

# 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.

The screenshot shows the 'Activity Sync' setup page in Salesforce. The 'Activity Sync Detail' section includes fields for Label (Event), Sync Type (Both), Active (checked), and Protected Component. The 'Standard object record criteria' field contains 'Subject LIKE \'%Meeting%\''. The 'Custom object record criteria' field contains 'CTPHARMA\_\_Status\_\_c LIKE \'%Planned%\''. Below this are sections for 'Additional fields mapping', 'Description', and 'System Information'.

## Planning Calendar

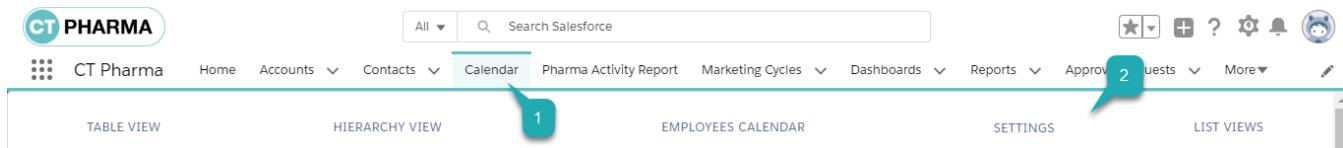
### Default Duration (Permission Setup Required)

**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.

CUSTOMIZE EVENTS					
RECORDTYPE NAME	TITLE FIELD	ICON URL	PREVIEW	DURATION	OPEN IN
1:1 Visit	Activity Nar ▾	/img/icon/trophy16.png		30	ActivityR ▾
Joint Visit	Activity Nar ▾	/img/icon/stamp16.png		30	Joint Vis ▾
Pharma Event	Activity Nar ▾	/img/icon/hexagon16.pn		30	ActivityR ▾
Timeoff	Activity Nar ▾	/img/icon/knight16.png		30	ActivityR ▾

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

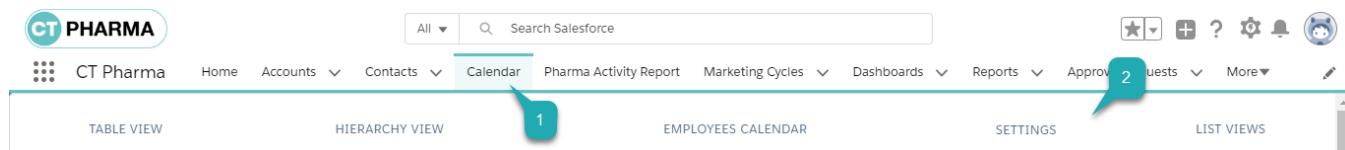
The Creation Pop-Up Window supports the lookup fields and field dependencies.

**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**

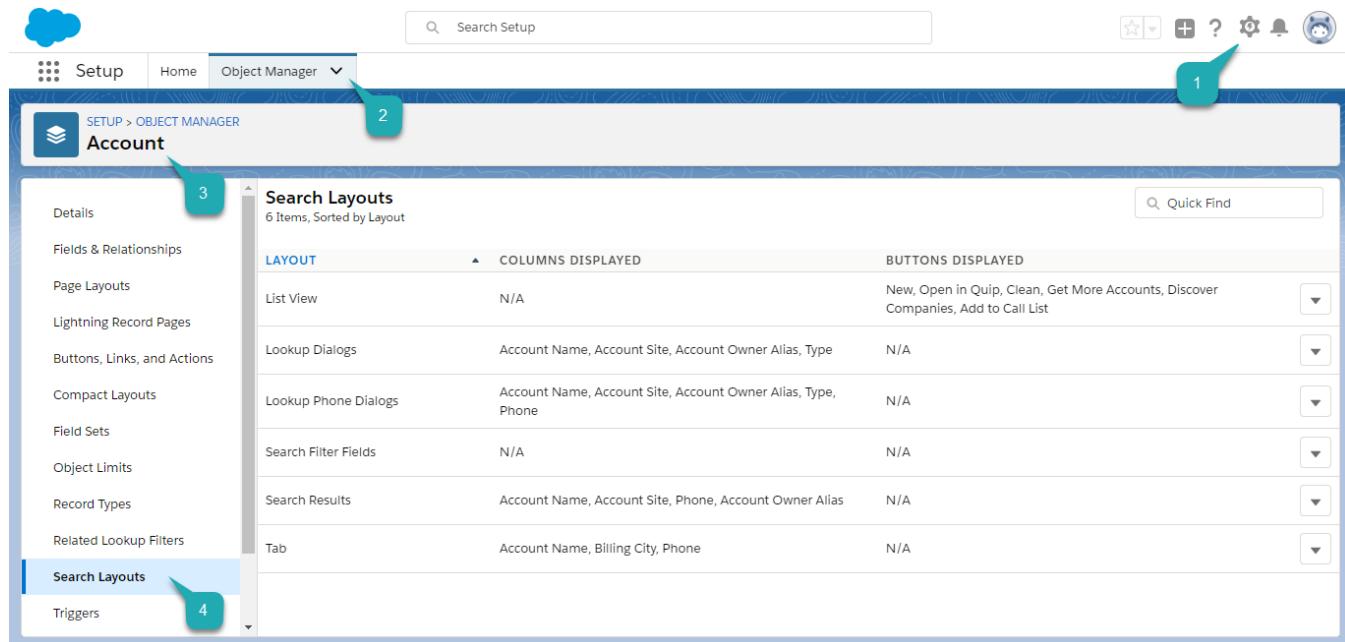
Select record type : 1:1 Visit ▾

Show popup:

ROW NUMBER	FIELD VALUE	REQUIRED
1:	Last Referenced Date ▾	<input checked="" type="checkbox"/>
2:	Contact ▾	<input checked="" type="checkbox"/>
3:	Status ▾	<input type="checkbox"/>
4:	-- None -- ▾	<input type="checkbox"/>
5:	-- None -- ▾	<input type="checkbox"/>
6:	-- None -- ▾	<input type="checkbox"/>
7:	-- None -- ▾	<input type="checkbox"/>
8:	-- None -- ▾	<input type="checkbox"/>
9:	-- None -- ▾	<input type="checkbox"/>
10:	-- None -- ▾	<input type="checkbox"/>

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**.



LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	New, Open in Quip, Clean, Get More Accounts, Discover Companies, Add to Call List
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
Search Filter Fields	N/A	N/A
Search Results	Account Name, Account Site, Phone, Account Owner Alias	N/A
Tab	Account Name, Billing City, Phone	N/A

## 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**.

Custom Setting

### Activity Layout Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

**View:** All ▾ Create New View

**Action** **Name** **↑**

Action	Name
Edit   Del	ActivityList
Edit   Del	Event
Edit   Del	JointVisit
Edit   Del	Time Off
Edit   Del	Visit

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**.

### Activity Layout Settings Detail

Back to List

**Edit**

Name Visit

Field Set API Name CTPHARMA\_\_OneOneVisit

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.

Page Layout Name	Created By	Modified By
Joint Visit Layout	Daria Efremova, 3/6/2019, 8:45 AM	Daria Efremova, 3/6/2019, 8:45 AM
Pharma Event Layout	Daria Efremova, 3/6/2019, 8:45 AM	Daria Efremova, 3/6/2019, 8:45 AM
Timeoff Layout	Daria Efremova, 3/6/2019, 8:45 AM	Daria Efremova, 3/6/2019, 8:45 AM
1:1 Visit Layout	Daria Efremova, 3/6/2019, 8:44 AM	Daria Efremova, 3/6/2019, 8:45 AM

Profiles	Record Types	Master	1:1 Visit	Joint Visit	Pharma Event
Analytics Cloud Integration User	Analytics Cloud Integration User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Analytics Cloud Security User	Analytics Cloud Security User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Chatter External User	Chatter External User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Chatter Free User	Chatter Free User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Chatter Moderator User	Chatter Moderator User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Contract Manager	Contract Manager	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Cross Org Data Proxy User	Cross Org Data Proxy User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Custom: Marketing Profile	Custom: Marketing Profile	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Custom: Sales Profile	Custom: Sales Profile	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Custom: Support Profile	Custom: Support Profile	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Force.com - App Subscription User	Force.com - App Subscription User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Force.com - Free User	Force.com - Free User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Gold Partner User	Gold Partner User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Identity User	Identity User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Marketing User	Marketing User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Partners for Subscription Users	Partners for Subscription Users	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout

## 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.

The screenshot shows the CT Pharma Control Panel interface. At the top, there is a navigation bar with the CT PHARMA logo and links for General, Calendar, Activity Report, Divisions, and Triggers, along with a Back button. Below the navigation bar, there is a general settings section with an information icon and a note about entering general system information. The main content area is divided into two sections: ACTIVITY SETTINGS and NEXT ACTIVITY SETTINGS. In the ACTIVITY SETTINGS section, there is a slider for 'Max days for activity planning' ranging from 0 to 800, with the value set to 800. There are also two toggle switches: one for 'Create Related Activity Data records' (which is checked) and one for 'Share Activity with Joint Visit Users' (which is checked). In the NEXT ACTIVITY SETTINGS section, there is a toggle switch for 'Create Next Activity' (which is checked). Below this, there is a table with columns for NAME and ACTION, and a Save button.

General

Calendar

Activity Report

Divisions

Triggers

Back

General Settings

For the correct functionality of the CT Pharma package, please enter general system information. Include some additional options to meet your company's business processes.

ACTIVITY SETTINGS

Max days for activity planning  
0 - 800

800

Create Related Activity Data records

Share Activity with Joint Visit Users

NEXT ACTIVITY SETTINGS

Create Next Activity

NAME

ACTION

Save

## 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.