Global Account Search

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TOC

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Global Account Search

iPad|Browser (Lightning)|

Global Account Search is a tool to search for and add accounts currently outside a user's territory, making it easier to interact with these accounts. Global Account Search also helps reduce the creation of unnecessary accounts, as users can first check if an account already exists outside of their territory before creating a new account.

For example, Sarah Jones visits Dr. Ackerman, who introduces her to Dr. Bob Adams, a doctor who has recently moved into Sarah's territory. Sarah searches for Bob Adams in CRM and sees that her org already has an account for him, currently outside her territory. Sarah is able to add Dr. Adams to her territory, enabling her to schedule calls with him.

Configuring Global Account Search

To enable this feature:

1. Grant admins the following permissions:

Object	OLS	Record Type	Fields	FLS
Implicit_Filter_vod	CRUD	n/a	• Location_vod • Applies_To_vod • Inclusion_vod • Implicit_Filter_Condition_vod	Edit
Implicit_Filter_Condition_vod	CRUD	n/a	• Object_Name_vod • Field_Name_vod • Criteria_vod • Implicit_Filter_vod	Edit

2. Grant admins access to the **Global Account Search Configuration** tab.

3. Grant all users access to the **Global Account Search** tab.

> **Note:** This step is only required when configuring this feature for the Browser (Lightning) platform.

4. Grant all users access to the **VeevaGlobalAccountSearchController** Apex class.

5. Populate the **Enable_Global_Account_Search_vod** Global Account Search Setting with a value of 1.

> **Note:** This step is only required when configuring this feature for the iPad platform.

Defining Implicit Filters for Global Account Search

Implicit filters are admin-defined filters that include or exclude sets of accounts from Global Account Search results, reducing the number of potentially unnecessary results and granting greater control over the results displaying to users.

To create an implicit filter:

1. Navigate to the **Global Account Search Configuration** tab.

2. Select **New** in the Implicit Filters section.

3. Populate the following fields:

   - Location_vod – Defines the scope of the implicit filter. If multiple implicit filters apply to a user, the implicit filter most specific to the user is applied to their search.

     Select one of the following options:

     - Organization-Wide Default

     - Profile

     - Territory – Applies to a user if the user is assigned to a territory with an implicit filter, or if the territory is a descendant of a territory with an implicit filter

   - Applies_To_vod – Defines which specific groups the implicit filter applies to. The contents of this field depend on the selection of the Location_vod field:

     - If Organization-Wide Default was selected, this field is disabled

     - If Profile was selected, this serves as a multi-select picklist with all profiles in the org

     - If Territory was selected, this field serves as a multi-select picklist with all territories in the org

- Inclusion_vod – Defines whether the filter is an inclusive or an exclusive filter:

    - If this field is selected, the filter is inclusive and accounts must meet the implicit filter criteria in order for them to display as results. This is the default option.

    - If this field is not selected, the filter is exclusive and the accounts cannot meet the implicit filter criteria in order for them to display as results

- Record Type – A multi-select picklist that defines the account record types either included or excluded based on the filter

4. Select **Save**.

For example, the admin creates the following Implicit_Filter_vod record with the following values:

- Location_vod – Profile

- Applies_To_vod – Primary Care Sales, Primary Care Sales Platform

- Inclusion_vod – Selected

- Record Type – Professional_vod, KOL_vod, Hospital_vod

Sarah Jones is a Primary Care Sales user who searches for "Bob" in Global Account Search. Bob Adams is an account with a record type of Professional_vod, so he displays as a result. Bob Richards is an account with a record type of Business_Profiessional_vod, so he does not display as a result.

Using Global Account Search in the Browser

Users can access Global Account Search via the dedicated Global Account Search tab.

Before selecting Search, users can define the following search parameters:

- Account Type – Filters results based on the type of account:

    - HCP – Filters results to only Person Accounts

- HCO – Filters results to only Business Accounts

- All – Does not filter results

- Name – Creates a fuzzy match search against text fields on the Account object

- Location – Searches for matches against text fields on the Address_vod object

The search may return up to 100 results. Users can select the Filter button to further refine the list of results by specialty and credentials.

Results display as a table with the information about each result's record type, name, specialty, and address.

Each of these columns can be sorted for further accuracy.

If the desired account does not display in results, users can select the New Account button to launch the New Account Wizard.

Adding an Account From Outside a User's Territory

Users can also add accounts from outside of their territory from the Global Account Search page:

1. Search for the appropriate account.

2. Select the check box in the results table for the appropriate out of territory account.

3. Select **Add to Territory**.

4. Select the appropriate parent accounts to also add to the territory. This step is optional and only displays if the account is a child account.

5. Select the appropriate territory to assign the account. This step only applies to users assigned to multiple territories.
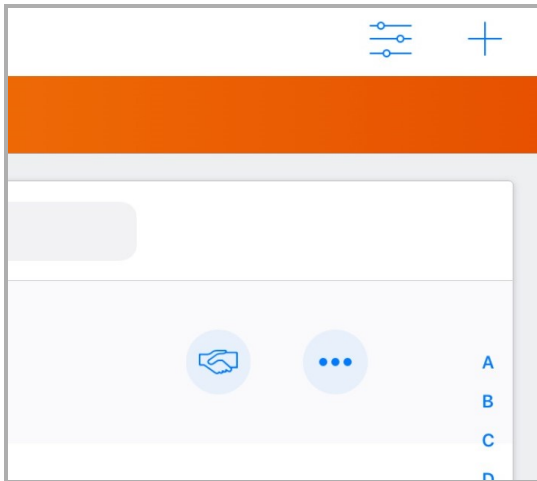
Using Global Account Search on the iPad

Users can access Global Account Search by selecting the + button on the My Accounts tab. When Global Account Search is enabled, iPad users must first search for an existing account before they can create a new account.

Before selecting Search, users can define the following search parameters:

- Account Type – Filters results based on the type of account:
    - HCP – Filters results to only Person Accounts
    - HCO – Filters results to only Business Accounts
    - All – Does not filter results
- Name – Creates a fuzzy match search against text fields on the Account object
- Location – Searches for matches against text fields on the Address_vod object

The search may return up to 50 results on the iPad divided into two categories:

- Inside Territory – The account is currently assigned to the same territory as the user
- Outside Territory – The account is currently not assigned to the same territory as the user

Note: If the user is using an iPad not connected to the internet at the time the search occurs, results still display, but are limited to only accounts currently synced to the device.

Users can preview results by selecting the account in the results panel to display the account's name, identifier, and any parent accounts.

Users can view the previewed account by selecting the View Account button.

If the desired account does not display in results, users can select the New Account button to launch the New Account Wizard.

Adding an Account From Outside a User's Territory on the iPad

Users can also add accounts from outside of their territory from the Global Account Search page:

1. Search for the appropriate account.

2. Select the appropriate result to preview the out of territory account.

3. Select **Add Account**.

4. Select the appropriate parent accounts to also add to the territory. This step is optional and only displays if the account is a child account.

5. Select the appropriate territory to assign the account or accounts. This step only applies to users assigned to multiple territories.