



INNOVATION GUIDE

# Vault CRM X-Pages

**Veeva** Vault CRM

# Overview

Veeva Vault CRM X-Pages enables a CRM user experience that's tailored for your teams, helping them make data-driven decisions that drive more effective engagements.

Your instance of **Vault CRM** should be as unique as your business, and **Veeva Vault CRM X-Pages** can help you make that happen. Vault CRM X-Pages lets you craft custom screens, workflows, and app-like experiences inside the Vault CRM interface, so you can put the data and functionality that power your team at their fingertips.

You can create screens using either configuration or code. Vault CRM X-Pages Studio allows administrators to architect and deploy screens to any Vault CRM org they manage with a codeless point-and-click interface. For more advanced use cases, developers can use industry-standard HTML5 and JavaScript to craft personalized user experiences.



## Tips & Tricks

### PUT ALL THE DATA THAT POWERS YOUR TEAMS IN ONE PLACE

X-Pages features an array of connectors and integration tools that make it easy to funnel data from both internal and external sources directly into Vault CRM. Your teams won't have to waste time switching between apps or searching for the right metrics when it's already right where they do their best work.

### Surface real-time CRM data for more relevant actions

Maybe you want to show your sales reps the healthcare professionals (HCPs) they've called on the fewest times this quarter or help medical teams see an HCP's most recent medical inquiry before they go in for a chat.

A widget from an X-Pages screen showing a user's most-seen and least-seen accounts.

| Top Seen Accounts               |            |
|---------------------------------|------------|
| Account Name                    | Call Count |
| <a href="#">Difilippo, John</a> | 20         |
| <a href="#">Abbate, Marc</a>    | 18         |
| <a href="#">Aarons, Darryl</a>  | 7          |
| <a href="#">Aaron, Michael</a>  | 6          |
| <a href="#">Hudis, Clifford</a> | 6          |

| At Risk Accounts               |            |
|--------------------------------|------------|
| Account Name                   | Call Count |
| <a href="#">Jones, Sally</a>   | 0          |
| <a href="#">Teicher, Mark</a>  | 0          |
| <a href="#">Green, Jeff</a>    | 0          |
| <a href="#">Acosta, Robert</a> | 0          |
| <a href="#">Admani, Irfan</a>  | 0          |

Metrics like these rely on data that's already stored in Vault CRM. X-Pages' built-in query system pulls CRM data into custom screens in real time. Once a field rep logs a call or sends an email, any metrics that depend on these data points will update automatically so your teams always see the most accurate account and activity data.

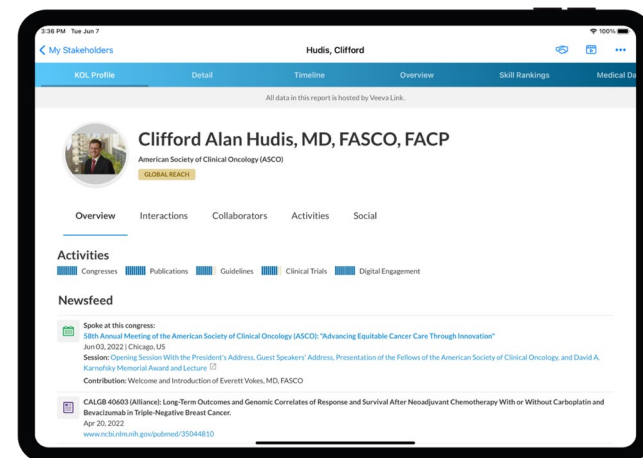
# Tips & Tricks



## Use prebuilt connectors to easily query data from Veeva Commercial Cloud

Pull in data from the rest of **Veeva Commercial Cloud** where it'll help your teams make better decisions. Prebuilt connectors for **Veeva Nitro**, **Veeva Link**, and other Veeva solutions enrich your X-Pages screens with detailed insights on who to talk to and what to talk about.

Whether you're looking to serve up a report on territory sales data, a preview of a KOL's Twitter feed, or updates on the newest patient leads, X-Pages provides a window to the other parts of the Veeva Commercial Cloud outside of Vault CRM. With these prebuilt connectors, the data you need will flow seamlessly into Vault CRM without any manual data loads or data inconsistencies between systems.

