Automated Release Management for Custom Applications with Veeva CRM

Get Accelerated Custom Application Development, Enhanced Security, and Worry-free Deployment for Veeva CRM

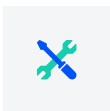**autorabit**

Veeva Technology Partner

Get Accelerated Custom Application Development, Enhanced Security, and Worry-free Deployment for Veeva CRM

As a provider of DevOps solutions purpose-built for Salesforce, AutoRABIT ARM simplifies the process of building, configuring, and testing custom applications deployed in Veeva CRM, built on the Salesforce platform.

AutoRABIT simplifies the DevOps process for custom solutions built around Veeva

AutoRABIT enables Salesforce development and IT operations teams to automate their release processes for Veeva CRM and related applications. A Continuous Integration/Continuous Deployment (CI/CD) tool purpose-built for Salesforce, AutoRABIT ARM enables developers to use best-in-class development tools, including version control, test automation, IDE tools such as VS Code, and more. With AutoRABIT ARM and Veeva:
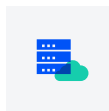
- Get the power to handle data migrations for managed packages by grouping like data types together and the ability to initiate configurations based on labels and package types
- Use flexible one-click or automated deployment options for increased speed
- Eliminate firefights with auto-test, auto-validation, test tool integration, and conflict-free merges before you deploy
- Easily keep Sandboxes in sync with automation to eliminate confusion
- And much more

Turnkey CI Setup

XML and Build Script Parsing

Integrate with Other DevOps

Metadata Mastery™

"Clicks-not code" with AutoRABIT

Without the right tools, Salesforce development and administration can be daunting. Complex linking and inheritance properties within the Salesforce data model, including mapping Salesforce objects, their metadata and their dependencies can result in slowed development, costly delays and unanticipated downtime. AutoRABIT ARM manages this complexity, enabling Salesforce admins and testers to quickly, easily and successfully deploy new features and functionality.

Automated Release Management Capabilities

- DeploymentAutomation
- VersionControl
- Test Automation
- Sandbox Management
- Salesforce Org Dataloading
- SalesforceDX

AutoRABIT ARM with Veeva CRM

How AutoRABIT Accelerated Deployments for a French Multinational Pharmaceutical Company

Veeva CRM is the life sciences industry's most advanced and only proven CRM platform, providing a personalized customer experience with comprehensive insights and intelligent engagement across channels. The solution offers advanced multichannel capabilities and real- time insights to help life sciences companies engage their customers in the way and channel they prefer. Built on the Salesforce platform, it includes complete functionality to manage primary care, specialty care, and managed markets in a single integrated CRM. It is also a part of the integrated Veeva Commercial Suite that includes Veeva Vault for regulated content management and Veeva Network, a complete customer master solution.

The Problem

The customer's Salesforce development team encountered problems with Veeva Org refreshes, new deployments of their custom Veeva applications, and data migration between Salesforce Orgs for their Veeva CRM environment. In many cases, a single data migration process took admins a full day or more.

A key driver of these slow migrations is the Veeva Org refresh process. There are two phases of a Veeva Org refresh:

- **Veeva Configuration Changes** – Including changes to Customer settings, Application changes, Admin Setup changes, Profile & Permission Set changes

- **Veeva Data Migration** – Post-configuration, the sandbox needs to be upserted with "Veeva" data to complete it as a Veeva CRM. Typically, Veeva objects form a unique schema with complex Master-Child relationships.

The Solution: AutoRABIT ARM

The customer solved the problem using AutoRABIT ARM's Environment Provisioning module to perform Veeva Configuration Changes. This module allows an Admin to create Automation templates, and each template contains "Steps," which perform specific actions. Actions can include:

- Migrating Custom Settings data from org to org

- Deployment of settings from a Salesforce Org/ Package manifest/ Metadata Zip bundle to the target org

- Updates of Profile & Permission sets

- Support for handling unsupported metadata

The Results

Faster, trouble-free deployments and changes using AutoRABIT ARM. The customer's Salesforce admins can now create an Environment Provisioning template and run it independently across multiple Sandboxes or choose to attach it to a Continuous Integration Job

For an improved Veeva Data Migration process, AutoRABIT's advanced Data Loader Pro is used to migrate data (including Master & Child relationships) for multiple "Veeva" records across Sandboxes. AutoRABIT helped the customer develop Data Loader Pro templates that can perform the Veeva Data Migration process on a Salesforce sandbox quickly and without the overhead of maintaining multiple CSV files.