Veeva & U Webinar

MyInsights

How the standard MyInsights pages can be adapted to meet your needs

This presentation is for informational purposes only and does not constitute legal or other professional advice. You should consult your own legal or compliance team before making a compliance decision. All information is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information, and without warranty of any kind, express or implied. In no event will Veeva be liable to you or anyone else as a result of your use of this information

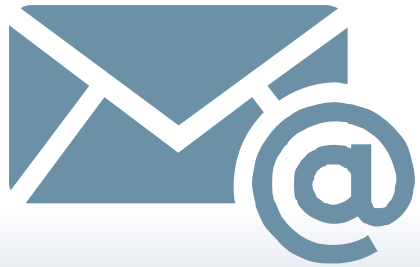
Webinar Housekeeping

Thank you for joining the Veeva & U webinar

Microphones will be **muted** throughout the webinar

Please use Q&A function to ask questions

Questions will be answered at the end of the presentation



We will email this presentation and the recording of the webinar

Chris Wade
Director, Multichannel Strategy

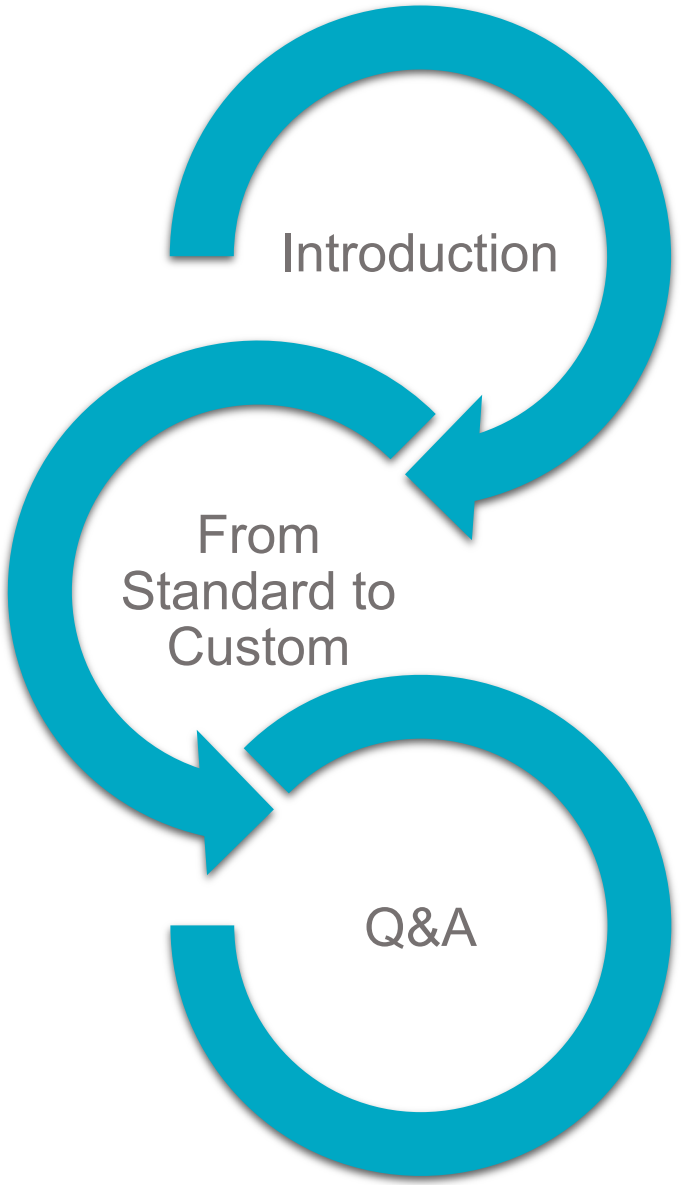
Donal McConnell
Solution Consultant

Attila Hagelmayer
Consultant, Technical Services

Albert Almeyda
Customer Success Manager

Today's session

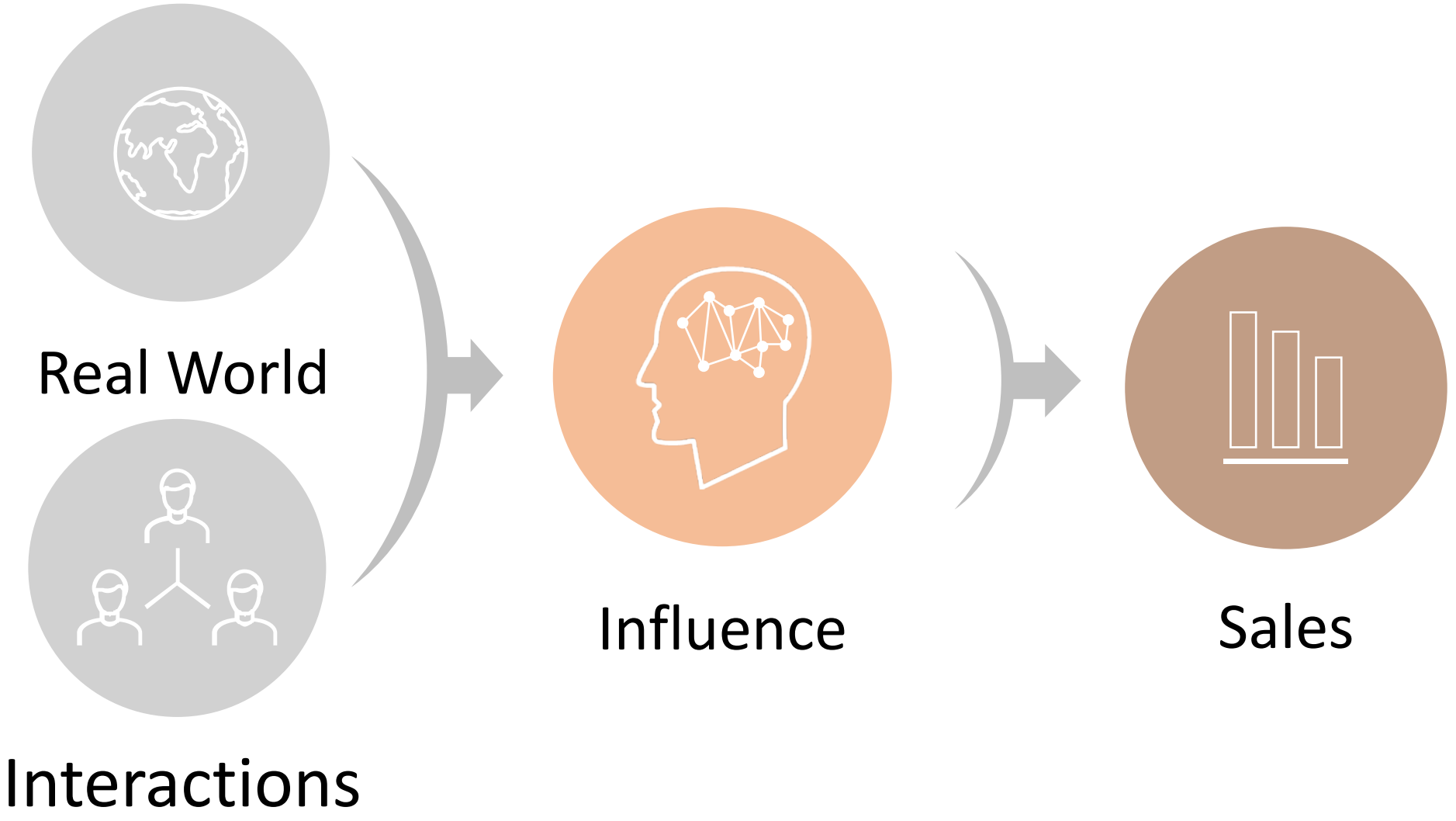
- How the standard MyInsights pages can be adapted to meet your needs:
  - ✓ In a easy and flexible way
  - ✓ Focus on the information that matters most to field teams
  - ✓ Learn what's needed and what works before customizing pages
- …and drive better decision-making



MyInsights

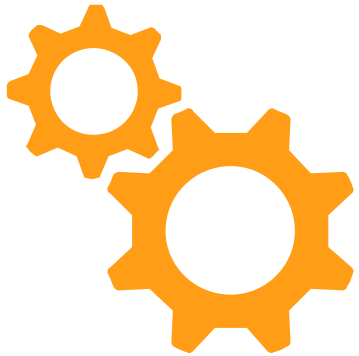
Using Embedded Insight to Accelerate Effective Customer Engagement

Too Much Data to Leave Insights to Chance?



