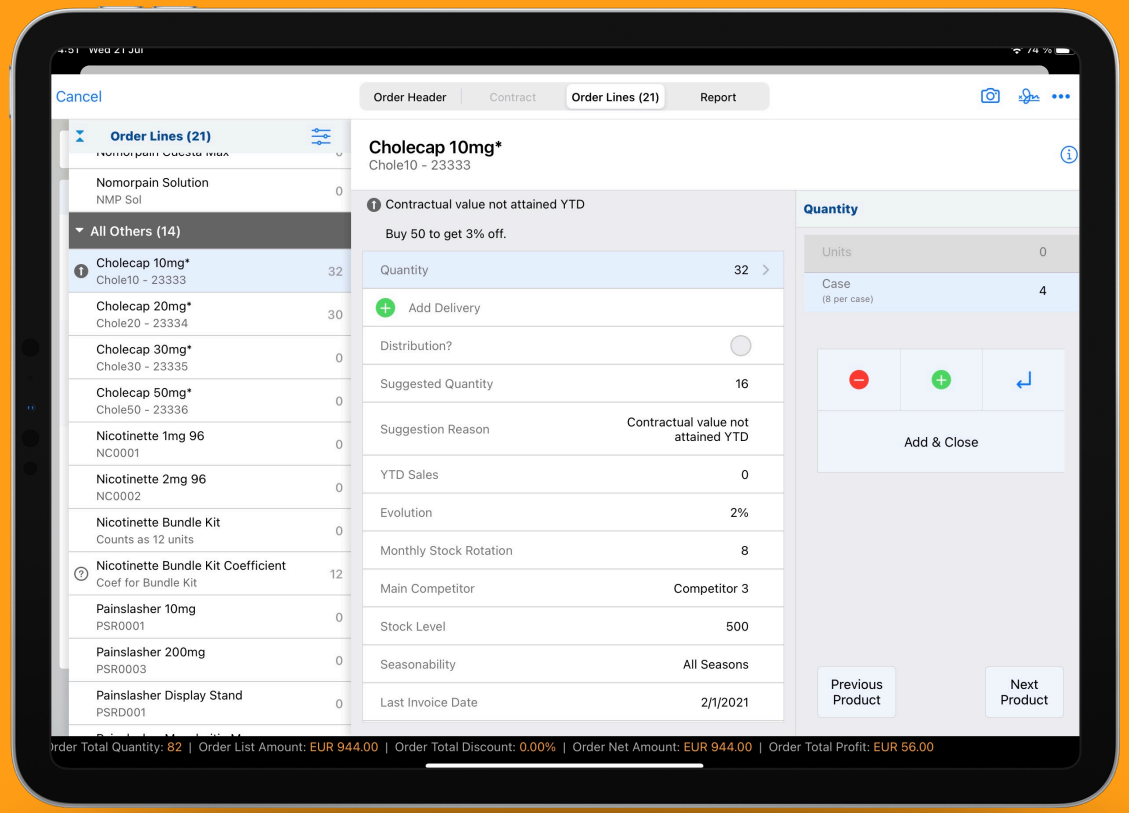
Plus and Minus buttons for Products with fixed multiples



