



INNOVATION GUIDE

# Business Rules Engine

# Overview

Compliance guidelines for pharma events are ever-changing. Create flexibility for maintaining compliance and minimizing the risk of mistakes with Event Business Rules in Veeva Vault CRM Events Management.

The Business Rules Engine in Events Management helps reduce and avoid compliance risks throughout the event lifecycle. It acts as a robust set of guardrails that make it easy for organizers to plan and execute events accurately. The Business Rules Engine improves the planning experience with configurable rule sets in five key areas: attendee requirements, expense estimates, spend rules, speaker rules, and required materials.

The Business Rules Engine verifies event details. If an infraction occurs, users receive an actionable alert that prevents them from moving forward until the exception is addressed.

With the Business Rules Engine, you can:

- Automate expense estimates
- Monitor speaker cap thresholds
- Limit the number of events an attendee is invited to in a given period
- Require certain materials be uploaded at specific points in the event lifecycle

Event Business Rules can be configured to only apply to country, event record type, event action, and event formats or location types. Being more specific can help avoid redundant business rules.

Admins can also create and run reports from event history records to better understand how event business rules are being used. They can analyze the details and violations caused by the rule to determine if it is functioning correctly.



## Your Team's Benefits



### EVENT ORGANIZERS

- Simplifies the event creation process
- Enforces rules in real-time to reduce errors



### COMPLIANCE

- Helps ensure the appropriate use of KOLs
- Guards against compliance infractions proactively
- Detailed insight into which rules are being applied at the event level



### EVENT PLANNERS/OPERATIONS

- Facilitates better tracking and closeout
- Configurable at the event level
- Requires material uploads to ensure timely processing

**Contact your IT Team to enable the Business Rules Engine within Events Management today.**

# Requirements



## APP CUSTOMIZATION

The Business Rules Engine is available now and is designed for use by business owners to set up and maintain rules as they change. Your IT team can enable the Business Rules Engine. Rules sets are available for the following:

- Expense Estimates ensure event organizers stay within budget during the planning process
- Expense Limits allows you to limit spend by HCP account across all event types
- Attendance Rules let you set maximums for an attendee across event types for a specific period of time, including TOV
- Speaker Rules set guidelines cross events types for things like the number of events a speaker can speak at or preventing speakers from attending events at a topic they are trained on
- Event Materials can enforce the upload of required documentation to improve compliance and audit trails.

# Resources



## Attendee Rules Demo

### Event Business Rules - Veeva CRM Online Help

- Utilizing Event Format and Location Type in Event Business Rules
- Reporting on Event Business Rules
- Expense Estimate Creation Rules

### Events Management Community on Veeva Connect

**Learn more at [veeva.com](https://veeva.com) | 925-452-6500 | [veeva.com/contact](https://veeva.com/contact)**