Intelligent Sales Sample Flows for Field Inventory Management

Salesforce, Spring ’23

@salesforcedocs

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CONTENTS

INTELLIGENT SALES SAMPLE FLOWS FOR FIELD INVENTORY MANAGEMENT

Improve management of your inventories and cycle counts, and ultimately increase medical device sales, by using Intelligent Sales Sample Flows for Field Inventory Management with Health Cloud. Leverage the full potential of these flows by customizing them based on your unique business needs.

Do you have providers who are interested in a product but aren't sure if it would meet their needs? Customers often want to see what your product can do before they place orders. With flows like Trial Request Management and Sample Request Management, your customers can take your products for a test drive and return them back safely to you.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Get to Know the Intelligent Sales Sample Flows

Let's take a closer look at the business processes enabled by the Intelligent Sales sample flows. These flows are designed to manage serialized inventory.

Get Ready to Use Intelligent Sales Sample Flows

Before you can use the Intelligent Sales sample flows, you must enable Intelligent Sales and assign the required permission sets. Download the package from GitHub and deploy using Workbench. After installation, give users easy access to the flows by configuring tab visibility and configuring Lightning record pages. Then, make sure you have the required data set up.

Objects and Fields Used for Intelligent Sales Sample Flows

The sample flows use custom objects and fields, which are deployed to Salesforce during package installation. We recommend adding these fields to the appropriate page layout using the page layout editor.

Use the Intelligent Sales Sample Flows for Field Inventory Management

Use the Intelligent Sales Sample Flows for Field Inventory Management to manage serialized product inventories. Capture product requests and provide the required approvals to deliver the requested products. Ensure all your products are accounted for by using cycle count flows designed for marking lost products and ordering missing products.

Get to Know the Intelligent Sales Sample Flows

Let's take a closer look at the business processes enabled by the Intelligent Sales sample flows. These flows are designed to manage serialized inventory.

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Sample Request Management (Request Capture and Request Fulfillment)

This flow captures the provider's request for a sample product, then fulfills the request when the product is delivered to the provider. It also updates the serialized product inventory and captures the provider's e-signature for regulatory compliance.

Trial Request Management (Request Capture and Request Fulfillment)

This flow captures the provider's request for a trial product, then fulfills the request when the product is delivered to the provider. It links the request with a new or existing opportunity, creates an order, and updates the serialized product inventory. The flow also captures the provider's e-signature for regulatory compliance.

Loan Request Management (Request Capture and Request Fulfillment)
This flow captures the provider's request for a trial product, then fulfills the request when the product is delivered to the provider. It also creates an order for the delivered product, updates the serialized product inventory, and captures the provider's e-signature for regulatory compliance.

Product Retrieval Management (Retrieval of Trial and Loan Products)
This flow enables the retrieval of a product provided as a loan or a trial. It captures the product condition details and quantity at the time of retrieval and updates the serialized product inventory. It also captures the provider's e-signature for regulatory compliance.

Mark as Lost
The Mark as Lost cycle count flow updates the serialized product inventory by marking a product as lost during a cycle count.

Relate to Order
The Relate to Order cycle count flow updates the serialized product inventory by relating a product to a new or existing order during a cycle count. You also have the option of linking the order with an existing visit for the selected account.

Get Ready to Use Intelligent Sales Sample Flows

EDITIONS

Available in: Lightning Experience

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Before you can use the Intelligent Sales sample flows, you must enable Intelligent Sales and assign the required permission sets. Download the package from GitHub and deploy using Workbench. After installation, give users easy access to the flows by configuring tab visibility and configuring Lightning record pages. Then, make sure you have the required data set up.

Enable Intelligent Sales to Use Intelligent Sales Sample Flows
Enable the Intelligent Sales and Visit Inventory Management org prefs so that your users can use Intelligent Sales sample flows.

Assign Permission Sets for Intelligent Sales Sample Flows
Assign the ActionPlans, Health Cloud Foundation, and Industries Visits permission sets to your users so that they can use Intelligent Sales sample flows.

Install the Intelligent Sales Sample Flows for Field Inventory Management Package
The Intelligent Sales Field Inventory Management Flows package is an unmanaged package that you can download from GitHub and deploy using Workbench.

Make Intelligent Sales Flows Custom Fields Available to Users
By default, only the System Administrator profile has access to the custom fields used for the sample flows. You can make these fields available to other profiles.

Expose the Intelligent Sales Flows Tabs
Ensure that your users have easy access to the Intelligent Sales flows by configuring tab visibility.

Make the Cycle Count Sample Flows Available in Lightning Record Pages
Make the Mark as Lost and Relate to Order flows available in Lightning record pages so that your sales team can easily launch them.

Set Up Data for Intelligent Sales Sample Flows
To get Intelligent Sales Sample Flows for Field Inventory Management up and running, make sure that Salesforce has the necessary data. For example, to run the Sample Request Management sample flow, make sure that all records in your Account object and related records such as Location and Contact are in place. You can also configure product retrieval-related questions, called Assessment Indicator Definitions, for each product.

Enable Intelligent Sales to Use Intelligent Sales Sample Flows

Enable the Intelligent Sales and Visit Inventory Management org prefs so that your users can use Intelligent Sales sample flows.

EDITIONS

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1. From Setup, in the Quick Find box, enter `Inventory Settings`, and then select **Inventory Settings**.
2. Enable **Visit Inventory Management**.
3. Enter `Intelligent Sales Settings` in the Quick Find box, and then select **Intelligent Sales Settings**.
4. Enable **Intelligent Sales**.
5. Enter `Visit Calendar Settings` in the Quick Find box, and then select **Visit Calendar Settings**.
6. Enable **Add Visits to Salesforce Calendar**.