The Challenge

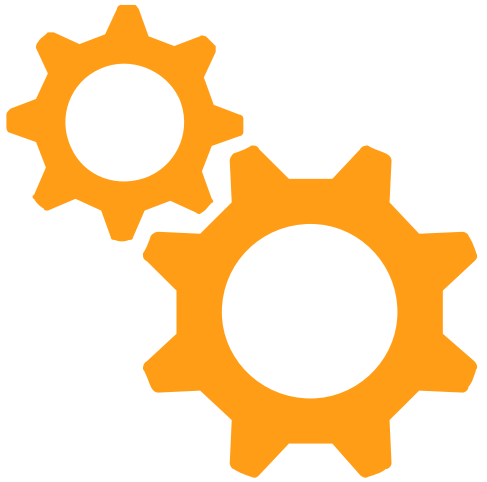
Insights



Execution

The Solution

Insights

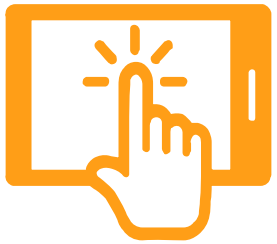


Execution

Making Insights Usable

New Data

Essential to building customer relationships



Simplified Tools

Targeted information delivery

Data Visualization

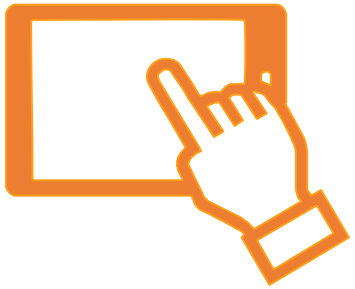
Embedded into field processes provide actionable insights

CRM MyInsights

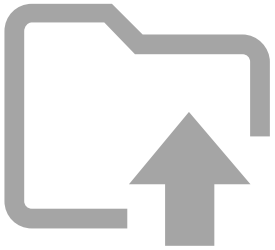
- ✓ Actionable
- ✓ Flexible
- ✓ Real Time
- ✓ Embedded

