

# Veeva CRM Innovation Guide

## Veeva CRM Sunrise UI



# OVERVIEW

Veeva's real-time architecture and Veeva CRM Sunrise User Interface (UI) advances the mobility and productivity of your reps and medical science liaisons by delivering the right information where and when they need it. With a new adaptive UI, users have the functionality they need across devices, including smartphones, tablets, and desktops.<sup>1</sup>

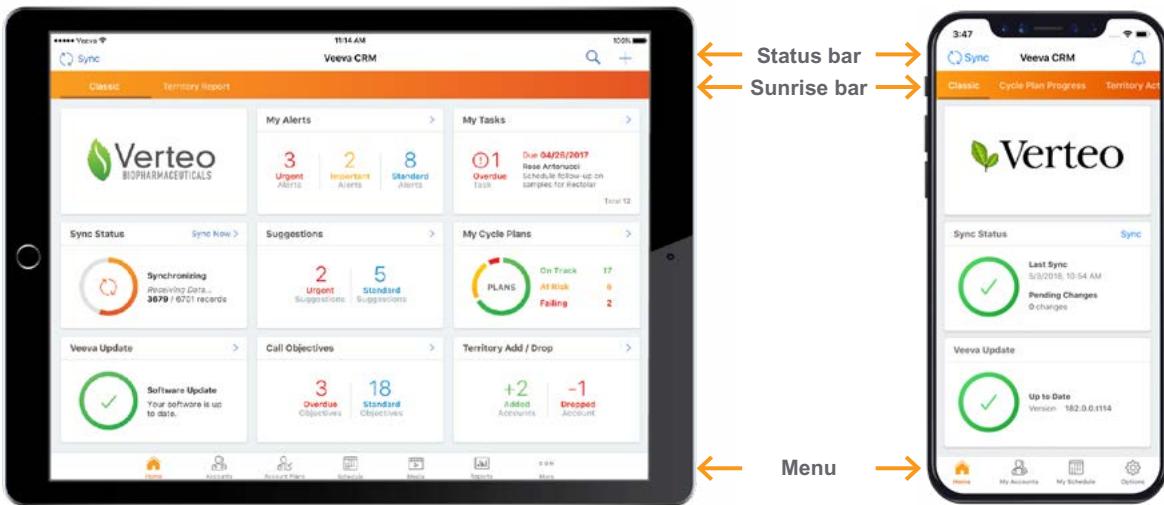
Sunrise UI enhances efficiency with navigation enhancements that save clicks and provides freedom to switch among devices. For example, users can plan on a laptop, view a real-time formulary notification on the iPhone as they arrive at an HCP's office, and then switch to an iPad to present to the HCP.

1. iOS devices available August 2018 with 18R2; Windows 10 devices available Spring 2019 with 19R1.

# TIPS & TRICKS

## › LEARN WHAT'S NEW

### Home Screen



**Status bar** - The iOS status bar is now visible on all screens to display time, battery life, and connectivity.

**Sunrise bar** - A consistent orange gradient bar at the top of the screen provides users access to the key features within a given section of Veeva CRM.

**Menu navigation bar** - The main Veeva CRM navigation moves from the left-hand side of the screen to the bottom in order to free up additional screen real estate. The menu bar can also be expanded to fill the screen similar to Launchpad, enabling quick navigation to available Veeva CRM apps.

# TIPS & TRICKS CONTINUED

## Account Overview

Classic UI

Sunrise UI

The Sunrise UI uses available screen space more efficiently to surface additional information. Access to lists, views, and filtering options are available with a quick tap.