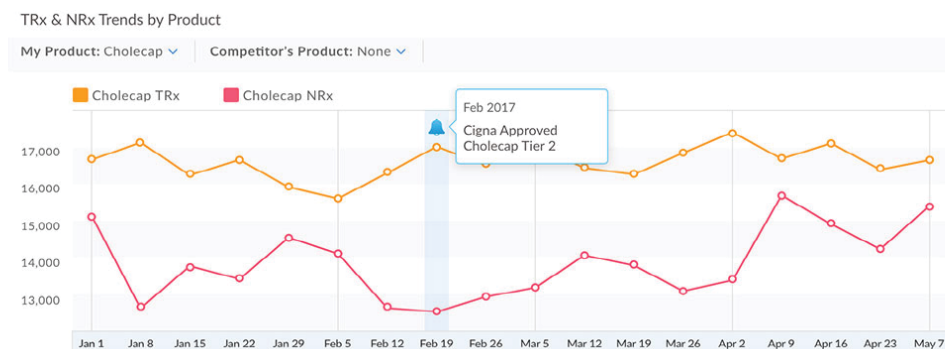


An X-Pages screen showing a KOL's Veeva Link profile.

## Connect external tools and data through third-party integrations

Have a Tableau dashboard that you want your reps to look at before calls? What about some custom KPIs from your own data warehouse? Or maybe there are some metrics from non-personal promotions that your reps should check on before each conversation?

A widget from an X-Pages screen showing prescription data.



X-Pages helps you put all of that into Vault CRM. With a developer kit that supports third-party APIs, X-Pages lets your developers build custom integrations to applications and data sources outside of Veeva Commercial Cloud. This way, you can bring the full extent of the insights that your field teams need into the app they use every day.



## Tips & Tricks

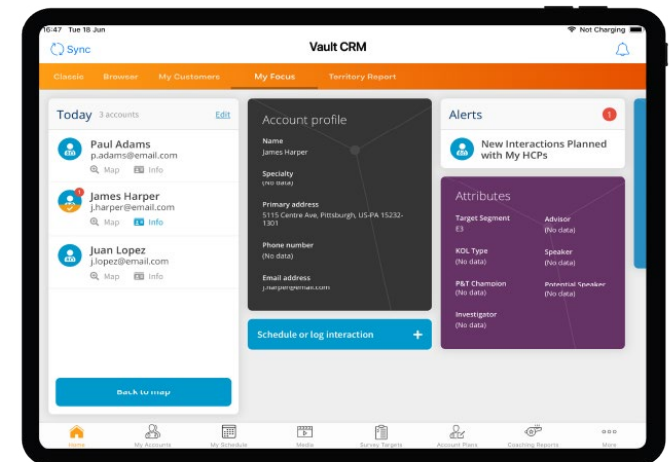
### BUILD A CRM EXPERIENCE THAT'S AS UNIQUE AS YOUR TEAMS

You don't bring treatments to market the way anyone else does, and your teams don't work the way other companies do. That's why X-Pages gives you the flexibility to craft a personalized workspace tailored for your brand strategy and the way your teams like to get things done.

#### Tailor the experience with a wide array of display options

The X-Pages screen supports a variety of visualizations and display elements to help you create intuitive, user-friendly experiences. X-Pages screens are built on the same HTML5 and JavaScript that powers the webpages and apps you use daily, giving you the freedom to present your insights using whatever visual language appeals to your team the best.

Not sure if you want a bar graph or a line chart to display your total territory scripts? X-Pages lets you try both. Or insert a pop-up box that your teams can click open for helpful reference information. Maybe you want a network mapping that shows all hospitals within a healthcare organization (HCO) or even an emoji that changes based on the status of an account. You're limited only by your creativity and business logic.



An X-Pages screen that displays widgets in a column layout.

### Build a command center by integrating your favorite field productivity tools

From route planners to patient portals, bring it all into Vault CRM so your teams don't have to switch back and forth between the apps they need. X-Pages has a set of robust developer tools that are compatible with any REST API, letting you incorporate the apps your teams use for customer engagement directly into the Vault CRM interface.

Whether you want to interact with an AI assistant side-by-side with territory call history or view a business intelligence dashboard next to sampling activity, X-Pages can make it happen.



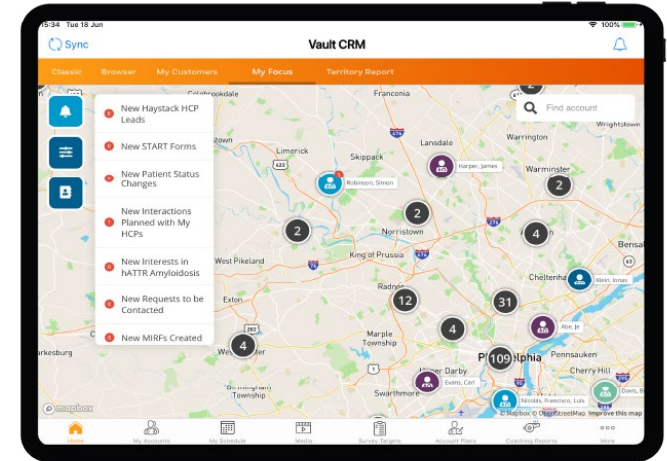
## Tips & Tricks

### Develop your own app-like experiences directly in Vault CRM

Think Nextdoor, but for large health systems. Pinterest, but for your educational content. DoorDash, but for sample requests. If you have a brilliant idea for an app that could help your field, don't wait for someone else to build it—X-Pages provides a set of robust platform features to help your developers create app-like experiences in Vault CRM.