Assign Permission Sets for Intelligent Sales Sample Flows

Assign the ActionPlans, Health Cloud Foundation, and Industries Visits permission sets to your users so that they can use Intelligent Sales sample flows.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

1. From Setup, enter `Permission Sets` in the Quick Find box, and then select **Permission Sets**.
2. Select **ActionPlans** and click **Manage Assignments**.
3. Click **Add Assignments**, select your users, and click **Assign**.

Repeat these steps for the Health Cloud Foundation and Industries Visits permission sets.

Install the Intelligent Sales Sample Flows for Field Inventory Management Package

The Intelligent Sales Field Inventory Management Flows package is an unmanaged package that you can download from GitHub and deploy using Workbench.

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USER PERMISSIONS

1. Download the package from GitHub.
2. Unzip the file and compress all the folders along with package.xml.
3. Log into Salesforce on Workbench.
4. From the dropdown menu that appears under **migration**, click **Deploy**.
5. Click Choose file and select your compressed file.
6. Select **Check Only**, **Rollback On Error**, and **Single Package**.

   Selecting **Check Only** checks if the deployment successful before making permanent changes to your org. If the check fails, fix any issues.
7. Click **Next**.
8. If the deployment is valid, repeat this process without selecting **Check Only** to deploy the flows to your org.

Make Intelligent Sales Flows Custom Fields Available to Users

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

By default, only the System Administrator profile has access to the custom fields used for the sample flows. You can make these fields available to other profiles.

1. After unzipping the downloaded package file, copy the admin.profile in the profiles folder and rename it using the format [ProfileName].profile.
2. Find this block of text in the package.xml file.

```
<members>Admin</members>
```

3. Copy and paste this code in the next line and replace Admin with the profile name you just used.
4. Deploy the updated profile by following the deployment steps for installing the package.

Expose the Intelligent Sales Flows Tabs

EDITIONS

Available in: Lightning Experience

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Ensure that your users have easy access to the Intelligent Sales flows by configuring tab visibility.

1. From Setup, in the Quick Find box, enter *App Manager*, and then select **App Manager**.
2. Next to Health Cloud - Intelligent Sales, click , and then click **Edit**.
3. In App Settings, click **Navigation Items**.
4. In Available Items, move these tabs to the Selected Items column.
   - Sample Request Management Trial
   - Request Management
   - Loan Request Management
   - Product Retrieval Management
5. **Save** your work.

Make the Cycle Count Sample Flows Available in Lightning Record Pages

EDITIONS

Available in: Lightning Experience

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Make the Mark as Lost and Relate to Order flows available in Lightning record pages so that your sales team can easily launch them.

1. From Setup, in the Quick Find box, enter *Intelligent Sales Settings*, then select **Intelligent Sales Settings**.
2. In the Configure Actions Button Visibility section, enable **Cycle Count Products Page**, and click **Save**.
3. Open a Visit record.
4. Click , then click **Edit Page**.
5. In Lightning App Builder, select **Phone** as the form factor.
6. Move Visit Overview, Visit Actions, and Task List for Medical Devices components onto the appropriate part of the page.
7. In the Properties pane of Task List for Medical Devices, under Custom Action Flow, select **Show More Actions**.

From **Show More Actions**, you can launch Mark as Lost and Relate to Order flows.

8. **Save** the settings and activate your changes.

Set Up Data for Intelligent Sales Sample Flows

To get Intelligent Sales Sample Flows for Field Inventory Management up and running, make sure that Salesforce has the necessary data. For example, to run the Sample Request Management sample flow, make sure that all records in your Account object and related records such as Location and Contact are in place. You can also configure product retrieval-related questions, called Assessment Indicator Definitions, for each product.

To learn more about how to set up data for the sample flows, see Set Up Data for Intelligent Sales.

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Objects and Fields Used for Intelligent Sales Sample Flows

The sample flows use custom objects and fields, which are deployed to Salesforce during package installation. We recommend adding these fields to the appropriate page layout using the page layout editor.

The Sample Request Management, Trial Request Management, Loan Request Management, and Product Retrieval Management flows use the Case object to implement an approval process. The approval process helps you meet compliance requirements for the use of the Case object. For example, while using the Sample Request Management flow, you implement an approval process to check details such as the quantity of products requested. You can hand over the product only after you get the required approvals.

EDITIONS

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Sample Request Capture Objects and Fields
Here’s the set of objects and fields that the Sample Request Capture sample flow uses.

Sample Request Fulfillment Objects and Fields
Here’s the set of objects and fields that the Sample Request Fulfillment sample flow uses.

Trial Request Capture Objects and Fields
Here’s the set of objects and fields that the Trial Request Capture sample flow uses.

Trial Request Fulfillment Objects and Fields
Here’s the set of objects and fields that the Trial Request Fulfillment sample flow uses.

Loan Request Capture Objects and Fields
Here’s the set of objects and fields that the Loan Request Fulfillment sample flow uses.

Loan Request Fulfillment Objects and Fields
Here’s the set of objects and fields that the Loan Request Fulfillment sample flow uses.

Product Retrieval Management Objects and Fields
Here’s the set of objects and fields that the Product Retrieval Management sample flow uses.

Mark as Lost Objects and Fields
Here’s the set of objects and fields that the Product Retrieval Management sample flow uses.

