CT PHARMA

CT Pharma Spring '19 Release Notes

Activity Sync (Generally Available)

Sync your work Activities with your external or device private calendar, standard SF Tasks & Events calendar, and CT CPG Calendar. Specify the criteria to make sure that you have enough information to make a decision and schedule an appointment at the right time.

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

Why: New criteria fields let you be more specific about the type of activities you wish to see in your personal or email calendars from CT Pharma Calendar and clarify the flow of Activities that should be created via the mailbox.

How: New fields **Standard object record criteria** and **Custom object record criteria** are available for admins as soon as the new release version is deployed.

You can setup Activity Sync.

1. Go to **Setup → 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: Once **Standard object record criteria** is set, **Standard Activity Type** field can no longer not be used as a filter.

Planning Calendar

Default Duration (Permission Setup Required)

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

Why: Improve your activities planning with Default duration for each record type. Now you can set the default duration for 1:1 Visits, Audit Calls, Conferences and Events aligned with your corporate best practices and company rules.

How: Admin should give **Edit** permission for the **Duration** *(CTPHARMA__Duration__c)* field on the **Planning Calendar Settings** *(CTPHARMA__CalendarSettings__c)* object.

1. Go to the **CPG Calendar** tab**.**
2. Tap **Settings**.
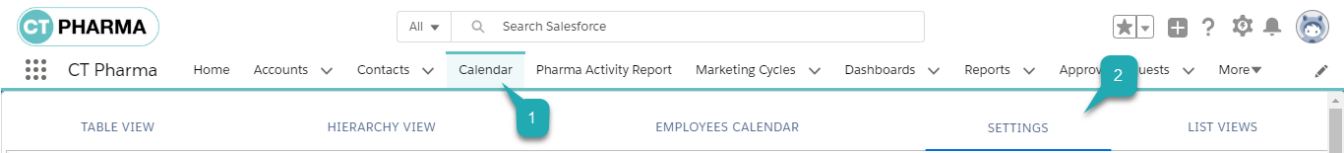
3. Scroll the page to the **Customize Events** section. Enter the **Duration** in minutes per each record type and click the **Save** button. The duration is set 30 minutes by default and has ranged from 30 to 480 minutes.

## Event creation pop-up window improvements (Generally Available)

The Creation Pop-Up Window supports the lookup fields and field dependencies.

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

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

How: Lookup fields and field dependencies will be pulled from standard SF field settings:

1. Go to the **CT CPG Calendar** tab.
2. Tap **Settings**.
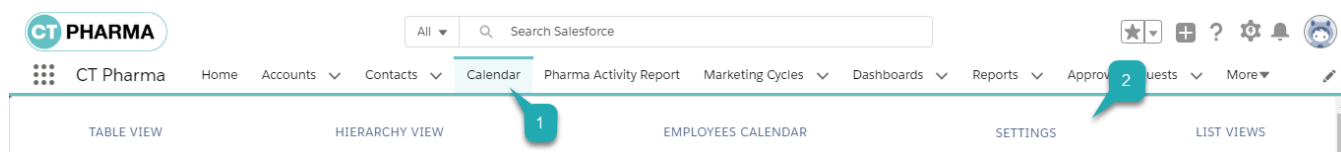
3. Scroll down to the **Event Creation Pop-Up Window Setup** section.
4. Select the record type and select **Show Pop-Up** checkbox.
5. Add dependent fields on the layout if you have them setup in your system.

EVENT CREATION POP-UP WINDOW SETUP

Select record type : 1:1 Visit
Show popup: ✔

ROW NUMBER	FIELD VALUE	REQUIRED
1:	Last Referenced Date ▼	✔
2:	Contact ▼	✔
3:	Status ▼	☐
4:	-- None -- ▼	☐
5:	-- None -- ▼	☐
6:	-- None -- ▼	☐
7:	-- None -- ▼	☐
8:	-- None -- ▼	☐
9:	-- None -- ▼	☐
10:	-- None -- ▼	☐

Lookup window is controlled by **Search Layout** of the selected object:

1. Go to **Setup**.
2. Select the **Object Manager**.
3. Open the object and find the **Search Layouts**.
4. Setup the **Search Results**.
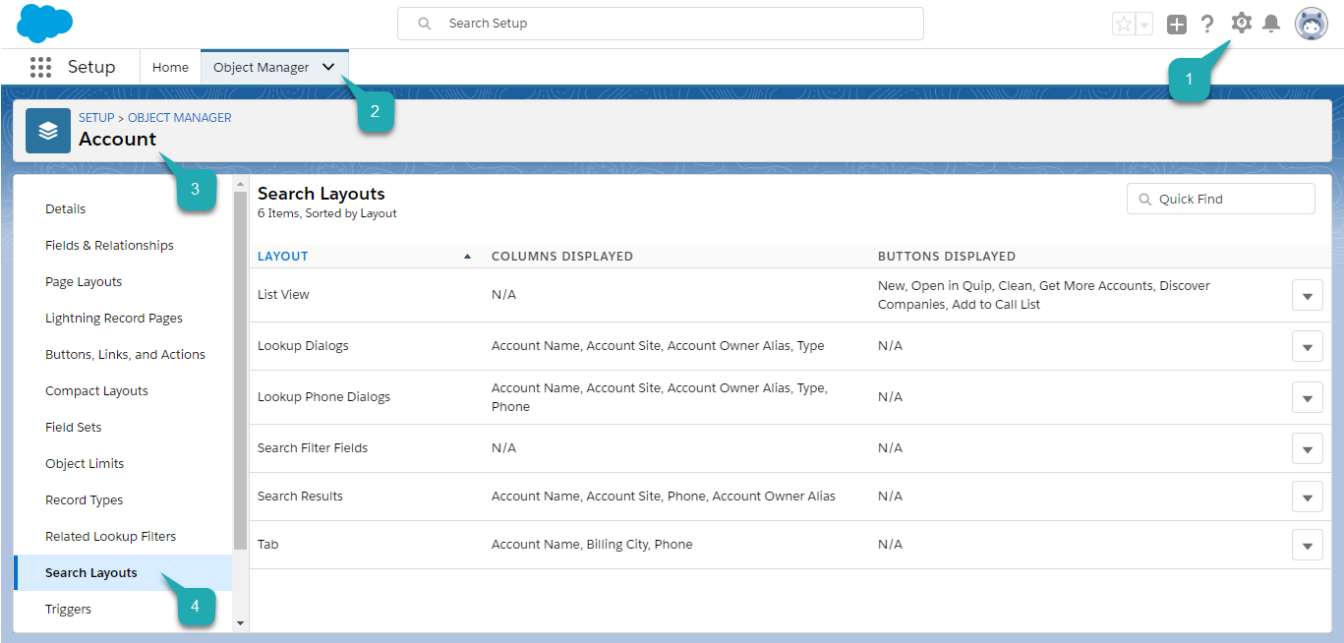
# Activity Report (Addition Setup Required)