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

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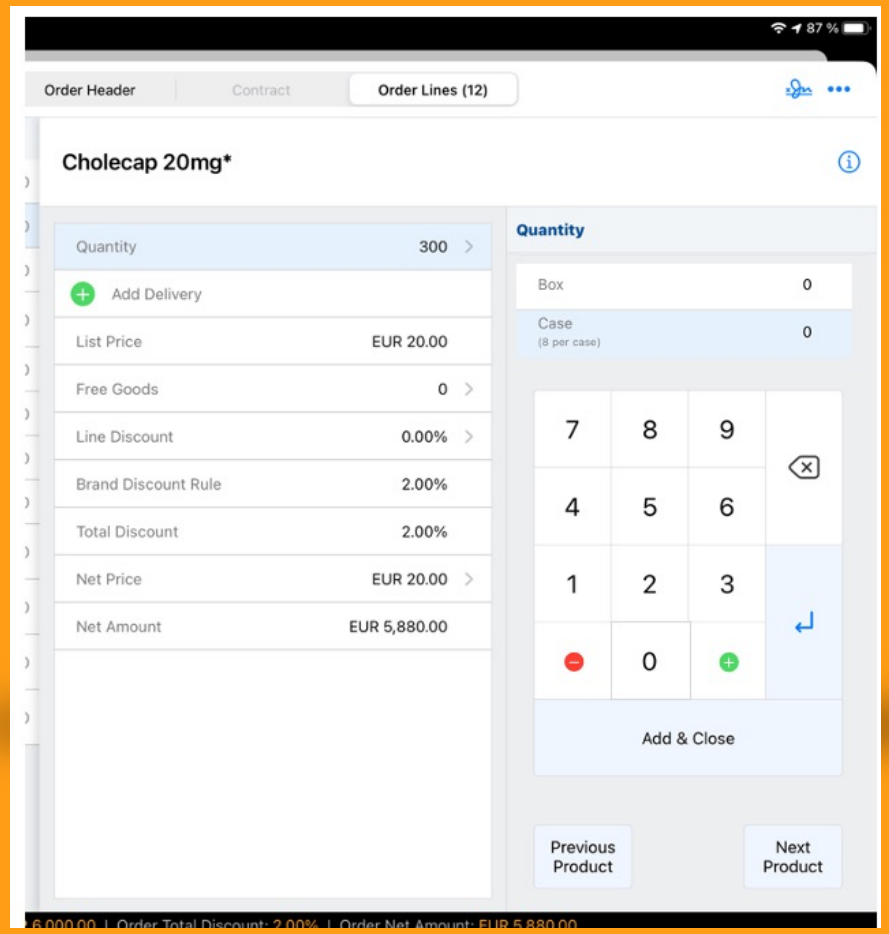
Customer Success

Increase/decrease buttons for Products with fixed multiples



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: 7th October SBX**

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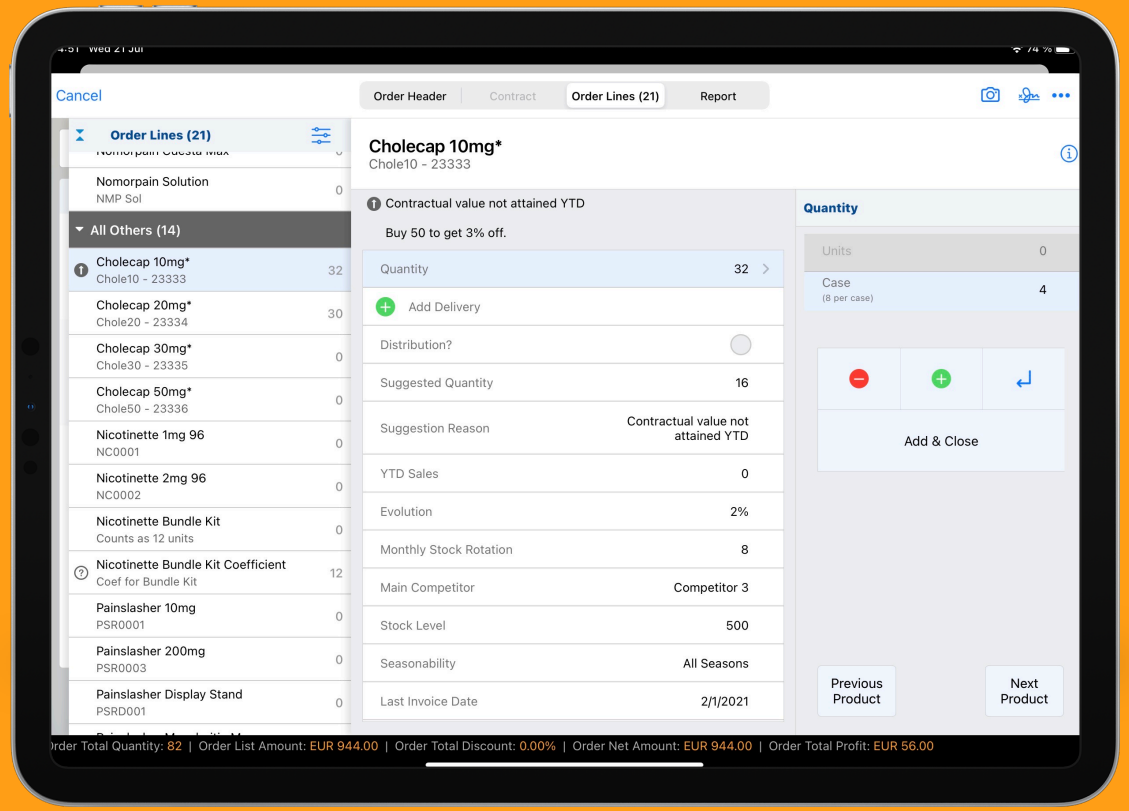
Previous Releases

