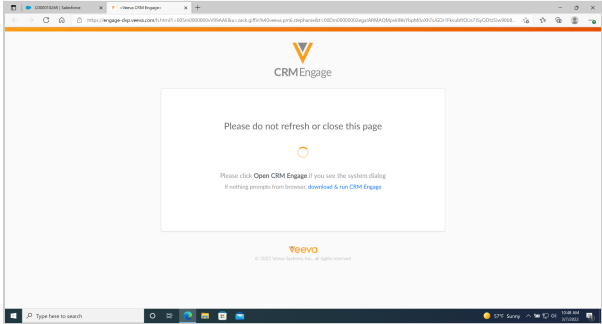
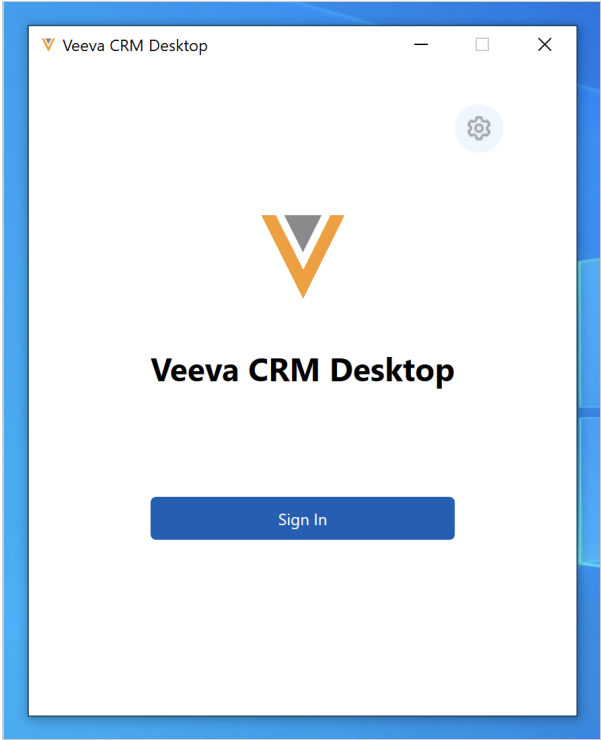


CRM Desktop (Windows) Updates

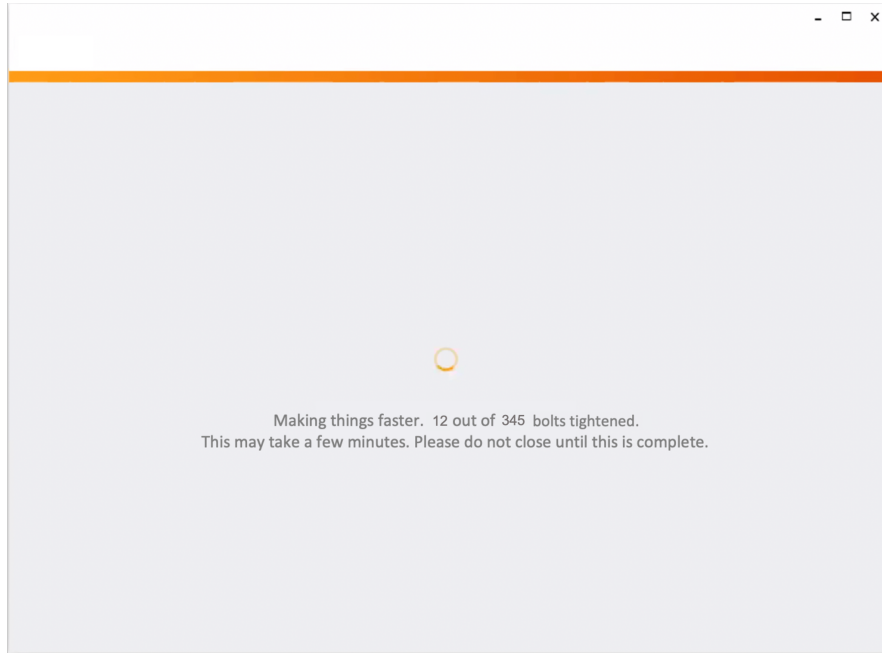
With the 22R1 release, the CRM Desktop (Windows) app is now a dedicated and independent app enabling users to access their media libraries whenever they need.

