

CT CPG Summer '19 Release Notes



Activity Sync (Generally Available)

[Sync your work Activities](#) in CT CPG Calendar with standard Salesforce calendar and your external private calendar. Specify the criteria to make sure that you have enough information to decide on and schedule an appointment at the right time.

Where: The feature is generally available in both Classic and Lightning Experience.

Why: With new criteria fields, you can select a specific type of activities that you wish to find in your personal or email calendars integrated with CT CPG Calendar. You can also determine the flow of Activities created via the mailbox.

How: New fields **Standard object record criteria** and **Custom object record criteria** are available for users with standard administrator rights as soon as the new release version has come out.

How to set up Activity Sync.

1. Go to **Setup** → **Custom Code** → **Custom Metadata Types** → **Activity Sync**.
2. Click **Manage Records** and create new Activity Sync.
3. Enter **Standard object record criteria** and **Custom object record criteria** queries for filtering.



Important: When **Standard object record criteria** are set up, **Standard Activity Type** field is not used as a filter anymore.

Activity Sync Detail

Edit Clone

Label	Visit Target	Sync Type	Both
Namespace Prefix	CTCPG	Active	<input type="checkbox"/>
Activity Sync Name	VisitTarget	Protected Component	<input type="checkbox"/>

▼ Details

Standard Object	Event	Activity Record Type	Visit
Standard Activity Type			
Standard object record criteria	Subject LIKE '%Meet Dr%'	Custom object record criteria	CTCPG__TargetFrequencyId__c != null

▼ Additional fields mapping

Fields to update	Event.Description	Field values	CTCPG__Activity__c.CTCPG__Objective__c
------------------	-------------------	--------------	--

▼ Description

Description	Full sync between Events and CTCPG__Activity__c records of Visit type
-------------	---

▼ System Information

Created By	Daria Efremova, 20.08.2019 15:18	Last Modified By	Daria Efremova, 20.08.2019 15:18
------------	----------------------------------	------------------	----------------------------------

Edit Clone

Planning Calendar

Default Duration (Permission Setup Required)

Now you can [set up the default duration](#) of activity aligned with your corporate best practices.

Where: The feature is generally available in both Classic and Lightning Experience.





Why: Enhance your activities planning with the default duration for each record type. Now you can set up the default duration for Visits, Audit Calls, Conferences, and Events aligned with your corporate best practices and company rules.

How: To enhance Planning Calendar, admins need to give **Edit** permission to the **Duration** (*CTCPG__Duration__c*) field of the **Planning Calendar Settings** (*CTCPG__CalendarSettings__c*) object.

How to set up Planning Calendar:

1. Go to the **CT CPG Calendar** tab → **Settings**.
2. Scroll down the page to the **Customize Events** section. Enter the **Duration** in minutes per each record type and click the **Save** button.

Note: The duration is set 30 minutes by default and can be maximized up to 480 minutes.

RECORDTYPE NAME	TITLE FIELD	ICON URL	PREVIEW	DURATION	OPEN IN
Event	Activity Nar ▼	/img/icon/trophy16.png		<input type="text" value="30"/>	ActivityReport ▼
Joint Visit	Activity Nar ▼	/img/icon/stamp16.png		<input type="text" value="30"/>	ActivityReport ▼
Timeoff	Activity Nar ▼	/img/icon/hexagon16.png		<input type="text" value="30"/>	ActivityReport ▼
Visit	Activity Nar ▼	/img/icon/knight16.png		<input type="text" value="30"/>	ActivityReport ▼

Planning Calendar

Event Creation Pop-up Window Improvements (Generally Available)

[The creation pop-up window](#) supports the lookup fields and field dependencies.

Where: The feature is generally available in both Classic and Lightning Experience.

Why: New supported fields are an improvement for the existing creation flow.

How: Lookup fields and field dependencies are interlaced with the standard Salesforce field settings.

How to use:

1. Go to the **CPG Calendar** tab → **Settings**.
2. Scroll down to the **Event Creation Pop-Up Window Setup** section.
3. Select the record type and set a flag next to the **Show Pop-Up** checkbox.
4. Add dependent fields to the layout if you have them set up in your system.

