



Administer Life Sciences Cloud



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Administer Life Sciences Cloud

Agentforce Life Sciences brings customer, clinical, and patient engagement together on a single, connected platform. As a Salesforce admin or implementer, use this guide to help you set up your organization for success with Agentforce Life Sciences.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

 **Note** Life Sciences Cloud is now Agentforce Life Sciences. You may see references to Life Sciences Cloud in your org and in this guide.

Agentforce Life Sciences supports three integrated domains:

- Customer Engagement drives compliant, orchestrated provider interactions, with visibility into territory alignment, brand messaging, and medical insights.
- Clinical Engagement supports intelligent clinical operations, simplifies site selection and patient recruitment, and connects patients, sites, sponsors, and contract research organizations (CROs).
- Patient Engagement powers benefit verification, eligibility coordination, and program tracking, with real-time insight into outcomes and adherence risks.

We've divided this guide into sections that cover the setup for each domain.

- [Set Up Customer Engagement](#) explains how to get your org ready to install the Customer Engagement managed package, which contains Customer Engagement features. You can then set up the features for Account Management, Engagement Planning, Engagement Execution, and so on. This section also explains how to set up the Life Sciences Cloud mobile app for iOS (iPad only), which is available in the [Apple App Store](#).
- [Set Up Clinical Engagement](#) explains how to set up clinical engagement features, such as Participant Management and Site Management.
- [Set Up Patient Engagement](#) explains how to set up patient engagement features such as Financial Assistance Programs, Patient Program Outcomes, and Pharmacy Benefits Verification.

Administer Life Sciences Cloud

To set up Customer Engagement for Life Sciences, install the Life Sciences Cloud for Customer Engagement managed package in your org, set up the Life Sciences Cloud mobile app, and configure Customer Engagement features for use on web and mobile platforms. We've grouped features in alphabetical order within feature groups such as Account Management, Engagement Planning, and Engagement Execution.

Set Up Life Sciences Cloud for Customer Engagement Basics

Complete tasks that impact your entire org before you install the Life Sciences Cloud for Customer Engagement managed package. Then install the managed package and complete post-installation tasks prior to setting up specific features.

Set Up the Life Sciences Cloud Mobile App

Set up the Life Sciences Cloud mobile app to enable your field users to securely connect with healthcare professionals and organizations through their iPads. Field users can access and work with critical data, content (PDFs, HTML5, videos), reports, and smart summaries with or without an internet connection.

Set Up Account Management Features

Manage your relationships with healthcare organizations (HCOs) and healthcare professionals (HCPs). Gain a comprehensive view of HCPs and HCOs, including their contact and social network details, specialties, affiliations, business licenses, ratings, as well as territory and product, and team-specific details.

Set Up Engagement Planning Features

Optimize daily schedules, prioritize key events, and manage routines with Calendar. Log and manage time away from your territory with Time Off Territory. Improve your plans' chances of success with reusable goal definition templates. Personalize action plan templates for Key Account Management. Identify growth opportunities and adapt to evolving customer needs with Account Plans. Drive initiatives targeted at key accounts in a region with Territory Business Plans.

Set Up Engagement Execution Features

Streamline scheduling, pre-visit planning, in-visit execution, and post-visit reporting processes with Visit Management. Capture, manage, and honor consent and communication preferences of healthcare professionals with Consent Management. Use Remote Engagement to host virtual meetings with customers. Use Medical Inquiries to deliver fast, compliant, and trusted responses to every HCP inquiry. Use Surveys to collect feedback from customers.

Set Up Intelligent Content Features

Equip field teams with a comprehensive content library so they can deliver impactful presentations

and monitor engagement. Enable personalized communications with healthcare professionals and organizations by providing your field team with preapproved, customizable email templates.

Set Up Product Management Features

In the Life Sciences industry, delivering value to customers—healthcare professionals, organizations, and patients—depends on making sure that the right products are available, accessible, and aligned with regulatory requirements. In Life Sciences Cloud, Product Management supports this goal by making it easier to configure, classify, and manage the products that your organization discusses, markets, sells, and distributes. The product hierarchy view helps teams structure portfolios according to SKU-level organization, while product territory alignments make sure that users access only the products approved for their designated regions and purpose, supporting compliance and reducing risk. Product messages and objectives enable personalized and effective engagement by equipping users with targeted guidance tailored to the needs of the customer.

Set Up Sample Management Features

Enable pharmaceutical companies to efficiently handle and distribute drug samples to healthcare providers. Enhance drug sales and keep healthcare providers informed about the safe and effective use of products, leading to quicker treatments. Track and manage sales representative inventories of samples, ensuring compliance with regulations, and maintaining accurate records of distribution. Effective sample management is crucial for supporting healthcare providers and low-income patients, and ensuring ethical practices and regulatory compliance.

Set Up Common Customer Engagement Components

Notify users of critical updates with App Alerts. Prevent legal and regulatory violations by making informed decisions with License Validation Checks. Manage complex business processes and guide users through their tasks with clear steps with multi-step workflows and related lists. Maximize customer engagement efficiency with Multi-Object Components and Dynamic Tree Views. Create Quick and Custom Actions for smoother workflows. Visualize Sales Data for effective customer interactions.

Integrate Data 360 and Tableau Next with Customer Engagement

Integrate Data 360 and Tableau Next with Life Sciences to transform complex life sciences data into actionable insights and enhanced visualizations. Tableau Next requires Data 360 and the Data 360 semantic layer. Set up Sales Data reports to help your users better understand their customers and plan effective interactions.

Use Life Sciences Cloud for Customer Engagement Features

Perform Life Sciences Cloud for Customer Engagement tasks such as managing HCO and HCP accounts, planning and executing engagements with your customers, managing key accounts, and managing samples.

Leverage Customer Engagement Best Practices

Leveraging extensive past experience in CRM, Medtech, and Life Sciences implementations, Salesforce has compiled best practices from partners, clients, and professional services. These insights, gathered over eight years from common mistakes and configuration issues, aim to guide future implementations for clients, partners, and professional services.

Life Sciences Cloud for Customer Engagement Patch Releases

We release patches periodically. The patch updates in this section provide information on each patch release for the Life Sciences Cloud for Customer Engagement package and Life Sciences Cloud mobile

app.

Set Up Life Sciences Cloud for Customer Engagement Basics

Complete tasks that impact your entire org before you install the Life Sciences Cloud for Customer Engagement managed package. Then install the managed package and complete post-installation tasks prior to setting up specific features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Package pre-installation tasks include turning on Life Sciences Customer Engagement Setup settings, turning on org preferences such as inventory counts and territories, and enabling person accounts. You must also set up territory types and create a hierarchy of territories in a territory model record.

After you install the managed package, add tabs to the Life Sciences Commercial app and customize your Home page. You can also create record types and page layouts for your healthcare professional (HCP) and healthcare organization (HCO) accounts.

[Get Your Org Ready for the Life Sciences Cloud for Customer Engagement Package](#)

Complete these tasks before you install the Life Sciences Cloud for Customer Engagement managed package in your org. The package installation process fails when you don't complete these prerequisite tasks.

[Set Up Sales Territories for Life Sciences Cloud](#)

Create a territory type, create a territory model, then create a hierarchy of territories as you build the territory model. Activate the territory model, and then assign users to territories.

[Install the Life Sciences Cloud for Customer Engagement Package for Admin Users](#)

Install the Life Sciences Cloud for Customer Engagement managed package in your Salesforce org before you set up Life Sciences Customer Engagement features. The package contains the Life Sciences Commercial app, which includes an Admin Console from where you can configure Customer Engagement features in one place.

[Create Custom Admin Profiles for Life Sciences Cloud Customer Engagement](#)

Create custom profiles for business admins and mobile admins by cloning the system administrator profile. Then create users and assign them to the relevant profiles.

[Create Custom Standard User Profiles for Life Sciences Customer Engagement](#)

Create custom profiles for personas such as Field Sales Representative and Medical Science Liaison by cloning the Standard User profile.

[Assign Life Sciences Cloud for Customer Engagement Permission Sets](#)

To work with Life Sciences Cloud for Customer Engagement, users need the appropriate permission

sets and permission set licenses. The Permission Sets page in Setup describes each permission set and shows the permission set license related to each permission set.

[Create Account Page Layouts and Record Types for Healthcare Organizations \(HCOs\)](#)

Create a page layout and a record type for the healthcare organization records that you create and maintain in Life Sciences Cloud.

[Create Person Account Page Layouts and Record Types for Healthcare Professionals \(HCPs\)](#)

Create a page layout and a record type for the healthcare professional records that you create and maintain in Life Sciences Cloud. Person Accounts represent people in Life Sciences Cloud.

[Add Tabs to the Life Sciences Commercial App](#)

The Life Sciences Commercial app shows the Home, Admin Console, and Accounts tabs by default. Add Customer Engagement tabs such as Calendar, Intelligent Content, and Visits to the Life Sciences Commercial app. The Life Sciences Commercial app is only available in your org when you install the Life Sciences Cloud for Customer Engagement managed package.

[Create Life Science Metadata Object Sharing Rules](#)

Support access to Customer Engagement features by creating object sharing rules for Life Science Metadata Categories and Life Science Metadata Records.

[Supported Languages in Life Sciences Cloud for Customer Engagement](#)

Life Sciences Cloud for Customer Engagement is localized in over 30 languages that are either fully supported or provide end-user support. For fully supported languages, Life Sciences Cloud features and user interface (UI) text appear in the selected language. End-user languages allow individual users to select a language other than their company's default language for end-user facing UI.

[Set Up the Life Sciences Customer Engagement Home Page](#)

The home page in Life Sciences Cloud for Customer Engagement provides a centralized view of critical information and tasks so your users can prioritize their work. Customize the home page to show announcements, upcoming activities, visits to submit, prioritized accounts, and more. To show each user what matters most to them, tailor the home page for different profiles.

Get Your Org Ready for the Life Sciences Cloud for Customer Engagement Package

Complete these tasks before you install the Life Sciences Cloud for Customer Engagement managed package in your org. The package installation process fails when you don't complete these prerequisite tasks.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To complete package pre-installation:

Life Sciences Commercial Admin and Health Cloud Starter permission sets

Make sure to install the Life Sciences Cloud for Customer Engagement managed package in a new, blank org that doesn't contain pre-existing configurations. Confirm with your Account Executive during license

provisioning that the licenses are applied to a new, blank org. If you plan to install the managed package in an org with pre-existing configurations, evaluate the org to test the potential impact.

1. Assign the Life Sciences Commercial Admin and Health Cloud Starter permission sets to your admin user account.
 - a. From Setup, use the Quick Find box to search for and select **Users**, and then select your admin user account.
 - b. Scroll to Permission Set Assignments and click **Edit Assignments**.
 - c. Verify that **Health Cloud Starter** and **Life Sciences Commercial Admin** are selected in the Enabled Permission Sets list. If they aren't selected, move them to the Enabled Permission Sets list from the Available Permission Sets list.
 - d. Save your changes.
 - e. Scroll to Permission Set License Assignments and verify that Health Cloud Starter and Life Sciences Commercial are listed. These licenses are automatically added when you assign the permission sets.
2. Turn on Life Sciences for Customer Engagement Setup.
 - a. From Setup, use the Quick Find box to search for and select **Life Sciences for Customer Engagement Setup**.
 - b. Turn on **Life Sciences Customer Engagement**. The Life Sciences for Customer Engagement Setup page shows more settings.
 - c. Turn on **RSVP Email Address** to create the email address that receives and handles responses from iCalendar invitations.

 **Note** The **Filter Admin Console Tiles Based On User Permissions** setting filters the tiles that display in the Admin Console based on user permissions, in addition to org permissions (which is the default). Before you activate this setting, be sure that users have the permissions to see the tiles they need. See [Filter Admin Console Tiles by User Permissions](#).
3. Turn on Surveys and configure survey settings.
 - a. Expand the Get Your Org Ready to Use Life Sciences Cloud for Customer Engagement section, then click **Configure Surveys**.
 - b. From the Surveys page, turn on **Surveys**. You can now access the Survey Invitation and Survey Subject objects in Object Manager.
 - c. Turn on **Survey Owners Can Manage Responses**.
 - d. Leave the other settings blank, and return to the Life Sciences for Customer Engagement Setup page.

 **Note** Configure territories later in this task.
4. Turn on settings for package installation.
 - a. From the Get Your Org Ready to Use Life Sciences Cloud for Customer Engagement section, click **Verify and Enable Settings** to open the list of settings.
 - b. Click **Enable All**.
 - c. Click **Close** after all settings are turned on.

 **Note** Don't turn off any of these prerequisite settings or feature preferences via metadata APIs. Doing so causes future upgrades of the package to fail.
5. Configure organization-wide default sharing settings.
 - a. From the Get Your Org Ready to Use Life Sciences Cloud for Customer Engagement section, click

Configure Sharing.

- b. Click **Edit**.
- c. Verify the default internal and external access for the Account and Contract object is Private. If it isn't, update the access, and acknowledge the UI messages that appear.
- d. Verify the default internal and external access for the Case and Opportunity objects is Private. If it isn't, update the access.
- e. For the Provider Affiliation and Provider Affiliation Product objects, change the default internal access to Public Read/Write.
- f. Save your changes and return to the Life Sciences for Customer Engagement Setup page.

6. Turn on Life Sciences Cloud for Customer Engagement Features.

- a. Expand the Life Sciences Cloud for Customer Engagement Features section.
- b. Turn on **Account-Based Sharing**, **Best Contact Time Custom Sharing**, **Contact Point Social Custom Sharing**, **Parent Territory Product Alignment**, and **Product Hierarchy Business Group Filter**.



Note Complete the Account Summarization for Customer Engagement and the Configure Provider Cards for Customer Engagement sections after you install the managed package.

7. Turn on Inventory Count Settings.

- a. From Setup, use the Quick Find box to search for and select **Inventory Count Settings**.
- b. Verify Inventory Count is turned on. If not, turn on **Inventory Count**.
- c. From Setup, use the Quick Find box to search for and select **Sales Account Plans**.
- d. Verify Sales Account Plans are turned on. If not, turn on **Sales Account Plans**.
- e. From Setup, use the Quick Find box to search for and select **Care Plan Settings**.
- f. Verify Care Plans are turned on. If not, turn on **Care Plans**.

8. Verify that Chatter is turned on in your org.

- a. From Setup, use the Quick Find box to search for and select **Chatter Settings**.
- b. Under Chatter Settings, if **Enable** is selected, don't take any further action. If this option isn't selected, click **Edit**, select **Enable**, and then save your changes.

9. Verify that data protection details are available in records.

- a. From Setup, use the Quick Find box to search for and select **Data Protection and Privacy**.
- b. If the **Make data protection details available in records** setting is selected, don't take any further action. If this option isn't selected, click **Edit**, select **Make data protection details available in records**, and then save your changes.

10. Verify Translation Workbench is turned on in your org.

- a. From Setup, use the Quick Find box to search for and select **Translation Language Settings**.
- b. If Translation Workbench isn't turned on, click **Enable**.
- c. For Language, if English is selected, click **Edit**. If English isn't selected, click **Add**, and then select **English**.
- d. Move the Admin User to the selected list of translators for English.
- e. Save your changes.

11. Turn on Multi-Currency. Follow the steps in [Enable Multiple Currencies](#).**12. Turn on State and Country/Territory Picklists.** Life Sciences Cloud uses State and Country fields such as ContactPointAddress.

- a. Follow the steps in [Convert State and Country/TerritoryData](#).
- b. Follow the steps in [Enable and Disable State and Country/Territory Picklists](#).

13. Turn on contacts to relate to multiple accounts, and then enable Person Accounts.

- a. Follow the steps in [Enable Contacts to Relate to Multiple Accounts](#).
 - b. Follow the steps in [Enable Person Accounts for Use in Life Sciences Cloud](#).
14. Set up sales territories. Follow the steps in [Set Up Sales Territories for Life Sciences Cloud](#). After you set up sales territories, you're ready to install the package.

Set Up Sales Territories for Life Sciences Cloud

Create a territory type, create a territory model, then create a hierarchy of territories as you build the territory model. Activate the territory model, and then assign users to territories.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To work with sales territories:	Customize Application
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You can create up to 1000 territories. This limit applies when your org expands to new business units or countries. You can request an increase from Salesforce if necessary. However, an extension to the limit affects system performance.

Prerequisite: Complete the steps in [Get Your Org Ready for the Life Sciences Cloud for Customer Engagement Package](#).

1. From Setup, use the Quick Find box to search for and select **Territory Settings**.
2. If Sales Territories isn't turned on, click **Enable Sales Territories**.
3. Create a territory type. Follow the steps in [Create Territory Types](#).
4. Create a territory model. Follow the steps in [Create a Territory Model Record](#).
5. Create a hierarchy of territories. Follow the steps in [Create Territories](#).
6. Activate the territory model. Follow the steps in [Activate a Territory Model](#).

You must assign Customer Engagement users to a territory. Otherwise, they have limited access to the Life Sciences Cloud for Customer Engagement mobile app. After you create users, assign them to territories. Follow the steps in [Assign Users to Territories](#).

Install the Life Sciences Cloud for Customer Engagement Package for Admin Users

Install the Life Sciences Cloud for Customer Engagement managed package in your Salesforce org before you set up Life Sciences Customer Engagement features. The package contains the Life Sciences Commercial app, which includes an Admin Console from where you can configure Customer Engagement features in one place.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To install the package:	Life Sciences Commercial Admin and Health Cloud Starter permission sets
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 **Note** The **Welcome to Agentforce Life Sciences** email sent to your organization includes the package installation URL. We don't provide the link in the Admin Guide.

Make sure to install the Life Sciences Cloud for Customer Engagement managed package in a new, blank org that doesn't contain pre-existing configurations. Confirm with your Account Executive during license provisioning that the licenses are applied to a new, blank org. If you plan to install the managed package in an org with pre-existing configurations, evaluate the org to test the potential impact.

1. After you complete the prerequisite setup tasks in the org where you want to install the package, click the **Install packages** link in your customer welcome email. The link redirects you to the Salesforce login page for production orgs.
2. To install the package in a production org, continue to the next step. If you use My Domain with single sign-on (SSO), click **Use Custom Domain** on the login page, enter the custom domain name, and then click **Continue**. To install the package in a sandbox org, go to <https://test.salesforce.com>. Append the package link to the browser address.
3. Use your credentials to log into the Salesforce org where you want to install the package.
4. Select **Install for Admin Users only**.
5. Acknowledge the message and click **Install**.
6. Click **Done**. You receive an email when your package installation is successful. In Setup, you can also open the Installed Packages page to verify if you've installed the package successfully.

Create Custom Admin Profiles for Life Sciences Cloud Customer Engagement

Create custom profiles for business admins and mobile admins by cloning the system administrator profile. Then create users and assign them to the relevant profiles.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To create custom profiles:	Life Sciences Commercial Admin and Health Cloud Starter permission sets
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1. From Setup, use the Quick Find box to search for and select **Profiles**.
2. Click **Clone** next to the System Administrator profile.
3. In Profile Name, enter a name such as Business Admin. Do not include underscores in profile names.
4. Save your changes.

5. Repeat the above steps to create a Mobile Admin profile.
6. To add users, see [Add Life Sciences Cloud Users](#).

Create Custom Standard User Profiles for Life Sciences Customer Engagement

Create custom profiles for personas such as Field Sales Representative and Medical Science Liaison by cloning the Standard User profile.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To create custom profiles: Life Sciences Commercial Admin and Health Cloud Starter permission sets

1. From Setup, use the Quick Find box to search for and select **Profiles**.
2. Click **Clone** next to the Standard User profile.
3. In Profile Name, enter a name for the user profile based on your organization's naming conventions for your users. Don't include underscores in profile names.
4. Click **Edit**, and then scroll to the Administrative Permissions section.
5. Turn off the View Setup and Configuration permission.
6. Save your changes.
7. To add users, see [Add Life Sciences Cloud Users](#).
8. Repeat the steps to create more profiles for your users.

Assign Life Sciences Cloud for Customer Engagement Permission Sets

To work with Life Sciences Cloud for Customer Engagement, users need the appropriate permission sets and permission set licenses. The Permission Sets page in Setup describes each permission set and shows the permission set license related to each permission set.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To assign permission sets Manage Users

Prerequisite: [Add Life Sciences Cloud Users](#)

In Setup, you can assign permission sets to users in a few ways. When you assign a permission set to a user, the permission set license is automatically assigned to the user.

- From the Company Information page, you can select a permission set license to view its details and assign it to multiple users.
- From the Permission Sets page, you can select a permission set to view its details and assign it to multiple users.
- From the Users page, you can select a user to view his or her details and assign multiple permission set licenses and permission sets to the user.

These permission sets are available by default in Life Sciences Cloud for Customer Engagement.