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.

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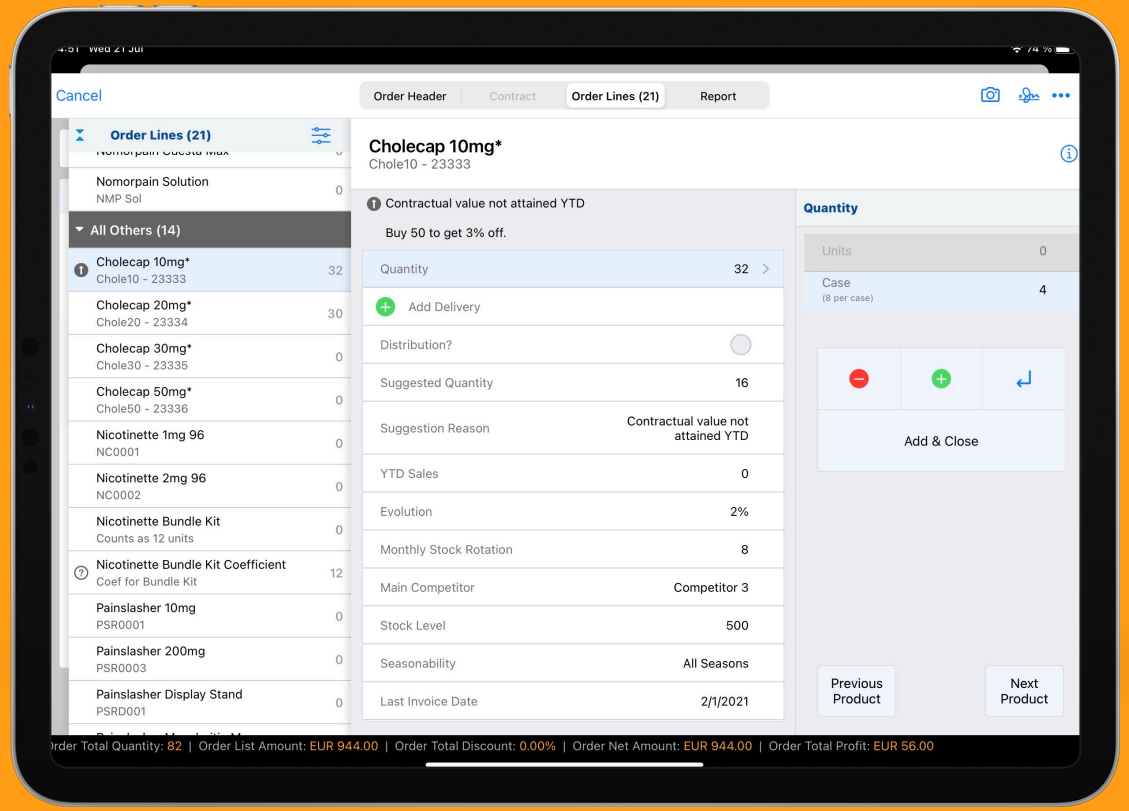
Advanced Product Filters



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 .

