

Improved Account Picker (iPad) Updates

With the 22R2 release, the Veeva CRM iPad app provides an improved consistent way of searching for accounts across multiple application modals, including the following:

- Sphere of Influence
- Approved Email
- Media
- Survey Targets
- Detail Pages

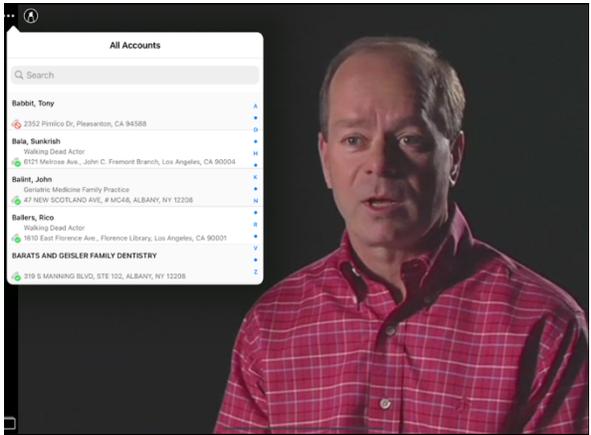
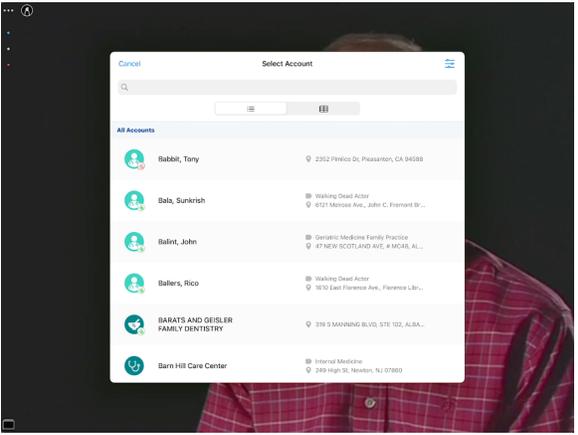
Installing Improved Account Picker on the Veeva CRM iPad App

Users can test the updates prior to the 22R2 release by downloading the app installer directly from an iPad browser using the link below. This will be a separate app named Veeva CRM Eval that installs on the iPad.

Evaluation App: <https://tinyurl.com/Pxdy5chK>

If the trial app displays a Trust error in your iPad, go to Settings > General > Device Management and trust Veeva Systems as a developer for the Veeva CRM Eval app. Please limit testing to only the Improved Account Picker. If you report issues, they will not be addressed until the 22R2 full feature release.

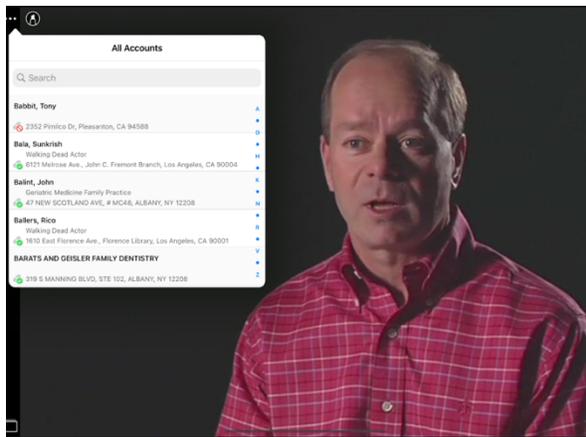
User Visible Changes

Before	After
<p><i>Account record type icons:</i> Not available <i>Cancel account selection:</i> Tapping outside of the popup <i>Window title:</i> All Accounts</p> 	<p><i>Account record type icons:</i> Available <i>Cancel account selection:</i> Dedicated button <i>Window title:</i> Select Account.</p> 

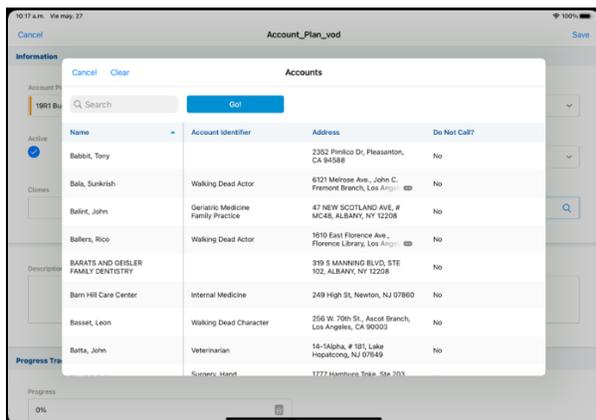
Before

Displayed a list view if:

- Account selection was in a wizard
- Account selection was in a detail page and Configurable Layouts was disabled (see [Configurable Lookup Filters and Layouts](#))



Or a table when Configurable Layouts was enabled.