Permission Set Label (API Name)	Description
Life Sciences Commercial Admin (LifeSciencesCommercialAdmin)	Provides access to Customer Engagement features, data model objects, and metadata objects.
Life Sciences Field Sales Representative (LifeSciencesFieldSalesRepresentative)	Provides Field Sales Representatives access to the Customer Engagement features and objects they require for their role.
Life Sciences Field Medical (LifeSciencesFieldMedical)	Provides Field Medical Users access to the Customer Engagement features and objects they require for their role.
Life Sciences Key Account Management (LifeSciencesKeyAccountManagement)	Provides Key Account Managers access to the Customer Engagement features and objects they require for their role.
Life Sciences Core (LifeSciencesCore)	Provides access to Apex classes in the Life Sciences Cloud for Customer Engagement package that are required to use Customer Engagement. Assign this permission set to all Life Sciences Customer Engagement users, including admins, field sales representatives, key account managers, and field medical users.
Access Presentation Player for Digital Experiences (AccessPresentationPlayerDigital Experience)	Provides access to specific Apex classes for Digital Experience users of the presentation player.
Access Remote Engagement for Digital Experiences (AccessRemoteEngagementDigitalExperience)	Provides access to specific Apex classes for Digital Experience users of remote engagement.

1. Assign the appropriate permission sets to your users via the Permission Sets or Users pages. Make sure to add the Life Sciences Core permission set for all users.
2. Add more permission sets depending on the features you want to make available to each user.
3. Save your changes.

Create Account Page Layouts and Record Types for Healthcare Organizations (HCOs)

Create a page layout and a record type for the healthcare organization records that you create and maintain in Life Sciences Cloud.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To create page layouts and record types:	Life Sciences Commercial Admin and Health Cloud Starter permission sets
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1. Create a page layout for a healthcare organization.
 - a. From Setup, go to **Object Manager**.
 - b. Search for and select **Account**, and then select **Page Layouts**.
 - c. Click **New**.
 - d. Select an existing page layout from the dropdown. The first time you do this, select **Account Layout**, which is the default layout.
 - e. Enter a name for the new layout, and then click **Save**. For example, enter HCO Account Layout.
 - f. Configure the layout to show the fields that your organization uses for business records.
 - g. Add the **Contact Point Addresses**, **Contact Point Emails**, **Contact Point Phones**, and **Business Licenses** related lists to the layout.
 - h. Save your changes.
2. Create a record type for a healthcare organization.
 - a. In the Account object, select **Record Types**.
 - b. Click **New**.
 - c. Select a Business record type from the dropdown.
 - d. Enter a label for the new record type. For example, enter Healthcare Organization.
 - e. Select **Active**.
 - f. Select the profiles for which you want to make this record type available, and then make this the default record type for profiles as needed.
 - g. Click **Next**.
 - h. Select a page layout to assign to all the profiles you selected or assign a different page layout for each profile.
 - i. Save your changes.

Create Person Account Page Layouts and Record Types for Healthcare Professionals (HCPs)

Create a page layout and a record type for the healthcare professional records that you create and maintain in Life Sciences Cloud. Person Accounts represent people in Life Sciences Cloud.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To create page layouts and record types:	Life Sciences Commercial Admin and Health Cloud Starter permission sets
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Prerequisite: [Enable Person Accounts](#).

1. Create a page layout for a person.
 - a. From Setup, go to **Object Manager**.
 - b. Search for and select **Person Account**, and then select **Page Layouts**.
 - c. Click **New**.
 - d. Select an existing page layout from the dropdown.
 - e. Enter a name for the new layout, and then click **Save**. For example, enter HCP Person Account Layout.
 - f. Configure the layout to show the fields that your organization uses for people records.
 - g. Add the **Contact Point Addresses**, **Contact Point Emails**, **Contact Point Phones**, and **Business Licenses** related lists to the layout.
 - h. Save your changes.
2. Create a record type for a healthcare professional.
 - a. In the Person Account object, select **Record Types**.
 - b. Click **New**.
 - c. Select the existing Person record type from the dropdown.
 - d. Enter a label for the new record type. For example, enter Healthcare Professional.
 - e. Select **Active**.
 - f. Select the profiles for which you want to make this record type available, and then make this the default record type for profiles as needed.
 - g. Click **Next**.
 - h. Select a page layout to assign to all the profiles you selected or assign a different page layout for each profile.
 - i. Save your changes.

Add Tabs to the Life Sciences Commercial App

The Life Sciences Commercial app shows the Home, Admin Console, and Accounts tabs by default. Add Customer Engagement tabs such as Calendar, Intelligent Content, and Visits to the Life Sciences Commercial app. The Life Sciences Commercial app is only available in your org when you install the Life

Sciences Cloud for Customer Engagement managed package.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Not all tabs available in the org are available for the Life Sciences Cloud mobile app. For example, don't configure the standard Salesforce Calendar tab for the mobile app.

1. From Setup, use the Quick Find box to search for and select **App Manager**.
2. Click **Edit** next to Life Sciences Commercial.
3. Select **Navigation Items**.
4. From the list of Available Items, move the tabs you want to show in the app to the list of Selected Items.

The Navigation Items page includes two Calendar tabs in the list of Available Items. Make sure to select the Calendar tab that's relevant to Customer Engagement.

The

correct

5. To give your users access to the app, select **User Profiles**, and then move the user profiles from the Available Profiles list to the Selected Profiles list.
6. Save your changes.
7. From Setup, use the Quick Find box to search for and select **Profiles**. For each user profile that you selected earlier: under Object Settings, verify that the tab settings are set to **Default On** for each tab that you selected earlier. If not, select the object, click **Edit**, change the setting under Tab Settings, and save your change.
8. From the App Launcher, go to the Life Sciences Commercial app to view the tabs.

Selected

If you've set up the Life Sciences Cloud mobile app: after you configure tabs, generate the metadata cache for your updates to take effect in the mobile app.

[Add Tabs from Custom Objects to the Life Sciences Commercial App](#)

Create custom objects to track and store data that's unique to your organization. Add custom object tabs to the Life Sciences Cloud Commercial app and to the Life Sciences Cloud mobile app.

See Also

[Generate Metadata Cache](#)

Add Tabs from Custom Objects to the Life Sciences Commercial App

Create custom objects to track and store data that's unique to your organization. Add custom object tabs to the Life Sciences Cloud Commercial app and to the Life Sciences Cloud mobile app.

1. From the Object Manager tab in Setup, click **Create | Custom Object**.
2. Complete the fields for your custom object and configure its features, then save your changes.
3. Create a tab for the custom object.
 - a. From Setup | Home, use the Quick Find box to search for and select **Tabs**.
 - b. From the Custom Tabs section, click **New**.
 - c. In Object, select the custom object you created.
 - d. In Tab Style, select a tab style for the custom object.
 - e. Click **Next**.
 - f. Accept the tab visibility as **Default On** for all profiles, or select **Default Off** or **Tab Hidden** for specific profiles.
 - g. Click **Next**.
 - h. Make the new tab available to all custom apps or specific custom apps, then save your changes.
4. Verify that the required user profiles have access to the new custom objects.
 - a. From Setup, use the Quick Find box to search for and select **Profiles**.
 - b. Select a profile for which you want to make the tab available, then select **Object Settings**.
 - c. Select the custom object you created, click **Edit**, and then configure the object permissions (Read, Create, Edit, Delete etc) for the profile.
 - d. Save your changes.
 - e. Repeat the steps for each profile that you want to give access to the tab.
5. Add the custom tab to the Life Sciences Commercial app.
 - a. From Setup, use the Quick Find box to search for and select **App Manager**.
 - b. Click **Edit** next to Life Sciences Commercial.
 - c. Select **Navigation Items**.
 - d. From the list of Available Items, move the custom tab you created to the list of Selected Items.
 - e. To verify your users have access to the app, select **User Profiles**, and if necessary, move user profiles from the Available Profiles list to the Selected Profiles list.
 - f. Save your changes.
6. Create the database schema for the custom object. Follow the steps in [Create Object Metadata Cache Configuration](#).
7. Generate the metadata cache for the required profiles. Follow the steps in [Generate Metadata Cache](#).
8. Verify the custom object appears in the top navigation bar of the Life Sciences Commercial app.

Create Life Science Metadata Object Sharing Rules

Support access to Customer Engagement features by creating object sharing rules for Life Science Metadata Categories and Life Science Metadata Records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

User Permissions Needed	
To create sharing rules:	Manage Sharing

1. From Setup, use the Quick Find box to search for and select **Sharing Settings**.
2. From the **Manage sharing settings for:** dropdown, select **Life Science Metadata Categories**.
3. In the Life Science Metadata Category Sharing Rules section, select **New**.
4. Enter the label name and rule name.
5. For the rule type, select **Based on record owner**.
6. For owned by members of, select **Public Groups** from the first dropdown and **All Internal Users** from the second dropdown.
7. For Share with, select **Public Groups** from the first dropdown list, and select **All Internal Users** from the second dropdown.
8. For Access Level, select **Read Only**.
9. Save your work.
10. Similarly, create a sharing rule for Life Science Metadata Records.
11. To push your changes to the Life Sciences Cloud mobile app, create a metadata cache.

See Also

[Generate Metadata Cache](#)

[Create Object Metadata Cache Configuration](#)

Supported Languages in Life Sciences Cloud for Customer Engagement

Life Sciences Cloud for Customer Engagement is localized in over 30 languages that are either fully supported or provide end-user support. For fully supported languages, Life Sciences Cloud features and user interface (UI) text appear in the selected language. End-user languages allow individual users to select a language other than their company's default language for end-user facing UI.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Fully Supported Languages

These languages have full support across Life Sciences Cloud for Customer Engagement features, including standard objects, Setup, and Help content.

- Chinese (Simplified): zh_CN

- Chinese (Traditional): zh_TW
- Danish: da
- Dutch (Netherlands): nl_NL
- English (US): en_US
- Finnish: fi
- French (France): fr
- German (Germany): de
- Italian: it
- Japanese: ja
- Korean: ko
- Norwegian: no
- Portuguese (Brazil): pt_BR
- Russian: ru
- Spanish (Spain): es
- Spanish (Mexico): es_MX
- Swedish: sv
- Thai: th

End-User Languages

These languages provide translations for Life Sciences Cloud for Customer Engagement standard objects and pages, but don't cover all setup pages or Salesforce Help content.

- Arabic: ar
- Bulgarian: bg
- Croatian: hr
- Czech: cs
- English (UK): en_GB
- Greek: el
- Hebrew: iw
- Hungarian: hu
- Indonesian: in
- Polish: pl
- Portuguese (European): pt_PT
- Romanian (Romania): ro
- Slovak: sk
- Slovene: sl
- Turkish: tr
- Ukrainian: uk
- Vietnamese: vi

Select End User Languages for Your Life Sciences Cloud Org

Select and turn on languages for your users that use the Language Settings and Translation Languages pages in Setup. While end-user languages appear within your Salesforce org, Salesforce Help and Setup pages aren't translated into these languages.

See Also

[User Interface Language Support](#)

[Supported Languages](#)

Select End User Languages for Your Life Sciences Cloud Org

Select and turn on languages for your users that use the Language Settings and Translation Languages pages in Setup. While end-user languages appear within your Salesforce org, Salesforce Help and Setup pages aren't translated into these languages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To view language settings:	View Setup and Configuration
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To change language settings:	Customize Application
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1. From Setup, find and select **Language Settings**.
2. Select **Enable end-user languages**. The Available Languages list shows all end-user languages.
3. To make a language available to your end users, move the language from the Available Languages list to the Displayed Language list.
4. Save your changes.
5. From Setup, find and select **Translation Language Settings**.
6. Click **Edit** next to a supported language.
7. Select translators for the language from your list of available users.
8. Save your changes.
9. Return to the page after translations are completed, and select **Active** to make the translated values available for your users.
10. Save your changes.

See Also

[Select Languages for Your Org](#)

Set Up the Life Sciences Customer Engagement Home Page

The home page in Life Sciences Cloud for Customer Engagement provides a centralized view of critical information and tasks so your users can prioritize their work. Customize the home page to show announcements, upcoming activities, visits to submit, prioritized accounts, and more. To show each user what matters most to them, tailor the home page for different profiles.

Customize the Home Page

Add your company logo to your Salesforce org. Customize the components on the home page in Life Sciences Customer Engagement by using Lightning App Builder.

Home Page Components

The Life Sciences Cloud for Customer Engagement home page supports various Lightning components that help your users through their daily work.

Customize the Home Page

Add your company logo to your Salesforce org. Customize the components on the home page in Life Sciences Customer Engagement by using Lightning App Builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up the home page:	Life Sciences Commercial Admin permission set
To create and save Lightning pages in Lightning App Builder:	Customize Application

1. To define your brand's unique identity within Salesforce, create a custom theme and add your company's logo.
Logos are supported only on the desktop site.
 - a. From Setup, in the Quick Find box, search for and select **Themes and Branding**.
 - b. Select **New Theme**.
 - c. Under Images, select your organization's logo.
 - d. Save your changes and activate the theme.
2. Customize the components on the home page.
 - a. From Setup, in the Quick Find box, search for and select **Lightning App Builder**.
 - b. Edit a home page, or create one.

The Life Sciences Cloud mobile app supports a single-column layout for the home page. Most components fill the entire page, but some components take up only 50% of the page in the mobile app. See [Home Page Components](#).

 - c. Search for the component that you want to add, and then drag the component to the page.
 - d. To add visibility rules based on the record field, device type, or other filters, click **Add Filter**. An eye icon on the component indicates that visibility rules are applied.
 - e. Save your changes to the record page.
 - f. Activate the home page to share it with your users. Set the home page as the org default, the app default, or assign it to specified app and profile combinations.

- If you activate the home page at the app level or the app and profile level, select the **Life Sciences Commercial** app.
- g. For each profile that you want to create a customized home page for, clone the default home page and customize it.

When you set up the Life Sciences Cloud mobile app, you [create an object metadata cache configuration](#) and [generate a metadata cache](#). The metadata cache syncs your customized home page to the Life Sciences Cloud mobile app.

Home Page Components

The Life Sciences Cloud for Customer Engagement home page supports various Lightning components that help your users through their daily work.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

-  **Note** The Life Sciences Cloud mobile app supports a single-column layout for the home page. Most components fill the entire page, but some components take up only 50% of the page in the mobile app.

Activity Plan by Product

To show each user's specific goals so that they can align their work with the overall company strategy, use the Activity Plan By Product component. Select a plan cycle type, such as AccountGoal or WeightedTerritoryGoal. See [Add the Activity Plan Lightning Component to the Home Page](#).

In the Life Sciences Cloud mobile app, the Activity Plan By Product component fills only 50 percent of the page.

Agentforce Welcome

To show an Agentforce search bar and up to 5 predefined utterances, use the IsAgentforceWelcome component. For example, to help your users work efficiently, define utterances such as "Show me declining prescribers" and "HCPs to meet with next." When users select an utterance, it's entered as an Agentforce prompt. See [Agentforce and Einstein Generative AI](#).

This component is supported only in the Life Sciences Cloud mobile app. Lightning App Builder shows a placeholder instead of previewing the component.

Home Office Announcements

To show important communications from headquarters or the home office so that users are up to date on the latest news, use the LSC Home Announcements component.

To populate the announcements in the component, create app alerts that use the Announcement type. If needed, customize the app alert with extra HTML. We recommend that you add a trusted image URL to each announcement. Expired alerts are removed from the Home Announcements component automatically. See [Create an App Alert](#) and [Additional Message Field for App Alerts](#).

Next Best Customer

 **Note** If your org uses the NbcTopResults component, we recommend replacing it with the updated Life Sciences Next Best Customers component for the best experience.

To show a ranked list of the top prioritized accounts in the territory each day so that users can maximize the impact of each interaction, use the Life Sciences Next Best Customers component. In the component properties, choose how many accounts to show. See [Next Best Customer](#).

When you configure quick actions, users can also start engagement activities such as creating a visit or sending an email directly from their workflow. Quick actions are supported only in the Life Sciences Cloud mobile app in the rationale view.

To calculate distances to the physician's address accurately, activate [data integration rules](#) on the Contact Point Address object. Data integration rules use Google Maps API to calculate the address's geolocation data: latitude, longitude, and location accuracy. Salesforce calculates the distance from an account's preferred contact point address to the user's location. If there's no preferred address, the distance is calculated by using the account's primary contact point address instead.

Users can also update geolocation data manually by selecting **Check for New Data** from the contact point address record's action menu. In the Data Status window, the Update button refreshes the data.

Notifications and Recommendations

To show users important alerts, notifications, and recommendations directly on the home page, use the Notifications List component. In the component's properties, choose how many notifications to show. To populate the alerts in the component, create App Alerts that use the Notification and Recommendation types. See [Create an App Alert](#).

This component is supported only on the desktop site. In the Life Sciences Cloud mobile app, notifications appear in the message pane.

Up Next Agenda

On the desktop site, use the UpcomingAgenda component to show users a list of their upcoming visits,

times off territory, and general events.

Up Next Map

Use the UpNextMapDisplay component to show users a list of their upcoming visits, times off territory, and general events. Users also see their upcoming visits on a map. Users who turn on location services can also see their distance from the upcoming visits on the map and their estimated time of arrival.

In the component's properties, set the timing for visit reminders on the device's lock screen. Do Not Disturb reminders open the iPad settings so that users can turn on Do Not Disturb before the visit. Event reminders open the Life Sciences Cloud mobile app.

This component is supported only in the Life Sciences Cloud mobile app. Lightning App Builder shows a placeholder instead of previewing the component.

Visits to Submit

Use the UnsubmittedVisits component to show users the visits that remain in the Planned state after their planned start time has passed. Visits are ordered by date so that users can quickly identify the visits that they must submit to stay compliant. Users can also see details about each visit, including the planned start and end times, the primary account, the place ID, the channel, and whether it was a group visit. For more information, see [Visit Management](#).

In the Life Sciences Cloud mobile app, the UnsubmittedVisits component fills only 50 percent of the page.

Standard Salesforce Components

The Life Sciences Cloud for Customer Engagement home page also supports standard Lightning components.

- To show lists of important records directly on the home page, add a List View component. In the Life Sciences Cloud mobile app, users see up to 5 records in each list.
- To add other relevant content or messages to the home page, use a Rich Text component.
- To help users visualize important data, use the standard Dashboard and Report Chart components. To show reports and dashboards on the home page in the Life Sciences Cloud mobile app, turn on report settings from the Admin Console. See [Reports and Dashboards Administration](#).

For information about these and other components, see [Standard Lightning Page Components](#).

Set Up the Life Sciences Cloud Mobile App

Set up the Life Sciences Cloud mobile app to enable your field users to securely connect with healthcare professionals and organizations through their iPads. Field users can access and work with critical data,

content (PDFs, HTML5, videos), reports, and smart summaries with or without an internet connection.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

The Life Sciences Cloud mobile app is available for iPad in the [Apple App Store](#).

- Supported Devices: iPad (11th generation), iPad Air 11-in and 13-in (7th generation), and iPad Pro 11-in and 13-in (7th generation).
- Supported OS Versions: iOS 18.0+

[Customize the Life Sciences Cloud Mobile App](#)

Customize the Life Sciences Cloud mobile app to your organization's needs by configuring the required settings.

[Synchronization Management](#)

Define device synchronization settings between the Life Sciences Cloud mobile app and your Salesforce org to support data management and control. Help your mobile app users keep their data current so they can make well-informed decisions.

[Deep Linking for the Life Sciences Cloud Mobile App](#)

Your sales reps rely on their mobile devices to perform complex tasks and navigate between multiple tabs, records, or actions. With deep linking, you can use supported URL schemes to send users directly to the right spot in the Life Sciences Cloud mobile app from a third-party or web app. For example, deep links can open specific records, create a record with prepopulated data, or perform a specific action when the app opens.

[Life Sciences Cloud \(LSC\) Apps](#)

LSC Apps are custom Lightning Web Components (LWC) that you can create and embed on the Life Sciences Cloud mobile app. These apps enable you to design and implement complex features and integrations on lightning pages and the Life Sciences Cloud mobile app.

[Global Search in the Life Sciences Cloud Mobile App](#)

Quickly find information in the Life Sciences Cloud mobile app by using the Global Search feature to search across a predefined set of objects and fields within the iPad database. You can instantly access recently viewed records via Global Search.

[Compare the Life Sciences Cloud Mobile App and Desktop Site](#)

Here are some highlights of how the Life Sciences Cloud mobile app compares with the desktop site.

Customize the Life Sciences Cloud Mobile App

Customize the Life Sciences Cloud mobile app to your organization's needs by configuring the required settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Create Object Metadata Cache Configuration](#)

Create a configuration that can be used to generate metadata cache. The mobile app uses this metadata cache to sync with your Salesforce org, enabling users to access the object in both online and offline modes.

[Validate Object Metadata Cache Configurations](#)

Before you generate the metadata cache, validate the object metadata cache configurations to make sure that they're set up correctly. This prevents failures during the metadata generation process.

[Cancel Validation of Object Metadata Cache Configurations](#)

Cancel the validation of object metadata cache configurations while the validation in progress.

[Assign Profiles to Object Metadata Cache Configurations](#)

Assign profiles to a new object metadata cache configuration to make the configuration available to users with that specific profiles.