Signing In

Before	After
<p>Users were only able to launch the app from Veeva CRM in the browser, either from a call or from the View Media Library tab. Users did not need to sign in to the app separately.</p>	<p>Launch the app from the desktop icon and sign in directly using Veeva CRM credentials. After signing in, the app remains running in the background and accessible from the app icon in the system tray. When the app window is closed, double-click the icon to reopen the app.</p>
	

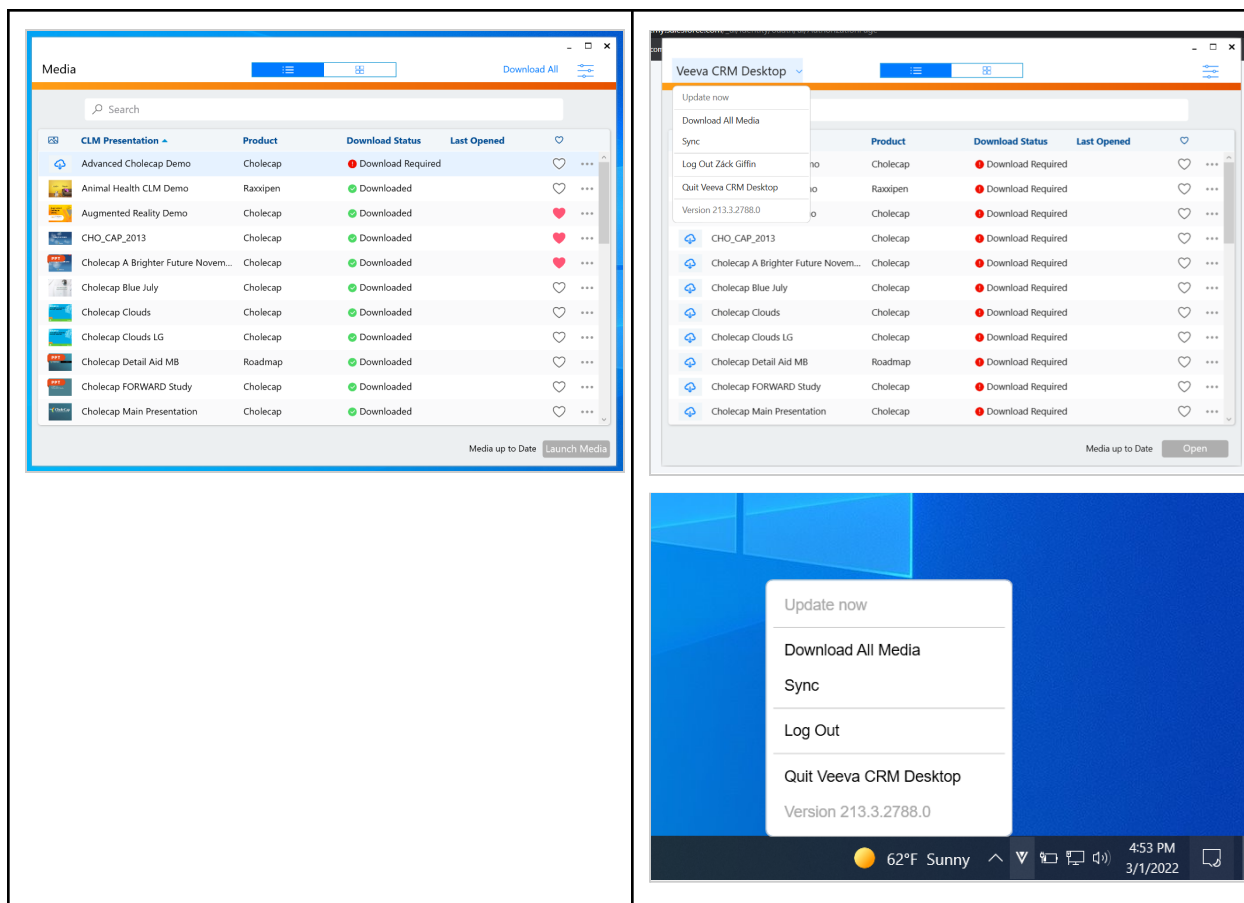
Upgrading Veeva CRM Desktop for Windows

A one-time performance tuning process occurs after upgrading to Veeva CRM Desktop 22R1. The process occurs automatically after signing in to the upgraded app for the first time and can take a few minutes.



Using the Media Library Menu

Before	After
<p>The app automatically synced and checked for updates when launched. Users selected the Download All button in the media library to download all the content in their libraries to their devices.