ROW NUMBER	FIELD VALUE	REQUIRED
1:	Type	<input checked="" type="checkbox"/>
2:	Description	<input type="checkbox"/>
3:	-- None --	<input type="checkbox"/>

Search Layout of the selected object controls the lookup window:

1. Go to **Setup** → **Object Manager**.
2. Select the object and find **Search Layouts**.
3. Set up **Search Results**.

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	New, Open in Quip, Clean, Get More Accounts, Discover Companies
Lookup Dialogs	Account Name, Account Site, Account Owner Alias, Type	N/A
Lookup Phone Dialogs	Account Name, Account Site, Account Owner Alias, Type, Phone	N/A

Activity Report (Addition Setup Required)

[Activity Page Layout](#) becomes more flexible given the integration with the standard Salesforce Page Layouts. A global setting includes previously used Field Sets. You can change Page Layout for each profile.

Where: The feature is generally available in both Classic and Lightning Experience.


Why: You can customize Activity Page as you like for any record type to meet your business requirements.

How: Follow steps to update custom settings:

1. Go to **Setup** → **Custom Code** → **Custom Settings**.
2. Select **Activity Layout Settings** and click **Manage**.
3. Create a new record for the specific record type based on which the Page Layout will be configured.

Activity Layout Settings Detail

[Back to List](#)

Name	Fieldset API Name
Visit 	CTCPG__Visit

Note: After removing the setting for the specific record type of Activity, Page Layout will be inherited from the standard Salesforce Page Layout.

Create or set up the Page Layouts to assign them to Profiles.

1. Go to **Setup** → **Object Manager**.
2. Select **Activity** (*CTCPG__Activity__c*) and find the **Page Layouts**.
3. Click the **Page Layout Assignment** button.
4. Click **Edit Assignment** to change the Page Layout for a profile.

Page Layout To Use: Event Layout ▼ 1 Selected 1 Changed

(1-4 of 5) [Next>](#)

Profiles	Record Types	Master	Event	Joint Visit	Timeoff
Analytics Cloud Integration User		Activity Layout	Event Layout	Joint Visit Layout	Event Layout
Analytics Cloud Security User		Activity Layout	Event Layout	Joint Visit Layout	Event Layout
Chatter External User		Activity Layout	Event Layout	Joint Visit Layout	Event Layout
Chatter Free User		Activity Layout	Event Layout	Joint Visit Layout	Event Layout
Chatter Moderator User		Activity Layout	Event Layout	Joint Visit Layout	Event Layout
Contract Manager		Activity Layout	Event Layout	Joint Visit Layout	Event Layout

Dynamic Groups – PILOT (General Availability)

Use dynamic groups to create lists, catalogs, teams, and more based on SOQL capabilities.

Where: The feature is generally available in Lightning Experience.

Why: Create groups using SOQL filters with an intuitive interface and keep them up to date. Groups could be used across the other Salesforce and CT CPG features.

How: To [set up the dynamic groups](#), please refer to the CT CPG Public Documentation portal.

The screenshot displays the 'SOQL Builder' interface for creating a dynamic group. The main panel shows a SOQL query: `SELECT * FROM CTCPG__Product__c WHERE ((CTCPG__IsActive__c = true))`. Below the query, there are 'OR' and 'AND' buttons. The 'AND' button is selected, and a filter is added: 'Active' equals 'True'. A 'Remove Group' button is visible next to the filter. On the right side, there is a 'Group Members' panel showing the group name 'Products to Offer', the owner 'Daria Efremova', and the 'IsDynamic' checkbox checked. The 'Created By' and 'Last Modified By' fields both show 'Daria Efremova' with the timestamp '21.08.2019 9:43'.

Public Classes (General Availability)

You can enable [Public Methods](#) using existing CT CPG Package logic.

Where: The feature is generally available in both Classic and Lightning Experience.

Why: You can enable Public Methods to facilitate your development and use existing package logic.

How: Find out more about public methods on the CT CPG Public Documentation portal.