



INNOVATION GUIDE

# Desktop Experience

**Veeva** CRM

# Overview

Veeva CRM's desktop experience improves field productivity with an interface that's built to accommodate traditional field teams, emerging digital teams, and everything in between.

Users can execute faster with more intuitive navigation and performance enhancements. Customizable role-based apps empower admins to build workspaces optimized for the way their users engage with customers. Added entry points for dashboards and reports help guide users to data-driven decisions right in their workflow. At the same time, new features for virtual meetings make remote conversations more accessible and efficient.

To take advantage of Veeva CRM's full range of desktop capabilities, you must enable your Veeva CRM org for Salesforce Lightning. New desktop experience features are built in the Lightning interface to enable more advanced configurations, more user-friendly features, and better performance.

You can find resources for making the transition to Lightning [here](#).



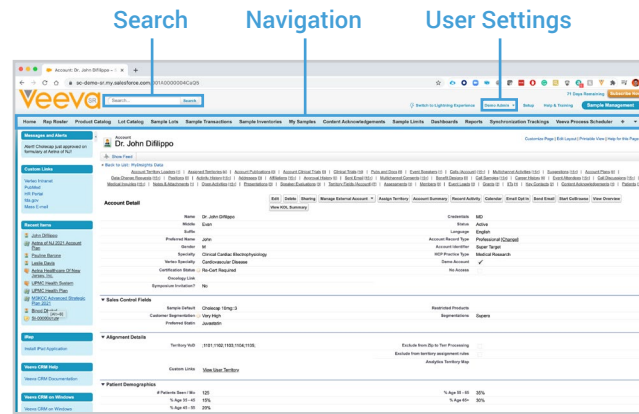
# Tips & Tricks

## THE RIGHT INFORMATION IN ALL THE RIGHT PLACES

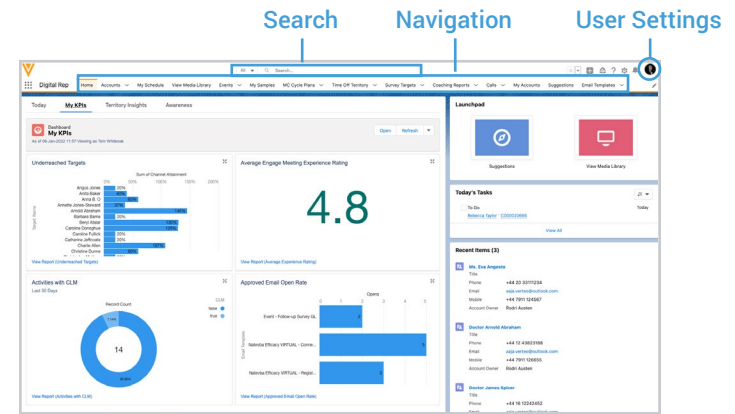
**Search less, do more.** The new navigation interface in Veeva CRM Online is adapted for how your teams work, so they can access the information they need faster than ever.

### The Same, But Better

The new navigation interface preserves many familiar features from the Salesforce Classic interface so users can make a seamless transition. More UI options for displaying reports and insights transform the CRM experience from data entry to workflow productivity.



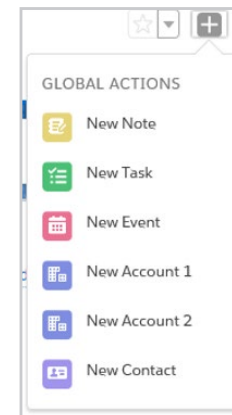
Classic



Lighting

### Global Actions

Give users access to key actions without interrupting their workflow. Admins can place common actions in a dropdown that appears throughout the Veeva CRM Online interface. Once a user clicks on an action, a pop-up box will display in the corner of their screen, allowing them to complete the action and then pick up right where they left off.