</p>	<p>The app automatically performs an incremental sync in the background when updates are detected online. Select the Veeva CRM Desktop library menu in the top left corner to manage app updates, content downloads, and manual syncs, as well as sign out or quit the app. When the background sync completes, select Apply Updates to update the content in the media library.</p> <p>The library menu is also available from the app icon in the system tray. Right-click the icon to display the menu.</p>



Updating the App

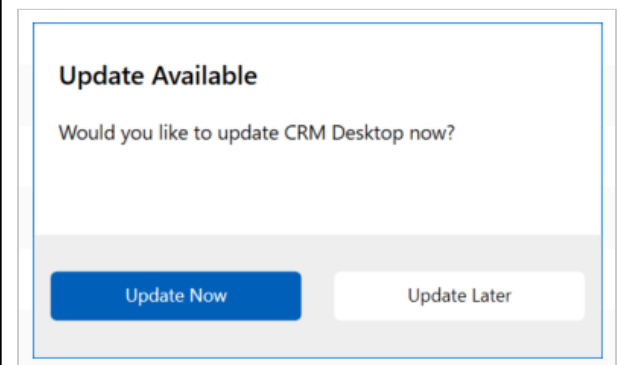
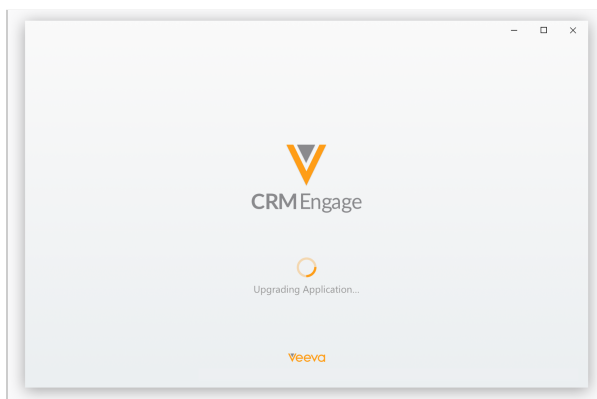
Before	After
<p>The app synced and checked for version updates when launched. The app updated automatically when a new version was available.</p>	<p>The app checks for version updates every time it is launched, a user successfully signs in, and after every full sync. Full syncs occur:</p> <ul style="list-style-type: none"> • Daily • When a user performs a manual sync • When content updates are detected online <p>App updates can be optional or required.</p> <p>When users are not in a call or an event, an update alert displays when there is an app version update. If the app window is minimized or closed when there is an update, the window automatically reopens and displays in the foreground.</p>