Veeva CRM MyInsights Use Cases

Custom Visualisations

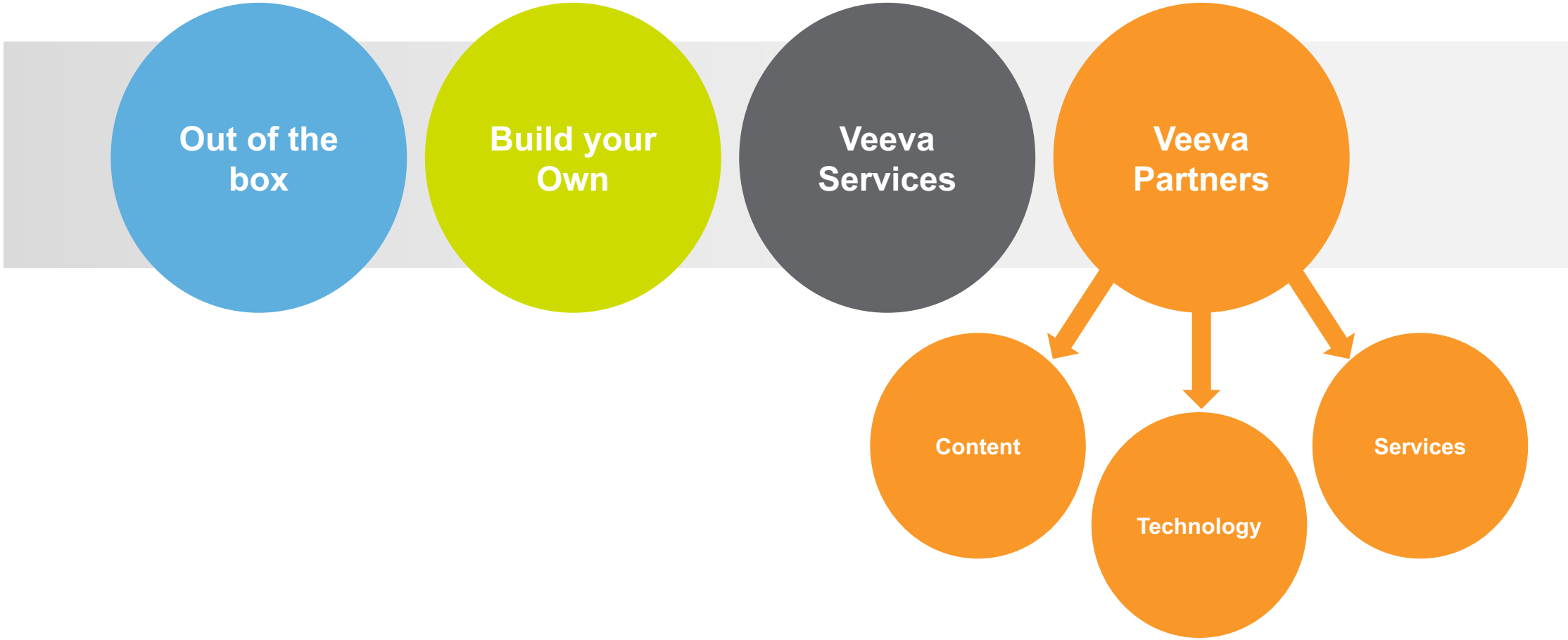


Landing Pages



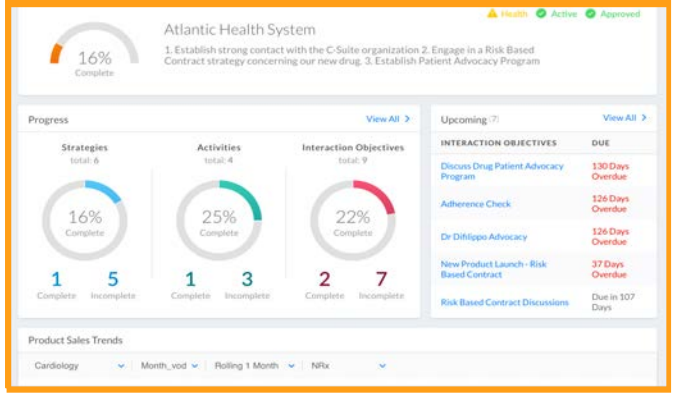
Embedded Processes

Options for Building Visualizations

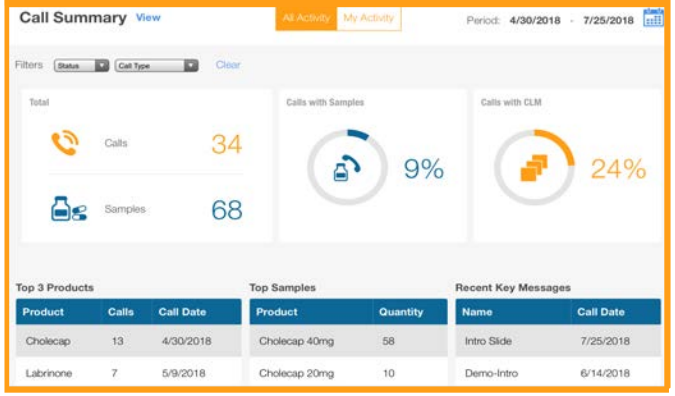


Pre-built MyInsights Pages

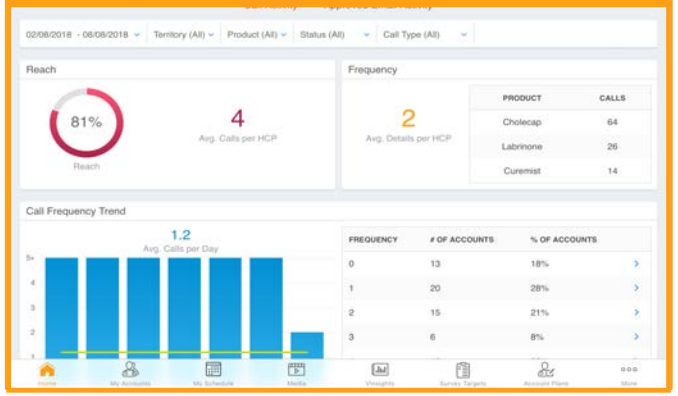
Account Plan



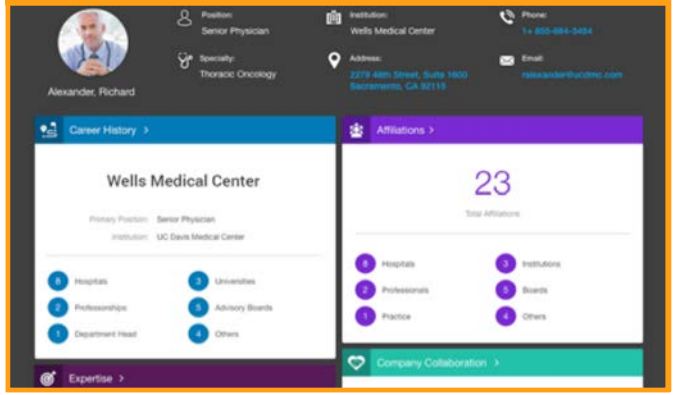
HCP Engagement



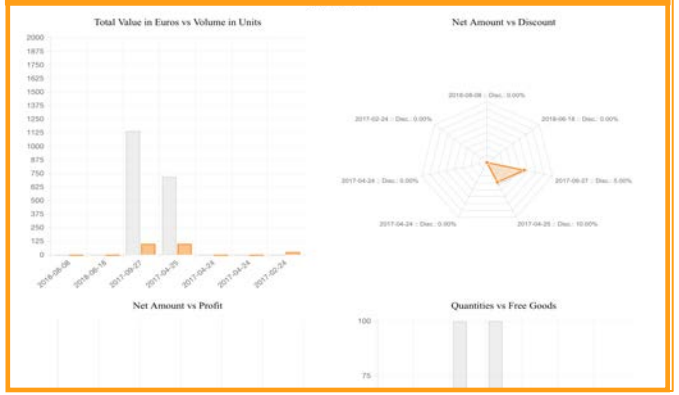
Territory Summary



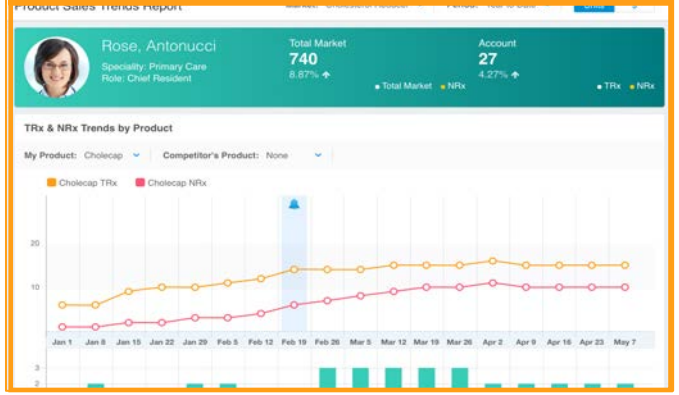
KOL Profile



Order Management



Sales Trends

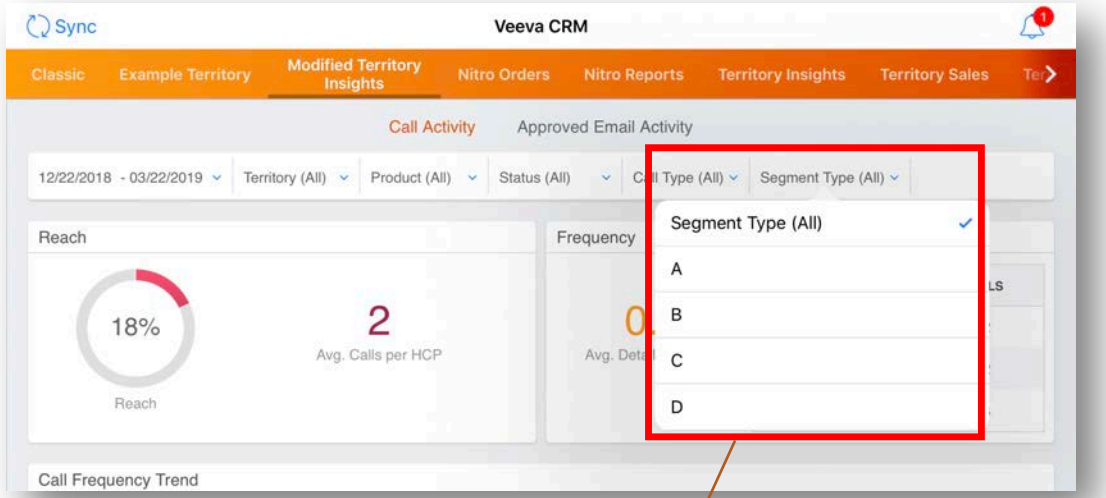


MyInsights

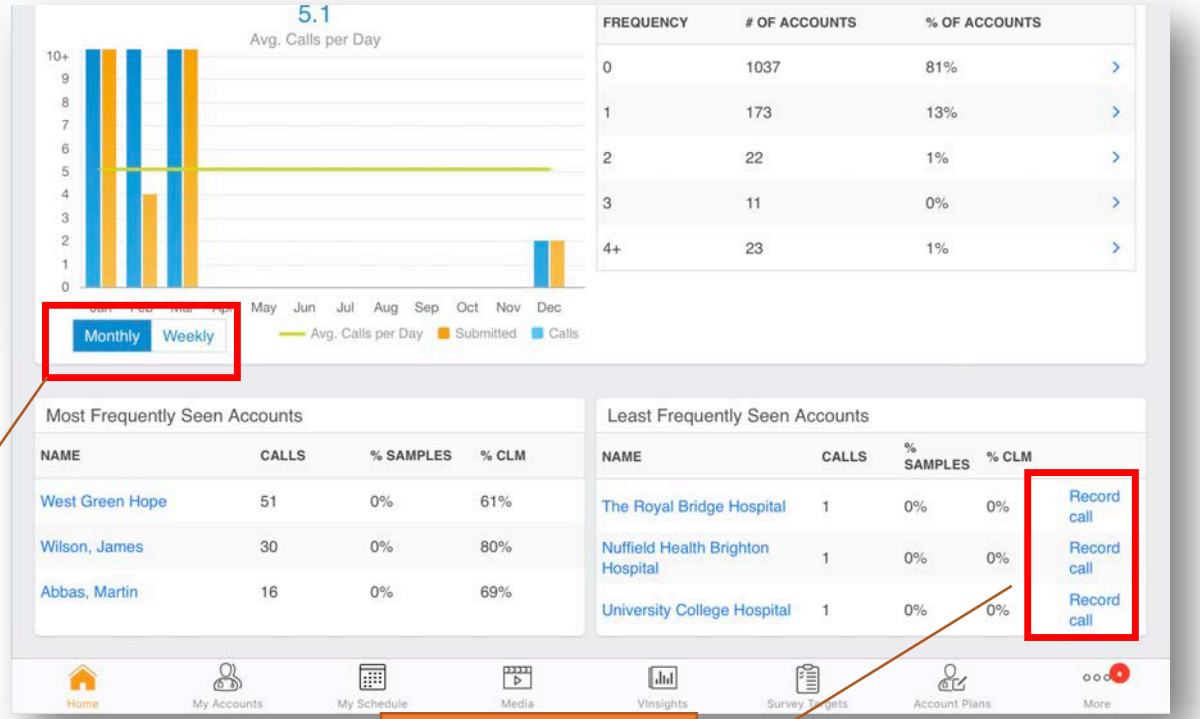
From Standard to Custom

Demo

Demo



New Filter



New time aggregation in the Frequency Chart