[Generate Metadata Cache](#)

To apply an object metadata cache configuration to your mobile app, you must first generate the metadata cache. The mobile app uses this metadata cache to sync with your Salesforce org, enabling users to access Customer Engagement features in both online and offline modes.

[Configure Application Settings](#)

Configure the essential settings for the mobile app to manage a wide range of settings, including default browser behavior, security features such as password type, and user access to various functionalities. By using these settings, you can also control notifications, search capabilities, and the overall user interface to customize the app to your needs.

[Set Up Profile-Based App Settings](#)

Configure parameters to customize the mobile app for specific profiles.

[Configure UI Settings](#)

Configure custom UI components for the mobile app. Create and manage records that define how tabs and static resources are shown in the mobile app.

See Also

[Set Up Consent Management](#)

[Mobile App Configuration for App Alerts](#)

Create Object Metadata Cache Configuration

Create a configuration that can be used to generate metadata cache. The mobile app uses this metadata cache to sync with your Salesforce org, enabling users to access the object in both online and offline

modes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create metadata cache configuration: Life Sciences Commercial Admin permission set

The LifeSciConfigCategory and LifeSciConfigRecords metadata types must have records populated in order to generate metadata.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **Object Metadata Cache Configuration**.
3. For Name, enter a unique name that describes the object.
4. Select **Is Active** if the entity is currently active.
5. For Type, select the type of the object.

Data	A database for the mobile app.
Configuration	A database with queried records. The records contain configuration data that can't be synced or queried from the mobile app.

6. For SObject, select an object or a configuration record.
7. For Assignments, select the profile that this configuration is assigned to.
8. For Delta Sync Date Field, enter the name of the field on the selected object that's used for syncing the change to the object.
9. To allow data sync only from the object to the mobile app, select **Web-to-Mobile Sync**.
10. For Attachment Download Method, select how the attachments are downloaded.
11. For SOQL Filter Condition, enter the condition for generating the metadata using the simple editor or advanced editor. Make sure you enter the conditions without any additional SOQL statements. If you don't enter a SOQL filter condition, the metadata is generated for all the rows of the selected object.
12. To test the SOQL query, click **Test SOQL**.
13. Save your changes.

[Creating SOQL Filter Condition Using Simple Editor](#)

To create a basic SOQL filter condition that's used to generate the metadata, use the simple editor.

[Creating SOQL Filter Condition Using Advanced Editor](#)

To create SOQL filter condition with variables, use the advanced editor.

See Also

- [First-Generation Managed Packages: Life Science Config Category](#)
- [First-Generation Managed Packages: Life Science Config Record](#)
- [Developer Guide: LifeSciConfigCategory](#)
- [Developer Guide: LifeSciConfigRecord](#)
- [Mobile App Configuration for Ratings](#)
- [Mobile App Configuration for Consent Management](#)

Creating SOQL Filter Condition Using Simple Editor

To create a basic SOQL filter condition that's used to generate the metadata, use the simple editor.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create filter conditions:	Life Sciences Commercial Admin permission set
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1. In the New Object Metadata Cache Configuration window, under Simple Editor, click **Add Condition**.
2. Complete the fields for the condition.
 - a. For Field, select a field.
 - b. For Operator, select an operator.
 - c. For Type, select the type of the value.
 - d. For Value, enter a value for the condition.Make sure strings and IDs are encased in single quotes.
3. Add more conditions, if required.
4. Select a logical operator for the condition.
 - All of the conditions are met (AND)
 - Any of the conditions are met (OR)
 - Customize the logic
5. Click **Add SOQL Expression**.
6. Save your changes.

Creating SOQL Filter Condition Using Advanced Editor

To create SOQL filter condition with variables, use the advanced editor.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create filter conditions:	Life Sciences Commercial Admin permission set
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1. Enter the SOQL query in the SOQL Filter Condition field.
Make sure strings and IDs are encased in single quotes.
2. From the Insert dropdown, select a variable to insert in the SOQL query.
3. Test the SOQL filter condition.
4. Save your changes.

Validate Object Metadata Cache Configurations

Before you generate the metadata cache, validate the object metadata cache configurations to make sure that they're set up correctly. This prevents failures during the metadata generation process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage validations of metadata configurations:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **Object Metadata Cache Configuration**.
3. Select the configuration records that you want to validate.
4. Click **Validate**.
You'll get a notification stating that the validation is queued.

To monitor the validation status, click the link in the notification. After the validation is complete, the status of the object metadata cache configuration changes to Valid.

Cancel Validation of Object Metadata Cache Configurations

Cancel the validation of object metadata cache configurations while the validation is in progress.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage validations of metadata configurations: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **Object Metadata Cache Configuration**.
3. Select the configuration records that you want to cancel the validation for.
4. Click **Abort**.
5. In the confirmation window, click **Yes**.

Assign Profiles to Object Metadata Cache Configurations

Assign profiles to a new object metadata cache configuration to make the configuration available to users with that specific profiles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To assign profile and permission sets to metadata configurations: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **Object Metadata Cache Configuration**.
3. Select the configuration records for which you want to assign a profile.
4. Click **Assign**.
5. In the Select Assignment window, select whether you want to assign a profile.
6. Select a profile.
7. Click **Submit**.

Generate Metadata Cache

To apply an object metadata cache configuration to your mobile app, you must first generate the metadata cache. The mobile app uses this metadata cache to sync with your Salesforce org, enabling users to access Customer Engagement features in both online and offline modes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To generate metadata cache:	Life Sciences Commercial Admin permission set
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To get notifications when a metadata cache is generated, complete these tasks.

- Enable Read Access for the Metadata Generated platform event.
 - Activate the Metadata Active trigger handler.
1. From the App Launcher, find and select **Admin Console**.
 2. Select **Mobile** and then select **Metadata Cache**.
 3. Click **New**.
 4. For Profiles, select a profile for which you want to generate the metadata for. If you don't select a profile, the metadata is generated for all the profiles in your org.
 5. For Update Due Date, select the date by when the mobile app users must update the metadata. Users won't be able to postpone the update after this date.
 6. For Update Alert Date, select the date on which the mobile app users are notified about the new metadata. Users can see these alerts only if notifications for new metadata are enabled.
 7. Save your changes.

An entry with the status **Validating** is added to the metadata cache list. You'll receive a notification after the metadata cache is generated.

Refresh your browser to check whether the metadata cache is validated. If the validation is successful, the status changes to Published, In Progress, and then Active.

See Also

- [Mobile App Configuration for Ratings](#)
- [Set Up Consent Management](#)
- [Mobile App Configuration for Consent Management](#)
- [Add a Tab for Consent Management on a Record Page](#)
- [Add a Logo to the Consent Page](#)
- [Mobile App Configuration for App Alerts](#)

Configure Application Settings

Configure the essential settings for the mobile app to manage a wide range of settings, including default browser behavior, security features such as password type, and user access to various functionalities. By using these settings, you can also control notifications, search capabilities, and the overall user interface to customize the app to your needs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure application settings:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **Application Settings**.
3. For Default Browser, select the default browser to show content in web view in the mobile app.
4. For Password Type, select the type of password for the mobile app.
5. For Hourly Dashboard Refresh Limit, select the number of times the mobile app dashboard can be refreshed in an hour.
6. For App Download URL, enter the full URL to download the latest version of the mobile app from the App Store.
7. Configure these settings as needed:
 - Let users use View Online option on the home screen
 - Let users view reports
 - Enable Background Notifications
 - Enable advanced search
 - Use Advanced Search for lookups
 - Use Advanced Search for account lookups
 - Let users override the lookup search fields
 - Enable Dynamic Actions
 - Let users publish platform events
 - Hide app upgrade notifications
 - Show persistent help text
 - Enable Survey Branching Single Page
 - Enable Survey Confirmation
8. Save your changes.

Set Up Profile-Based App Settings

Configure parameters to customize the mobile app for specific profiles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure profile-based settings: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **Profile Based App Settings**.
3. For **Apply Settings To**, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - To apply the settings to all the profiles in your org, select **SOrg Default**.
 - To apply the settings to a specific profile in your org, select **Profile**.
4. To show tasks in the Kanban view for the selected profile, select **Use kanban view for assessment tasks**.
5. To restrict the execution batch jobs when the org is in maintenance, select **Don't allow batch job execution when the org is in maintenance mode**.
6. For **Time Interval**, enter the time interval in minutes for datetime fields in the mobile app. For example, enter 10 to display 10-minute intervals in the datetime fields: 12:10, 12:20, 12:30.
7. For **Mobile App**, select the lightning app that you want to show by default for the selected profile.
8. To let users perform bulk edit operations, select **Let users perform bulk edit**.
9. Save your changes.

Configure UI Settings

Configure custom UI components for the mobile app. Create and manage records that define how tabs and static resources are shown in the mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure custom components:

Life Sciences Commercial Admin permission set

Create a Custom Tab

1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **UI Settings**.
3. Click **New**.
4. For Label, enter a display name for the custom UI component.
5. For Name, enter a unique API name for the custom UI component.
6. For Mobile UI Type, select **Tab**.
7. For Tab Name, enter a display name for the tab.
8. For Tab Order, enter a number that determines the tab's position on the dashboard.
9. Select the profile that you want to assign this custom component to.
10. Select **Is Active** to make the component available on the mobile app.
11. Save your changes.

Create a Static Resource Component

1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **UI Settings**.
3. Click **New**.
4. For Label, enter a display name for the custom UI component.
5. For Name, enter a unique API name for the custom UI component.
6. For Mobile UI Type, select **Static Resource**.
7. For Resource Name, select one of these options:
 - To use an existing static resource, select **Select Static Resource**.
 - To create a static resource, select **New Static Resource**.
8. Select the profile you want to assign this custom component to.
9. Select **Is Active** to make the component available on the mobile app.
10. Save your changes.

Assign Profiles to Custom UI Components

1. From the App Launcher, find and select **Admin Console**.
2. Select **Mobile** and then select **UI Settings**.
3. Select the custom components for which you want to assign a profile.
4. Click **Assign**.
5. On the Select Assignment window, select a profile.
6. Click **Submit**.

Synchronization Management

Define device synchronization settings between the Life Sciences Cloud mobile app and your Salesforce org to support data management and control. Help your mobile app users keep their data current so they can make well-informed decisions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Synchronization Types

Synchronization between the Life Sciences Cloud mobile app and your Salesforce org can happen in a few different ways: Full, Delta, and Upload Only.

Sync Type	What it Does	When it Happens
Full	Downloads all territory-specific data and metadata to the user's mobile device and then uploads their transactions, logs, and statistics to Salesforce.	<ul style="list-style-type: none">Initial Sync: This happens after a user's first login and territory selection (if applicable).Territory Switch Sync: This happens after a user switches to a different territory.Extended Offline Work: If a user works offline for longer than the configured Days Offline Limit (without an initial or territory switch).Admin-Forced Sync: If an admin has enabled the Is Force Full Sync Enabled option in a user's profile, a full sync is performed during the next Delta Sync.
Delta	Refreshes the app's database, downloads the latest information and sends the user's changes to the server, and	<ul style="list-style-type: none">During Manual Sync after a user taps Sync Database.After a user unlocks the app

Sync Type	What it Does	When it Happens
	downloads list views. This process can run in the foreground (which requires the user to wait before using the app) or in the background.	with their passcode. If metadata has changed, the user is prompted to download the metadata (or skip).
Upload Only	Uploads mobile app data, such as transactions, logs, and statistics, to Salesforce. It's a one-way process, so no metadata or other data is downloaded to the user's device.	<ul style="list-style-type: none"> After a user saves or deletes a record, the app initiates the upload in the background to sync all transactions currently in the queue. If a Wi-Fi connection isn't available, the transaction stays in the queue until the next synchronization attempt.

Synchronization Management Data Model

Synchronization Management uses many objects and fields to help users synchronize data your Salesforce org and the Life Sciences Cloud mobile app. To learn about these objects and fields, see the Synchronization Management data model.

-  **Note** Synchronization management objects aren't accessible in Object Manager. However, you can access them through data tools.

[Synchronization Management Guidelines and Best Practices](#)

To secure data in the Life Sciences Cloud mobile app, manage object sharing and DBSchema records. For optimal performance, always include a WHERE clause in DBSchema settings and monitor the Transactions queue daily. Ensure efficient synchronization by quickly resolving errors and using Simulation Mode to proactively find and fix potential problems before they affect users. Limit record access to necessary users only and keep all required DBSchema settings enabled for the mobile app.

[Clone and Activate the Sync Processor Scheduler Flow](#)

To automate data synchronization from the Life Sciences Cloud mobile app to your Salesforce org, clone and activate the Sync Processor Scheduler flow. This flow automates the scheduling of the Sync Processor batch management job. The Scheduler flow runs daily at 1:00 AM UTC, processing Device Sync Transaction records from the past 60 days.

[Manage Synchronization Transactions](#)

View completed synchronization records and manually update or retry synchronization transactions in the Synchronization Admin Console.

[Configure Mobile Sync Settings](#)

Set the mobile sync settings at the org default or user profile level to determine the record synchronization details.

Configure Sync Processor Settings

Define comprehensive guidelines for managing records throughout their lifecycle. Descriptive record handling rules are crucial for data integrity, regulatory compliance, efficient information management, and risk mitigation.

Synchronization Management Guidelines and Best Practices

To secure data in the Life Sciences Cloud mobile app, manage object sharing and DBSchema records. For optimal performance, always include a WHERE clause in DBSchema settings and monitor the Transactions queue daily. Ensure efficient synchronization by quickly resolving errors and using Simulation Mode to proactively find and fix potential problems before they affect users. Limit record access to necessary users only and keep all required DBSchema settings enabled for the mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Objects and Security

Life Sciences Cloud includes several objects preconfigured to download data to the mobile app. Each object has a DBSchema setting that is active and named with the prefix: DbSchema_. These settings are accessible through the Admin Console under the Mobile tile and then Object Metadata Cache Configuration in the left navigation. If you don't need to transfer data for a certain object, deselect Is Active on the associated DBSchema record.

To enhance data security, configure the sharing settings for objects regularly synced from the mobile device to Salesforce.

Daily Monitoring

Review the Transactions queue daily in the Admin Console to make sure no transactions remain in the New status for more than one day. If transactions for a user remain in the New status for an extended period, contact the user and instruct them to do a full manual sync by selecting Sync Database from the gear icon in the Life Sciences Cloud mobile app.

Error Handling

Transaction failures require thorough error analysis. Common causes include record locking, processing

timeouts, heap size exceptions, and CPU time limit exceptions. These problems often arise from hitting governor limits due to high loads or nonbulkified code. Validation rules can cause additional errors. Database validation rules differ from UI logic and include field-level uniqueness or non-null constraints. When a transaction encounters an error and remains pending, all subsequent transactions will be placed in the New status.

Proactively identify potential issues with Simulation Mode. Use Simulation Mode to test transactions in a virtual environment and assess the probability of transaction success or failure. Correct the identified problem and start a new transaction using the Admin Console.

Clone and Activate the Sync Processor Scheduler Flow

To automate data synchronization from the Life Sciences Cloud mobile app to your Salesforce org, clone and activate the Sync Processor Scheduler flow. This flow automates the scheduling of the Sync Processor batch management job. The Scheduler flow runs daily at 1:00 AM UTC, processing Device Sync Transaction records from the past 60 days.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To activate or deactivate a flow: Manage Flows

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Open the Sync Processor Scheduler flow template.
3. In Flow Builder, select **Save as New Flow**.
4. Enter a flow label and a description.
5. Save and activate the flow.

Manage Synchronization Transactions

View completed synchronization records and manually update or retry synchronization transactions in the Synchronization Admin Console.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage synchronization transaction: Life Sciences Commercial Admin

To view synchronization transactions, from the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**. Select **Synchronization**, and then **Transactions**.

Use the filter options to narrow transaction results. Find specific transactions by choosing the view (success or failed), the transaction name, record ID, period, and the user who made the transaction.

Transactions in the Admin Console have several possible statuses.

Status	Description
New	The transaction is in the processing queue.
Retry	The transaction is queued for a subsequent processing attempt.
Success	The transaction processed successfully.
Failed	The transaction encountered an error and processing failed.
Canceled	The transaction was canceled.

A green Success label indicates successful transactions. To update transaction details, select **Edit**. The Edit dropdown menu provides options to view related items and dependencies or add comments regarding the transaction.

A red Failed label indicates failed transactions. To update transaction details, select **Edit**. Select **Ignore** to stop the transaction from being processed again, or **Retry** to attempt processing one more time. The **Simulate** option records the transaction in the logs without committing any actions. The Simulate dropdown menu provides options to view related items or dependencies, add a comment about the transaction, or manually log the record.

Configure Mobile Sync Settings

Set the mobile sync settings at the org default or user profile level to determine the record synchronization details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage mobile sync settings: Life Sciences Commercial Admin

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Synchronization**, and then select **Mobile Sync Settings**.
3. From the Select Type dropdown, select the type of settings to configure. You can configure mobile sync settings for the org default or specific user profiles.
4. Select processing options and enter values to meet your business needs.

Setting	Description	Recommended Value
Related Record Retrieve	Enables showing related record names for inaccessible records. The related record is read-only, preventing users from opening the inaccessible object.	Selected
Mobile Non Wifi Data Limit in Megabytes	The limit in MB a user can download when not on wifi before a warning message is shown.	25
Mobile Offline Days Limit	The maximum number of days a user can stay offline before they're forced to synchronize.	30
Mobile Timeout Period in Minutes	The number of minutes before the mobile app times out and returns the user to the PIN screen.	60
Number of Items per Transaction	The maximum number of items to include in a transaction.	10

5. Save your work.
6. To push your changes to the Life Sciences Cloud mobile app, create a metadata cache.

See Also

[Create a Metadata Cache](#)

Configure Sync Processor Settings

Define comprehensive guidelines for managing records throughout their lifecycle. Descriptive record

handling rules are crucial for data integrity, regulatory compliance, efficient information management, and risk mitigation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage sync processor settings:	Life Sciences Commercial Admin
------------------------------------	--------------------------------

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Synchronization**, and then select **Sync Processor Settings**.
3. Select processing options and enter a number of retry attempts to meet your business needs.

Setting	Description	Recommended Value
Optimize performance by grouping items	Automatically group transaction items by order within a single transaction. When activated, transaction items sharing the same Operation and Object Type values receive an identical Order field value. Items with the same order value process together as a single batch, which reduces the number of SOQL queries.	Selected
Cancel sync for deleted records	Automatically cancel transactions that try to delete previously deleted records.	Selected
Cancel sync when record isn't found	Automatically cancel transactions attempting to update nonexistent records.	Selected
Retry sync for locked rows	Automatically retry sync transaction if the Unable to Lock Row error occurs. Retries continue until the transaction is successful or a different error occurs.	Selected

Setting	Description	Recommended Value
Number of Retry Attempts	The number of retries when a transaction fails.	3

4. Save your work.
5. To push your changes to the Life Sciences Cloud mobile app, create a metadata cache.

See Also

[Create a Metadata Cache](#)

Deep Linking for the Life Sciences Cloud Mobile App

Your sales reps rely on their mobile devices to perform complex tasks and navigate between multiple tabs, records, or actions. With deep linking, you can use supported URL schemes to send users directly to the right spot in the Life Sciences Cloud mobile app from a third-party or web app. For example, deep links can open specific records, create a record with prepopulated data, or perform a specific action when the app opens.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

With Salesforce-supported URL schemes, your users can open the Life Sciences Cloud mobile app and perform one of several actions.

- View a specific record.
- Create or update a record with prepopulated data.
- Open a specific tab in the Life Sciences Cloud mobile app.
- Start an action on a specific record page.
- Create an email with a predefined email template and recipients.

Life Sciences deep links work only for users who have the right access to that action, record, or area of the app. If an unauthenticated user taps a deep link, they're taken to the login page. When the app is locked, users are prompted to enter their PIN. After users log in or enter their PIN, they must tap the link again to view the linked page.

[Deep Linking Format for Life Sciences](#)

Use the predefined URL scheme for the Life Sciences Cloud mobile app on iOS.

[Deep Linking for Visits](#)

The Life Sciences Cloud mobile app supports more URL schemes for visits. Deep links for visits support actions such as opening the Visit Engagement page to create or edit a visit.

Considerations for Life Sciences Deep Links

When you create deep links to open the Life Sciences Cloud mobile app from external and third-party apps, keep these considerations in mind.

Deep Linking Format for Life Sciences

Use the predefined URL scheme for the Life Sciences Cloud mobile app on iOS.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

URL Scheme Name

The Life Sciences Cloud mobile app supports this value for scheme name in deep link URLs.

```
lsc://deeplink/lightning
```

Common Parameters

Here are some of the common parameters that the Life Sciences deep link URL scheme format supports.

- `sObject` –indicates the API name of a Salesforce object. This value is case-sensitive. For example, use Account, not account.
- `id` –the unique single instance of a Salesforce object. ID lengths of 15 and 18 characters are supported.
- `actionName` –an action that's available on the specified object's record detail page.
- `field_api_name` –indicates the API name of a Salesforce field.