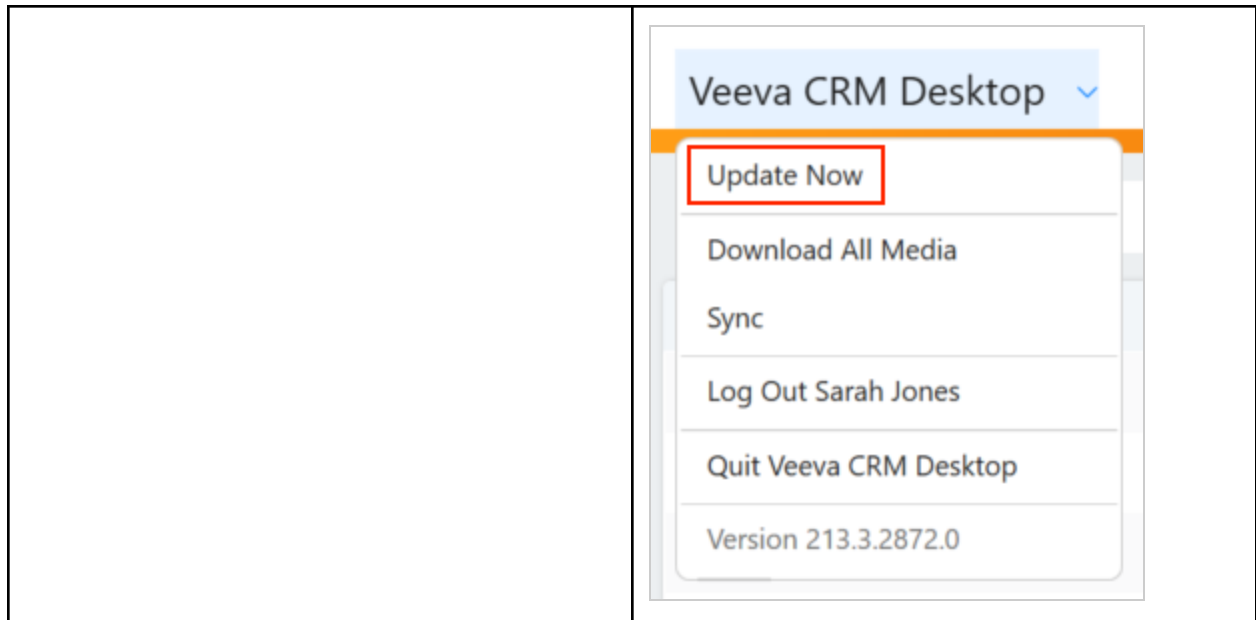
When users are in a call or an event, app update alerts for optional and required app updates do not display until the call or event ends.

If the update is optional, users can:

- Initiate call mode or join a call to hide the alert until the call ends
- Select Update Now to update the app immediately. The app quits and automatically relaunches after the update completes. Users do not need to sign in again. Any unsynced CLM tracking data is saved and syncs after the app relaunches.
- Select Update Later to update the app at a later time. The Update Now button in the media library menu and tray icon menu becomes available. When users are ready to update the app, select Update from either menu.