New Smart Link to record a call

Modifying the MyInsights page based on business needs

Adding Filters based on business needs

Altering value ranges to enhance the visualizations

Actionable Insights via Smart Linking

Steps to update existing report

Download Source

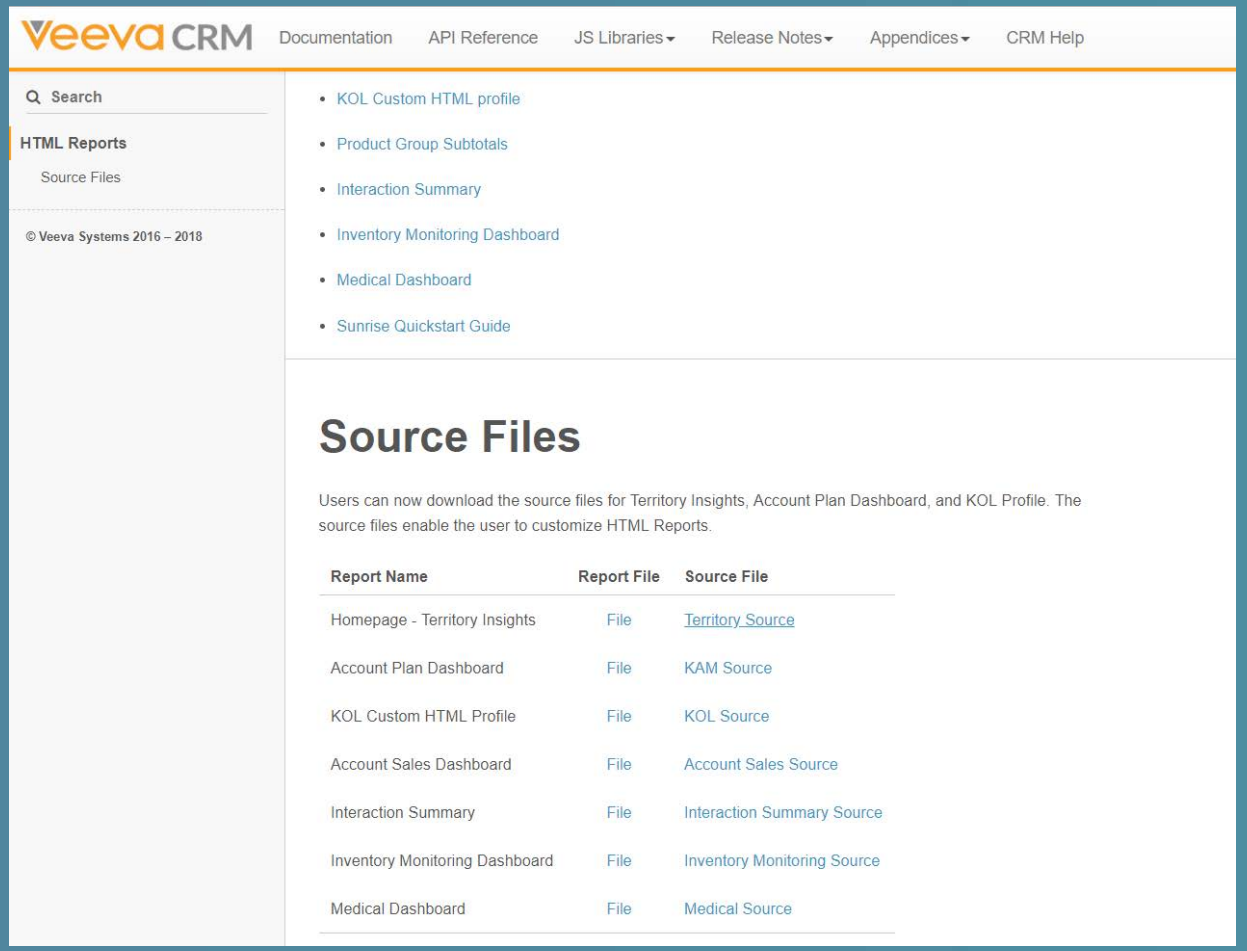
Update Code

Upload

Publish

Use

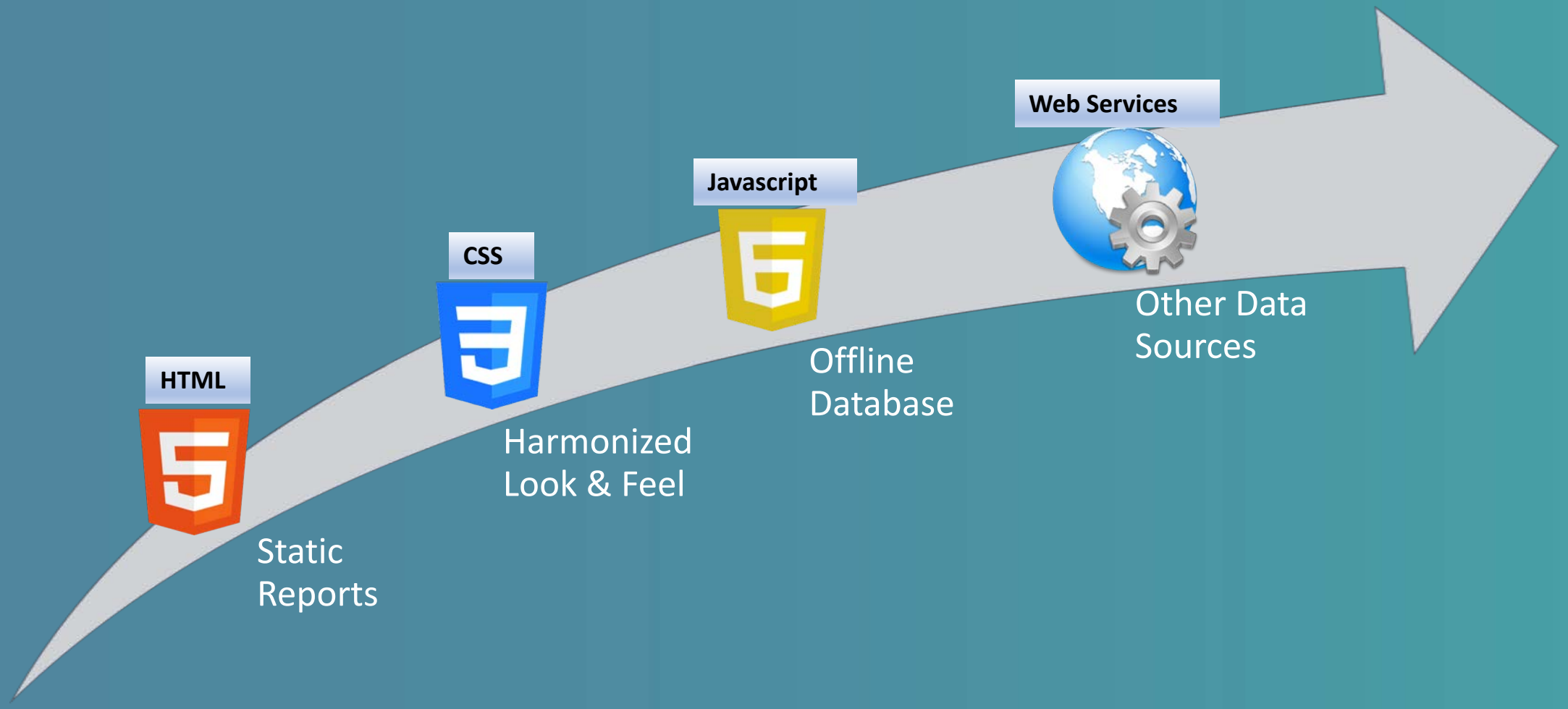
How to access report source code?



- **Library of prebuilt reports**

- https://developer.veevacrm.com/docs/reports/
- Set of fully customizable prebuilt HTML 5 reports that Veeva has built for customers to use
- These reports can be either deployed as out of the box reports or with minimum customizations required

What skillsets do we need to update a report?



Implementation approaches

