Life Sciences Cloud Developer Guide

Version 63.0, Spring '25

Last updated: November 21, 2024

Customer Engagement for Life Sciences Cloud (Pilot)

These objects are available for Customer Engagement for Life Sciences Cloud.

Customer Engagement for Life Sciences Cloud is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Account Management

Account Management in the Life Sciences industry is crucial for organizations to effectively manage their relationships with healthcare providers (HCPs) and healthcare organizations (HCOs). Profile information is the foundation for operational activities within an organization, providing a comprehensive view of HCPs and HCOs. Profile information includes contact and social network details, specialties, affiliations, business licenses, and territory and product-specific details. Life Sciences Cloud enables organizations to create a single complete view of their customers providing up-to-date information in support of their business priorities.

Account Ratings Management

Sales representatives use ratings to segment and categorize their customers, enabling tailored actions for each segment. Visibility rights let you add ratings to layouts based on profiles and rating-access levels. Share layouts across profiles and control view access to ratings. Ratings are supported across these five contexts for an account: General (Account), Account Territory, Account Product, Account Team, and Account Address.

Activity Plans

Activity plans allow administrators to define goals for specific employees, including targeted accounts, plan cycle duration, types of activities, links to products, and weight of activity type. Employees and managers can review and edit these goals before final approval by the administrator. After plans are approved, employees execute activities against their goals, with the option to request changes during an active plan. Charts provide a visual representation of the employee's progress toward goals.

App Alerts

App Alerts keep users informed of critical updates, events, and insights that require timely action, helping to prevent missed opportunities. These alerts can deliver messages from admins and managers, as well as system-triggered updates and external recommendations, enabling users to act directly or dismiss suggestions with feedback. Serving as a direct, immediate communication channel, App Alerts integrate across components to streamline teamwork and enhance commercial engagement.

Compliance Statement Definition

To ensure compliance when field users communicate with healthcare professionals (HCPs), they must follow regulatory guidelines and track the acknowledgment of legal disclaimers and terms and conditions. Compliance Statements define these guidelines, disclaimers, and terms and conditions for different areas of application. This process can involve capturing consent, including e-signatures during a visit or remote engagement, where representatives must communicate or display the necessary disclaimers for HCP agreement.

Consent Management

Consent Management captures and honors healthcare provider consent and communication preferences across subscriptions and channels. Increase engagement and improve relationships by personalizing healthcare provider communications while ensuring privacy and compliance.

Data Change Requests

With Data Change Requests, organizations can implement configurable data validation processes that are tailored to their specific business needs. Validate data changes by objects and fields and configure data changes by profile and record type. Data Change Requests support controlled data synchronization of externally managed data domains.

Document Management

Document Management generates documents from templates for various purposes such as signing agreements, collecting consent, and sending invitations. Define document record types, fields, layouts, and signature types. Administrators can create templates, associate them with modules, and assign them to territories. Users can select a template, fill in information, save the document, and enter additional details. If necessary, the healthcare provider can review and sign the document on the device before the user submits it.

Event Management

Companies use Event Management to organize and run in-person, virtual, and hybrid meetings and events across various subjects for both internal and external participants. Throughout the planning and execution process, companies can record and monitor expenses related to events and their participants.

Field Email

Field Email streamlines the email creation process, enhances efficiency, and ensures professional and compliant communication that aligns with brand guidelines. Predefined email templates ensure compliance with regulations like GDPR and CAN-SPAM while maintaining brand consistency. Customization options such as dynamic variables and content fragments, allow for personalized messages that resonate with recipients. Tracking key performance metrics like opens and clicks enables users to optimize their email campaigns effectively.

General Events

General Events enable users to log and manage various non-customer related activities. With the Planner tool, users can easily create, view, and manage General Events in their schedules. Users can also add employees to a General Event for team collaborations.

Intelligent Content

Intelligent Content facilitates marketing strategies by enabling direct and interactive communications with healthcare professionals (HCPs). Sales and medical teams can deliver personalized presentations based on real-time feedback and analytics, enhancing the impact of their interactions. By continuously refining and optimizing marketing messages and strategies through data collection and analysis, Intelligent Content ensures that they are relevant and responsive to HCP needs and preferences. Intelligent Content capabilities include analytics and optimized user interfaces, offering a comprehensive solution for targeted content delivery in both planned and unplanned presentations.

Key Account Management

Key Account Management enables Key Account Managers (KAM) to strategically manage and engage with their most important customers. By using comprehensive account and territory plans, KAMs can set clear business objectives, track progress, and ensure alignment across global, affiliate, and territory levels. This structured approach enhances customer targeting accuracy and drives effective execution of strategic initiatives. With capabilities for creating multiple plans, defining specific objectives, and assigning tasks, the Key Account Management ensures alignment, collaboration, and effective execution of strategies to achieve desired business outcomes.

Life Sciences Customer Engagement Configuration

The Life Sciences Customer Engagement Configuration objects store settings and configurations for many Customer Engagement features. In some cases, you can control a feature’s behavior by assigning configurations to specific profiles or users. Other configurations apply to all the users in an org.