

# 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		<a href="#">Edit</a>	<a href="#">Clone</a>														
Label	Visit Target			Sync Type	Both												
Namespace Prefix	CTCPG			Active	<input type="checkbox"/>												
Activity Sync Name	VisitTarget			Protected Component	<input type="checkbox"/>												
<b>▼ Details</b> <table border="1"> <tr> <td>Standard Object</td> <td>Event</td> <td>Activity Record Type</td> <td>Visit</td> </tr> <tr> <td>Standard Activity Type</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Standard object record criteria</td> <td>Subject LIKE '%Meet Dr%'</td> <td>Custom object record criteria</td> <td>CTCPG__TargetFrequencyId__c != null</td> </tr> </table>						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
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<b>▼ Additional fields mapping</b> <table border="1"> <tr> <td>Fields to update</td> <td>Event.Description</td> <td>Field values</td> <td>CTCPG__Activity__c.CTCPG__Objective__c</td> </tr> </table>						Fields to update	Event.Description	Field values	CTCPG__Activity__c.CTCPG__Objective__c								
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<b>▼ System Information</b> <table border="1"> <tr> <td>Created By</td> <td>Daria Efremova, 20.08.2019 15:18</td> <td>Last Modified By</td> <td>Daria Efremova, 20.08.2019 15:18</td> </tr> <tr> <td></td> <td><a href="#">Edit</a></td> <td><a href="#">Clone</a></td> <td></td> </tr> </table>						Created By	Daria Efremova, 20.08.2019 15:18	Last Modified By	Daria Efremova, 20.08.2019 15:18		<a href="#">Edit</a>	<a href="#">Clone</a>					
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	<a href="#">Edit</a>	<a href="#">Clone</a>															

## 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.

CUSTOMIZE EVENTS					
RECORDTYPE NAME	TITLE FIELD	ICON URL	PREVIEW	DURATION	OPEN IN
Event	Activity Nar ▾	/img/icon/trophy16.png	■	30	ActivityReport ▾
Joint Visit	Activity Nar ▾	/img/icon/stamp16.png	■	30	ActivityReport ▾
Timeoff	Activity Nar ▾	/img/icon/hexagon16.pn	■	30	ActivityReport ▾
Visit	Activity Nar ▾	/img/icon/knight16.png	■	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.

**EVENT CREATION POP-UP WINDOW SETUP**

Select record type : **Event** ▾

Show popup:

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**.

**Search Layouts**  
6 Items, Sorted by Layout

Quick Find

AYOUT	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	Edit

## 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

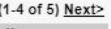
[Back to List](#)

		<a href="#">Edit</a>		
Name	Visit 			Fieldset API Name
				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.

<a href="#">Save</a> <a href="#">Cancel</a>				
Page Layout To Use: <a href="#">Event Layout</a>  1 Selected 1 Changed				
Record Types 				
Profiles	Master	Event	Joint Visit	Timeoff
Analytics Cloud Integration User	Activity Layout	<b>Event Layout</b>	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

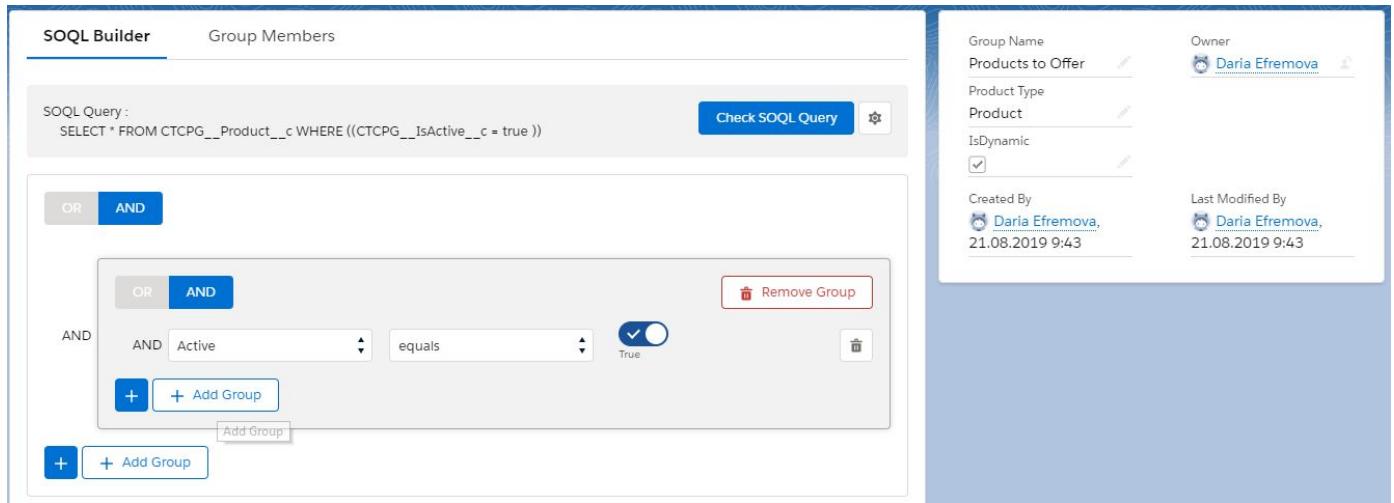
## Dynamic Groups – PILOT (General Availability)

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 shows the SOQL Builder interface. On the left, the SOQL Query is displayed as:

```
SELECT * FROM CTCPG__Product__c WHERE ((CTCPG__IsActive__c = true ))
```

On the right, the Group Members configuration is shown:

Group Name	Owner
Products to Offer	Daria Efremova
Product Type	Product
IsDynamic	<input checked="" type="checkbox"/>
Created By	Daria Efremova, 21.08.2019 9:43
Last Modified By	Daria Efremova, 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.