To use deep links, users must have the correct permissions for that action, record, or area of the app.

View a Record by Using a Salesforce ID

This URL scheme goes to the object tab and then opens a record detail page by using a Salesforce record ID.

```
lsc://deeplink/lightning/r/{sObject}/{id}/view
```

This example uses a Salesforce ID to go to a healthcare provider record detail page.

```
lsc://deeplink/lightning/r/healthcareprovider/001XXXXXXXXXXXXIAM/view
```

View a Record by Using an External ID

This URL scheme goes to the object tab and then opens a record detail page by using an external ID.

```
lsc://deeplink/lightning/r/{sObject}/{external_id_field_api_name}:::value/view
```

This example uses an external ID to go to a healthcare provider record detail page.

```
lsc://deeplink/lightning/r/healthcareprovider/sourcesystemidentifier:::1234/view
```

Create a Record

This URL scheme creates a record without populating fields.

```
lsc://deeplink/lightning/o/{sObject}/new
```

This example creates an inquiry record without populating any fields.

```
lsc://deeplink/lightning/o/Inquiry/new
```

Create a Record and Populate Fields

This URL scheme creates a record and populates fields.

```
lsc://deeplink/lightning/o/{sObject}/new?{field_api_name}=value&{field_api_name}=value&{field_api_name}=value
```

This URL scheme creates a record with a specific record type and populates fields.

```
lsc://deeplink/lightning/o/{sObject}/new?RecordTypeId={record_type_id}&{field_api_name}=value&{field_api_name}=value
```

These field types are supported as URL parameters. To pass more than one parameter, use an ampersand (&) between them.

- Checkbox
- Date

- DateTime
- Email
- Lookup
- Number
- Picklist
- Picklist (Multiselect)
- Reference
- Text
- Text Area
- Text Area (Rich)

For field values with spaces or special characters, use these encoded values.

Character	Encoded Value
Space	%20
&	%26
=	%3D
?	%3F

This example creates an inquiry record and populates some fields.

```
lsc://deeplink/lightning/o/Inquiry/new?Type=Medical%20Inquiry&IsSignatureCopyRequested=true
```

Create or Edit a Record and Its Related Record

This URL scheme upserts a record by creating or editing a record and its related record together. You can specify records by using either Salesforce IDs or external IDs. Format the record data in JSON format, and then convert it to Base64 format.

```
lsc://deeplink/lightning/o/{sObject}/upsert?referenceId={id}&data=JSONConvertedToBase64Format
```

Go to an Object List

Use this URL scheme to go to an object list.

```
lsc://deeplink/lightning/o/{sObject}/list
```

This example goes to the list of accounts.

```
lsc://deeplink/lightning/o/Account/list
```

Go to a Lightning Page

Use this URL scheme to go to a Lightning page.

```
lsc://deeplink/lightning/page/{page_name}
```

This example goes to the home page.

```
lsc://deeplink/lightning/page/Home
```

Go to a Lightning Component

Use this URL scheme to go to a Lightning component within a tab.

```
lsc://deeplink/lightning/n/{component_name}
```

This example goes to the AccountFilter Lightning component.

```
lsc://deeplink/lightning/n/lsc4ce__AccountFilter
```

Initiate an Action for an Account

This URL scheme initiates an action for a specific account on the record detail page.

```
lsc://deeplink/lightning/r/{sObject}/{id}/action/{actionName}
```

This example opens a survey for the specified account.

```
lsc://deeplink/lightning/r/account/001XXXXXXXXXXXXXIAc/action/lsc4ce__Survey
```

Start an Email

This URL scheme starts an email by specifying one or more email templates and account IDs.

```
lsc://deeplink/lightning/cmp/lsc4ce:WebEmail?lifesemailtemplate-id={id}&account-id={id}&account-id={id}&account-id={id}
```

This example opens the Send Email window with the specified template selected and the selected account as the recipient.

```
lsc://deeplink/lightning/cmp/lsc4ce:WebEmail?lifesemailtemplate-id=1LLXXXXXX  
XXXXXX4A2&account-id=001XXXXXXXXXXXXXAI
```

Deep Linking for Visits

The Life Sciences Cloud mobile app supports more URL schemes for visits. Deep links for visits support actions such as opening the Visit Engagement page to create or edit a visit.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

View a Visit Record

This URL scheme opens a visit record detail page without opening the Visit tab first.

```
lsc://deeplink/lightning/r/Visit/{id}/view?modal=1
```

This example goes to the specified visit record detail page without opening the Visit tab first.

```
lsc://deeplink/lightning/r/Visit/001XXXXXXXXXXXXKAG/view?modal=1
```

Create a Visit

This URL scheme creates a visit with no parameters.

```
lsc://deeplink/lightning/o/Visit/new
```

Create a Visit for an Account

This URL scheme creates a visit for an account.

```
lsc://deeplink/lightning/o/Visit/new?accountid={id}
```

This example creates a visit for the specified account.

```
lsc://deeplink/lightning/o/Visit/new?accountid=001XXXXXXXXXXXXYAI
```

Create a Visit for a Product

This URL scheme creates a visit with one or more product IDs. This scheme works only for product detail item records. To validate product restrictions, pass both the account and the product detail items as parameters in the URL.

```
lsc://deeplink/lightning/o/Visit/new?product-id={id}
```

This example creates a visit for the specified product detail item.

```
lsc://deeplink/lightning/o/Visit/new?product-id=1KeXXXXXXXXXXXX0AM
```

Edit a Visit

This URL scheme opens an existing visit in edit mode. Submitted visits open on the record detail page. Planned visits open on the Visit Engagement page.

```
lsc://deeplink/lightning/r/Visit/{id}/edit
```

This example opens the specified visit in edit mode.

```
lsc://deeplink/lightning/r/Visit/0Z5XXXXXXXXXXXX0AG/edit
```

Create or Edit a Record and Its Related Record

This URL scheme upserts a visit by creating or editing a visit and its related record together. Specify records by using either Salesforce IDs or external IDs. Format the record data in JSON format, and then convert it to Base64 format.

```
lsc://deeplink/lightning/o/{sObject}/upsert?referenceId={id}&data=JSONConverte  
dToBase64Format
```

When you configure upsert deep links for visits, keep these considerations in mind.

- Upsert deep links can add products and attendees to the visit or edit visit fields.
- The visit record must exist and be editable.

- To reference fields and objects, use the API names.
- If the URL doesn't contain a record ID, a new record is created.
- When you use an upsert deep link for visits, validations don't run for required fields, restricted products, or on the Visit Engagement page. On the Visit Engagement page, validations run when you submit the visit.

Considerations for Life Sciences Deep Links

When you create deep links to open the Life Sciences Cloud mobile app from external and third-party apps, keep these considerations in mind.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Best Practices for Deep Links

- Always pass the record type as a parameter for objects that have record types.
- Make sure that all fields that you include as parameters in a deep link are available on the object page layout.

Limitations for Deep Links

- Deep links to create records support a single object and its related fields.
- If your Salesforce org uses [multi-object components](#) to show fields from multiple objects on a single record page, deep links work only for the parent objects—account, inquiry, and visit.
- Deep links to initiate an action are available only for the account object.
- Deep links to open a window are available only for the visit object and for emails.

Life Sciences Cloud (LSC) Apps

LSC Apps are custom Lightning Web Components (LWC) that you can create and embed on the Life Sciences Cloud mobile app. These apps enable you to design and implement complex features and integrations on lightning pages and the Life Sciences Cloud mobile app.

REQUIRED EDITIONS

 **Important** LSC Apps aren't available offline.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Implement LSC apps for specific use cases by embedding them on either record pages or the Home page. The embedding method determines the component's functionality and placement.

- Embed on Record Pages: lets users take immediate action on a specific record.
 - LWC Quick Actions: Launch the LWC component from the Quick Action menu on the record page.
 - Inline Components: Access the component directly on the record page alongside native components.
- Embed on the Home Page: Give users global access to the custom feature.
 - Inline Components: Add the custom component to a section of the Home Page.

 **Note** Make sure that your users have access to all the fields or objects used in the custom LWC components.

[Create and Add an LWC as an Inline Component on a Record Page](#)

Make the custom functionality accessible to users directly from a record page alongside native components by creating and adding it as an inline component.

[Create and Add an LWC Quick Action to a Record Page](#)

Make your custom functionality available from the Quick Action menu of a record page by creating and adding the custom quick action to the record page.

[Create and Add an LWC to the Home Page](#)

Give users global access to a custom feature from the Home page by creating and adding the custom LWC to the Home page.

[Sync Changes to the Mobile App](#)

Sync your latest changes to the Life Sciences Cloud mobile app by generating metadata cache.

Create and Add an LWC as an Inline Component on a Record Page

Make the custom functionality accessible to users directly from a record page alongside native components by creating and adding it as an inline component.

REQUIRED EDITIONS

 **Note** We recommend that you add only one LSC app as an inline component on a record page. Adding multiple LSC apps to the same record page can cause the page renderer to work incorrectly.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

1. Create a mobile-ready custom LWC component. Add `lscMobileInline_` as the prefix for the API name of the component.
2. Ensure that the `lightning__RecordAction` and `lightning__RecordPage` targets are defined in the configuration file of the custom LWC. Additionally, the `mobileHeight` property of type Integer must be added to `RecordPage targetConfig`.
3. Add the LWC to the record page.
 - a. From the Setup menu on a record page, select **Edit Page**.
 - b. Drag the LWC component from the Components panel to the desired section of the page.
 - c. For the `mobileHeight` field, enter the desired pixel size. This field determines the height of the LWC component in the mobile app.
 - d. Save and activate the page.
4. Pass the `recordId` and `SobjectName` of the record as context to the LWC using a quick action.
 - a. Create a quick action of type Lightning Web Component using the LWC component that was added to the record page in step 3.

This quick action is used to pass the record's context to the custom LWC. To prevent the component from appearing as both a button in the quick action menu and an Inline element, the LSC App hides quick actions with the `lscMobileInline_` prefix.
 - b. From Setup, in the Quick Find box, find and select **Object Manager**.
 - c. Search for and select the object.
 - d. Select **Page Layouts**, and then select the page layout you want to edit.
 - e. From the palette, select **Mobile & Lightning Actions**.
 - f. Drag the desired quick action to the Salesforce Mobile and Lightning Experience Actions section.
 - g. Save the page layout.

Create and Add an LWC Quick Action to a Record Page

Make your custom functionality available from the Quick Action menu of a record page by creating and adding the custom quick action to the record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

1. Create a mobile-ready custom LWC component.
2. Ensure the `lightning__RecordAction` target is defined in the configuration file of the custom LWC. Look for the file ending with `.js-meta.xml`.
3. Create a quick action of type Lightning Web Component using the LWC component.

- a. From Setup, in the Quick Find box, find and select **Object Manager**.
 - b. Search for and select the target object.
 - c. Select **Buttons, Links, and Actions**, and then select **New Action**.
 - d. For Action Type, select **Lightning Web Component**.
 - e. Select the mobile-ready custom LWC component.
 - f. Give a label for the quick action.
4. Add the quick action to a record page.
 - a. From Setup, in the Quick Find box, find and select **Object Manager**.
 - b. Search for and select the object you want to edit.
 - c. Select **Page Layouts**, and then select the page layout you want to edit.
 - d. From the palette, select **Mobile & Lightning Actions**.
 - e. Drag the desired quick action to the Salesforce Mobile and Lightning Experience Actions section.
 - f. Save the page layout.

Create and Add an LWC to the Home Page

Give users global access to a custom feature from the Home page by creating and adding the custom LWC to the Home page.

REQUIRED EDITIONS

 **Note** We recommend that you add only one LSC app as an inline component on a home page. Adding multiple LSC apps to the same home page can cause the page renderer to work incorrectly.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

1. Create a mobile-ready custom LWC component. Add `IscMobileInline_` as the prefix for the API name of the component.
2. Ensure that the `Lightning__HomePage` target is defined in the configuration file of the custom LWC. Additionally, the `mobileHeight` property of type Integer must be added to `RecordPage targetConfig`.
3. Edit the home page from Lightning App Builder.
4. Drag the LWC component from the Components panel to the desired section of the home page.
5. For the `mobileHeight` field, enter the desired pixel size. This field determines the height of the LWC component in the mobile app.
6. Save and activate the page.

Sync Changes to the Mobile App

Sync your latest changes to the Life Sciences Cloud mobile app by generating metadata cache.

REQUIRED EDITIONS

For instructions on how to generate the metadata cache, see [Generate Metadata Cache](#).

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Global Search in the Life Sciences Cloud Mobile App

Quickly find information in the Life Sciences Cloud mobile app by using the Global Search feature to search across a predefined set of objects and fields within the iPad database. You can instantly access recently viewed records via Global Search.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

There's no configuration required for Global Search. It's available within the Life Sciences Cloud mobile app via the Search icon in the top navigation menu.

Global Search shows results based on the fields defined in the Search Layouts for each object. Clicking a record in the search results opens the record page, which helps you transition swiftly between different types of records.

Supported Objects

These objects are eligible for global search.

- Account + Healthcare Provider
- Inquiry
- Presentation
- Visit + Provider Visit

Supported Field Types

These field types are eligible for global search:

- Email

- Formula (with return type Text)
- Picklist (with i18n support for labels)
- Text.

Compare the Life Sciences Cloud Mobile App and Desktop Site

Here are some highlights of how the Life Sciences Cloud mobile app compares with the desktop site.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Account Management

Feature	Where	Life Sciences Cloud Mobile App	Desktop Site
Account Address field map	Contact Point Address records	The map isn't available. The field displays as plain text.	Available. The field includes a clickable address hyperlink or the Google Maps preview functionality.
Affiliations	Affiliated Account Summary modal	Both the Account tab and the Account Plans tab is available in the mobile.	Only the Account tab is available on the web.

Engagement Planning

Feature	Where	Life Sciences Cloud Mobile App	Desktop Site
Account Plan	Account Plan Stakeholder related list	Not Available	Available
Account Plan	Account Plan Stakeholder related list	Not Available	Available

Feature	Where	Life Sciences Cloud Mobile App	Desktop Site
Account Plan	Rich area text fields	Not Available. Rich area text fields are displayed in plain text format with HTML tags.	Available
Assign or Unassign Participant button	Account Plan Stakeholder related list dropdown	Available	Not Available. If configured, the Assign or Unassign Participant button is available on the highlights panel of the Account Plan Stakeholder record page.
Assign or Unassign Stakeholder button	Account Plan Participant related list columns dropdown	Available	Not Available. If configured, the Assign or Unassign Stakeholder button is available on the highlights panel of the Account Plan Participant record page.
Activity Plan Review tab	Home page	Not Available	Available. Admins must configure the tab.

Intelligent Content

Feature	Where	Life Sciences Cloud Mobile App	Desktop Site
Search, tag, and filter presentations	Content Library	Available	Available
Search by using conceptual terms and phrases while online with Data 360	Content Library	Available	Available
Mark presentations as favorites	Content Library	Available	Not Available
Create custom presentations	Content Library	Available	Not Available

Feature	Where	Life Sciences Cloud Mobile App	Desktop Site
Get recommended presentations	Content Library	Available	Not Available
Send presentations as links in emails	Content Library	Available	Available
Send presentations as email attachments	Content Library, Presentation Player	Available	Not Available
Use drawing tools	Presentation Player	Available	Not Available
Capture healthcare professional (HCP) feedback	Presentation Player	Available	Not Available
View presentations in preview and training mode	Presentation Player	Available	Available
View interactive presentations	Presentation Player	Available	Available
View presentations with simple dynamic content, such as variables	Presentation Player	Available	Available
View presentations with advanced dynamic presentation content, such as embedded surveys, querying records, and updating records	Presentation Player	Available	Not Available
Track presentation metrics	Presentation Player	Available	Not Available

Set Up Account Management Features

Manage your relationships with healthcare organizations (HCOs) and healthcare professionals (HCPs). Gain a comprehensive view of HCPs and HCOs, including their contact and social network details, specialties, affiliations, business licenses, ratings, as well as territory and product, and team-specific details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Account Address

Account Address helps manage addresses for diverse accounts like healthcare professionals (HCPs) and organizations (HCOs). Accurate address tracking and grouping are important for effective engagement, compliance, logistics, and data integrity. Accounts often have multiple addresses for different purposes (for example billing, shipping). Sales reps use this to tailor outreach, ensuring targeted deliveries and optimized efficiency.

Account Merge

Merge duplicate accounts to create a single, accurate view of customer data. Doing this brings consistency, and improves business decisions and customer satisfaction.

Account Search

Customize how users find and manage accounts by configuring various settings in the Admin Console. You can define search criteria and results and adjust the appearance and behavior of search options. You can manage this setup at both the org and profile levels, and further refine it by record type.

Account Summarization

Prepare for smoother and more efficient customer interactions with the highly customizable Account Summarization solution. Help users save the time that's lost while switching between tabs to find the latest and most relevant information about an account before any customer interaction. Provide contextual information about provider accounts in a territory, including key account details and updates made to the account and the account's related records since the user's last interaction with the account. Help users access account summaries on the web and on mobile devices, even when the user is offline.

Agentforce for Account Summarization

Optimize visit-planning measures and improve provider engagement by leveraging the power of AI-generated summarization. Get real-time, data-driven insights and contextual information about an account's latest updates, historical interactions, and related records, tailored for the current user's assigned territory. Use natural language utterances to interact with persona-based agents in the intuitive and conversational Agent window to easily get account summaries on the go, on the web and on the iPad.

Create an Account Team

Let team members view details of all the collaborators of an account across different territories. Choose which fields to display to the account team.

Activity Timeline

The Activity Timeline in Life Sciences Cloud gives you a 360-degree view of all activities for an account. It helps sales representatives, Key Account Managers (KAM), and Medical Science Liaisons (MSLs) visualize past and upcoming interactions with healthcare providers (HCPs) and healthcare organizations (HCOs). Activity Timeline helps you work more effectively by consolidating relevant account activities in one place, enabling better collaboration, informed decision-making, and smarter preengagement planning.

Affiliations

Use the Affiliations feature to understand and map the connections between Healthcare Professionals (HCPs) and Healthcare Organizations (HCOs). Mapping these relationships in the healthcare ecosystem provides insights that help you target your engagement and improve outcomes.

Bulk Update for Account-Related Records from Related Lists

Give your users an efficient way to update multiple account-related records in a single action from a

related list. To allow bulk updates from related lists, enable bulk edits for the user profile, create a custom button, and add the custom button to the account page layout.

Data Change Request

Use Data Change Request to manage how data changes are submitted, validated, and implemented across the Life Sciences Cloud for Customer Engagement app. Reduce manual corrections, prevent unapproved changes from being applied, and make sure that data consistency across both web and mobile apps.

Lists and Filters

Use Lists and Filters to organize and prioritize accounts and associated data in the Life Sciences Cloud for Customer Engagement app. Sales reps manage and refine large volumes of accounts into meaningful segments, helping them to focus on accounts that align with specific criteria based on business priorities, territory requirements, or engagement strategies.

Next Best Action

Set up Next Best Action to equip your sales reps with AI-driven weekly action plans. Help your sales reps achieve better time management and strategic engagement by recommending actions, such as visits, meetings, and emails for accounts, in the optimal sequence.

Next Best Customer

With the Next Best Customer scores, your field reps can identify the highest priority accounts for their next engagement. Next Best Customer leverages user-configured data, such as engagement history and territory alignment, to rank the accounts that are most likely to respond, so your reps can maximize the impact of each interaction.

Provider Cards for Life Sciences

Provider Cards in Life Sciences Cloud consolidates an account's information that's scattered across various objects and fields, such as the provider's locations and specialties and the user's scheduled visits, and displays it all in one place on the mobile. You can choose which records to show in the card. To create provider cards, you can use the predefined template or create them from scratch.

Ratings

Ratings help prioritize and organize customer accounts into meaningful segments. Sales reps can use ratings to focus on the right customers, align on relevant accounts, and adjust strategies for maximum efficiency.

Territory Management Batch Jobs

Territory management relies on dedicated batch jobs to handle large-scale data processing. These jobs automate the critical task of aligning accounts to specific territories, whether through explicit mappings loaded from external systems or based on geographical representations like zip/postal codes or bricks.

Account Address

Account Address helps manage addresses for diverse accounts like healthcare professionals (HCPs) and organizations (HCOs). Accurate address tracking and grouping are important for effective engagement, compliance, logistics, and data integrity. Accounts often have multiple addresses for different purposes (for example billing, shipping). Sales reps use this to tailor outreach, ensuring targeted deliveries and optimized efficiency.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Primary Address

The Primary Address is the single, main contact point for an account, which is used for all official correspondence and regulatory filings. An HCP's main practice location or an HCO's headquarters is their primary address.

An account can have only one primary address at a time to provide a clear and consistent point of contact. The Primary address is stored on the Contact Point Address object, where users can select the Is Primary checkbox to designate a record as primary. Understanding the Primary Address helps you know the established main point of contact for an account.

