

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' configuration page in Salesforce Setup. The page is titled 'Activity Sync' and includes a 'Help for this Page' link. Below the title, there is a section for 'Activity Sync Detail' with buttons for 'Edit', 'Delete', and 'Clone'. The detail section includes fields for 'Label' (Event), 'Event' (Visit (both)), 'Sync Type' (Both), 'Active' (checked), 'Namespace Prefix', 'Activity Sync Name' (Event_Visit_both), and 'Protected Component' (unchecked). Below this is a 'Details' section with a table showing 'Standard Object' (Event) and 'Activity Record Type' (Visit). The 'Standard Activity Type' section is highlighted with a red box and contains two criteria: 'Standard object record criteria' (Subject LIKE '%Meeting%') and 'Custom Object Record Criteria' (CTPHARMA__Status__c LIKE '%Planned%'). Below this is an 'Additional fields mapping' section with 'Fields to update' and 'Field values' fields. The 'Description' section is empty. The 'System Information' section shows 'Created By' (Daria Efremova, 29.04.2019 17:20) and 'Last Modified By' (Daria Efremova, 29.04.2019 17:21), with 'Edit', 'Delete', and 'Clone' buttons.

Planning Calendar

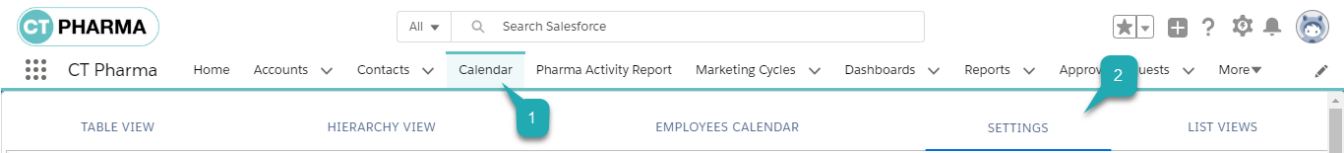
Default Duration (Permission Setup Required)

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.png		30	ActivityR ▼
Timeoff	Activity Nar ▼	/img/icon/knight16.png		30	ActivityR ▼

Event creation pop-up window improvements (Generally Available)

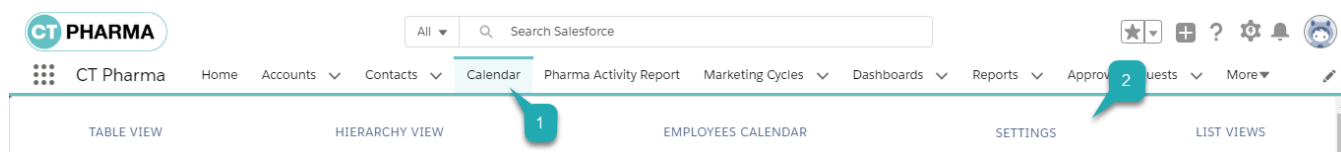
The Creation Pop-Up Window supports the lookup fields and field dependencies.