Sample Request Capture Objects and Fields

Here's the set of objects and fields that the Sample Request Capture sample flow uses.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label	API Name	Description
Case	Location	Location__c	Device location
	Requested Quantity	Quantity__c	The quantity of device requested
	Requested Date	Requested_Date__c	The date that the provider requested the device sample
	Status	Status	Case status with custom picklist values (In Review or Approved)
	Type	Type	Type of request (Sample Device Request, Loan Device Request, Trial Device Request, Loan Device Return, or Trial Device Return)

Sample Request Fulfillment Objects and Fields

Here's the set of objects and fields that the Sample Request Fulfillment sample flow uses.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label	API Name	Description
Case	Location	Location__c	Device location
	Requested Quantity	Quantity__c	The quantity of device requested
	Requested Date	Requested_Date__c	The date that the provider requested the device sample
	Status	Status	Case status with custom picklist values (In Review or Approved)
	Quantity Handedover	Quantity_Handedover__c	Device quantity handed over to the provider

Object	Field Label	API Name	Description
Order	Type	Type	Type of order (Sample, Trial, Loan, or Mark for Order)

Trial Request Capture Objects and Fields

Here's the set of objects and fields that the Trial Request Capture sample flow uses.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label	API Name	Description
Case	From Date	From_Date____c	Start date for the device trial or loan
	Location	Location__c	Device location
	Requested Quantity	Quantity__c	The quantity of device requested
	Status	Status	Case status with custom picklist values (In Review or Approved)
	To Date	To_Date__c	End date of the device trial or loan
	Type	Type	Type of request (Sample Device Request, Loan Device Request, Trial Device Request, Loan Device Return, or Trial Device Return)
Opportunity	Case	CaseId__c	Case ID

Trial Request Fulfillment Objects and Fields

Here's the set of objects and fields that the Trial Request Fulfillment sample flow uses.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label	API Name	Description
Case	From Date	From_Date____c	Start date for the device trial or loan
	Location	Location__c	Device location
	Requested Quantity	Quantity__c	The quantity of device requested

Object	Field Label	API Name	Description
	Status	Status	Case status with custom picklist values (In Review or Approved)
	To Date	To_Date__c	End date of the device trial or loan
	Type	Type	Type of request (Sample Device Request, Loan Device Request, Trial Device Request, Loan Device Return, or Trial Device Return)
	Quantity Handedover	Quantity_Handedover__c	Device quantity handed over to the provider
Order	Case	CaseId__c	Case ID
	Order Type	Type	Type of order (Sample, Trial, Loan, or Mark for Order)

Loan Request Capture Objects and Fields

Here's the set of objects and fields that the Loan Request Fulfillment sample flow uses.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label	API Name	Description
Case	From Date	From_Date____c	Start date for the device trial or loan
	Location	Location__c	Device location
	Requested Quantity	Quantity__c	The quantity of device requested
	Status	Status	Case status with custom picklist values (In Review or Approved)
	To Date	To_Date__c	End date of the device trial or loan
	Type	Type	Type of request (Sample Device Request, Loan Device Request, Trial Device Request, Loan Device Return, or Trial Device Return)

Loan Request Fulfillment Objects and Fields

Here's the set of objects and fields that the Loan Request Fulfillment sample flow uses.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label	API Name	Description
Case	From Date	From_Date____c	Start date for the device trial or loan
	Location	Location__c	Device location
	Requested Quantity	Quantity__c	The quantity of device requested
	Status	Status	Case status with custom picklist values (In Review or Approved)
	To Date	To_Date__c	End date of the device trial or loan
	Type	Type	Type of request (Sample Device Request, Loan Device Request, Trial Device Request, Loan Device Return, or Trial Device Return)
	Quantity Handedover	Quantity_Handedover__c	Device quantity handed over to the provider
Order	Case	CaseId__c	Case ID
	Order Type	Type	Type of order (Sample, Trial, Loan, or Mark for Order)

Product Retrieval Management Objects and Fields

Here's the set of objects and fields that the Product Retrieval Management sample flow uses.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label	API Name	Description
Case	From Date	From_Date____c	Start date for the device trial or loan
	Location	Location__c	Device location
	Requested Quantity	Quantity__c	The quantity of device requested

Object	Field Label	API Name	Description
	To Date	To_Date__c	End date of the device trial or loan
	Type	Type	Type of request (Sample Device Request, Loan Device Request, Trial Device Request, Loan Device Return, or Trial Device Return)
	Quantity Returned	Quantity_Returned__c	Device quantity that the provider returned
	Quantity Handedover	Quantity_Handedover__c	Device quantity handed over to the provider
Generic Visit Key Performance Indicator (*GnrcVstKeyPerformanceInd*)	Case	CaseId__c	Case ID
	Serial Number	SerialNumber__c	Product serial number
Serialized Product (SerializedProduct)	Return Date	Return_Date__c	Return date of a device
Generic Case KPI *(Generic_Case_KPI__c)*	Actual Boolean Value	ActualBooleanValue__c	Actual boolean KPI value
	Actual DateTime Value	ActualDateTimeValue__c	Actual date time KPI value
	Actual Decimal Value	ActualDecimalValue__c	Actual decimal KPI value
	Actual Integer Value	ActualIntegerValue__c	Actual integer KPI value
	Actual String Value	ActualStringValue__c	Actual string KPI value
	Assessment Indicator Definition	Assessment_Indicator_Definition__c	ID of the Assessment Indicator Definition
	Case	Case__c	Case ID for the KPI
	Expected Boolean Value	ExpectedBooleanValue__c	Expected boolean KPI value
	Expected DateTime Value	ExpectedDateTimeValue__c	Expected date time KPI value
	Expected Decimal Value	ExpectedDecimalValue__c	Expected decimal KPI value
	Expected Integer Value	ExpectedIntegerValue__c	Expected integer KPI value
	Expected String Value	ExpectedStringValue__c	Expected string KPI value
	Product	Product__c	Product ID for which KPI was captured
	Serial Number	SerialNumber__c	Serial Number of the serialized product for which KPI was captured
	Type	Type__c	Type (Sample Device Handover, Loan Device Handover, Trial

Object	Field Label	API Name	Description
			Device Handover, Trial Device Return, or Loan Device Return)

Note: Generic Case KPI is the junction object between Case and Serialized Product.