X-Pages is designed to give developers the freedom to work however they're most comfortable, with support for all modern front-end web frameworks. So whether your developers prefer React, Angular, Vue.js, or something else, they can hit the ground running in X-Pages.

The X-Pages API allows developers to access and manipulate data just as Vault CRM does. This means that your developers can reshape the workflow of tasks in Vault CRM using custom X-Pages screens and build the flow that helps your teams achieve the most.



An X-Pages screen that displays a map to help field teams plan their route for the day.

### DRIVE PRODUCTIVITY WITH ACTION PROMPTS EMBEDDED IN VAULT CRM

When it comes to customer engagement, the right timing is everything—which is why you can build prompts for action into X-Pages screens, helping your teams make the right moves at the right times. That way, you can reduce the number of process steps to get things done and make the right actions the path of least resistance in Vault CRM.

### Send updates and to-dos with Suggestions

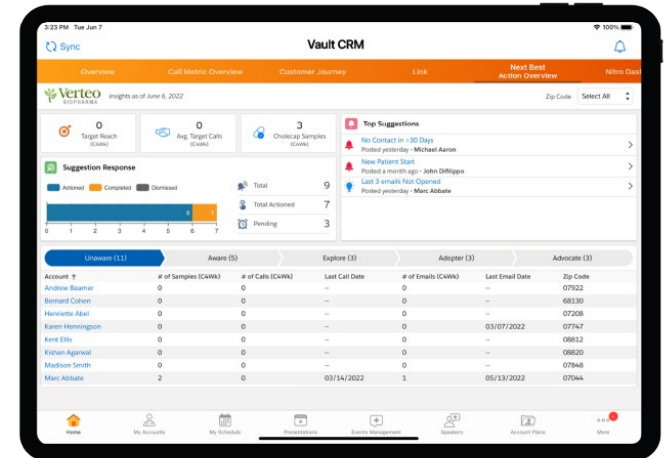
Today's customer engagement teams operate in a complicated world. They have access to more data from more sources than ever before amid constantly changing field conditions. Suggestions let you deliver the signal through the noise as notifications in the Vault CRM app. Suggestions are included in Vault CRM's core functionality and embedded in the user interface.



## Tips & Tricks

X-Pages supports actions against the Suggestions data model so you can display Suggestions in X-Pages screens for your field teams to act on. From an X-Pages screen, it's only a few clicks for your teams to open a Suggestion and start a call, Engage Meeting, or Approved Email.

And with X-Pages' flexible display options, you can present your Suggestions however you want—a checklist, a calendar, a Kanban board, or whatever format helps your teams most.



An X-Pages screen that includes a widget for a sales rep's Suggestions in the field.

Watch an X-Pages Suggestions use case **in action**.

## Get your teams where they need to be with Deep Links

X-Pages allows you to customize your navigation flow in Vault CRM, so anything your teams need is always within reach. The Deep Link feature allows you to make custom links in X-Pages screens that can take users to view a record, create a record, or start an action with just a tap.

This way, if you want to show the sales reps a table of the HCPs they've called on the least, you can make each HCP name a Deep Link so the rep can start a call right away. Or if you want to show the list of HCOs that have the most sales and then link each HCO to its account plan, Deep Links can do that too.

Deep Links cover a wide range of Vault CRM objects, from Approved Emails to Events and CLM presentations, so your teams can spend less time switching screens and more time getting work done.

