Leveraging the Salesforce Platform

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Session Goals

- Understand what the Salesforce1 platform is

- Understand how you can leverage the Salesforce1 platform to increase the value you get from Veeva CRM

- Explore some ideas for using Salesforce1 in the life sciences

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What Does Salesforce1 have to do with Veeva?
Salesforce1 and Veeva

- Veeva CRM is built on the Salesforce1 platform
- When you purchase Veeva CRM, you are purchasing Salesforce1 platform licenses

Veeva CRM

CLM  Email  Mobile  Web  Content  Network

Extensible Salesforce1 Platform

Pre-built apps

Custom apps
What is the Salesforce1 Platform?
Cloud Database

- One database in the cloud with your important data
- Available from anywhere
- No database administrators needed
- Eliminates data silos
Multitenant Infrastructure

- Focus on your applications and not on maintaining infrastructure
- Scale applications with ease
- Automatic upgrades
- Build, test and deploy

Cust 1  Cust 2  Cust 3  Cust n

Veeva CRM

Salesforce1 Platform
Point-and-click Development

- Create brand new applications
- Point and click
- Drag-n-drop
- Programming skills optional
Salesforce1 APIs

- Built in from the ground up, not bolted on
- Integrate with 3rd party back-office systems like Oracle and SAP
- Integrate with other cloud systems
Website Development

- Design and publish websites using salesforce.com Sites
- Use your own domain name
- Automatically integrated with your Veeva data
- Uses salesforce.com VisualForce technology
Mobile Services

- Design and build mobile apps
- Connects to your Veeva data
- Write for iOS or Android
- Point-and-click development
- Code-based development
Visual Workflow

- Visually automate business processes
- Drag-n-drop interface
- Branching logic
- Can call custom Apex code
Translation Workbench

- Create translations for objects and field labels
- Built-in support for 14 languages
- Supports most worldwide currencies
Licensing
Veeva CRM Licenses are Unlimited

- These licenses are no longer offered directly from Salesforce.com

- The marketing term for them is ‘Unlimited’ but there are some limits (which we will discuss)
Unlimited Tabs and Applications

- **Applications** = Groups of tabs
- **Tabs** = Objects, VisualForce pages, iframes, etc.
- 2000 custom objects included!
5000 API Calls Per License Per Day

Legacy Systems  Call Center & Phone Systems  Financial Systems  HR Systems  Corporate Systems
Sites Capabilities

- 25 Salesforce.com Sites
- 1 million Sites page views per month
- 40 GB of Sites bandwidth per day

*Additional licenses may be required for authenticated sites usage
The Salesforce.com AppExchange
Salesforce.com App Exchange

- Like the Apple app store, but for Salesforce.com
- Most apps install right into your Veeva org via managed package
- Free apps, paid apps … there are apps for everything!
AppExchange Apps You Might Like

- gridbuddy
  - Mass manage related data on one page
  - Simple spreadsheet-like UI
  - Easy setup and configuration
  - Fantastic support and satisfied customers

  “Super time & frustration saver”
  - Garry Polmateer, Salesforce MVP

- Conga composer

- Geopointe
  - Unlock the where in your data

arrowpointe.com/maps
A Word of Caution
Design with Veeva CRM in mind

- Schema fit
  - Person Accounts – not Contacts
  - Child Object for Addresses – not stored on Account
- Don’t modify Veeva VOD components
  - Don’t do it! We know it’s tempting but don’t do it!
  - Veeva VF pages may prevent modifications
    - MIRF
    - Order Management
    - Network account pages
- Mobile platform compatibility
  - Is data related to Account?
  - Data volume/synch considerations
When in Doubt, Ask a Veeva Certified Administrator

- Partners – Visit the Partner Pavilion!
- Veeva Professional Services
- Veeva Managed Services
- Internally Certified Resources
  - Send your admins to Veeva Administrator Training!
- Examples of apps that may be difficult to use with Veeva CRM
  - Account de-duplication
  - Address cleansing
Examples
# Contract/Tender Management App

- Customer was using spreadsheets to manage RFP process and status of various contracts
- Functionality built to track requests for product/quantity pricing, proposal submission/approval, contract win/loss, and competitor win information
- Track order fulfillment on won contracts to ensure proposed quantity met throughout contract; reports highlight contract fulfillment issues
- Technologies:
  - Custom objects
  - Workflow/Approval processes
  - Reports
  - No code!
Budget Management

- Several customers allow reps to manage budget for sample/literature distribution on a monthly basis.
- Rep budget is decremented for Rep ordered samples and for samples shipped directly to HCP.
- Budget Administrators allocate budget and balance across territories.

Technologies:
- Custom objects
- VisualForce/Apex
- iRep
- Integration (to fulfillment vendor)
- Reports
Freeze/Inactivate Users

- Inactivating users is a multi-team, multi-step process for one Veeva customer
- When a user leaves the company, one team freezes the user, then another team is supposed to inactivate the user
- Administrators need an easy way to follow up to make sure that employees who have left have been both frozen and inactivated
- Technologies:
  - VisualForce
  - Force.com Ajax Toolkit
  - jQuery
Address Attestation

- Allow a healthcare provider to attest to the addresses at which he or she practices

Technologies:
- Veeva iRep
- Force.com custom buttons
- VisualForce pages
- HTML5
- Force.com database
Demo – MSL Locator
MSL Locator

- Allow HCPs to find the medical science liaison for their zip code
- Technologies:
  - Force.com Sites
  - jQuery
  - VisualForce pages
  - HTML5
  - Force.com database
Demo – MedComms Application
MedComms Call Center

- MedComms call center agents fulfill HCP and patient requests for information

- Agents search Vault for standard responses from Service Cloud and fulfill via Author-It to PDF document archived in Vault and delivered via email, fax, or print/mail

- Allows standard response documents to be securely created and approved, with flexibility for agents to modify some or all content in responses

- Technologies:
  - Salesforce.com Service Cloud/Veeva Vault/Author-It
  - VisualForce/Apex
  - Force.com Inbound Email Apex Handler
  - Canvas
  - JSON
Questions
Thank You