## Account Detail

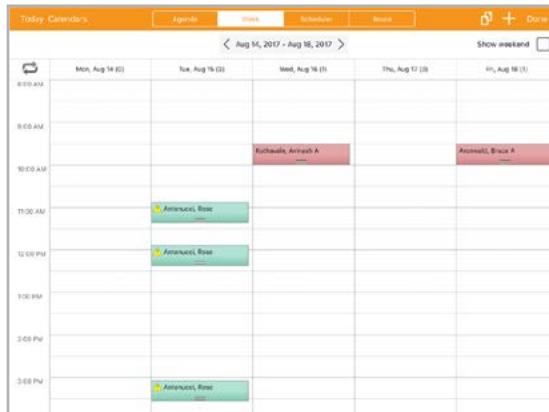
Classic UI

Sunrise UI

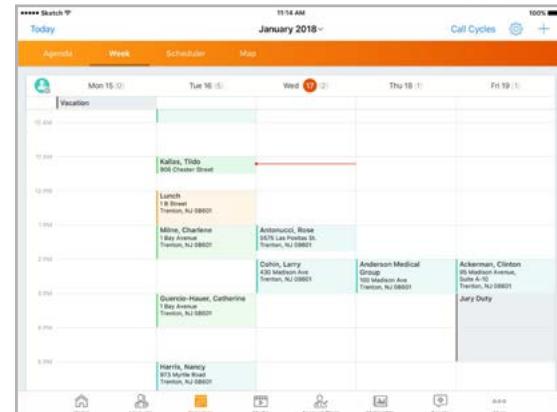
A number of the items previously located on the left menu have moved to the Sunrise navigation bar, or to the icon menu on the top right of the screen.

# TIPS & TRICKS CONTINUED

## Schedule

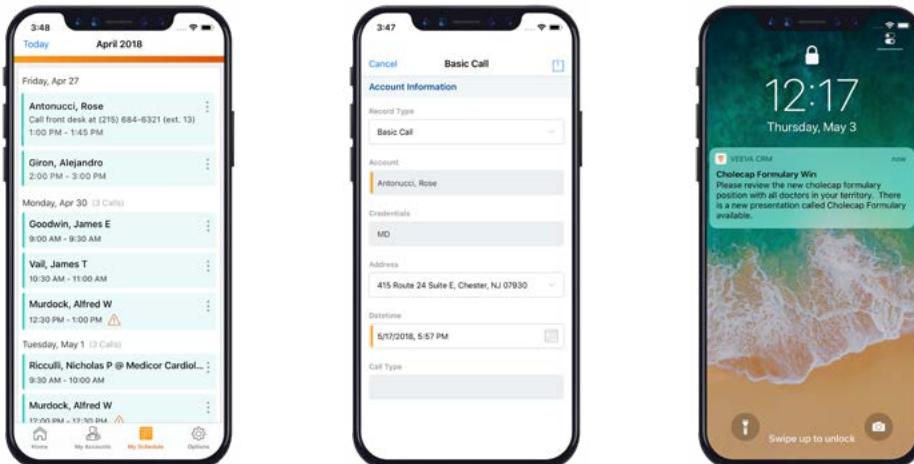


Classic UI



Sunrise UI

**Real-time insights.** With the Sunrise UI, Veeva CRM syncs activity data instantly, driving real-time collaboration<sup>2</sup> and providing actionable information in the field. Multiple views of customer data and embedded contextual information from Veeva CRM MyInsights will also improve execution.



**Anytime, anywhere access.** Veeva CRM on iPhone with Sunrise UI is unobtrusive and convenient, enabling actionable iPhone alerts and notifications, reminders, schedule adjustments, account review, and more.

2. Real-time architecture available in December 2018 with the Veeva CRM 18R3 release.

# TIPS & TRICKS CONTINUED

## › HOW TO PREPARE

**No assembly required.** Sunrise UI is an automatic update on iOS devices with the Veeva CRM 18R2 release, and for Windows devices with the 19R1 release. The update requires no development or changes to settings, layouts, object configuration, or deployment. Reps are up and running quickly without interruption to their workflow.

**Communicate to stakeholders in advance.** Inform commercial and medical teams that the Veeva CRM interface is changing, and that some buttons, features and information will be repositioned. Also notify other relevant stakeholders such as training, legal, and compliance teams.

**Organize a Q&A session.** Bring together end users just prior to the 18R2 release of Veeva CRM in August 2018. For organizations on the Windows 10 platform, do this prior to 19R1 in Spring 2019. A Q&A session one to two weeks prior to go-live will help keep the changes top of mind and maximize the use of Veeva CRM Sunrise UI.

**Update existing Veeva CRM materials.** Identify the stakeholders responsible for internal Veeva CRM materials, then work together to define the impact and update existing assets. Once these updates have been completed, communicate them to field teams.

# RESOURCES

## Veeva CRM Sunrise UI resources

### RESOURCES

- [Frequently Asked Questions](#)
- [Webpage](#)
- [Infographic: Enabling Real-time Reps on Any Device, Anywhere](#)
- [Product Brief](#)
- [Demo](#)



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