Activity Page Layout is more flexible due to the integration with the standard Salesforce Page Layouts. The previously used Field Sets are used as the global setting but could be overwritten per each profile.

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

Why: Activity Page could be customized differently for any Record Type to meet your requirements.

How: Update custom settings:

1. Go to **Setup**.
2. Open the **Custom Settings**.
3. Select **Activity Layout Settings** and click **Manage**.
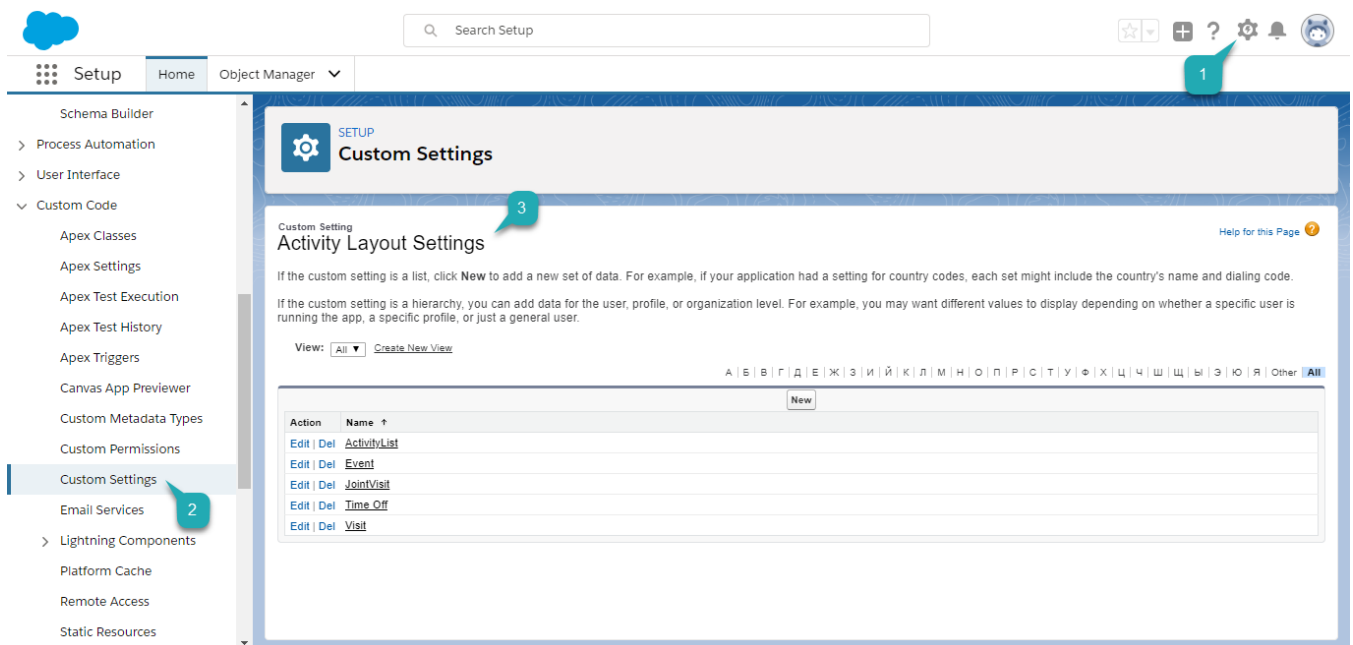
4. **Create** the new record for the specific record type if you want the Page Layout would be created based on the **Field Set**.
   Delete the record for the specific Activity record type, then the page layouts would be inherited from the **standard Salesforce Page Layouts**.

Create or setup the **Page Layouts** and assign them to **Profiles**.

1. Go to **Setup**.
2. Tap **Object Manager**.
3. Open the **Activity** object and find the **Page Layouts**.
4. Click the **Page Layout Assignment** button.

CT Pharma Control Panel

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

Why: Speed up setup velocity for the package.

How: Enable the CT Pharma Control Panel tab to start using the new setup interface.

Public Classes (Generally Available)

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

Why: Public methods are added to our solution to make your development easier and reuse the existing package logic.

How: See the documentation on the Confluence public portal.