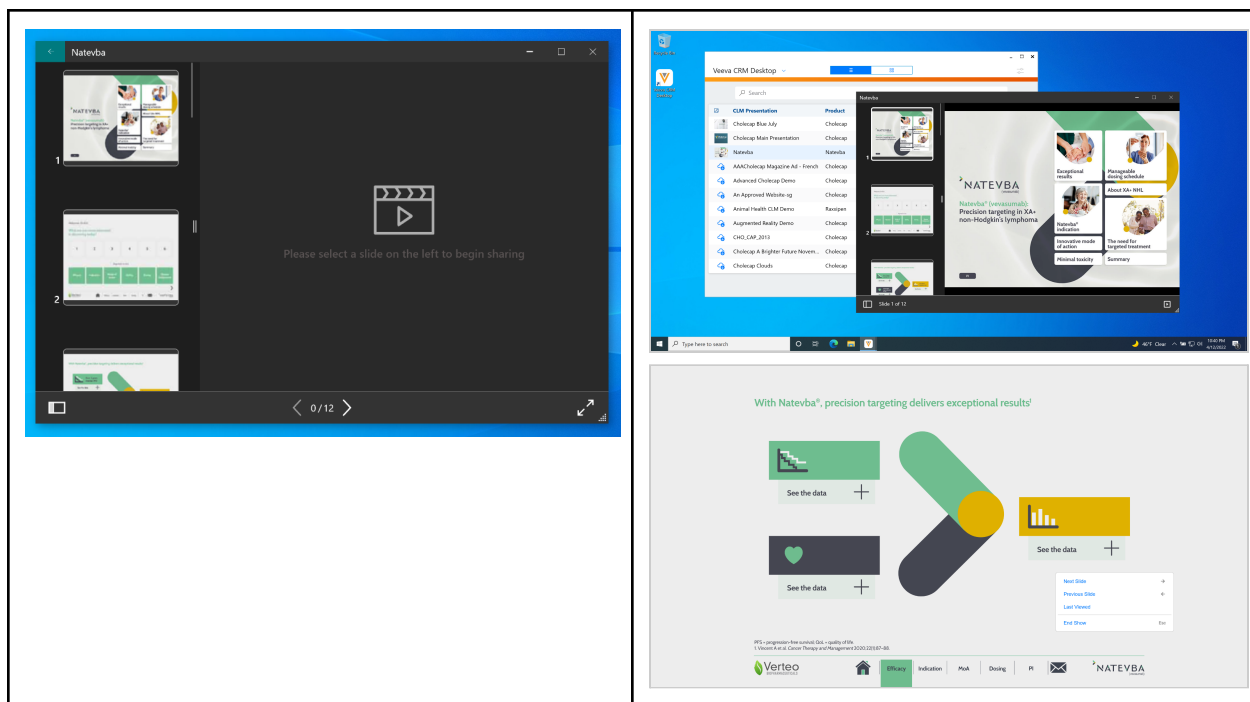
If the app update is required, select Update Now to update the app immediately. The app quits and automatically relaunches after the update completes. Users do not need to sign in again. Any unsynced CLM tracking data is saved and syncs after the app relaunches.