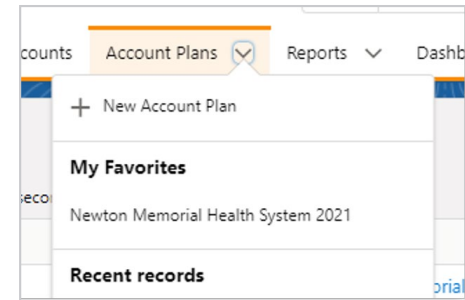


# Tips & Tricks



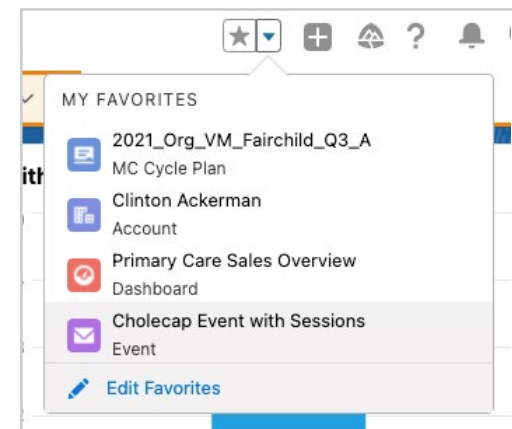
## Dropdown Item Menus

Navigation tabs just got a lot more powerful. When users see a caret icon next to a tab name, they can click it to reveal a dropdown menu with shortcuts to frequently used records, list views, and actions within the tab.



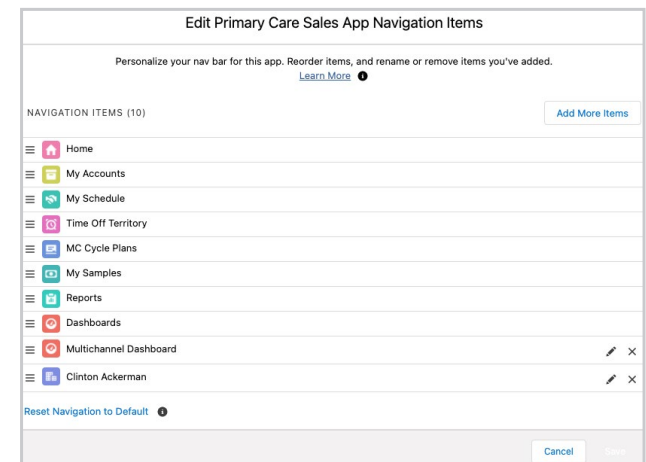
## Favorites

Are there key accounts to pay attention to? Maybe an upcoming event to prepare for? The star icon in the top right corner lets users store records, lists, groups, and other pages for easy access, no matter where they may be in the CRM interface.



## Customizable Navigation Bar

Your navigation should be as unique as your users. In the new Veeva CRM Online interface, users can drag and drop to sort the tabs on their navigation bars and create their own custom tabs for favorite dashboards or records.





# Tips & Tricks

## A WORKSPACE FOR EVERY ROLE

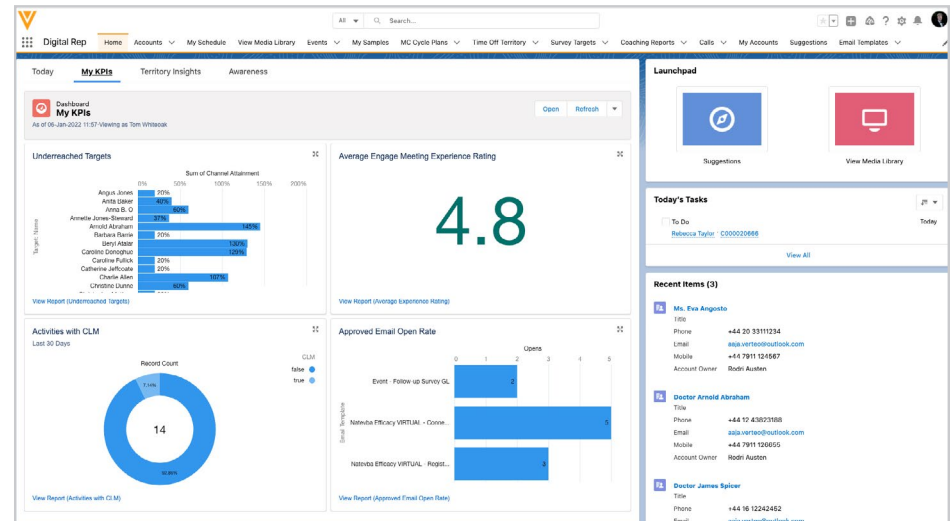
**Make it even easier for your teams to do their best work.** Our ready-to-use Lightning Business Apps are tailored for different roles in life sciences. These apps are a starting point to help your teams use Veeva CRM Online in ways that enhance how they already work.