Preferred Address

A preferred address is a specific location that an account designates for particular interactions or communications within a territory. For instance, a healthcare professional (HCP) might prefer product samples sent to their home. Or, a healthcare organization (HCO) might specify a delivery address for certain supplies. With this distinction, life sciences companies can tailor their outreach. It ensures targeted information, product samples, or deliveries reach the most desired location. It also optimizes engagement and operational efficiency. The preferred address is a field on the Provider Account Territory Information object. It stores territory-based account addresses. Only the user within the territory can access the data. This helps keep the data personal to the user in that territory and the healthcare professional (HCP). Sales reps can access an account's preferred address in the Account Territory Field component on an account dashboard.

[Custom Formula Fields for Account Address](#)

Configure how addresses are shown across the Life Sciences Commercial app by creating custom formula fields. Use the custom fields for both Contact Point Addresses and Sample Management Addresses. For example, Sample Management Addresses appear when you create a sample order or sample transfer. You can apply this custom field usage across the entire organization or for individual profiles.

[Field-Level Security Configuration for Account Address](#)

For your users to create and manage account addresses, grant them access to the Parent field on the Contact Point Address object for all relevant profiles.

[Configure Addresses for an Account](#)

Configure how account addresses appear in the accounts list view by using Admin Console. This configuration defines the display format for Contact Point Addresses and Sample Management

Addresses, enhancing their visibility for users in critical areas such as the Ship To field on a Sample Order. Optimized address views aid sales representatives in quickly identifying important account locations for better engagement and streamlined workflows.

[Set Up Best Time for Account Address](#)

Customize the Best Time feature to help sales reps identify the optimal times for contacting healthcare providers (HCPs) at their addresses.

[Configure Provider Territory Fields Information on Account Pages](#)

Help sales reps access and manage their assigned provider accounts in the context of the territories that the providers operate in. Customize the provider's account page to show territory-specific information in the account's dashboard.

[Configure Search Before Creating for Contact Point Addresses](#)

Configure the account page layout to enable users to check for duplicate contact point addresses before they create a record. Users can search for duplicate addresses for business and person accounts.

[Batch Jobs for Account Address](#)

Account Address batch jobs are designed to process large volumes of records and help you overcome the governor limits faced by trigger handlers.

Custom Formula Fields for Account Address

Configure how addresses are shown across the Life Sciences Commercial app by creating custom formula fields. Use the custom fields for both Contact Point Addresses and Sample Management Addresses. For example, Sample Management Addresses appear when you create a sample order or sample transfer. You can apply this custom field usage across the entire organization or for individual profiles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

For the account's list view, you can configure how the address is listed for each account.

Object	task	related admin console setting
Contact Point Address	Create a custom formula field that returns a text data type to format the account address to be displayed in the Accounts List view.	Contact Point Address Formula Field
Address	Create a custom formula field	Samples Management Address

Object	task	related admin console setting
	that returns a text data type to format the sample management address to be displayed in the Accounts List view.	Formula Field

See Also

[Salesforce Help: Build a Formula Field](#)

Field-Level Security Configuration for Account Address

For your users to create and manage account addresses, grant them access to the Parent field on the Contact Point Address object for all relevant profiles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

On the Contact Point Address object, set the access level of the Parent field to Visible. Make this change for all relevant user profiles. See [Set Field-Level Security for a Field on All Profiles](#).

Configure Addresses for an Account

Configure how account addresses appear in the accounts list view by using Admin Console. This configuration defines the display format for Contact Point Addresses and Sample Management Addresses, enhancing their visibility for users in critical areas such as the Ship To field on a Sample Order. Optimized address views aid sales representatives in quickly identifying important account locations for better engagement and streamlined workflows.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access account address settings

Life Sciences Commercial Admin permission set

Before you begin, create the required custom formula fields. See [Custom Formula Fields for Account Address](#).

1. From App Launcher, find and select **Admin Console**.
2. Select **Address**, and then select **Account Address**.
3. Under the Account Address section, for the Contact Point Address Formula Field, select the custom formula field you created for Contact Point Address.
4. Under Sample Management Address, for the Address Formula Field, select the formula field you created on the Address object.
5. Save your changes.

Set Up Best Time for Account Address

Customize the Best Time feature to help sales reps identify the optimal times for contacting healthcare providers (HCPs) at their addresses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up best time	Life Sciences Commercial Admin permission set
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Configure Best Time Parameters

Set up Best Time parameters and manage how sales reps can view and edit their personal best times, the provider's best times, unavailable times, appointments, and set appointment duration.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Address Administration**, and then select **Best Time Setup**.
3. For Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
4. Under Availability Settings, configure these settings as needed.
 - Let users edit the unavailable time.
 - Let users edit the healthcare provider's best time.
 - Let users edit appointments.
 - Let users edit their best time.
 - Select an appointment duration.

5. Under General Settings, select whether you want to allow users to filter accounts by best time or not.
6. Save your changes.



Note If you apply availability settings at a profile level, repeat steps 4 and 5 for all the relevant profiles.

Enable Planner Settings

Configure Planner settings for the Best Times tab's calendar view.

1. From the App Launcher, find and select **Admin Console**.
2. Select the Planner Administration tile.
3. For First Day of Work Week, select a day.
4. For Work Day Start Time, select a start time for the workday.
5. For Hourly Slots Viewable on Calendar, select the number of slots you want to display on the calendar.
6. For Time Format, enter a time format for the calendar.
7. Save your changes.

Configure Provider Territory Fields Information on Account Pages

Help sales reps access and manage their assigned provider accounts in the context of the territories that the providers operate in. Customize the provider's account page to show territory-specific information in the account's dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit an account record page: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Accounts**.
2. Select the assigned account's record page.
3. Go to Setup, and then click **Edit Page**.
4. Select the account's Dashboard tab.



Note If the tab isn't available, create a tab by selecting **Add Tab** on the right pane. You can select an existing tab label from the provided options or create a custom label.

5. From the left panel, select **Components**. Drag the Account Territory Fields and Territory Switcher components on to the Account Dashboard.
6. Save your changes.

Configure Search Before Creating for Contact Point Addresses

Configure the account page layout to enable users to check for duplicate contact point addresses before they create a record. Users can search for duplicate addresses for business and person accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit a page layout:	Life Sciences Commercial Admin permission set
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1. From Setup, go to Object Manager.
2. To add the **New** button for a person account record page, find and select **Person Account**.
3. Click **Page Layouts**, and then select the page layout that's currently active for the profile.
4. Go to the Contact Point Addresses related list, and click the  icon.
5. To enable search before users create contact point addresses, in the Buttons section, configure the **New** button.
 - a. Deselect the **New** standard button.
 - b. From Available Buttons, move the **New** custom button to Selected Buttons.
6. Save your changes. To see the button, refresh the account page.
7. To configure the **New** button for business accounts, from Object Manager, find and select **Account**, and then follow the same procedure.

Batch Jobs for Account Address

Account Address batch jobs are designed to process large volumes of records and help you overcome the governor limits faced by trigger handlers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Account Address Primary Batch

This batch job marks a single primary address for an account and is an alternative to the Account Address

Primary Handler Trigger. If there are multiple addresses present, then the last modified address is marked as primary.

Provider Account Territory Information Job

This batch job creates provider account territory information records. It also calculates year-to-date visits, next visit, and last visit values for those records.

After the batch job creates provider account territory records, it automatically populates the preferred address field based on associated contact point address records.

- If an associated contact point address record is marked as primary, the job uses that address.
- If multiple contact point address records are marked as primary, the job uses the last modified record marked as primary.
- If no contact point address record is marked as primary, the job uses the last modified non-primary record.
- If no associated contact point address records exist, the preferred address field remains blank.

Account Merge

Merge duplicate accounts to create a single, accurate view of customer data. Doing this brings consistency, and improves business decisions and customer satisfaction.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

When you merge accounts, the account records are consolidated into one unified record. The account that remains is the Consolidated Account (also called the winner account), and the account that's removed is the Merged Account (also called the loser account). All associated child records, transactions, and other account references from the Merged Account are realigned to the Consolidated Account. With a quick action, you can merge two accounts from the account record page. To merge more than two accounts at once, use Connect APIs or batch jobs.

Configure Manual Account Merge

Let your users manually merge two accounts by adding the Account Merge quick action to account record pages. First, create the Account Merge action, and then add it to the Account page layout.

Merge Multiple Accounts by Using Connect APIs

The Account Merge feature provides Connect APIs to merge customer accounts in real time. You can integrate these APIs with any Salesforce capability or an external application to automate your merge processes.

Merge Multiple Accounts by Using a Batch Job

Use the Merge Account batch job to efficiently merge multiple accounts at once. This job retrieves all merge request records in Requested status and merges the corresponding accounts.

Merge Two Accounts Manually

Combine two duplicate account records from the account record page. Select a consolidated (winner) account, choose which field values to keep from each record, and merge them into a single, unified record.

Configure Manual Account Merge

Let your users manually merge two accounts by adding the Account Merge quick action to account record pages. First, create the Account Merge action, and then add it to the Account page layout.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create the quick action and edit page layouts Life Sciences Commercial Admin permission set

Create an Action

Set up the Account Merge quick action on the Account object by using a Lightning web component.

1. From Setup, go to Object Manager, find and select **Accounts**.
2. Click **Button, Links, and Actions**, and then click **New Action**.
3. Select the action type as **Lightning Component**.
4. Select `lsc4ce:CustomerMerge` as the Lightning web component.
5. Enter Account Merge as the label and, if needed, add a description.
6. Save your changes.

Add Account Merge Action to Account Page Layout

Give your users the option to merge accounts by adding the Account Merge action to the highlights panel on the Account layout and the Person Account page layout.

1. From Setup, go to Object Manager, find and select **Account**.
2. Select **Page Layout**, and then select **Account Layout**.
3. In the palette at the top, select **Mobile & Lightning Actions**.
4. If prompted, click the link to override the predefined actions.

5. From the Mobile & Lightning Actions category in the palette, drag the **Account Merge** action to the Salesforce Mobile and Lightning Experience Actions section.
6. Save your changes.
7. Repeat these steps to add the action to the Person Account Page layout.

Merge Multiple Accounts by Using Connect APIs

The Account Merge feature provides Connect APIs to merge customer accounts in real time. You can integrate these APIs with any Salesforce capability or an external application to automate your merge processes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Choose the API that best fits your integration's error-handling and data integrity requirements based on the details in the table.

Connect API	Transaction Type	Error Handling	Best For
Merge Customer Accounts	Atomic	The entire transaction is rolled back if a single merge fails. All or nothing.	Scenarios where every merge in a batch must succeed together to ensure data consistency.
Merge Customer Accounts With Status	Non-Atomic	Partial success is allowed. Successful merges are committed even if others in the batch fail.	Processing large batches where individual failures don't affect the entire operation.

Merge Customer Accounts API

This API performs an atomic transaction. When you submit multiple account merges in a single request, the entire operation succeeds or fails as a single unit. If even one merge request is unsuccessful, the entire transaction is rolled back, and no accounts are merged. This ensures complete data integrity.

To use this API, provide values for the winningId and losingId fields, along with other required fields of the Merge Request object.

Merge Customer Accounts with Status API

This API performs a non-atomic transaction to allow partial success. It processes each winning and losing account pair in a request independently. Successful merges are committed to the database, while any that fail don't stop the others from completing.

The API response returns the processing status for each individual merge attempt, allowing you to identify which specific merges succeeded or failed.

To identify accounts, you must provide values for one of these valid ID combinations for each merge request:

- winningId and losingId
- winningId and losingExternalId
- winningExternalId and losingId
- winningExternalId and losingExternalId

Merge Multiple Accounts by Using a Batch Job

Use the Merge Account batch job to efficiently merge multiple accounts at once. This job retrieves all merge request records in Requested status and merges the corresponding accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create merge requests and run the Merge Account batch job	Life Sciences Commercial Admin permission set
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Create a Merge Request

Each merge request record represents a mapping of consolidated and merged accounts. You can create multiple mappings by creating merge request records. These records are further used in batch job processing.

1. From App Launcher, find and select **Merge Requests**.
2. Click **New**.
3. Select **Account** as object type.
4. For status, select **Requested**.
5. Enter a value for Winning Record Identifier or Winning External Record Identifier.

6. Enter a value for Losing Record Identifier or Losing External Record Identifier.
7. To include field values from a merged account when the corresponding fields in the consolidated account are blank, select **Override Blank Values**.
8. Save your changes.

Run the Merge Account Batch Job

Run the Merge Accounts batch job to merge multiple accounts into one so that your users can access the correct accounts. You can run the job manually on an ad hoc basis, or you can schedule the job to run later or at a regular interval. For example, schedule the merge account job to run daily to make sure that new sales reps have access to the unique accounts.

1. From App Launcher, find and select **Admin Console**.
2. Select **Account Management**, and then select **Merge Account**.
3. Run the batch job or schedule it for later. See [Run Batch Jobs](#)

Merge Two Accounts Manually

Combine two duplicate account records from the account record page. Select a consolidated (winner) account, choose which field values to keep from each record, and merge them into a single, unified record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To merge accounts	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Accounts**.
2. Select the account record you want to keep as the consolidated account.
3. Under Quick Actions, select **Account Merge**.
4. In the Merge Account window, search for and select the duplicate account to merge.
5. If needed, select **Retain merged account field values when consolidated account field values are blank**, and click **Next**.
6. On the Select Fields to Retain window, select the field values that you want to see in the consolidated account, and click **Next**.
7. Click **Confirm**.

Account Search

Customize how users find and manage accounts by configuring various settings in the Admin Console. You can define search criteria and results and adjust the appearance and behavior of search options. You can manage this setup at both the org and profile levels, and further refine it by record type.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Locate and manage accounts efficiently with Account Search. Focus on strategic, high-value tasks by using an extensive search functionality with customizable search options and result layouts.

Account Search makes it easier for users to find accounts efficiently in the Salesforce org. Users can find accounts across the entire Salesforce ecosystem or even search external systems such as a master data management (MDM) system or IQVIA's OneKey database. Users can focus on the right accounts by downloading and aligning accounts to a specific territory.

Users begin their workflow with an internal Salesforce search by using keywords. The search checks for accounts not in their territory. If users don't find the account they're looking for, they have the option to search externally to identify potential accounts. Users can also use advanced search to further refine their search by using attributes. If the required account doesn't exist, the user confirms its absence before initiating the account creation process. This flow prevents duplicates, thus maintaining data integrity and reducing redundancy.

[Define Sharing Settings for Account Search](#)

Ensure the automatic update of searchable HCP data in the batch job runs successfully by configuring the Care Specialty object's sharing settings.

[Configure User-Specific Country Settings](#)

Narrow the account search scope by configuring the user-specific country settings. Define countries accessible by a user, and designate a country preferred by the user for specific interactions.

[Customize Account Search Preferences](#)

Customize the appearance and behavior of account search options available to users by configuring settings in the Admin Console. You can do this at the org and profile level.

[Configure External Search](#)

Customize the behavior of external search functionality for users. You can configure these settings at the org and user levels.

[Configure Advanced Search](#)

Configure the criteria for performing advanced account search and the search results based on the record type. You can apply these configurations at the org and profile level.

[Set up External Search by Using Built-In MuleSoft Integration](#)

Integrate Life Sciences Cloud with configured external data sources, such as an MDM or IQVIA's OneKey, to extend account searches beyond Salesforce. This integration helps sales reps find and add accounts that aren't yet available in Salesforce.

[Configure Search Before Account Creation](#)

Enable users to search for matching accounts before creating a new record in the standard Accounts tab. This prevents the creation of duplicate account records.

See Also

[Search for Accounts and Align Accounts with Your Territory](#)

[Refine Account Search Results by Using Advanced Search Criteria](#)

Define Sharing Settings for Account Search

Ensure the automatic update of searchable HCP data in the batch job runs successfully by configuring the Care Specialty object's sharing settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To define sharing settings for account search: Life Sciences Commercial Admin permission set

1. From Setup, in the Quick Find box, find and select **Sharing Settings**.
2. In the Organization-Wide Defaults section, click **Edit**.
3. For the Care Specialty object, set the default internal access to Public Read Only.
4. Save your changes.

Configure User-Specific Country Settings

Narrow the account search scope by configuring the user-specific country settings. Define countries accessible by a user, and designate a country preferred by the user for specific interactions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed

package.

USER PERMISSIONS NEEDED

To configure user-specific country settings: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **User Additional Info**.
2. Find and select the UAI record of a user.
3. To set the user's country preferences, click the  icon in the information section.
 - a. For Available Countries, select a country from Available and move them to Chosen.
 - b. For Preferred Country, select a country from the dropdown.
4. Save your changes.
If you don't find a record for a user, you can create a User Additional Info record. You can also upload these records in bulk by using [data loader](#).

Customize Account Search Preferences

Customize the appearance and behavior of account search options available to users by configuring settings in the Admin Console. You can do this at the org and profile level.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To customize account search preferences: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Account Management**, and then select **Account Search Preferences**.
3. Under the Search Outside Territory section, enable users to search outside their territories and show active accounts in the internal search results.
Users can manually align an affiliated account only after you've enabled the option to search for accounts outside their territory.
4. Configure country-based settings for external search.
 - To configure search across all countries, don't select country-based search.
 - To default search to user's available countries, select country-based search.
 - To provide users a dropdown with specific countries, select the country-based search and the country filter.
5. Select the record types available for filtering to include in a search outside the territory and move them to Selected Values.
6. Under the Advanced Search section, enable business license-based searching and limit the search

scope by a user's available countries.

7. If necessary, under the Additional Search Preferences section, further customize your search preferences.
 - a. Enable users to view accounts in a map view (LSC Mobile app only) and automatically align affiliated accounts after a primary account is aligned to a territory.
 - b. Select a default customer filter and an additional provider territory field for searching. The selected filter applies to account searches performed outside the Life Sciences Commercial Accounts tab.
 - c. To configure the record types of accounts available for filtering during search, select the required record types and move them to Selected Values.

Configure External Search

Customize the behavior of external search functionality for users. You can configure these settings at the org and user levels.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure external search:

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**. Then, select **Account Management**.
2. Select **External Search** and then select **Enable users to download out-of-contract accounts**.
3. Configure settings at the user level.
 - a. Select **External Search User Settings**.
 - b. Set the user's limit for downloading out-of-contract accounts for the org or for a particular user.
4. Configure settings at the org level.
 - a. Select **External Search Org Settings**.
 - b. Select an active external system for search from the dropdown.
If you don't select an option, users can't perform external search.
 - c. Specify the integration definition API to connect with the external system for external search.
 - d. Set the org's limit for downloading out-of-contract accounts.
If you exceed the org limit when you download out-of-contract accounts from an external system, all out-of-contract downloads are blocked for all users. If the org limit is available, the user limit is checked before downloading.

Configure Advanced Search

Configure the criteria for performing advanced account search and the search results based on the record type. You can apply these configurations at the org and profile level.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure advanced search:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Select **Search Before Create** and then select **Field Set Mapping**.
The field sets for the HCO and HCP record types are set by default.
3. To associate custom field sets based on your preferences, [create custom field sets](#) and select them for the required record type.
4. To customize the advanced search layout further, select **Search Before Create** on the Admin Console page and then select **General Settings**.
 - a. To show external search results and internal search results simultaneously, under General Settings customize the advanced search.
 - b. To customize the fields that appear in the business license search, its results, and the details for affiliations and specialties during account creation, select the required field sets.
 - c. If necessary, set the sorting criteria used to display contact point addresses in the search results.
 - d. To populate searchable fields on healthcare provider records by using the data from associated records, run the Update HCP Records with Searchable Data job from the Search Before Create Jobs section, or activate the Update Healthcare Provider with Searchable Data data processing engine (DPE) definition from Setup.

You can create data change requests while creating an account that requires approval.

See Also

[Data Change Request](#)

[Salesforce Help: Create and Edit Field Sets](#)

[Salesforce Help: Run Data Processing Engine Definitions](#)

Set up External Search by Using Built-In MuleSoft Integration

Integrate Life Sciences Cloud with configured external data sources, such as an MDM or IQVIA's OneKey, to extend account searches beyond Salesforce. This integration helps sales reps find and add accounts that aren't yet available in Salesforce.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Use prebuilt integration applications, including the Provider Services API and Onekey System API, which are deployed via MuleSoft Direct to facilitate interaction with external data sources.

To address end-to-end business needs, integrate Salesforce apps with external systems by using Integration Solutions with MuleSoft Direct.

To set up MuleSoft Direct, see [Integrate Solutions with Mulesoft Direct](#).

To set up integration for external search, see [Explore MuleSoft Direct Integration Apps](#).

Create an Integration Definition

Use integration definitions to quickly set up integrations with different external endpoints by using a low-code interface. Create integration definitions for Apex classes used to integrate with third-party systems.