Mark as Lost Objects and Fields

Here's the set of objects and fields that the Product Retrieval Management sample flow uses.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Object	Field Label	API Name	Description
Lost Serialized Product (Lost_Serialized_Product__c)	Date of Lost	Date_of_Lost__c	Date when a device was lost
	Location of Lost	Location_of_Lost__c	Location where a device was lost
	User Responsible for Loss	User_Responsible_for_Loss__c	The person who is responsible for the lost device

Use the Intelligent Sales Sample Flows for Field Inventory Management

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Use the Intelligent Sales Sample Flows for Field Inventory Management to manage serialized product inventories. Capture product requests and provide the required approvals to deliver the requested products. Ensure all your products are accounted for by using cycle count flows designed for marking lost products and ordering missing products.

With sample flows such as Trial Request Management and Loan Request Management, your customers can take your products for a test drive and return them safely to you. If you have products you give out as samples, then the Sample Request Management flow is for you. You even have flows designed to facilitate the process of product retrieval. Leverage the full potential of these flows by customizing them as per your unique business needs.

Sample Request Management
This flow is designed to help your sales team manage the end-to-end sample management process, from capturing product requests to handover. It also updates the serialized product inventory and captures the provider's e-signature for regulatory compliance.

Trial Request Management
This flow captures the device trial request from a provider. It associates the request with an opportunity, and fulfills the trial request when the trial product is handed over to the provider. It also creates an order, updates the serialized product inventory, and captures the provider's e-signature for regulatory compliance.

Loan Request Management

The Loan Request Management flow captures device loan requests from a provider and enables sales reps to fulfill the requests by giving the required approvals. The flow also creates an order for the loaned product, updates the serialized product inventory, and captures the provider's e-signature for regulatory compliance.

Product Retrieval Management for Loan and Trial Products

Sales reps can use this flow to retrieve the loaned or trial product from the provider, and capture return details along with the provider's e-signature for regulatory compliance.

Mark a Product as Lost during a Cycle Count

Sales reps can use this flow to count the product quantity and update the serialized inventory by marking a product as lost.

Order Missing Products during a Cycle Count

Sales reps can use this flow to identify the serial numbers of missing products and update the serialized inventory by linking the missing product to a new or existing order.

Sample Request Management

This flow is designed to help your sales team manage the end-to-end sample management process, from capturing product requests to handover. It also updates the serialized product inventory and captures the provider's e-signature for regulatory compliance.

The flow improves your operational efficiency by allowing you to quickly capture and fulfill sample device requests using your mobile devices.

There are two parts that makes up this flow:

- Sample Request Capture
- Sample Request Fulfillment

EDITIONS

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Capture a Sample Request

This flow captures the sample request, including details about the provider who made the request and the product being requested.

Fulfill a Sample Request

This flow fulfills the sample request by enabling users to hand over the sample product after the request is approved.

Capture a Sample Request

This flow captures the sample request, including details about the provider who made the request and the product being requested.

1. To create a sample request, tap **New**.
2. Enter details about the provider requesting the sample device.
   - Account: Select the appropriate business account.
   - Location: Select the location associated with the account.
   - Provider: Select the contacts for the account.

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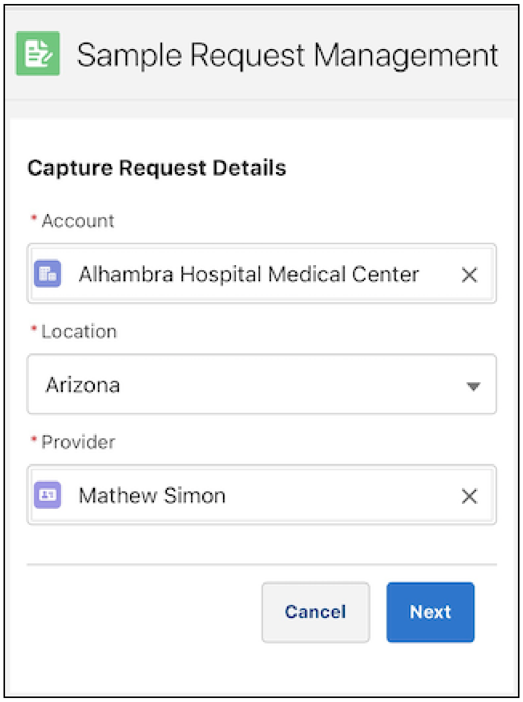
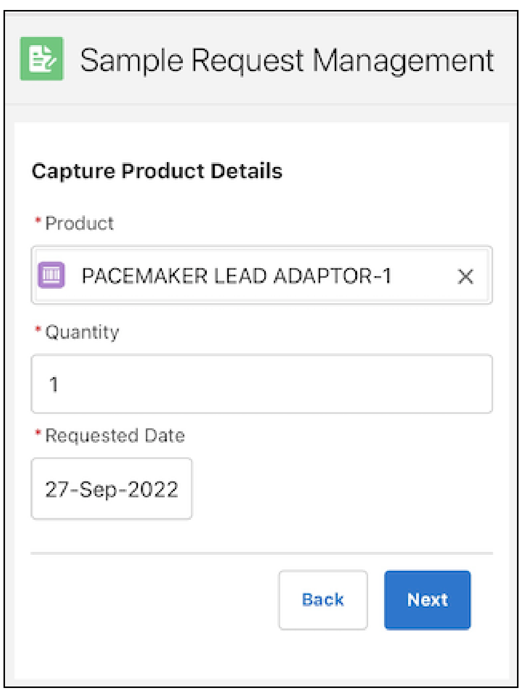


3. Tap **Next**.
4. Enter details about the requested sample device.
   - Product: Select the product.
   - Quantity: Enter the number of units requested.
   - Requested Date: Defaults to today's date. Change the date as needed.



5. Tap **Next**.
6. Review the summary and ensure that everything is correct. Tap **Next**.
7. Capture the provider's signature, tap **Complete**, then **Yes**.