Once you and your teams have gotten the hang of what's new, Lightning Business Apps grow with you. Each app is fully customizable so you can bring in the widgets and features that best suit your needs.

Our growing collection of business apps is each prebuilt for a different team and deploy into Veeva CRM with just a few steps.

### Digital Rep

Help reps identify where they can make the most impact at a glance with easy access to daily activities, KPIs, and activity planning.

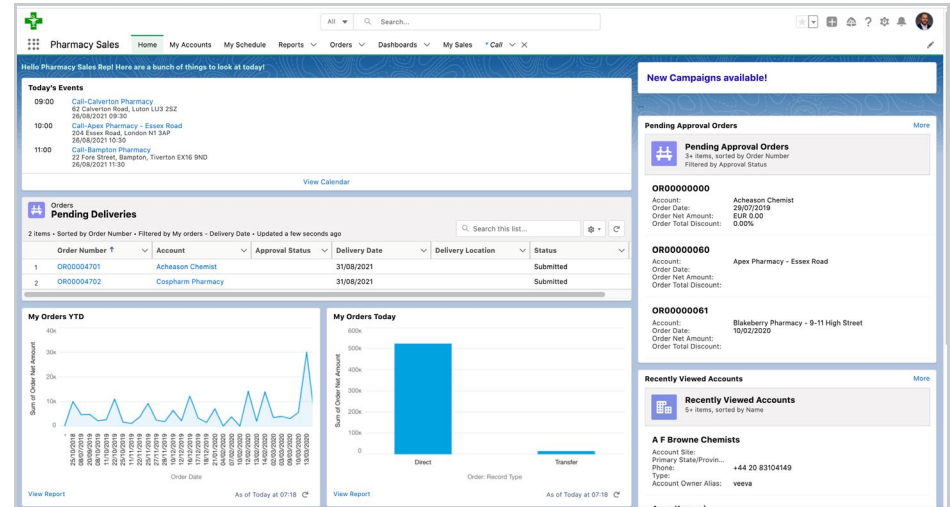


# Tips & Tricks



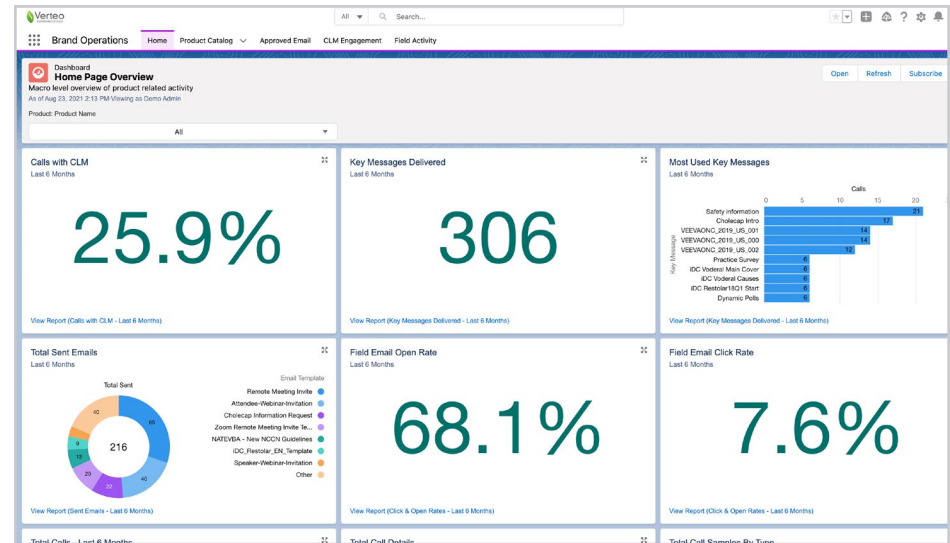
## Pharmacy Sales

Give pharmacy reps the insights they need to provide the best service through reporting components for orders, deliveries, and calls.