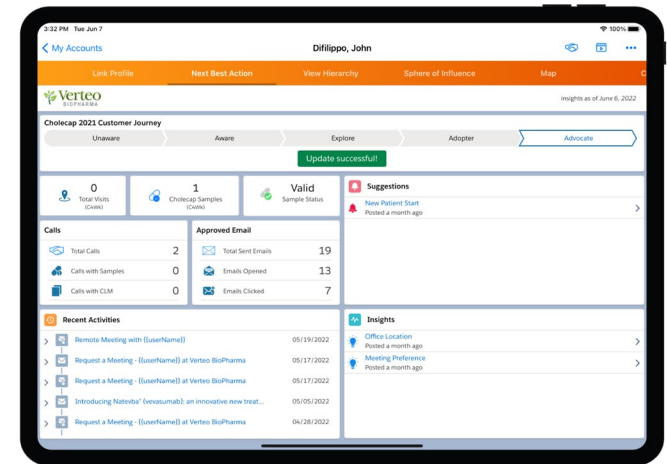


## Tips & Tricks

### Update Vault CRM data with Inline Edit

Sometimes your teams need to edit some data in Vault CRM: maybe they're moving a customer to a different stage in a customer journey, adding details to an order, or changing the strength of an affiliation between an HCP and her Ph.D. advisor. Using X-Pages, you can provide them an opportunity to make that edit without interrupting their workflow.

X-Pages' Inline Edit feature gives you the ability to create custom prompts for editing Vault CRM data right into X-Pages screens. Any object in Vault CRM can be edited this way, including custom objects that your admins may have built for your business, so you can capture data from your teams wherever it makes the most sense.



An X-Pages screen that allows field teams to move an HCP from one stage in the customer journey to another.



# Getting Started

## IMPLEMENT YOUR IDEAS WITH A VARIETY OF OPTIONS

### X-Pages Studio

Want the flexibility of X-Pages without the code? X-Pages Studio is a no-code configuration tool that comes with every Vault CRM license. A point-and-click interface enables you to construct business logic for your data and craft personalized user experiences with bespoke functionality.

On top of this, Studio also has a set of creator tools that make it easy to test and debug your screens. The preview feature pulls live data from Vault CRM and Veeva Nitro so you can check that the calculations you've configured give you the correct values. Detailed error messages and debug logs show you where errors occur to help you catch bugs before your field users do.

X-Pages Studio also helps streamline the deployment of X-Pages screens to Vault CRM orgs. In Studio, you can manage different versions of a screen, see all the places it has deployed to in your org, and deploy the same screen to multiple user profiles with just a click.

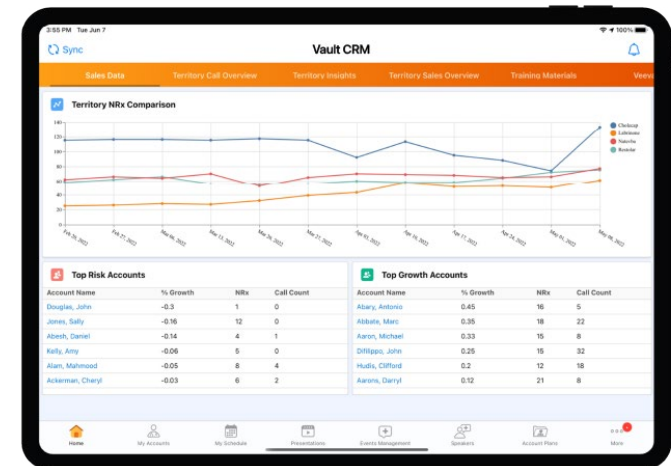
Studio is designed for anyone who has a thorough understanding of the CRM data model and is familiar with data processing skills, such as Excel reports, giving your Vault CRM admins the power to shape the software for your business process.

### X-Pages Custom

For those looking to experiment with the full range of X-Pages features, the custom code approach is the way to go. More advanced functionality, such as integrating third-party applications or complex app-like user interfaces, requires custom code.

The X-Pages code platform is easy for any seasoned web developer to pick up. It supports industry-standard HTML5 and JavaScript and follows general web development principles, giving developers the freedom to use the same coding setup, frameworks, and libraries that they're used to.

Useful debugging functions make it easy for developers to get to the bottom of any issues with the screens they build,



An X-Pages screen created in X-Pages Studio.

# Getting Started

giving them the support they need to explore the endless possibilities of an X-Pages screen.

## X-Pages Services and Partners

If you're looking for a little extra help with X-Pages, the good news is that you're not alone. Veeva's Professional Services team and X-Pages partners are here to provide their expertise throughout the entire screen creation process, from initial wireframes to post-project change management.

Our experienced services teams and partners are technical and process experts who have worked with a variety of customers. They not only design and code custom screens but also work with you to architect the best X-Pages approach for your business.

See our X-Pages services partners on our [partners page](#).



# Resources

## Demo

- [Veeva Vault CRM X-Pages: Crafting a More Tailored User Experience](#)

## Product Brief

- [Veeva Vault CRM X-Pages Features Brief](#)

## Documentation

- [X-Pages Overview](#)
- [X-Pages Studio](#)
- [X-Pages Developer Reference](#)

## Customer Stories

- [Empowering Alnylam's Multichannel Field Teams with Data-driven Insights](#)

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