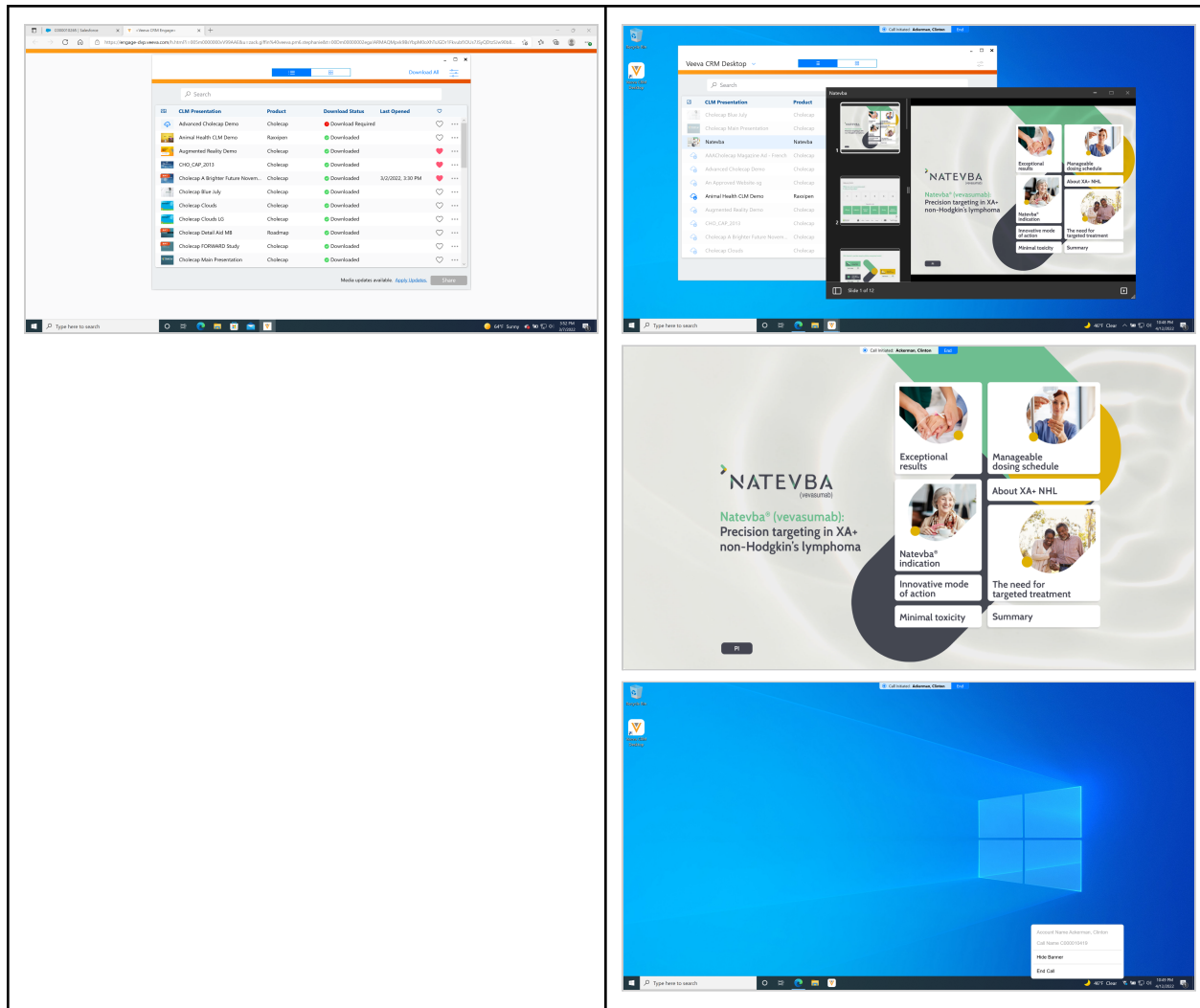
Reviewing Presentations for an Engage Meeting or Call

Before	After
To review presentations in preparation for a call, users had to launch the app from the View Media Library tab in Veeva CRM in the browser.	<p>Review and prepare content for calls by launching the app from the View Media Library tab in Veeva CRM in the browser or by double-clicking the app icon in the system tray. Presentations launch in Normal View. Select the Present button in the bottom right corner to display the content in fullscreen Presentation View. The slides are not interactive in Normal View.</p> <p>In Presentation View, content displays in fullscreen and is interactive. Use arrow keys to navigate between slides and the Escape key to exit the presentation. Alternatively, right-click on the slide to display a navigation menu.</p>