## Brand Operations

Show marketing users the performance and adoption of their assets in the field across channels with an array of detailed dashboards.

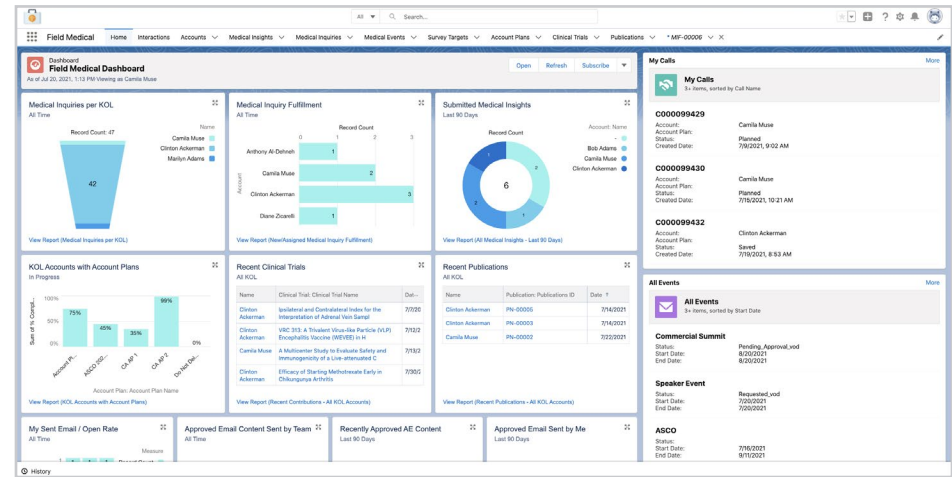


# Tips & Tricks



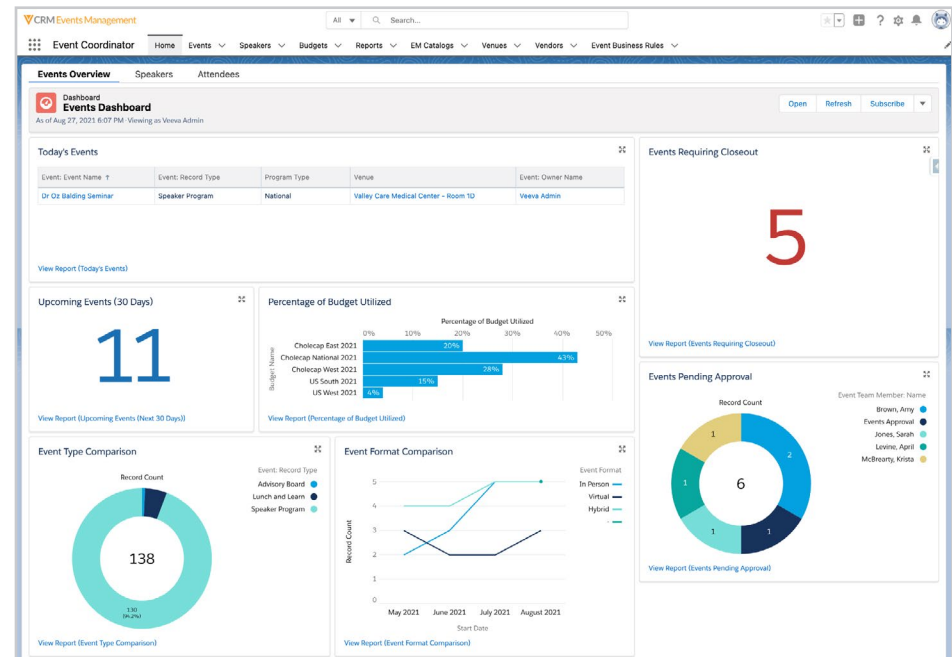
## Field Medical

A workspace dedicated to metrics for medical inquiries, insights, and scientific activity empowers medical science liaisons to build deeper KOL relationships.