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

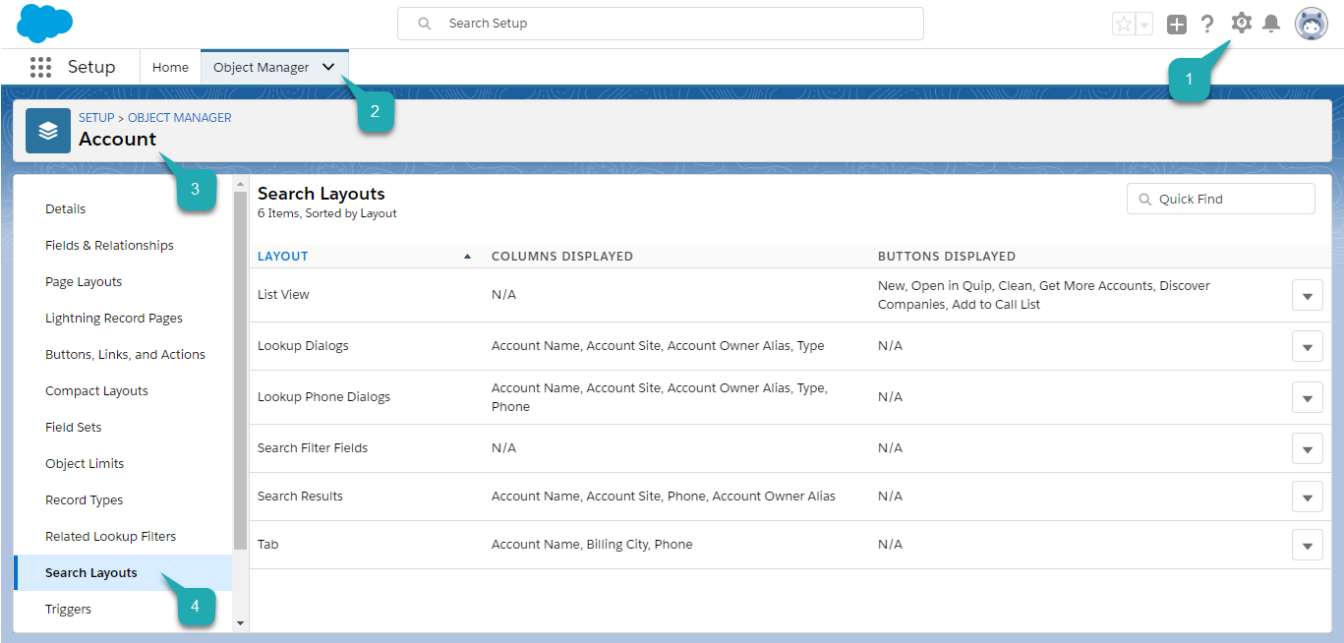
Select record type : 1:1 Visit

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**.



Activity Report (Addition Setup Required)

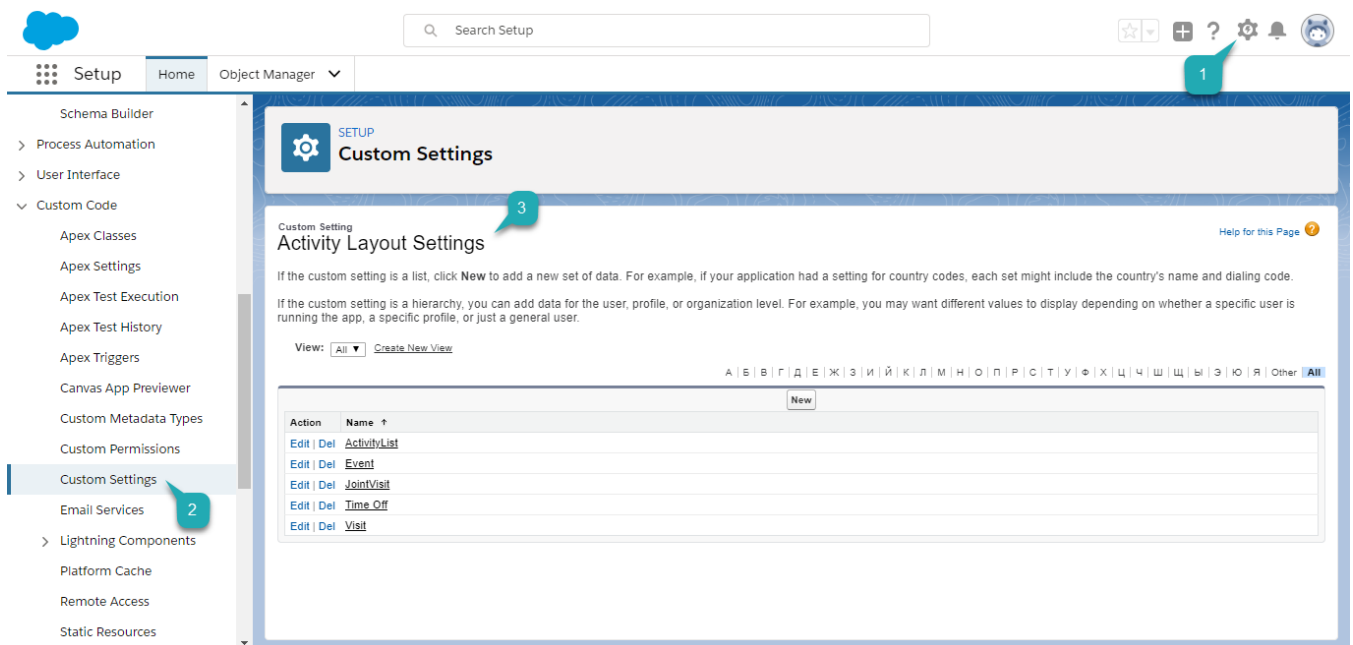
Activity Page Layout is more flexible due to the integration with the standard Salesforce Page Layouts. The previously used Field Sets are used as the global setting but could be overwritten per each profile.

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**.

Activity Layout Settings Detail

[Back to List](#)

Edit	
Name	Visit i
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.

Setup > Object Manager

Pharma Activity

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Page Layouts
4 Items, Sorted by Page Layout Name

Quick Find

New Page Layout Assignment

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

Setup > Object Manager

Pharma Activity

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Page Layout Assignment
Pharma Activity

Back to Custom Object: Pharma Activity

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment

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

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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.

CT PHARMA

GeneralCalendarActivity ReportDivisionsTriggers

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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.