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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		

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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 Colum 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

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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)

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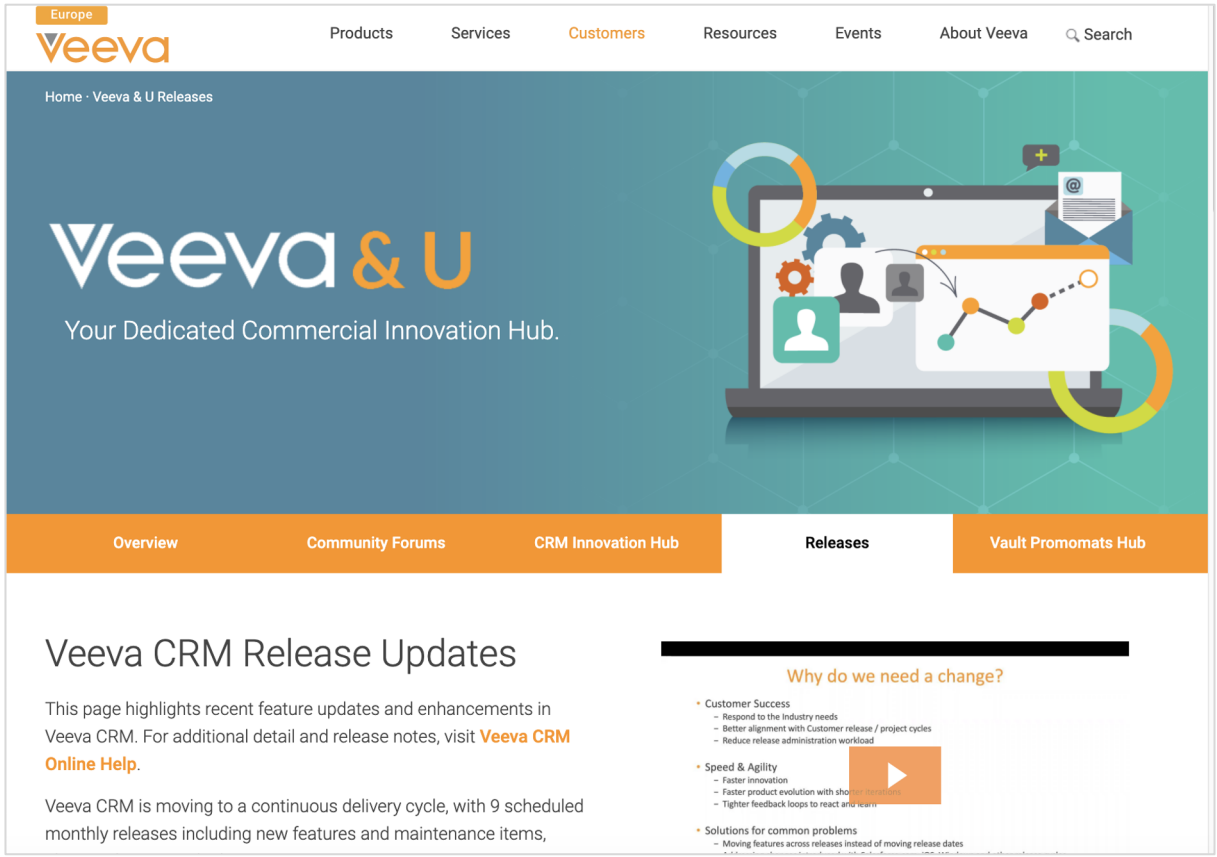
CRM Release Resource Center – Europe

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



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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

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Thank you