Create an Integration Definition

Use integration definitions to quickly set up integrations with different external endpoints by using a low-code interface. Create integration definitions for Apex classes used to integrate with third-party systems.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create an integration definition: Customize Application

Before you create an integration definition, make sure your named credential is set up. This named credential is typically auto-created as part of the MuleSoft integration and Connected App setup. Find the named credential in the {MuleSoft Application Name}_provider-services-impl format.

1. From Setup, in the Quick Find box, enter *Integration Definitions*, and then select **Integration Definitions**.
2. Click **New**.

3. For Type, select **Apex Defined**.
4. For Name, enter the name of the integration definition.
The Developer Name is auto-populated.
5. For Apex Class, select **Isc4ce.ExternalSearchCalloutService**.
6. For Attribute Value, enter the API Name of your named credential.
7. Click **Save and Activate**.

Configure Search Before Account Creation

Enable users to search for matching accounts before creating a new record in the standard Accounts tab. This prevents the creation of duplicate account records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure search before account creation: Life Sciences Commercial Admin permission set

1. From Setup, go to Object Manager, and select **Account**.
2. Click **Buttons, Links, and Actions**.
3. Select **New** action from the list.
4. Click the icon, and select **Edit**.
5. For Lightning Experience Override, select **Lightning component**, and then select **SbcCreateAccount** component from the dropdown.
6. Save your changes.

Account Summarization

Prepare for smoother and more efficient customer interactions with the highly customizable Account Summarization solution. Help users save the time that's lost while switching between tabs to find the latest and most relevant information about an account before any customer interaction. Provide contextual information about provider accounts in a territory, including key account details and updates made to the account and the account's related records since the user's last interaction with the account. Help users access account summaries on the web and on mobile devices, even when the user is offline.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

Also, generate separate summaries for different profiles by configuring profile-specific graphs in the admin console. Customize and extend the Account Summarization solution to generate summaries of objects and records of your choice.

Permissions and Admin Settings for Account Summarization

Make sure your admins and users have the right permissions and licenses to access the Account Summarization solution. Enable the admin settings that grant access to Einstein Generative AI and Cross-Object Field History settings.

Account Summarization Data Setup

Account Summarization relies on data set up in your org. Review these prerequisites before setting up Account Summarization.

Account Summarization Workflow

Account Summarization helps sales reps stay informed and prepared for provider visits with agent-generated summaries of the latest changes that have taken place in account since the user's last interaction with the account. The agent-generated summaries are available on both on the web and in the mobile, and supports both online and offline viewing in the mobile.

Configure History Tracking for Account Summarization

Account Summarization informs sales reps of the latest changes in a provider account since their last interaction. Choose which fields to include in the information summary.

Create a Cross-Object Graph for Account Summarization

A cross-object graph represents a set of objects and the relationship between the objects. In Account Summarization, the Account object is the root node in the graph. The Account Summarization graph template references the objects related to the provider's account. You can configure graphs for different profiles by customizing the related objects and fields. You can also create a graph from scratch.

Assign a Cross-Object Graphs to an Org or Profile

Choose the cross-object graph that's relevant for performing account summaries, and configure the graph for the org or for a specific profile.

Account Summarization Customizations

Achieve more personalized solutions that cater to the unique needs of your organization by customizing each component of the Account Summarization capability.

Permissions and Admin Settings for Account Summarization

Make sure your admins and users have the right permissions and licenses to access the Account Summarization solution. Enable the admin settings that grant access to Einstein Generative AI and Cross-Object Field History settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

- Assign these permission sets to Account Summarization admins.
 - Health Cloud Starter
 - Life Sciences Commercial Admin
 - Prompt Template Manager
 - Access Life Sciences Customer Engagement Agentforce
- Assign these permission sets to users.
 - Health Cloud Starter
 - Life Sciences Field Sales Representative
 - Access Life Sciences Customer Engagement Agentforce
- These admin settings must be turned on in Life Sciences for Customer Engagement Setup.
 - Account Summarization
 - Territory-Based Derived Sharing
- To create prompts using Einstein Generative AI, turn on Einstein Setup.
- To create object relationship graphs that store historical data of associated records, turn on Cross-Object Field History.

Account Summarization Data Setup

Account Summarization relies on data set up in your org. Review these prerequisites before setting up Account Summarization.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

- Make sure you're assigned the Life Sciences Commercial Admin permission set.
- Configure [territory models and activate the models](#).
- [Assign users and accounts to territories](#).
- Set up data in the Account object and in these related objects.
 - Accreditation
 - Award
 - Party Publication
 - Healthcare Provider Specialty

- Provider Visit Request Sample
 - Contact Point Address
 - Provider Account Territory Info
 - Provider Affiliation
 - Provider Visit Product Detailing
 - Provider Visit Detail Product Message
 - Provider Activity Goal
 - Inquiry
 - Inquiry Question
- If you're adding other objects to the graph, make sure that you have access to the objects and set up the data.
 - Configure the Provider Summary Lightning App Builder component to enable history tracking for the fields that you want to include in the information summary.
 - To provide offline access to account summaries in the mobile app, create [the object metadata cache configuration](#) for the Provider Account Territory Summary object.

See Also

[Generate Metadata Cache](#)

[Set Up Sales Territories for Life Sciences Cloud](#)

[Track Object Field History](#)

Account Summarization Workflow

Account Summarization helps sales reps stay informed and prepared for provider visits with agent-generated summaries of the latest changes that have taken place in account since the user's last interaction with the account. The agent-generated summaries are available on both on the web and in the mobile, and supports both online and offline viewing in the mobile.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for Life Sciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

By default, when the user interacts with the account for the first time, the summary generated shows the account's key information and all the updates that have taken place in the record in the last 90 days.

 **Note** You can configure the period of time for which summary changes are captured by customizing the Generate Provider Account Territory Summary autolaunched flow.

The Account Summarization solution consists of flows, invocable actions, batch jobs, prompt templates, and cross-object graphs that all work together to summarize a provider account and its related records for the current user and the territory the account is part of.

The batch job and object meta data cache configurations help ensure that users have access to account summaries at all times. The batch job generates summaries at regular intervals, while the object meta data cache configurations sync the Provider Account Territory Summary records across the web and mobile devices, thereby enabling users to view the summaries even when they're offline.

Account Summarization Cross-Object Graph Template

Cross-object graphs represent a set of objects, and relationship between the objects, where the account-related information is stored. The graphs also contain information about the specific fields whose updates are fetched in the summarization flow.

Account Summarization cross-object graphs have the Account object as the root node. The records of the objects that are configured in the cross-object graph are sorted by the descending order of the last modified date.

You can create cross-object graphs with a predefined Account Summarization template that offer a complete view of the account and all its related objects. To get summaries of the latest changes in a record, you must enable history tracking for the fields configured in the template. To pass on relationship information to the Summarization flow, you must configure the graph as the org default or for specific profiles.

Run Account Summarization Batch Job Flow

The Run Account Summarization Batch Job schedule-triggered flow runs on a daily cadence and calls an action to run the Summarize Provider Accounts batch job. You can customize the date, time, and frequency of the flow according to your preference.

 **Note** The Run Account Summarization Batch Job is a template flow. As a prerequisite for generating summaries, you must save it as a new flow, and give it a label and API name.

Summarize Provider Accounts Batch Job

The Summarize Provider Accounts batch job helps summarize the active provider accounts in bulk by launching the Generate Provider Account Territory Summary flow.

Generate Provider Account Territory Summary Flow

The Generate Provider Account Territory Summary flow calls the Get Object Relationship Data invocable action and the Get Life Sciences Configuration Field Names and Values invocable action to fetch data from the cross-objects graphs configured for Account Summarization. The output from the invocable action is passed into the Summarize Provider Account Related Information prompt template to generate the account summary.

Summarize Provider Account Related Information Prompt

The Summarize Provider Account Related Information prompt template generates summaries of the objects and fields configured in the cross-object graph, and formats and categorizes the output in the following JSON format.

```
{"keyInfo": [{"sectionName": "", "sectionData": [{"data": ""}]}], "changeInfo": [{"sectionName": "", "sectionData": [{"data": ""}]}]}
```

The summary information is stored in the Provider Account Territory Summary records and displayed on the account's record page on the web, and in the account's profile on the iPad.

See Also

[View a Smart Summary of an Account](#)

Configure History Tracking for Account Summarization

Account Summarization informs sales reps of the latest changes in a provider account since their last interaction. Choose which fields to include in the information summary.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To enable history-tracking for fields: Life Science Commercial Admin permission set

 **Note** You can't enable history tracking for the formula, text area, and derived fields.

1. In the management settings for the object that you want to monitor, go to Fields & Relationships.
2. Click **Set History Tracking**.
3. Select fields for which you want to view both past and new values.
4. Select fields for which you want to monitor only the most recent value.
5. Save your changes.

Create a Cross-Object Graph for Account Summarization

A cross-object graph represents a set of objects and the relationship between the objects. In Account Summarization, the Account object is the root node in the graph. The Account Summarization graph

template references the objects related to the provider's account. You can configure graphs for different profiles by customizing the related objects and fields. You can also create a graph from scratch.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create cross-objects graph: Life Sciences Commercial Admin permission set

 **Note** Make sure you enable cross-objects field history.

1. From Setup, in the Quick Find box, enter and select **Cross-Object Field History Graphs**.
2. In Feature Settings, select **Cross-Object Field History Graphs**.
3. Click **New Graph**.
4. To use the predefined template, select **Account Summarization**, and then click **Create Graph**.
You can also create a graph from scratch.
5. In Graph Properties, enter a label for the graph.
The developer name is automatically populated. Make note of graph's developer name for related tasks, such as assigning the graph to the org or to a profile.
6. Customize the template as needed.
7. Save your changes.

Next, assign the graph to a profile or to the org.

See Also

[Create a Cross-Object Field History Graph](#)

Assign a Cross-Object Graphs to an Org or Profile

Choose the cross-object graph that's relevant for performing account summaries, and configure the graph for the org or for a specific profile.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To assign the cross-object graph to the org or to a **Life Science Commercial Admin** permission set profile:

1. From App Launcher, find and select **Admin Console**, and then select **Account Management**.
2. Select **Account Summarization Graph Settings**.
3. Choose whether the graph applies to the org or to a specific profile.
4. For Provider Account Related Relationship Graph, select the cross-object graph to assign.
5. Save your changes.

Account Summarization Customizations

Achieve more personalized solutions that cater to the unique needs of your organization by customizing each component of the Account Summarization capability.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

Here's a list of the various ways in which each of the Account Summarization components can be customized and configured to suit your unique needs.

- Create different relationship graphs for different profiles, or create custom graphs to capture additional information. You can add any object to the cross-object graph, but the object must have a direct or indirect lookup to the Account object. You can add a maximum of three levels of relationships in the graph, and up to five nodes at each level in the graph. By default, you create different graph definitions for different profiles, so that the summaries are tailor-made for each persona's unique business needs. For example, to create separate summaries for key account managers and medical science liaison, configure two different cross-object graphs and associate the relevant graph with the target profile. You can further customize the graph definitions to create cross-object graphs for specific purposes, such as a graph with a set of objects and fields that are configured only for summaries of key information without the details of the changed information.
- Create custom batch jobs to summarize account records for a subset of accounts, determined by condition logic. You can add filter conditions based on the account's standard fields, such as account type, or including custom fields representing the category, tier, or segment that the account belongs to. For example, you can choose to generate summaries in bulk only for premium accounts.
- The Account Summarization solution uses the flexible Generate Provider Account Territory Summary flow that can be customized to fetch data from multiple graphs and feed the data into multiple prompt templates, based on your requirements.
- Create a custom prompt template based on the default template, and add custom instructions to

categorize the data. Make sure you display the prompt output in the following format.

```
{"keyInfo": [{"sectionName": "", "sectionData": [{"data": ""}]}], "changeInfo": [{"sectionName": "", "sectionData": [{"data": ""}]}]}
```

The highly configurable solution can be customized in multiple ways using various components, such as with custom graphs, flows, batch jobs, prompts, invocable actions, and context definitions.

Customize How and When an Account Summary is Generated

Customize the Generate Provider Account Territory Summary flow to fetch records of objects other than the Account object. Choose when to capture summary changes.

Customize the Batch Job for Summarizing Provider Accounts

The Summarize Provider Accounts batch job summarizes the active provider accounts in bulk at regular intervals. Customize the batch size, criteria, and retry count and interval.

Customize When to Run a Summarization Batch Job

Choose when and how often to perform summarizations by customizing the Run Account Summarization Batch Job flow.

Create a Custom Prompt Template for Account Summarization

Configure a custom prompt template to modify the summarization guidelines, add input data, and update the categorization details. When you modify the objects and fields in the cross-object graph, you must update the prompt to summarize the details of the objects and fields you added.

Customize How and When an Account Summary is Generated

Customize the Generate Provider Account Territory Summary flow to fetch records of objects other than the Account object. Choose when to capture summary changes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To use Account Summarization:

Life Science Commercial Admin permission set

AND

Access Life Sciences Customer Engagement
Agentforce

To open, edit, or create a flow in Flow Builder:

Manage Flow

1. From Setup, in the Quick Find box, enter and select **Flows**.
2. Select **Generate Provider Account Territory Summary** to open Flow Builder.
3. To change the time period to generate summaries, edit the GetLastVisitStartTime element.
4. To fetch specific objects records in the associated cross-object graph, add a Get Records element and add the filter conditions.
5. To pass the data onto custom prompt templates, clone the GetRetrieveKeyInformationSummaryandChangedInformationSummary action, and associate it with the custom prompt template. Add customizations as needed.
6. In the top-right corner, click  and select **Save as New Version**.
7. Activate the flow.

See Also

[Get Started Automating a Business Task with a Flow](#)

Customize the Batch Job for Summarizing Provider Accounts

The Summarize Provider Accounts batch job summarizes the active provider accounts in bulk at regular intervals. Customize the batch size, criteria, and retry count and interval.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for Life Sciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To use Account Summarization:

Life Science Commercial Admin permission set

AND

Access Life Sciences Customer Engagement
Agentforce

To create a batch job:

System Administrator profile

 **Note** For large number of records, make sure that the batch job operates within the specified [execution limits](#).

1. From Setup, in the Quick Find box, enter and select **Batch Management**.
2. Click **New** and enter a name for the batch job.
The API name is automatically populated.
3. For the process type, select **Flow**.
4. For Execution Process, enter *prvd_sum_ProviderSummarization*.

5. For Group, enter *Provider Summarization*.
6. Specify the batch size, retry count, and retry interval.
7. For the flow input variable, select **accountId**.
8. For the object that you want to run the batch job for, select **Account**.
9. Add criteria to run the batch job.
10. Save your changes.
11. Activate the batch job.

Make sure you associate the custom batch job with the Run Account Summarization Batch Job schedule-triggered flow.

See Also

[Create a Batch Job](#)

[Execution Governors and Limits](#)

Customize When to Run a Summarization Batch Job

Choose when and how often to perform summarizations by customizing the Run Account Summarization Batch Job flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for Life Sciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To use Account Summarization:

Life Science Commercial Admin permission set

AND

Access Life Sciences Customer Engagement
Agentforce

To open, edit, or create a flow in Flow Builder:

Manage Flow

 **Note** The Run Account Summarization Batch Job is a template flow. Regardless of whether you use the default configuration or customize the flow, you must first save it as a new flow.

1. From Setup, in the Quick Find box, enter and select **Flows**.
2. Select the new flow you saved the template Run Account Summarization Batch Job flow as.
3. In Flow Builder, select the first element.
4. Enter the date and time to start the flow and the frequency.

5. Click  and select **Action**.
6. Select the batch job that you want to associate with the action.
7. For **userType**, select **All Users**.
8. Enter the territory ID used in the original action element.
9. Delete the default action element.
10. Save your changes.

Create a Custom Prompt Template for Account Summarization

Configure a custom prompt template to modify the summarization guidelines, add input data, and update the categorization details. When you modify the objects and fields in the cross-object graph, you must update the prompt to summarize the details of the objects and fields you added.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To use Account Summarization:	Life Science Commercial Admin permission set
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To use prompt templates:	Prompt Template User permission set
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AND

Access Life Sciences Customer Engagement Agentforce
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1. From Setup, in the Quick Find box, enter and select **Prompt Builder**.
2. Select **Summarize Provider Account Related Information**.
3. Click the dropdown next to Save As and select click **Save as a New Version**.
4. Make modifications to the prompt as per your preference.
Make sure that the output of the prompt template is in this format.

```
{"keyInfo": [{"sectionName": "", "sectionData": [{"data": ""}]}], "changeInfo": [{"sectionName": "", "sectionData": [{"data": ""}]}]}
```

5. In Template Settings, choose a model.
6. Activate the prompt.

To use a custom prompt, you must override the autolaunched Generate Provider Account Territory Summary flow and associate the custom prompt with a new version of the flow.

See Also

[Create a Prompt Template](#)

Agentforce for Account Summarization

Optimize visit-planning measures and improve provider engagement by leveraging the power of AI-generated summarization. Get real-time, data-driven insights and contextual information about an account's latest updates, historical interactions, and related records, tailored for the current user's assigned territory. Use natural language utterances to interact with persona-based agents in the intuitive and conversational Agent window to easily get account summaries on the go, on the web and on the iPad.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud for Customer Engagement Add-on license, Agentforce for Life Sciences Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder. Also available with Einstein GPT Trust and Genie Data Platform Starter add-on licenses.

The Agentforce for Account Summarization solution consists of a topic, two actions, and a flow.

- The Pre Visit Planning topic helps the agent summarize provider records in the context of the user's territory by using the Generate Healthcare Provider Summary action and the Identify Records By Name action to identify the provider record and the territory of the user.
- The Pre Visit Planning topic also calls the Generate Account Summary flow which generates the account summary.

To tailor the Agentforce for Account Summarization solution to your specific needs, [customize](#) the topic and [related actions](#).

[Set Up Agentforce for Account Summarization](#)

To start using the Agentforce features, make sure you enable Einstein Setup, visit-specific topics and actions, and account summarization. Also verify that you have records set up in your org.

[Create an Agent for Account Summarization](#)

Provide key account managers, field sales agents, and medical science liaisons with intelligent agents who summarize information from multiple data points and offer key insights that support planning initiatives before a visit. Use predefined agent templates to configure agents that cater to the specific needs of personas in Life Sciences.

[Account Summarization Flows for Agentforce](#)

The Generate Healthcare Provider Summary agent action invokes the Generate Account Summary flow, which determines if an existing summary record exists and if the existing summary record captures the latest updates in an account. If there are no summary records or if the account record has updates that haven't been summarized, the flow retrieves the latest summary details.

Provide Access to Your Pre Visit Planning Agent

To help users access the Pre Visit Planning agent, create a permission set with agent access enabled, and assign it to the user. Or, provide agent access to your user's current profile.

Set Up Agentforce for Account Summarization

To start using the Agentforce features, make sure you enable Einstein Setup, visit-specific topics and actions, and account summarization. Also verify that you have records set up in your org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud for Customer Engagement Add-on license, Agentforce for Life Sciences Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder. Also available with Einstein GPT Trust and Genie Data Platform Starter add-on licenses.

USER PERMISSIONS NEEDED

To enable Agentforce: [Customize Application](#)

To enable Account Summarization: Life Sciences Commercial Admin permission set

AND

Access Life Sciences Customer Engagement Agentforce

Prerequisites

- To use Einstein Generative AI, turn on [Einstein Setup](#).
 - Set up data to summarize accounts.

Licenses

- Assign the following permission sets to your users:
 - Health Cloud Starter
 - Life Sciences Core
 - Prompt Template User
 - Access Life Sciences Customer Engagement Agentforce
 - Assign licenses based on the standard user's persona:
 - Assign the Life Sciences Key Account Management permission set to key account managers.
 - Assign the Life Sciences Field Medical permission set to medical science liaisons.
 - Assign the Life Sciences Field Sales Representative permission set to sales representatives.

1. From Setup, in the Quick Find box, enter *Life Sciences for Customer Engagement Setup*, and

select it.

2. In the Enable Life Sciences Cloud for Customer Engagement Features section, turn on Territory-Based Derived Sharing admin settings.
3. In the Configure Account Summarization For Customer Engagement section, turn on the Account Summarization.
4. In the Set Up Agentforce for Visit Planning section, turn on Enable Visit Planning Actions and Topics.

Create an Agent for Account Summarization

Provide key account managers, field sales agents, and medical science liaisons with intelligent agents who summarize information from multiple data points and offer key insights that support planning initiatives before a visit. Use predefined agent templates to configure agents that cater to the specific needs of personas in Life Sciences.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud for Customer Engagement Add-on license, Agentforce for Life Sciences Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder. Also available with Einstein GPT Trust and Genie Data Platform Starter add-on licenses.

USER PERMISSIONS NEEDED

To build and manage Employee agents:

Manage AI Agents and Manage Agentforce Employee Agents

OR

Customize Application

The Key Account Management agent template, the Medical Science Liaison agent template, and the Life Sciences Field Sales agent template are all based on the Agentforce Employee Agent agent type. All three templates are all provisioned with the Pre Visit Planning topic, and are geared towards the following personas in Life Sciences.