   Tapping **Yes** creates a case record, with a status of In Review, for the sample request. You can find this case under **Open Requests**. The flow populates these case details:

Field	Value
Subject	Sample Device Request - (Product Name)
Account Name	Account of the hospital requesting the sample device
Case Origin	Phone
Type	Sample Device Request
Contact Name	Contact associated with the account making the request
Description	Sample Device Request - (Product Name)
Priority	High
Status	In Review

Fulfill a Sample Request

This flow fulfills the sample request by enabling users to hand over the sample product after the request is approved.

After the sample request is approved, the case is moved to **Approved Requests**.

1. Tap **Complete Request**.
2. Select the location where the product will be handed over to the provider.
3. Enter the serial numbers of the sample devices and tap **Next**.

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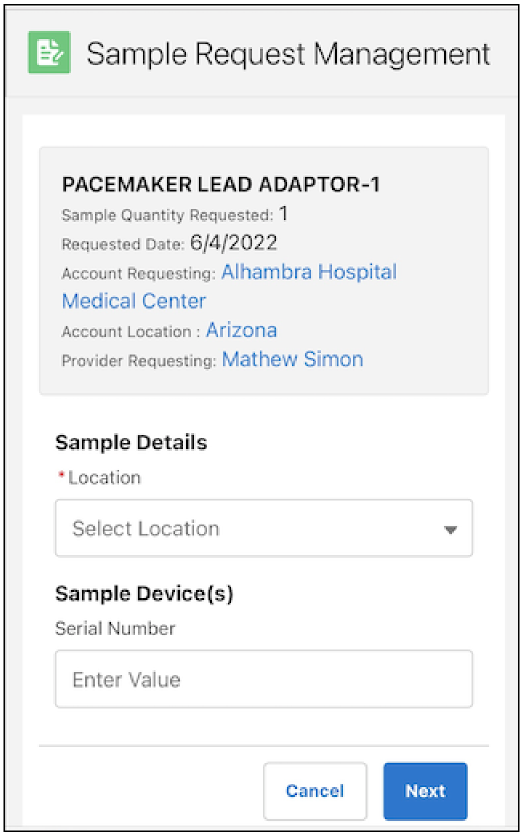


4. Capture the provider's signature and tap **Complete**, then **Yes**.

   Tapping **Yes** updates the product quantity in the serialized inventory.

Trial Request Management

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

This flow captures the device trial request from a provider. It associates the request with an opportunity, and fulfills the trial request when the trial product is handed over to the provider. It also creates an order, updates the serialized product inventory, and captures the provider's e-signature for regulatory compliance.

There are two parts that makes up this flow:

- Trial Request Capture
- Trial Request Fulfillment

Capture a Trial Request

This flow captures the details about the provider who requested the device trial and the device being requested.

Fulfill a Trial Request

This flow fulfills the trial request by enabling users to hand over the trial product after the request is approved.

Capture a Trial Request

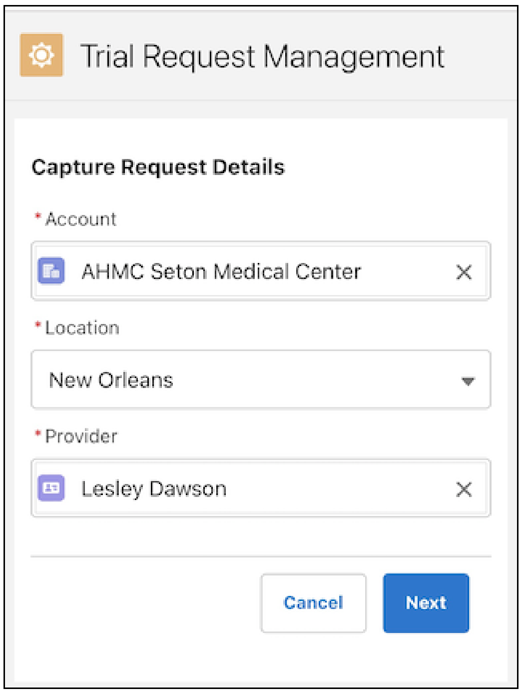
This flow captures the details about the provider who requested the device trial and the device being requested.

EDITIONS

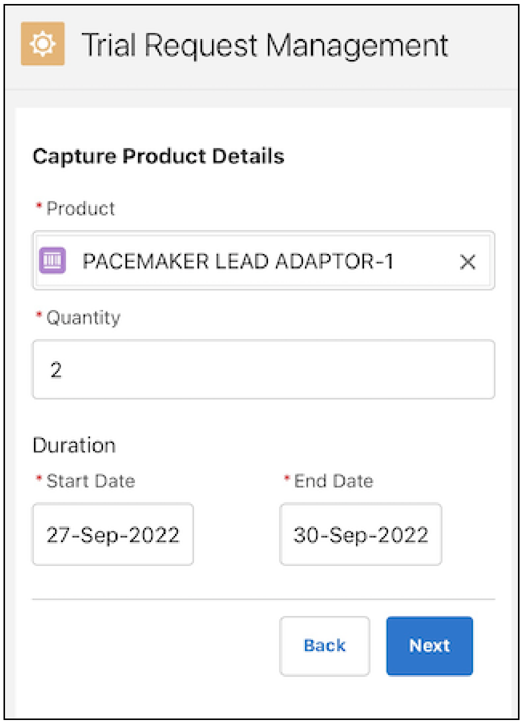
Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

1. To create a trial request, tap **New**.
2. Enter details about the provider requesting the trial device.
   - Account: Select the appropriate business account.
   - Location: Select the location associated with the account.
   - Provider: Select the contact for the account.



3. Tap **Next**.
4. Enter details about the request.
   - Product: Select the product.
   - Quantity: Enter the number of units requested.
   - Duration: Enter start and end dates of the trial.