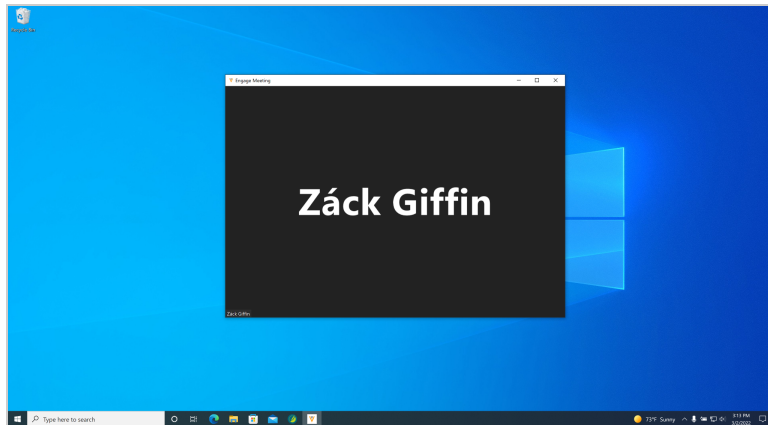
Initiating Call Mode

Before	After
<p>When a user selected the Start Media button on a call report in Veeva CRM in the browser, the app was launched and brought to the foreground.</p> <p>When sharing a presentation during a call, the app automatically tracked the activity.</p>	<p>Select the Start Media button on a call report in Veeva CRM in the browser to display the app in the foreground. A banner displays at the center top of the screen to indicate call mode. Call Mode means the app is tracking CLM activity for a specific call. Select the End button to end the call.</p> <p>During a call, activity is tracked only in Presentation View, not in Normal View.</p> <p>Additionally, the app icon in the system tray displays a blue dot to indicate call mode. Right-click the icon to display a menu with information about the call, as well as buttons to hide the banner or end the call.</p>



Starting an Engage Meeting

When a user selects the Start Meeting button on a call report in Veeva CRM in the browser, the app is brought to the foreground and the Engage Meeting is started. Meeting hosts can share content from the app during Engage Meetings.

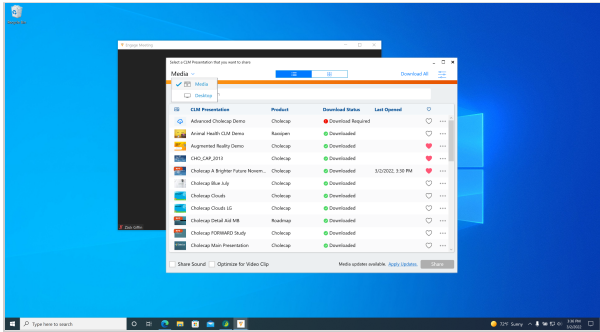
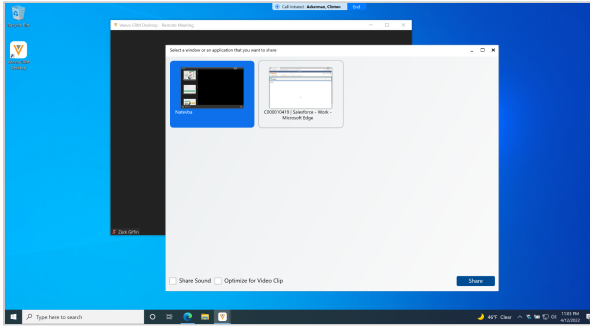