- The Key Account Management agent template helps key account managers obtain a holistic view of a provider in the context of broader organizational goals and strategies.
- The Medical Science Liaison agent template helps medical science liaisons (MSLs) drive more focused discussions by helping them stay informed about the key opinion leader's profile, research interests, and clinical trials.
- The Life Sciences Field Sales agent template helps sales reps prepare for visits by helping them gain a deeper understanding of a provider's prescribing habits, past interactions, and key interests.

1. [Create an agent](#) based on the Key Account Management, Medical Science Liaison, or the Life Science

- Field Sales template.
2. Verify that Generate Healthcare Provider Summary action and the Identify Record by Name action were added to the agent, and click **Next**.
 3. Enter a name for the company the agent represents, and click **Next**.
 4. Click **Create**.
 5. Activate your agent.

Agent Topic: Pre Visit Planning

The Pre Visit Planning topic helps optimize customer interactions by providing informed, personalized insights and summaries. The topic processes the user's utterances to extract the provider's name and the user's territory, and calls the Identify Record By Name action and the Generate Healthcare Provider Summary action to generate account summaries.

Agent Topic: Pre Visit Planning

The Pre Visit Planning topic helps optimize customer interactions by providing informed, personalized insights and summaries. The topic processes the user's utterances to extract the provider's name and the user's territory, and calls the Identify Record By Name action and the Generate Healthcare Provider Summary action to generate account summaries.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud for Customer Engagement Add-on license, Agentforce for Life Sciences Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder. Also available with Einstein GPT Trust and Genie Data Platform Starter add-on licenses.

Topic Details

topic	description	Included Agent Actions
PreVisitPlanning	Help key account managers, medical science liaisons, and field sales reps prepare for visits by generating contextual summaries of provider records	Generate Healthcare Provider Summary* Identify Records By Name

*This action executes one or more prompt templates.

Examples of Utterances Classified to This Topic

- "Give me the summary for the current record."
- "Provide the Healthcare Provider summary for the current record."
- "What is the latest summary for the current record?"

Account Summarization Flows for Agentforce

The Generate Healthcare Provider Summary agent action invokes the Generate Account Summary flow, which determines if an existing summary record exists and if the existing summary record captures the latest updates in an account. If there are no summary records or if the account record has updates that haven't been summarized, the flow retrieves the latest summary details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud for Customer Engagement Add-on license, Agentforce for Life Sciences Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder. Also available with Einstein GPT Trust and Genie Data Platform Starter add-on licenses.

Flow	Definition
Generate Account Summary	Generates the summary of a healthcare professional's account by calling a flow that returns the latest summary of the account for users of a specified territory.

Provide Access to Your Pre Visit Planning Agent

To help users access the Pre Visit Planning agent, create a permission set with agent access enabled, and assign it to the user. Or, provide agent access to your user's current profile.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud for Customer Engagement Add-on license, Agentforce for Life Sciences Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder. Also available with Einstein GPT Trust and Genie Data Platform Starter add-on licenses.

USER PERMISSIONS NEEDED

To create permission sets: Manage Profiles and Permission Sets

To assign permission sets: Assign Permission Sets

Make sure you assign the Health Cloud Starter, Life Sciences Core, Prompt Template User, and the Access Life Sciences Customer Engagement Agentforce permission sets, along with the persona-specific permission set to your users.

1. From Setup, in the Quick Find box, enter *Profile* and then select it.
2. Click **New**, and enter a label and description for the permission set.
The API name is automatically populated.
Alternatively, select the profile assigned to the user.
3. Click **Enabled Agent Access**, and then click **Edit**.
4. Move your agent from the Available Agents list to Enabled Agents list.
5. Save your changes.
In case of new permission sets, assign the permission set to your users.

Create an Account Team

Let team members view details of all the collaborators of an account across different territories. Choose which fields to display to the account team.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create account teams:	Life Sciences Commercial Admin permission set
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To create an account team, you must have territories set up, and accounts and users assigned to each territory.

1. Choose the fields that you want to display.
 - a. From the object management settings for Users, select **Field Set**.
 - b. Click **New**, and enter the field label.
The field name is automatically populated. Note the field set's API name. You need to add it in the Lightning App Builder.
 - c. Enter where the field set is used.
 - d. Save your changes.
 - e. In the properties panel, move the fields that you want to display onto the editable part of the page.
 - f. Save your changes.
2. On the Account's record page, click  and select **Edit Page**.
3. In the Lightning App Builder, on the Additional Information tab, select the Account Team component.
4. In the Properties pane, for Field Set Name, enter the field set's API name.
5. Save your changes.
6. Activate the page, and assign it as the org default.

See Also

[Coordinating with Account Teams Across Territories](#)

Activity Timeline

The Activity Timeline in Life Sciences Cloud gives you a 360-degree view of all activities for an account. It helps sales representatives, Key Account Managers (KAM), and Medical Science Liaisons (MSLs) visualize past and upcoming interactions with healthcare providers (HCPs) and healthcare organizations (HCOs). Activity Timeline helps you work more effectively by consolidating relevant account activities in one place, enabling better collaboration, informed decision-making, and smarter preengagement planning.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Key Activity Types

Activity timeline supports a range of activity types, encompassing both standard and custom objects. Standard activities include Inquiries, Visits, Assessment Tasks, LifeScience Emails, and Survey Responses. The timeline can include any custom activities your organization tracks for HCPs and HCOs. It also integrates with intelligent content and tracks products discussed and samples dropped during visits.

Interacting with the Activity Timeline

- **Timeline View:** Activities appear in chronological order on the Activity Timeline tab of the account record page. Users can scroll through past and future interactions to view events. For convenience, users can click Today to quickly go to the current date.
- **Calendar View:** The calendar offers Month and Week views. The Month view uses large dots to show daily activity volume. Clicking a day takes you to the Week view, which provides detailed activity information and links to records. You can customize your view with the same criteria available on the timeline view.

[Understanding Activity Rollup for HCOs](#)

Activity rollup provides a unified view of activities for Healthcare Organizations (HCO). It improves user experience and increases efficiency by combining activities for an HCO and its affiliated Healthcare Professionals (HCPs) in a single place.

[Configure First Day of the Week in Your Calendar](#)

Align the calendar view with your team's workweek. Setting the correct start day in the Planner supports accurate planning and review of time-sensitive activities.

[Configure Email Settings for Activity Timeline](#)

Configure email settings to show scheduled and canceled email activities directly on an account page for your sales team. For the timeline to show email activity, schedule email jobs to update email status.

[Assign Permissions to View Activities on Timeline](#)

Give your users the permissions to view activities that are outside their territory.

[Configure Activity Timeline General Settings](#)

Customize how the Activity Timeline and Calendar views show activities, including default focus, territory and address filters, HCP activity rollup, and the visibility of detailed visit information.

[Configure Activity Timeline Visibility Settings](#)

Control which standard and custom activities appear in the Activity Timeline and Calendar views, and customize the fields for expanded activities to make relevant information easily accessible.

[Manage Timeline Display Text](#)

Customize the text that appears in the header and body of each activity on the Activity Timeline and Calendar views, and manage the options for filtering activities.

[Activity Timeline Objects Access on Mobile](#)

The Activity Timeline provides desktop and mobile app users with a comprehensive view of their activities. Configure key objects to make this feature available on the Life Sciences Cloud mobile app and give your mobile app users access activity-related data.

Understanding Activity Rollup for HCOs

Activity rollup provides a unified view of activities for Healthcare Organizations (HCO). It improves user experience and increases efficiency by combining activities for an HCO and its affiliated Healthcare Professionals (HCPs) in a single place.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

When configured, the Activity Timeline consolidates and shows activities from affiliated accounts directly within the HCO's activity timeline. On an HCO account, you can see activities from affiliated accounts, such as HCPs and child HCOs. This rollup offers a full picture of interactions at the institutional level.

-  **Note** Rollup functionality works in one direction. HCP activities appear on the HCO's Activity Timeline, but HCO activities don't appear on the HCP's timeline.

Impact on Activity Timeline and Calendar Views Filters

Implementing activity rollup introduces an Affiliations filter on the Activity Timeline and Calendar views. Use this filter to narrow down activities based on affiliated accounts.

The filter appears when provider affiliation records exist where a person account is affiliated with an HCO account. Admins can also configure the filter to only display activities from specific Affiliation Roles, such as Admitting or Staff. You can apply a maximum of five affiliation roles for filtering.

Customize Display of Rolled-Up Activities

To tell the difference between activities from various affiliated HCPs, you can customize the text for each activity. Salesforce admins set up custom labels that include details like the HCP's name or account ID within the activity's header or body.

The custom label for the rollup activity header takes precedence over the standard header text label when the rollup feature is active. With this feature, you can create specific text customizations for rolled-up activities. With the rollup feature's filters and customization options, you get a more efficient understanding of all engagements tied to an HCO.

 **Note** The Activity Timeline can generate an error if the Rolled-Up Activity Header Custom Label is missing.

Configure First Day of the Week in Your Calendar

Align the calendar view with your team's workweek. Setting the correct start day in the Planner supports accurate planning and review of time-sensitive activities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access planner settings

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Click **Planner**, and then click **Planner** again.
3. In Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
4. For First Day of the Week, enter any day you want to set, for example, Monday.
5. Save your changes.

Configure Email Settings for Activity Timeline

Configure email settings to show scheduled and canceled email activities directly on an account page for your sales team. For the timeline to show email activity, schedule email jobs to update email status.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access email settings	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Click **Email Settings** and then click **Settings**.
3. For **Apply Settings To**, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
4. Select **Schedule emails to send later**.
5. Save your changes.

Assign Permissions to View Activities on Timeline

Give your users the permissions to view activities that are outside their territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit object permissions	Life Sciences Commercial Admin permission set
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1. From Setup, in the Quick Find box, find and select **Profiles**.
2. Select the profile associated with your user, and click **Edit**.
3. Under Standard Object Permissions, provide View All Records access to Visits.
4. Save your changes.
5. Similarly, provide View All Records access to all these objects:
 - a. Product Disbursements
 - b. Provider Visits
 - c. Provider Visit Product Detailings

Configure Activity Timeline General Settings

Customize how the Activity Timeline and Calendar views show activities, including default focus, territory and address filters, HCP activity rollup, and the visibility of detailed visit information.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access activity timeline settings	Life Sciences Commercial Admin permission set
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Prerequisite:

- Set up the picklist values for roles in provider affiliation. See [Customize Picklist Values for Affiliations](#).
- To apply territory filters and view results, enable View All Records access on the Visit object to all your desired profiles.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Activity Timeline**, and then select **Activity Timeline General Settings**.
3. In Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
4. Under Default View Setting, select **Default to user's last submitted visit**.

 **Note** When selected, the activity timeline loads to the last completed visit, which is marked with a red line. If no visit has been submitted, the page defaults to show today's activities, and the summary box for the last submitted visit expands automatically.

5. Under Visit Activity Settings, configure these settings as needed.
 - Let users view products discussed during visit
 - Let users view samples discussed during visit
 - Show territory in visit header
 - Show intelligent content thumbnails
6. Under Territory Filters Settings, configure these settings as needed.
 - Use territory filter
 - Default territory filter to All
-  **Note** The territory filter doesn't apply to activities that aren't associated with a territory.
7. Under Address Filter Setting, select **Use address filter**.

 **Note** On activity timeline and calendar views, if All is selected in the address filter, all records are

shown regardless of whether they have an associated Contact Point Address record. If an address became inactive, the activities tied to the address continue to appear in the timeline.

8. Under Activity Rollup Setting, **select Roll up HCP activities to the HCO account.**
9. Under Affiliation Roles Setting, add the affiliation roles from available values to selected values.

 **Note** To use the affiliation filter on the timeline and calendar views, you must enable the Activity Rollup Setting and have provider affiliation records.
10. Save your changes.

Configure Activity Timeline Visibility Settings

Control which standard and custom activities appear in the Activity Timeline and Calendar views, and customize the fields for expanded activities to make relevant information easily accessible.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Configure Standard Activities for Activity Timeline](#)

Specify which standard activities, such as Visits and Inquiries, are shown in the Activity Timeline and Calendar views, and define the fields that appear when these activities are expanded.

[Custom Activity Setup Overview](#)

Review the tasks you must complete to set up custom activities on your timeline.

[Configure Custom Activities for the Activity Timeline](#)

Complete essential setup tasks, such as creating custom objects and defining required fields, before you configure custom activities on the activity timeline.

[Create Custom Activity Records by Using Apex Code](#)

Automatically generate records for your parent custom object. Each such record corresponds to a custom child object that represents an activity to track on the timeline.

[Add Custom Activities to the Activity Timeline](#)

Configure your custom activities, such as meetings or specific events, and show them in the Activity Timeline and Calendar views for accounts.

Configure Standard Activities for Activity Timeline

Specify which standard activities, such as Visits and Inquiries, are shown in the Activity Timeline and Calendar views, and define the fields that appear when these activities are expanded.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access activity timeline settings

Life Sciences Commercial Admin permission set

Activity timeline supports these standard activities: Visit, Survey Response, Assessment Task, Life Science Email, and Inquiry.

Before you configure standard activities settings, make sure that you create a field set for each of these objects. These field sets are used to show the field names in the expanded view of an activity timeline view for each standard activity. [Create and Edit Field Sets](#).

- Assessment Task
- Visit
- Life Science Email
- Inquiry
- Survey Response

1. From the App Launcher, find and select **Admin Console**.
 2. Select **Activity Timeline**, and then select **Activity Timeline Visibility Settings**.
 3. In Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
 4. Under Standard Activities Settings, select the field sets corresponding to each object present in Activity Objects list.
-  **Note** The timeline shows a maximum of 6 fields from the selected field set. If you don't select a field set for an object, the expanded view shows only the Name field.
5. Deselect Active, if you don't want to include activities related to the selected object.
 6. Save your changes.

Custom Activity Setup Overview

Review the tasks you must complete to set up custom activities on your timeline.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Start by configuring a custom object that serves as the parent or the container for child custom objects that represent the individual activities that you want to show on the timeline.

Then, configure the fields of the container object. Make sure the labels and field names of the fields are exactly as follows.

Field Label	Field Name	Data Type	Description
Account	Account__c	Lookup (Account)	Represents the account that's related to the activity.
Entity Id	Entity_Id__c	Text	Represents the ID of the record to track on the timeline.
Entity Type	Entity_Type__c	Picklist	Represents the list of standard or custom objects to track.
Entity Subtype	Entity_Subtype__c	Text	Represents additional grouping of an object by criteria, such as object type or record type name.
Event Data	Event_Data__c	Long Text Area	Represents data related to the event in JSON format.
Event Date Time	Event_Date_Time__c	Date/Time	Represents the date and time of the event's occurrence.
Event Title	Event_Title__c	Text	Represents data from related records, and is used as a criteria for adding dynamic filters to account activities.
Hide From Activity History	Hide_From_Activity_History__c	Checkbox	Represents whether a record must be excluded from the account's activity.

Field Label	Field Name	Data Type	Description
			history.
Title	Title__c	Text	Represents the title of the event.
Subtitle	Subtitle__c	Text	Represents a subtitle for the event.

Lastly, create another custom object to represent the individual custom activities, such as in-person meeting.

Instead of manually setting up records, you can also [use Apex code to generate records](#) of the custom container object that correspond to each custom object.

Configure Custom Activities for the Activity Timeline

Complete essential setup tasks, such as creating custom objects and defining required fields, before you configure custom activities on the activity timeline.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure the visibility settings for the activity timeline: Life Sciences Commercial Admin permission set

 **Note** You must create only one custom object to represent the container for all individual custom activities.

1. [Create a custom object](#) to represent the container for all custom activities. For example, create a custom object called Account Activity. Enter *Account Activity* as the label of the object. After you save the object, confirm that *Account_Activity__c* is the final object name.
2. Create custom fields to represent data in the container topics. First, create a lookup to the Account object.
For more information on each of the fields, see [Custom Activity Setup Overview](#)
 - a. From the object management settings for the custom container object, select **Fields & Relationships**, and click **New**.
 - b. For Data Type, select **Lookup Relationship**, and click **Next**.
 - c. For Related To, select **Account**, and click **Next**.

- d. For Field Label, enter *Account*.
 - e. This action automatically adds *Account* as the field name. After you save the field, confirm that the final field name is *Account__c*.
 - f. Select **Required** and select **Delete this record also**.
 - g. Select the profiles that can access the custom field.
 - h. Click **Next**, **Next**, and **Save & New**.
3. Create text fields for Entity ID, Entity Subtype, Event Title, Title, and Subtitle.
 - a. For Data Type, select **Text**, and click **Next**.
 - b. For Field Label, enter *Entity ID*.
 - c. This action automatically adds *Entity_Id* as the field name. After you save the field, confirm that the final field name is *Entity_Id__c*.
 - d. For Length, enter *255*.
 - e. Select **External ID**.
 - f. Select the profiles that can access the custom field.
 - g. Click **Next**, **Next**, and **Save & New**.
 - h. Similarly, create text fields for Entity Subtype, Event Title, Title, and Subtitle. After you save the fields, confirm that the final field names are *Entity_Subtype__c*, *Event_Title__c*, *Title__c*, and *Subtitle__c*.
 4. Represent the entity type by creating a picklist type field. Add the names of the objects that you want to show on the timeline as the picklist values.
 - a. For Data Type, select **Picklist**, and click **Next**.
 - b. For Field Label, enter *Entity Type*.
 - c. This action automatically adds *Entity_Type* as the field name. After you save the field, confirm that the final field name is *Entity_Type__c*.
 - d. Select **Enter values, with each value separated by a new line**, and enter picklist values of your choice.
 - e. Select the profiles that can access the custom field.
 - f. Click **Next**, **Next**, and **Save & New**.
 5. Represent the event data by creating a long area text type field.
 - a. For Data Type, select **Text (Long Area)**, and click **Next**.
 - b. For Field Label, enter *Event Data*.
 - c. This action automatically adds *Entity_Data* as the field name. After you save the field, confirm that the final field name is *Entity_Data__c*.
 - d. For Length, enter *131,072*.
 - e. For Visible Lines, enter *10*.
 - f. Select the profiles that can access the custom field.
 - g. Click **Next**, **Next**, and **Save & New**.
 6. Represent the event date and time by creating a date/time type field.
 - a. For Data Type, select **Date/Time**, and click **Next**.
 - b. For Field Label, enter *Event Date Time*.
 - c. This action automatically adds *Event_Date_Time* as the field name. After you save the field, confirm that the final field name is *Event_Date_Time__c*.
 - d. Select **Required**.
 - e. Select the profiles that can access the custom field.

- f. Click **Next, Next, and Save & New.**
7. Provide users with the option to hide records from the activity history with a checkbox type field
 - a. For Data Type, select **Checkbox**, and click **Next**.
 - b. For Field Label, enter *Hide From Activity History*.
 - c. This action automatically adds *Hide From Activity History* as the field name. After you save the field, confirm that the final field name is *Hide From Activity History__c*.
 - d. For Default Value, select *Unchecked*.
 - e. Select the profiles that can access the custom field.
 - f. Click **Next, Next, and Save**.
8. [Create a custom object](#) to represent each custom activity. The label and the record details appear on the timeline.
For example, create a custom object to represent in-person meetings.

Create Custom Activity Records by Using Apex Code

Automatically generate records for your parent custom object. Each such record corresponds to a custom child object that represents an activity to track on the timeline.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure activity timeline visibility settings: Life Sciences Commercial Admin permission set

Use the following steps as an example to create records for the parent custom object on insert, update, and delete actions, as applicable. Wherever needed, replace *Custom_Activity__c* with the API name of your custom child object. For example, if you create a custom object to represent in-person meetings, use the *In_Person_Meetings* object name to replace *Custom_Activity__c*, wherever applicable.