## Event Coordinator

Enable events teams with a streamlined, end-to-end view into all event planning workstreams, from speakers to expenses.

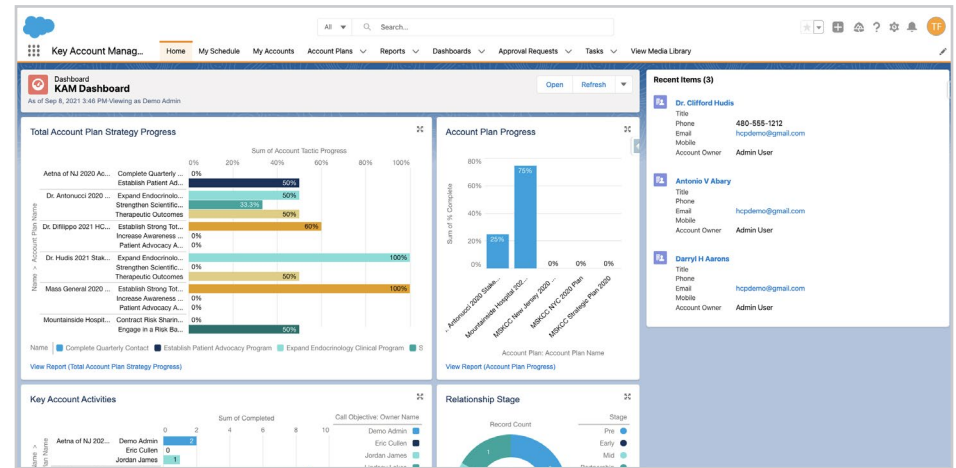




# Tips & Tricks

## Key Account Management

Key account managers can get a clearer picture of their targets across teams using account plan breakdowns, account hierarchy information, a stakeholder navigator interface, and call objective reporting.







# Tips & Tricks

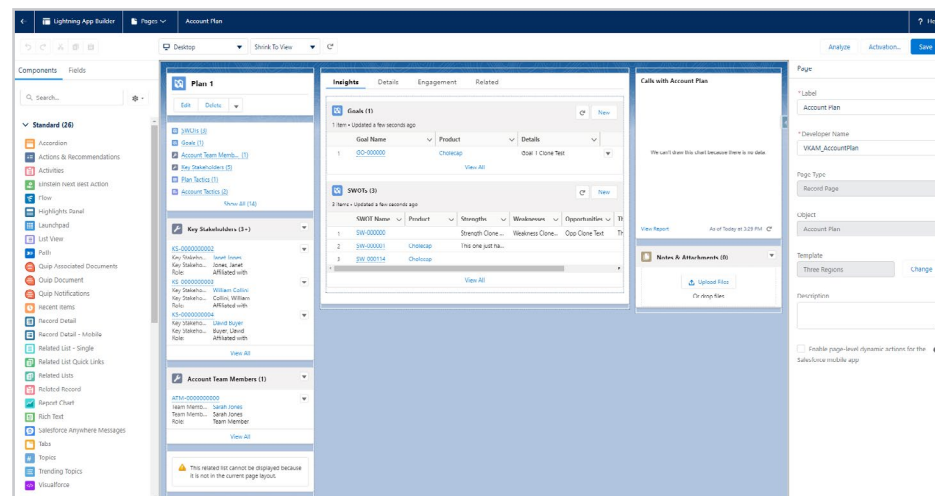
## CONFIGURE & CUSTOMIZE

**Create tailored workspaces for your teams.** Use the Lightning App Builder to create diverse page layouts to help every team do their best work. A palette of components offers a high degree of customization to fuel your business processes.

**Get started fast.** The Lightning App Builder is the default method to edit tabs and pages in Lightning-enabled Veeva CRM environments and does not require additional configuration to turn on. The drag-and-drop interface is easy to learn and lets admins quickly deploy new pages to the field.