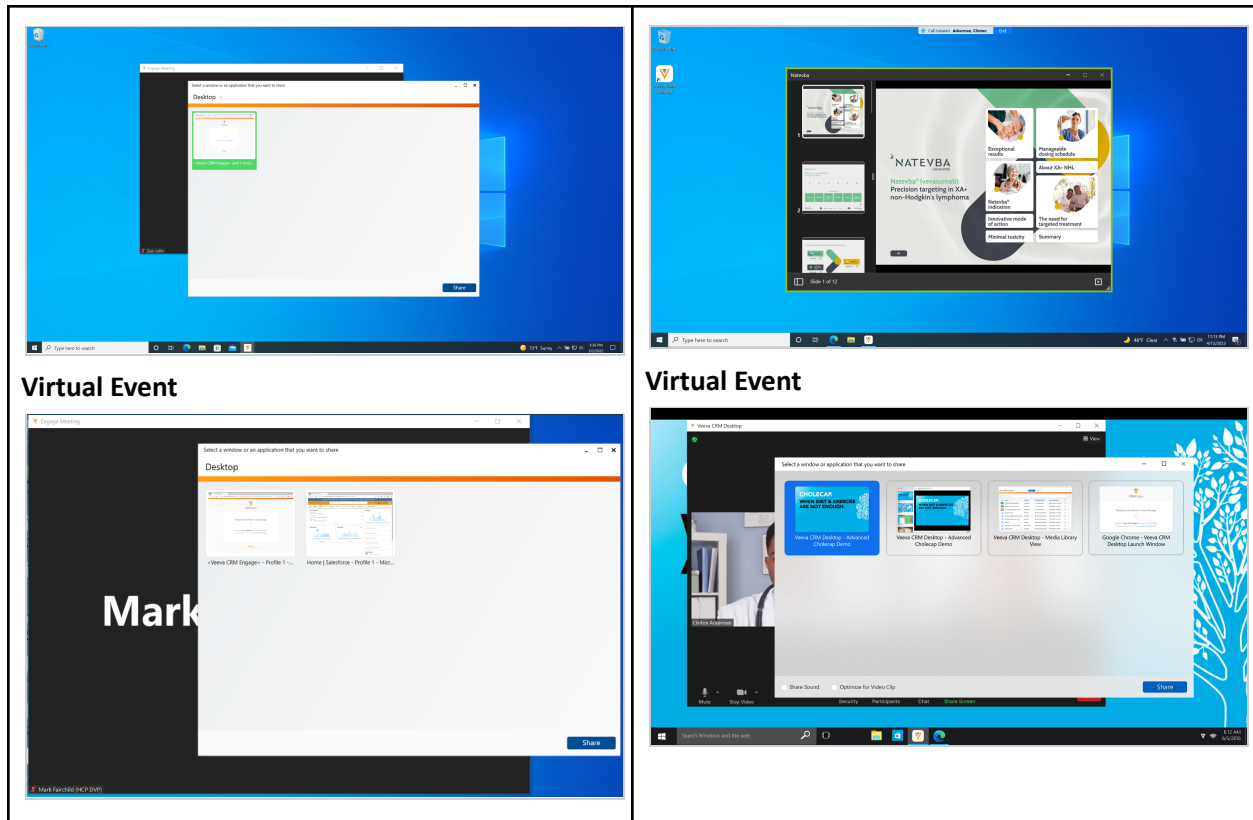
Sharing Content During an Engage Meeting

Before	After
<p>Meeting hosts toggled between the media library or desktop windows during a meeting to select the appropriate content to share. Users selected Media in the media library, then selected Share from the meeting window to view the media library and select the appropriate content to launch. The content automatically started sharing.</p>	<p>Launch the appropriate content in either Normal View or Presentation View. Select Share from the meeting window to view the available Normal View and Presentation View windows. Select the appropriate window to share.</p> <p>For presentations in Normal View, the entire window is shared. Select the Present button to display the content in fullscreen Presentation View for the app to begin tracking the activity.</p> <p>For presentations already in Presentation View, the app immediately starts tracking the activity.</p>



Sharing Windows on the Desktop During an Engage Meeting or Virtual Event

Before	After
<p>Meeting hosts for Engage Meetings and event hosts (or alternative hosts) for virtual events toggled between the media library or desktop windows during a meeting to select the appropriate content to share. Users selected Desktop in the media library, then selected Share from the meeting window to display the available desktop windows to share. After selecting the appropriate window, users selected the Share button.</p>	<p>Select Share to display the available desktop and CLM presentation windows. Select the appropriate window, then select the Share button.</p>
<p>Engage Meeting</p> 	<p>Engage Meeting</p> 



Tracking CLM Activity

Before	After
When users launched a presentation and selected a slide, tracking started automatically. A call key message was created if the key message for a slide was displayed for at least 2 seconds.	<p>A call key message is created for a presentation launched during a call or Engage Meeting if the following conditions are met:</p> <ul style="list-style-type: none"> The presentation is in Presentation View and in the foreground The key message for a slide is displayed for at least 2 seconds <p>Duration tracking for a key message is paused when users display another window in the foreground while displaying a presentation slide.</p>

Ending Call Mode

Before	After
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Ending an Engage Meeting or closing the app window quit the app completely.

Select End from the call mode banner or End Call from the tray icon menu, or End Meeting for an Engage Meeting, to end the call. A pop-up window displays. Select End Call to confirm the end of the call. The call key message data immediately syncs online.

The app remains running in the background even after ending a call or closing the window, and even if the user did not launch the app from a call.