After

Always displays both a list view and a table view with a toggle switch in detail pages or wizards.

List view:

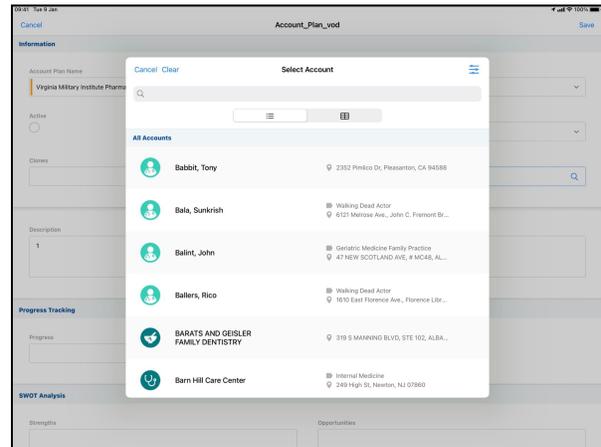
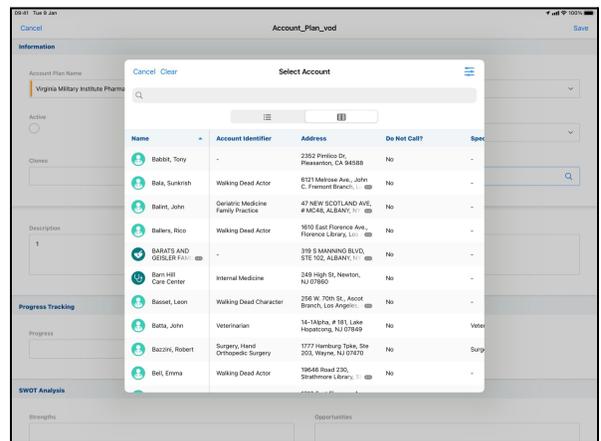


Table view



Searchable Fields

Veeva Standard Columns

Before 22R2, to define which rows and columns are searchable, Veeva CRM relied on [Advanced Account Search configuration](#), which is enabled or disabled through the ADVANCED_SEARCH_vod and DISABLE_SEARCH_TERMS_vod settings.

In 22R2 on the iPad, account search disregards Advanced Account Search configuration and always searches in the following fields:

- Account
 - Formatted_Name_vod__c
 - Account_Identifier_vod__c
 - Furigana_vod__c
 - NPI_vod__c
 - Account_Search_FirstLast_vod__c
 - Account_Search_LastFirst_vod__c
- Address_vod (searches across all addresses)
 - Name
 - Address_Line_2_vod__c
 - City_vod__c
 - State_vod__c
 - Zip_vod__c
 - Phone_vod__c
 - License_vod__c

Custom Columns

Enhanced search enablement allowed customers to set up custom columns to display and search on some detail pages. This was configured by setting the **Enable Enhanced Lookups** value to 1.

In 22R2 account search checks if there are custom columns defined in Search Layouts of any of the supported types. Account search modals search and display these custom columns, disregarding the value of the Enable Enhanced Lookups setting.

Account Search Layouts		
Action	Layout	Columns Displayed
Edit	Search Results	Account Name, Account Record Type, Last Activity
Edit	Lookup Dialogs	Account Name, Specialty 1, Specialty 2, Order Type, Default Inventory Monitoring Type, Default Order Type

Edit Search Layout

Account Lookup Dialogs

Select the fields to include in this search layout. Note that your choices only determine the display of fields.

Available Fields		Selected Fields
<ul style="list-style-type: none"> Restricted Products Sample Default Segmentations Shoe Size Signature Page Display Name Speaker? Specialty Specialty 2 Spend Amount Spend Status Spend Status Value 	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	<ul style="list-style-type: none"> Account Name Specialty 1 Specialty 2 Order Type Default Inventory Monitoring Type Default Order Type <div style="text-align: right;"> Up <input type="button" value="▲"/> Down <input type="button" value="▼"/> </div>

Note: To configure custom columns, switch to Salesforce Classic and go to the Account object. Select Customize layout of fields on search results and lookup dialogs, and select the Edit link for Lookup Dialogs. Select the custom fields to include them in the search layout.

For detailed configuration information see:

https://crmhelp.veeva.com/doc/Content/CRM_topics/General/SettingUp/ConfigLookup.htm

Search logic

Before 22R2:

- If `ADVANCED_SEARCH_vod` was disabled, the search string needed to be an exact match

Expected Result	ADVANCED_SEARCH_vod disabled
Ackerman, Clinton ID: 121212 123 North Street, Newton, NJ 08124	"Ackerman, Cl" * This search string is an exact string match, forcing the user to type the last name first. You can never search by first name only.