**A dynamic user experience.** In the Lightning App Builder, tabs and pages have additional permissions that let admins control user visibility at a granular level. Admins can also make page components appear or disappear based on predefined conditions, ensuring that Veeva CRM always displays what a user needs to see in any context.

**A component for every occasion.** Power up your page layouts with Lightning components, helpful widgets that can be added to any Lightning page. Prebuilt Veeva CRM Lightning components, like the one for **Veeva CRM MyInsights**, extend the CRM functionalities you know and love. Admins can also pull in prebuilt components from the Salesforce AppExchange to incorporate additional capabilities unique to your teams.



Lightning App Builder

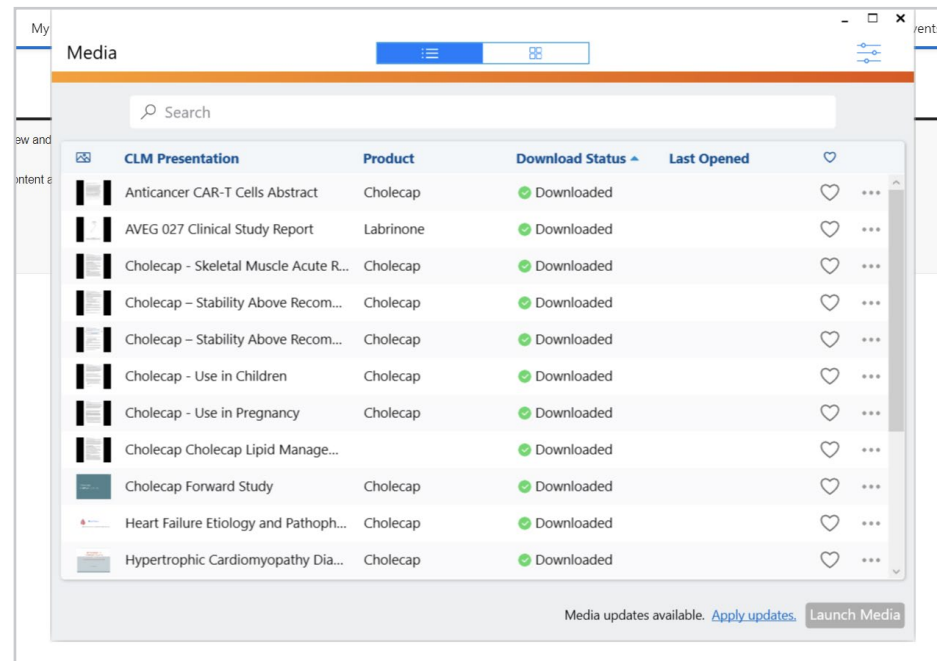


# Tips & Tricks

## REMOTE MEETINGS, OPTIMIZED FOR THE DESKTOP

**Content Ease.** Veeva CRM Desktop is the companion desktop app to Veeva CRM Online that streamlines the journey from content organization to remote engagement. The app allows your teams to find, assemble, present, and share their CLM content from their computer quickly and conveniently through a set of robust content library features.

**Flexibility & Compliance.** Meet your customers in their comfort zone. With Veeva CRM Desktop, your teams can share content across a variety of different remote meeting platforms, including Veeva CRM Engage Meeting, Zoom, and Microsoft Teams. Content usage in meetings is tracked automatically, making it easy for your teams to log interaction details and for home office to track content performance.



Veeva CRM Desktop



# Resources

## Documentation

- [Getting Started with Veeva CRM and Lightning](#)
- [Lightning Business Apps](#)
- [Launching CLM Media Library from the Call Report Online](#)
- [Veeva CRM and Lightning Product Brief](#)

## From the Veeva Blog

- [Reinventing the Veeva CRM Desktop Experience](#)

## Website

- [Veeva CRM Desktop Experience Homepage](#)

## Demos

- [Lightning Business App for Digital Reps](#)
- [Lightning Business App for Primary Care Sales](#)
- [Lightning Business App for Pharmacy Sales](#)
- [Lightning Business App for Key Account Management](#)
- [Lightning Business App for Brand Managers](#)
- [Lightning Business App for Event Coordinator](#)

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