5. Tap **Next**.
6. Ensure that the details you have entered are accurate.
7. Either create an opportunity for the request or associate the request with an existing opportunity, then tap **Next**.
8. Capture the provider's signature, tap **Complete**, then **Yes**.

   Tapping **Yes** creates a case record, with a status of In Review, for the trial request. You can find this case under **Open Requests**.

   The flow populates these case details:

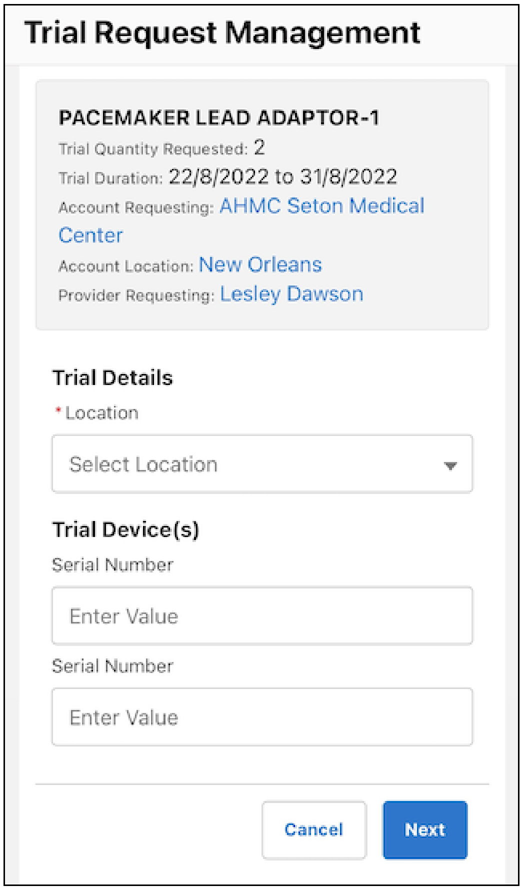
Field	Value
Subject	Trial Device Request - (Product Name)
Account Name	Account of the hospital requesting the trial device
Case Origin	Phone
Type	Trial Device Request
Contact Name	Contact associated with the account making the request
Description	Trial Device Request - (Product Name)
Priority	High
Status	In Review

Fulfill a Trial Request

This flow fulfills the trial request by enabling users to hand over the trial product after the request is approved.

After the trial request is approved, the case is moved to **Approved Requests**.

1. Tap **Complete Request**.
2. Select the location where the sales rep will hand over the trial device.
3. Enter the serial numbers of the trial devices and tap **Next**.



4. Capture the provider's signature and tap **Complete**, then **Yes**.

   Tapping **Yes** creates an order for the trial request and updates the product quantity in the serialized inventory.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Loan Request Management

The Loan Request Management flow captures device loan requests from a provider and enables sales reps to fulfill the requests by giving the required approvals. The flow also creates an order for the loaned product, updates the serialized product inventory, and captures the provider's e-signature for regulatory compliance.

There are two parts that makes up this flow:

- Loan Request Capture
- Loan Request Fulfillment

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud

Capture a Loan Request
This flow captures the details about the provider requesting the loan device and the device that is being requested.

Fulfill a Loan Request
This flow fulfills the loan request by enabling users to hand over the loaned product after the request is approved.

Capture a Loan Request

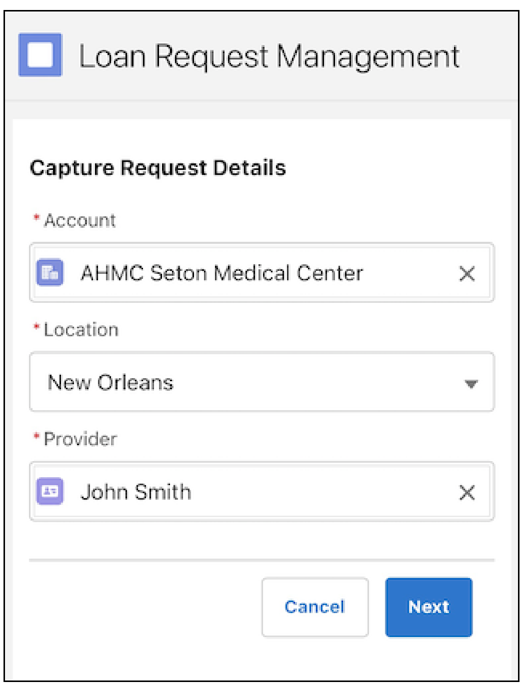
This flow captures the details about the provider requesting the loan device and the device that is being requested.

1. To create a loan request, tap **New**.
2. Enter details about the provider requesting the loan device.
   - Account: Select the appropriate business account.
   - Location: Select the location associated with the account.
   - Provider: Select the contact for the account.

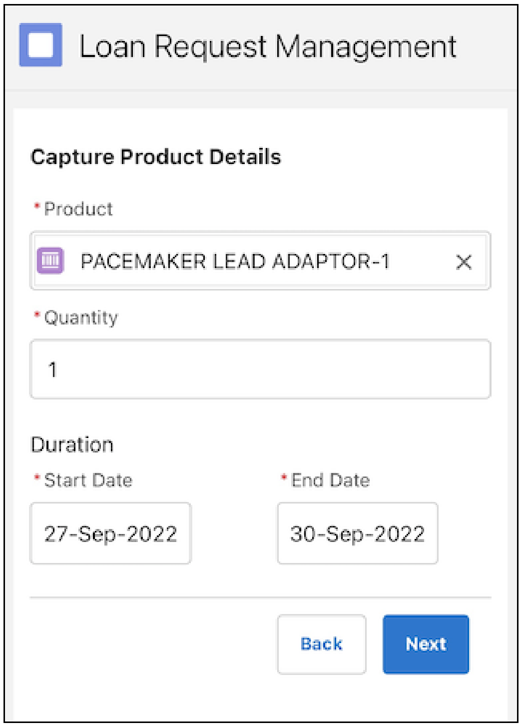
EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud



3. Tap **Next**.
4. Enter details about the request.
   - Product: Select the product.
   - Quantity: Enter the number of units requested.
   - Duration: Enter start and end dates for the loan.