- When `ADVANCED_SEARCH_vod` was enabled, Full Text token search was available. When only one term was entered, the results displayed all accounts where one of the fields on the account contained a word or term that began with the entered value. When

users entered a space, the search token was an exact match across any searchable field. All tokens were joined by an implicit AND.

Expected Result	ADVANCED_SEARCH_vod enabled
Ackerman, Clinton ID: 121212 123 North Street, Newton, NJ 08124	"Clinton" "Ackerman Newton" "121212 Newton" * Tokens can be used to search across multiple fields at once and the user can type in the first or last name.

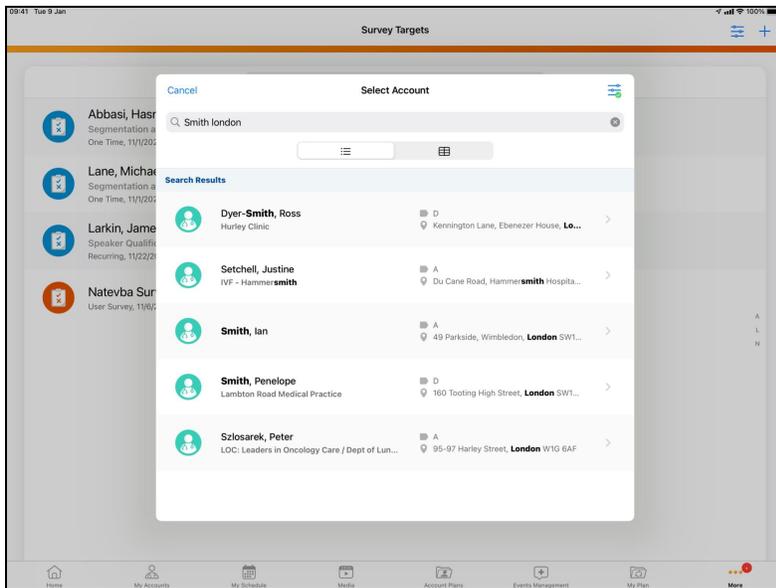
In 22R2:

- Search disregards the value of the ADVANCED_SEARCH_vod setting
- When only one term is entered, the results display all accounts where one of the fields on the account **CONTAINS** a string that matches the entered value. When you enter a space, other search tokens are joined by an implicit AND.

Expected Result	New search logic
Ackerman, Clinton ID: 121213 123 North Street, Newton, NJ 08124	"Clinton" "Ackerman Newton" "121213 Newton" * Tokens can be used to search across multiple fields at once and the user can type in the first or last name. Partial tokens can be used as well. "Clint Newton", "kerman", "1213", "8124"

Highlighting

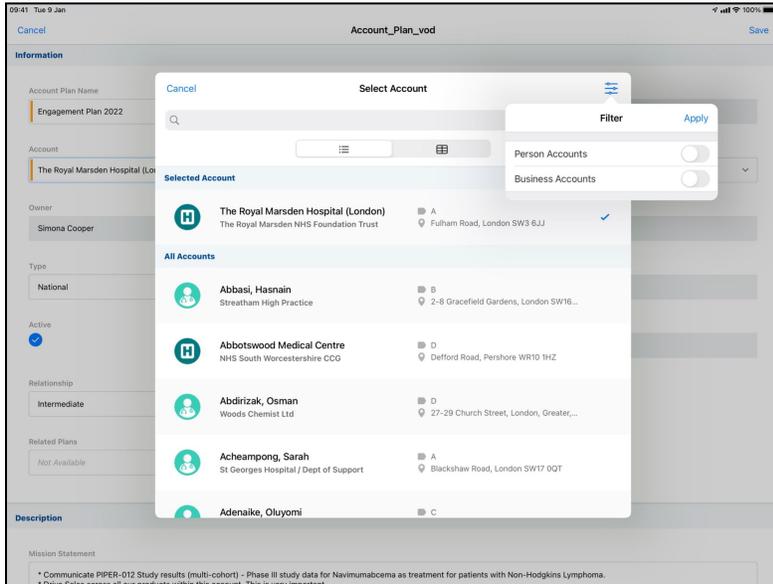
In 22R2, the matching term(s) for which a row is listed are highlighted if the field is available as part of the results. If the match occurs in multiple fields at the same time, all matches are highlighted. If multiple matches occur in the same field or the same word, each match is highlighted.



Note: In the case where the Account search is matching based on a non displayed Address, no highlighting will occur.

Filters

In 22R2, users can filter between Business and Person Accounts using the filter icon.



Selected Account in Detail Pages

In 22R2, if an account is already selected and the user wants to edit it, the search displays the selected account in a section at the top of the screen.