100% standard page

Modify the standard page

Custom development

Q&A

Unanswered questions during the webinar

- Could we use smart linking also for Consent Capture Page?
  - No, this is not posible. Please check this article available in the Veeva CRM online help for a detailed list of supported objects
- How to arrange tabs in Veeva CRM? If we want to make Myinsights report as first in the order?
  - The tabs are sorted alphabetically

Unanswered questions during the webinar

- We are building Vinsights in Myinsights and want to turn off the offline vinsights tab without modifying online tab. How it is possible?
  - No, it is not possible to turn off Vinsights offline only
- Is it possible create and edit records for custom objects directly from MyInsights reports? So after clicking to link, you are redirected to Edit Page of record
  - No, this is not possible. There are few object that allow the creation of new records. Please check this article available in the Veeva CRM online help for a comprehensive list of supported objects

Unanswered questions during the webinar

- Is Smart Linking on Sent email possible in Territory Report ?
  - Approved Email users can now create a new email from MyInsights as well as view previously sent emails

Register for Your Monthly Webinars

Vault CRM

Tuesday, 9 April, 2019

Sampling and Promotional Items – Learn how to manage samples/promotional items allocation and distribution efficiently and in a compliant way

Tuesday, 7 May, 2019

Back to Basics – Discover some basic CRM functionalities that can considerably improve the CRM end-user experience

Vault PromoMats

Thursday, 11 April, 2019

Powering the Compliant Web with Vault Digital Publishing – Join this session to learn how to use Vault to serve content quickly and compliantly to global audiences and generate actionable insights on content consumption

Thursday, 16 May, 2019

Top 5 Ways to Reduce Time Spent in MLR – Join this webinar for practical tips on how to streamline your review and approval process in Vault PromoMats

Community Forums

Networking & Collaboration

Share Industry Best Practice

Veeva&U Community

Opportunity to Meet the Experts

UK&IRE
26th March 2019
London

France
4th April 2019
Paris

Spain
23rd May 2019
Madrid