5. Tap **Next**.
6. Ensure that the details you have entered are accurate, then tap **Next**.
7. Capture the provider's signature, tap **Complete**, then **Yes**.

   Tapping **Yes** creates a case record, with a status of In Review, for the loan request. You can find this case under **Open Requests**.

   The flow populates these case details:

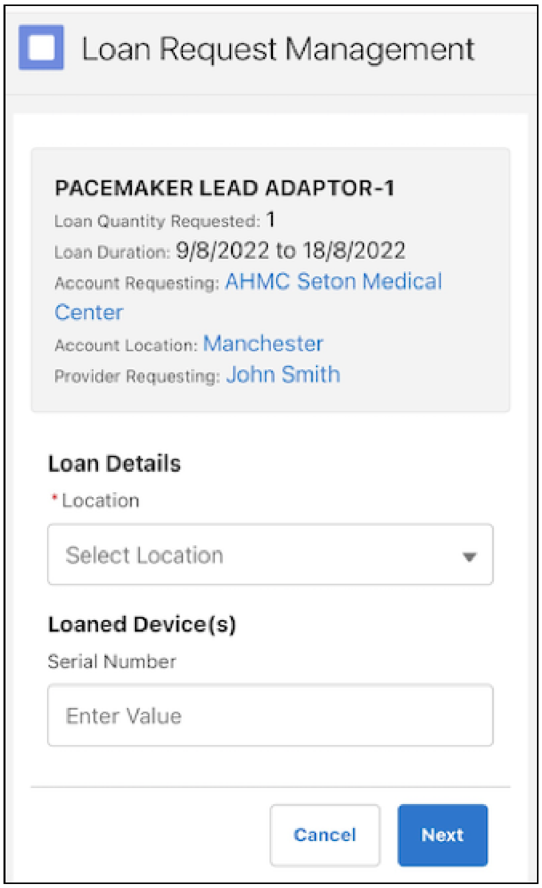
Field	Value
Subject	Loan Device Request - (Product Name)
Account Name	Account of the hospital requesting the loan device
Case Origin	Phone
Type	Loan Device Request
Contact Name	Contact associated with the account making the request
Description	Loan Device Request - (Product Name)
Priority	High
Status	In Review

Fulfill a Loan Request

This flow fulfills the loan request by enabling users to hand over the loaned product after the request is approved.

After the loan request is approved, the case is moved under **Approved Requests**.

1. Tap **Complete Request**.
2. Select the location where the sales rep will hand over the loaned product.
3. Enter the serial numbers of the loaned products and tap **Next**.



4. Capture the provider's signature and tap **Complete**, then **Yes**.

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Product Retrieval Management for Loan and Trial Products

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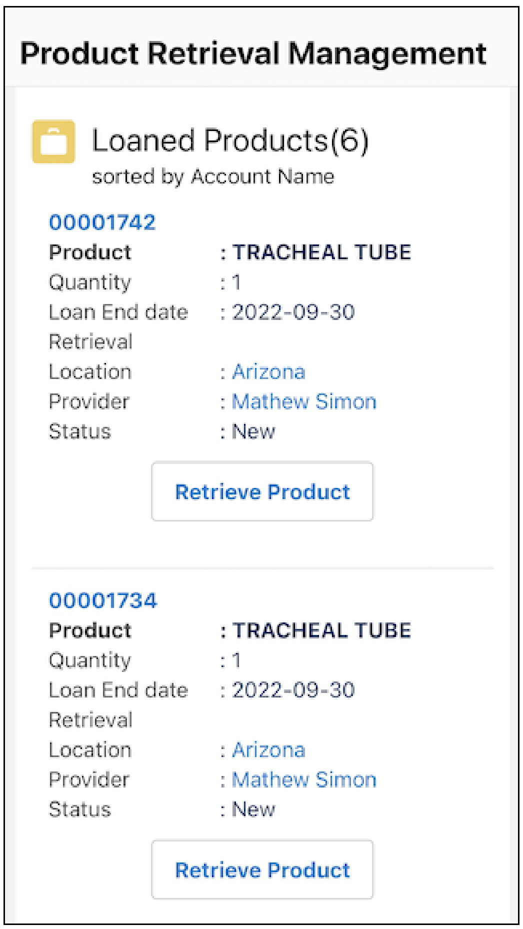
Sales reps can use this flow to retrieve the loaned or trial product from the provider, and capture return details along with the provider's e-signature for regulatory compliance.

There are two parts that makes up this flow:

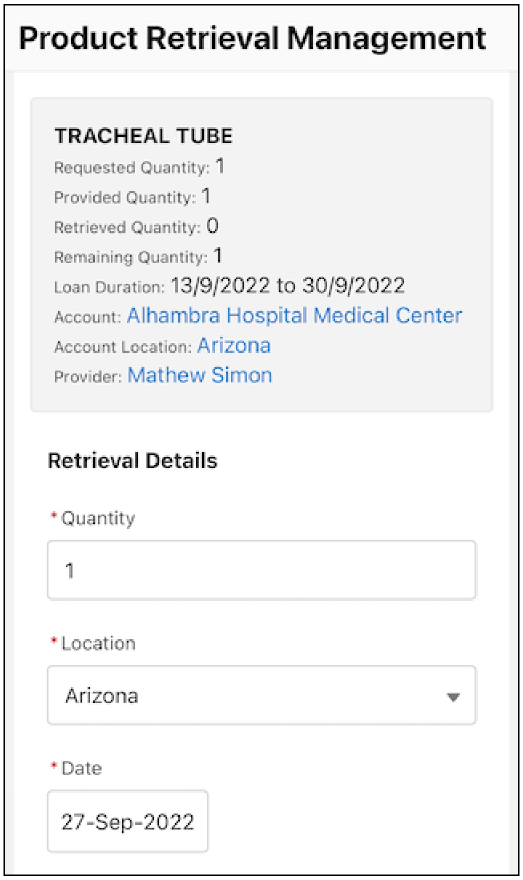
Note:

- Loaned Products
- Trial Products

1. Tap **Loaned Products** or **Trial Products** depending on the product you're retrieving. You see a list of cases with details for loaned or trial products.
2. Tap **Retrieve Product** for the product being returned.



3. Enter the retrieval details:
   - Quantity: The number of loaned or trial products being returned.
   - Location: The location to where the product is returned.
   - Date: Enter the date on which the product is being returned.



4. Tap **Next**.
5. Capture the serial number of the product, and answer any questions configured for the product. Tap **Next**.
6. Review the summary and ensure all details of the return are correct. Then, tap **Retrieve**.
7. Capture the Provider's signature, tap **Complete**, and then tap **Yes**.

Mark a Product as Lost during a Cycle Count

Sales reps can use this flow to count the product quantity and update the serialized inventory by marking a product as lost.

When a cycle count is assigned to a sales rep, they count the quantity for each serialized product using a barcode scanner. The products that aren't scanned appear on-screen for the sales rep to review and mark as lost.

1. Tap  on the Cycle Count Products screen.
2. Tap **Mark as Lost**.
3. You see a list of the serial numbers that weren't scanned during the cycle count. Select the serial numbers to mark as lost.
4. Tap **Next**.
5. Enter details about the serial numbers you selected previously.

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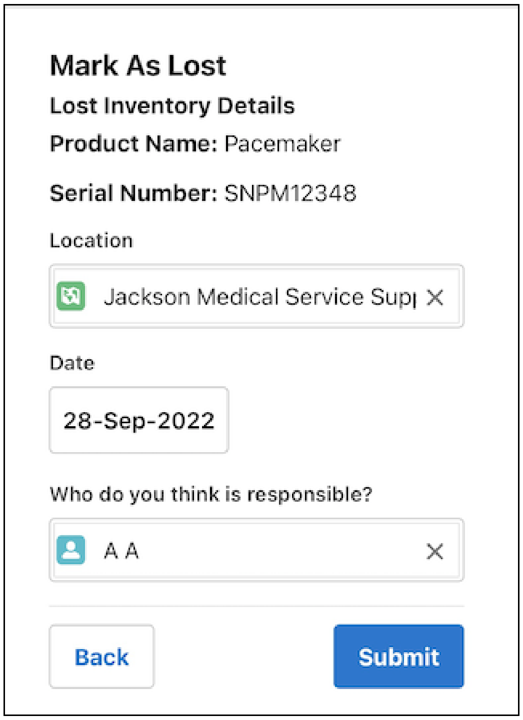
- Location: Enter the location where the product was lost.
- Date: Enter the date of product loss.
- Who do you think is responsible?: Select the party you suspect might be responsible for the loss.

Note: The serial numbers of products already marked as lost won't appear in the cycle count.



6. Tap **Submit**, then tap **Yes**.

   The product is marked as lost in the serialized inventory and the inventory count is updated.

Order Missing Products during a Cycle Count

Sales reps can use this flow to identify the serial numbers of missing products and update the serialized inventory by linking the missing product to a new or existing order.

When a cycle count is assigned to a sales rep, they count the quantity for each serialized product using a barcode scanner. The products that aren't scanned appear on-screen for the sales rep to review and mark as ordered.

1. Tap on the Cycle Count Products screen.
2. Tap **Relate to Order**.
3. You see a list of the serial numbers that weren't scanned during the cycle count. Select the serial numbers to relate to an order.
4. Tap **Next**.
5. Link the product marked for order to an existing order or create an order.

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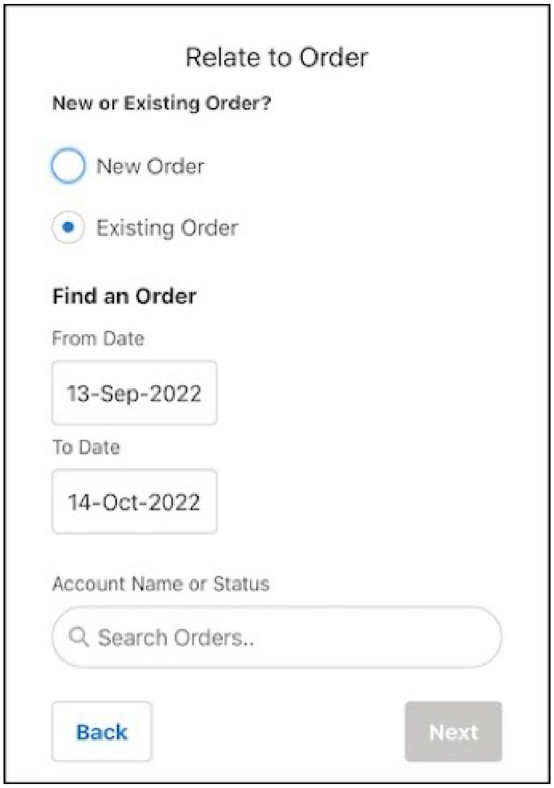
Note: Make sure the selected order has a price book attached. Otherwise, the flow will fail.



6. You see a list of the visits associated with the account you selected. Optionally, link the order with one of these visits.
7. Tap **Next**, then tap **Yes**.
8. If you linked the product serial number and order to a visit, capture the provider's signature in the next screen. Tap **Submit**, then tap **Confirm**.