1. Create a trigger service apex class to generate records for the parent custom object that each corresponds to the child custom objects.
 - a. From Setup, select **Developer Console**.
 - b. Click **File | New | Apex Class**.
 - c. Enter *CustomActivityTriggerService* as the name.
 - d. In the *CustomActivityTriggerService.aptx* file, enter the following sample code. Customize the code as needed.

```
public class CustomActivityTriggerService {  
    public static void writeAccountActivityRecord(List<Custom_Activity__c> inc
```

```

omeRecords) {
    List<Account_Activity__c> eventRecords = new List<Account_Activity__c>();
    for (Custom_Activity__c objRecord : incomeRecords) {
        eventRecords.add(new Account_Activity__c(
            Account__c = objRecord.Account__c,
            Event_Date_Time__c = Datetime.now(), // value should be in GMT
            Title__c = 'any text you want to use as a Title',
            Subtitle__c = 'another text you want to use as Subtitle',
            Entity_Id__c = objRecord.Id,
            Entity_Type__c = SObjectType.Custom_Activity__c.name,
            Entity_Subtype__c = 'any value that is used to classify ObjectA records, e.g. this can be a record type name',
            Event_Data__c = JSON.serialize(new ObjectEventData(objRecord))
        ));
    }
    insert eventRecords;
}

private class ObjectEventData {
    public List<FieldDTO> fields;
    public ObjectEventData(Custom_Activity__c record) {
        fields = new List<FieldDTO>();
        fields.add(new FieldDTO(SObjectType.Custom_Activity__c.fields.Status__c.name, String.valueOf(record.Status__c)));
        // fields.add(new FieldDTO(SObjectType.Custom_Activity__c.fields.FieldB__c.name, String.valueOf(record.FieldB__c)));
        // fields.add(new FieldDTO(SObjectType.Custom_Activity__c.fields.FieldC__c.name, String.valueOf(record.FieldC__c), record.FieldC__r.Name));
        //example for date time field
        fields.add(new FieldDTO(SObjectType.Custom_Activity__c.fields.Start_Time__c.name, record.Start_Time__c.formatGMT('yyyy-MM-dd\''T\''HH:mm:ss.SSS\''Z\''')));
    }
}
private class FieldDTO {
    public String fieldAPIName;
    public String fieldValue;
    public String relatedRecordName;
    public FieldDTO(String fieldAPIName, String fieldValue) {
        this.fieldAPIName = fieldAPIName;
    }
}

```

```
        this.fieldValue = fieldValue;
    }

    public FieldDTO(String fieldAPIName, String fieldValue, String relatedRecordName) {
        this(fieldAPIName, fieldValue);
        this.relatedRecordName = relatedRecordName;
    }

}
```

2. Create a trigger for the apex class.

This configuration ensures that after you create a record for a custom activity, such as an in-person meeting, a related parent custom activity record is created.

- a. From Setup, select **Developer Console**.
- b. Click **File | New | Apex Trigger |**.
- c. Enter *CustomActivityTrigger* as the name.
- d. Select **Custom_Activity__c** as the sObject.
- e. In the CustomActivityTrigger.aptx file, enter the following sample code. Customize the code as needed.

```
trigger CustomActivityTrigger on Custom_Activity__c (after insert, after update) {
    //this check can be skipped if trigger is subscribed only on after insert
    //and after update events and service class method can be called immediately
    if (Trigger.isAfter && (Trigger.isInsert || Trigger.isUpdate)) {
        CustomActivityTriggerService.writeAccountActivityRecord(Trigger.new);
    }
}
```

Add Custom Activities to the Activity Timeline

Configure your custom activities, such as meetings or specific events, and show them in the Activity Timeline and Calendar views for accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access activity timeline settings

Life Sciences Commercial Admin permission set

Complete the steps in [Prerequisites to Configure Custom Activities](#).

1. From the App Launcher, find and select **Admin Console**.
2. Select **Activity Timeline**, and then select **Activity Timeline Visibility Settings**.
3. In Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
4. Under Custom Activity Setting, for activity object, select **Account Activity**.
5. Deselect **Active** if you don't want to include this custom activity on the timeline.
6. Save your changes.

After you've set up custom activities, verify if they are listed under the Type filter in the Activity Timeline and Calendar Views.

Manage Timeline Display Text

Customize the text that appears in the header and body of each activity on the Activity Timeline and Calendar views, and manage the options for filtering activities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Custom Labels for Activity Timeline](#)

Activity Timeline uses custom labels to specify the text that appears in the headers, prefixes, and links of activities displayed on the Activity Timeline and Calendar views.

[Configure Activity Timeline Display Text](#)

Customize how activity headers and bodies appear on the Activity Timeline and Calendar views by mapping custom labels and fields to specific activity types and statuses.

[How Dynamic Text in Custom Labels Works](#)

Use a combination of custom labels, activity settings, and specific field values to control the dynamic text displayed in activity headers and bodies on the Activity Timeline and Calendar views. Build logic that determines what information populates the placeholder fields in your custom labels for the Activity Timeline.

Custom Labels for Activity Timeline

Activity Timeline uses custom labels to specify the text that appears in the headers, prefixes, and links of activities displayed on the Activity Timeline and Calendar views.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Before you configure the display text, create the custom labels you plan to use. Here are the labels that correspond to the settings in Admin Console.

task	related admin console setting
<p>Create a custom label to include the text for the header of each activity.</p> <p>For example, The visit was planned.</p>	<p>Activity Header Custom Label</p> 
<p>Create a custom label to include the prefix text for the body of the activity.</p> <p>For example, Don't forget to.</p>	<p>Prefix Text for Body</p> 
<p>Create a custom label to include the link text for the body. This text generates a clickable URL link to the corresponding activity record.</p> <p>For example, Go To Visit.</p>	<p>Link Text for Body</p> 
<p>Create a custom label to include the text for the header of each rolled-up activity.</p>	<p>Rolled-Up Activity Header Custom Label</p>

Configure Activity Timeline Display Text

Customize how activity headers and bodies appear on the Activity Timeline and Calendar views by mapping custom labels and fields to specific activity types and statuses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access activity timeline settings	Life Sciences Commercial Admin permission set
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Before you configure the display text, complete the steps in [Custom Labels for Activity Timeline](#).

1. From the App Launcher, find and select **Admin Console**.
2. Select **Activity Timeline**, and then select **Activity Timeline Display Text Settings**.
3. In Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
4. Click **New**.
5. Enter a name.
6. In Activity Header Custom Label, enter the name of your activity header custom label.
7. In Prefix Text for Body, enter the name of your prefix text for body custom label.
8. In Activity Type Object, enter the name of the object to customize.
9. In Assessment Task Type to Exclude, enter the value of the task type field on the Assessment Task object to exclude the assessment task activities.
10. In Field to Display in Header, enter the field API name of the selected object.
This field is used in the parameters of the custom label created for the activity header.
11. In Link Text for Body, enter the name of your link text for body custom label .
12. In Rolled-Up Activity Header Custom Label, enter the name of your rolled-up activity header custom label.

 **Note** In the case of rolled-up activities, Rolled-Up Activity Header Custom Label takes precedence over Activity Header Custom Label.
13. In Status, enter the API names of the Status field values for the selected object to filter activities based on their status.

 **Note** Use the API names of the Status field values for the Visit, Inquiry, and Assessment Task objects. For Life Sciences Email object, use the API value of Email Status field.
14. In Body Text Field, enter the field API name to be shown in the activity body.

After you complete these configurations, create a metadata cache to complete the setup.

How Dynamic Text in Custom Labels Works

Use a combination of custom labels, activity settings, and specific field values to control the dynamic text displayed in activity headers and bodies on the Activity Timeline and Calendar views. Build logic that determines what information populates the placeholder fields in your custom labels for the Activity Timeline.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

To customize the display text, understand how the activity rollup setting affects your labels. This section explains the logic for how placeholder values are replaced in your custom labels.

How Activity Rollup Affects Placeholders

The number of available placeholders in a custom label depends on whether you roll up Healthcare Professional (HCP) activities to the Healthcare Organization (HCO) account.

- When activity rollup is enabled: Custom labels can have up to two placeholders ({0} and {1}).
- When activity rollup is disabled: Custom labels for Inquiry, Life Science Email, Assessment Task, and Survey Response activities can have only one placeholder ({0}).

How Placeholder Fields Are Populated

The custom label used, and the value that replaces its first parameter, varies based on the activity type and specific conditions. Take a look at some such scenarios.

Activity Type	Condition	custom label used	first parameter is replaced with
Inquiry, Life Science Email, and Assessment Task	Roll up HCP activities to the HCO account is enabled.	Rolled-Up Activity Header	The value of this field: Field to Display in Header.
	Roll up HCP activities to the HCO account is disabled.	Activity Header	
Survey Response	Roll up HCP activities to the HCO account is enabled.		
	Roll up HCP activities to the HCO account is disabled.		
Visit	Show territory setting and Roll up HCP activities to the HCO		The name of the user who created the visit.

Activity Type	Condition	custom label used	first parameter is replaced with
	account are both enabled.		
	Show territory setting is enabled but Roll up HCP activities to the HCO account is disabled.		
	Show territory setting and Roll up HCP activities to the HCO account are both disabled.		The value of this field: Field to Display in Header.
	Show territory setting is disabled but Roll up HCP activities to the HCO account is enabled.	Rolled-Up Activity Header	

The first parameter of custom labels for Link Text for Body is replaced by the Body Text Field value. If there's no value for Link Text for Body field, the Body Text Field value is used as the link text. For Life Science Email, the Link Text for Body is always replaced by the Body Text Field.

Here's which custom label applies and what value replaces its second parameter based on the activity and certain conditions.

Activity Type	Condition	custom label used	second parameter is replaced with
Inquiry, and Assessment Task	NA	Rolled-Up Activity Header	The account name.
Visit	If show territory is enabled.	Activity Header	The territory associated with the visit.
	If show territory is disabled.		The account name.
Life Science Email	If the Email Status is Opened or Closed.		
	Any other Email Status.		The sender of the email.

 **Note** If Roll up HCP activities to the HCO account is enabled, and Field to Display in Header is

empty, the second parameter's value is displayed as the first parameter, and the second parameter becomes null. If a visit has a parent visit associated with it, the visit link on the activity timeline redirects you to the parent visit record.

Activity Timeline Objects Access on Mobile

The Activity Timeline provides desktop and mobile app users with a comprehensive view of their activities. Configure key objects to make this feature available on the Life Sciences Cloud mobile app and give your mobile app users access activity-related data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

For the timeline to function on mobile, create an [object metadata cache configuration](#) with the type set to Data for key objects. These objects support the mobile Activity Timeline:

- Visit
- LifeScience Email
- Inquiry
- Survey Response
- Assessment Task

These objects are required to create the metadata cache to make other features work in the activity timeline, but these objects don't show up as activities on the timeline:

- Provider Visit
- Provider Visit Product Detailings
- Product Disbursements
- Presentations

After completing database schema configuration, [generate metadata cache](#) for all supported objects.

Affiliations

Use the Affiliations feature to understand and map the connections between Healthcare Professionals (HCPs) and Healthcare Organizations (HCOs). Mapping these relationships in the healthcare ecosystem provides insights that help you target your engagement and improve outcomes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Hard affiliations connect a person to a specific location or organization, like an HCP who is affiliated with a hospital. Soft affiliations are based on influence rather than a physical location, such as HCPs who significantly influence other doctors through their research or network.

You can choose from multiple dynamic views accessible from the Affiliations tab on an account record page: List View, Hierarchy View, and Network View.

To identify crucial insights, tailor the relationship visualization by using the advanced filtering and search capabilities.

Views for Managing Affiliations

Life Sciences Cloud provides distinct views for affiliations, each designed to help you visualize account relationships for different purposes. The Table View presents data in a structured list, the Hierarchy View shows relationships in an org-chart format for mobile users, and the Network View visualizes connections as a graph. Understanding each view helps you choose the one that best fits your workflow.

Territory Alignment for Affiliated Accounts

A user's territory determines which accounts they can view and manage. With territory alignment for affiliations, users can manually align an affiliated account from outside their territory to their current one.

Create Field Sets and Custom Fields for Affiliation Settings

Create the necessary field sets and custom fields on affiliation objects that are required to configure affiliation settings in the Admin Console.

Field-Level Security for Affiliations

To manage affiliations, users need access to certain fields that aren't available to them by default.

Picklist Values Customization for Affiliations

To make it easier for your sales rep to select the appropriate options, customize the picklist values for fields in the Provider Affiliation object.

Customize How Affiliations Are Displayed

Customize the appearance and behavior of account affiliations in the list, network, and hierarchy views by configuring Affiliation settings. Use these settings to also manage data relationships, enforce data validation rules, and streamline address management.

Map Direct and Reverse Affiliation Roles

Simplify relationship management by automatically creating a reverse role for every direct role you define. For instance, when you map a healthcare professional (HCP) as an employee of a healthcare organization (HCO), Life Sciences Cloud automatically creates the reverse relationship, designating the HCO as the HCP's Employer. This automation eliminates manual inverse entries and ensures

consistent, efficient relationship management.

Streamline Address Management

Keep practitioner addresses up-to-date by automatically adding the primary address from their affiliated organization whenever a hard affiliation is created. This makes sure that the practitioner's workplace address is always listed, without manual updates.

Affiliated Account Summary

The Affiliated Account Summary modal provides a customizable view that surfaces essential information about affiliated accounts. Users get immediate access to key details without having to navigate away from their current screen. The feature also includes a quick action button to help users create a visit directly from the summary.

Manage Affiliation Alignment Rules

Define affiliation alignment rules to automatically align affiliated accounts to specific territories. Create rules based on criteria such as account type, affiliation role, and specialty to ensure accounts are assigned correctly.

Batch Jobs for Affiliations

Affiliation batch jobs efficiently process large volumes of records at once by bypassing the governor limits faced by trigger handlers. These batch jobs automate tasks such as setting affiliation types, creating reciprocal affiliations, and establishing primary affiliations between accounts and parent organizations.

Views for Managing Affiliations

Life Sciences Cloud provides distinct views for affiliations, each designed to help you visualize account relationships for different purposes. The Table View presents data in a structured list, the Hierarchy View shows relationships in an org-chart format for mobile users, and the Network View visualizes connections as a graph. Understanding each view helps you choose the one that best fits your workflow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Affiliations Table View

The Affiliations Table View presents account relationships in a structured table format. This view is also called the list or grid view. This view lists all active affiliations with a start date that falls within the effective start and end dates of the Provider Affiliation. Configure columns to show the key details for each affiliation. Users can use a search box to filter accounts by name, and the view includes out-of-the-box filters such as Strength, Healthcare Professionals (HCPs), Healthcare Organizations (HCOs), and Territories. The table view shows accounts both within and outside the user's territory. Clicking an

affiliated account in the table view opens a profile panel that displays details about the account. Create new affiliations and update existing ones directly within the view.



Note The affiliations table view is available on both web and mobile.

Affiliations Hierarchy View

The Hierarchy view gives mobile users an org chart style view of affiliations based between HCPs and HCOs. This view shows only an account's Hard Affiliations. It presents these relationships in a structured hierarchy that can be viewed for accounts within the current territory or outside it. If an account has multiple hard affiliations, the view will display separate tiles for each. Filtering options available in the Hierarchy view include Record Type, Role, Show Inactive, and Show Outside Territory. Unlike the List and Network views, the Hierarchy view doesn't support configurable filters. Show Inactive filter depends on the Effective Start and End Dates of the Provider Affiliation. Tapping an account name within the Hierarchy opens the Account Summary for that account.



Note The affiliations hierarchy view is available only on mobile.

Affiliations Network View

The Network View visualizes affiliations as a graph. In the graph, lines (or connectors) link account nodes to represent the affiliations. You must enable this view in the Admin Console. The appearance of the connectors is configurable. This view shows Hard or Soft types of affiliations. Both Hard and Soft affiliations are displayed in the view. The Network View includes configurable filters such as Record Type and Role. Show Inactive filter depends on the Effective Start and End Dates of the Provider Affiliation. Opening an account node in the network diagram expands the view to show its related affiliations. Use the network diagram to view affiliations. To edit an affiliation, use the Table View.

Depending on the affiliation's direction, the graph connecting accounts shows either a one-way or two-way arrow. A one-way arrow indicates a unidirectional affiliation, while a two-way arrow represents a bidirectional affiliation.



Note The affiliations network view is available on both web and mobile.

Territory Alignment for Affiliated Accounts

A user's territory determines which accounts they can view and manage. With territory alignment for affiliations, users can manually align an affiliated account from outside their territory to their current one.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

To enable this functionality, select **Enable users to search for accounts outside the user's territory** in Account Search Preferences of Account Management. See [Customize Account Search Preferences](#).

From the Salesforce mobile app's Affiliations view, an account outside a user's current territory is identifiable by the absence of an edit action next to its name. Tapping this account record shows a window with an Align option. Selecting this option aligns the affiliated account with the user's current territory.

Create Field Sets and Custom Fields for Affiliation Settings

Create the necessary field sets and custom fields on affiliation objects that are required to configure affiliation settings in the Admin Console.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create custom fields and field sets: Life Sciences Commercial Admin permission set

Object	task	related admin console setting
Provider Affiliation	Create a field set to uniquely identify provider affiliation records.	Provider Affiliation Unique Field Set
	Create a field set to show a list of columns in the table view of affiliations.	Provider Affiliation Columns Field Set
	Create a custom or formula field that stores value in hexadecimal format to show the color of connectors in the network view of affiliation. For example, #FF0000.	Connector Color Field

Object	task	related admin console setting
	Create a custom or formula field that stores numeric values to show the thickness of connectors in the network view of affiliation.	Connector Thickness Field
Account	Create a text field to search for an account in the table view of affiliations.	Account Search Field
Provider Affiliation Product	<p>Create a field set to filter provider affiliations in the network view of affiliations. To enable product filter in network view, add the Product field. You can also include Provider Affiliation fields in the field set.</p> <p>After you enable the Product filter, all the active products from the LifeSciMarketableProduct and the Product2 objects are shown the Product filter picklist in the Affiliation network view.</p>	Provider Affiliation Product Filters Field Set

[Create a Custom Field](#) and [Define Field Sets](#).

Considerations for Affiliations Field Sets

Make sure your implementation is successful by reviewing the considerations for affiliation field sets. These field sets directly control the appearance and functionality of the affiliation views, such as the columns in the table view and the filters in the network view. Understanding these limitations beforehand helps you tailor the experience for your users.

Considerations for Affiliations Field Sets

Make sure your implementation is successful by reviewing the considerations for affiliation field sets. These field sets directly control the appearance and functionality of the affiliation views, such as the columns in the table view and the filters in the network view. Understanding these limitations beforehand helps you tailor the experience for your users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Provider Affiliation Unique Field Set

Keep these limitations in mind for the Provider Affiliation Unique Field Set:

- Fields from the Provider Affiliation object are supported.
- In addition to the default Account and Related Account fields, you can add up to five more fields.
- One multi-select picklist field is supported.
- Text area fields aren't supported.

Provider Affiliation Product Filters Field Set

For the Provider Affiliation Product Filters Field Set, only single-select picklist and checkbox fields are supported.

See Also

[Salesforce Help: Define a Field Set](#)

Field-Level Security for Affiliations

To manage affiliations, users need access to certain fields that aren't available to them by default.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You must manually grant your users access to these fields.

Object	Field
Provider Affiliation	Account Name
	Related Account Name
	Account Person Account

Object	Field
	Related Account Person Account
Healthcare Provider	Primary Provider

See [Set Field-Level Security for a Field on All Profiles](#).

Picklist Values Customization for Affiliations

To make it easier for your sales rep to select the appropriate options, customize the picklist values for fields in the Provider Affiliation object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Here are some recommended values, but you can configure any values to fit your business needs.

Object	Field	Recommended Picklist Values
Provider Affiliation	Affiliation Title	<ul style="list-style-type: none"> • Board Member • Chairman • Specialist • Surgery Specialist • Vice Chairman
	Role	<ul style="list-style-type: none"> • Attending • Admitting • Co-Business • Consulting • Staff
Territory Provider Affiliation Assignment Rule	Affiliation Role	

 **Note** We recommend that you define default values for the Role field on the Provider Affiliation object. This default value is used in the HealthcareProviderAffiliationHandler trigger handler.

See Also

[Salesforce Help: Add or Edit Picklist Values](#)

[Salesforce Help: Define Default Field Values](#)

Customize How Affiliations Are Displayed

Customize the appearance and behavior of account affiliations in the list, network, and hierarchy views by configuring Affiliation settings. Use these settings to also manage data relationships, enforce data validation rules, and streamline address management.

Configure Core Affiliation Behavior

Use General Settings in the Admin Console to configure core behaviors and views for the Affiliations tab on an account record page. These settings control aspects such as the creation of reverse affiliations and how the affiliation type, hard or soft, is determined. The settings also manage the visibility of the network graph view, and the fields used for uniqueness validation.

Customize the Table View Appearance

Configure the appearance and search capabilities of the Affiliations table view. Customize the view on the account record page by adjusting pagination and defining the sort order for columns.

Customize the Network View Appearance

Customize the color and thickness of connectors (edges) between accounts in the network view of affiliations by using Use Network View Settings. You can also configure the filters available to users within the network view by referencing field sets on the Provider Affiliation Product object.

Configure Core Affiliation Behavior

Use General Settings in the Admin Console to configure core behaviors and views for the Affiliations tab on an account record page. These settings control aspects such as the creation of reverse affiliations and how the affiliation type, hard or soft, is determined. The settings also manage the visibility of the network graph view, and the fields used for uniqueness validation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access account management

Life Sciences Commercial Admin permission set

Prerequisite: [Create Field Sets and Custom Fields for Affiliation Settings](#)

1. From the App Launcher, find and select **Admin Console**.
2. Select **Account Management**, and then select **Affiliations**.
3. For Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.

- b. To apply the settings to a specific profile in your org, select **Profile**.
4. Under General Settings, configure these settings as needed.
 - Disable reverse: Select to disable the creation of reverse provider affiliation records.
 - Set affiliation type for provider affiliations: Select to set the affiliation type as Soft or Hard for provider affiliation records based on predefined criteria in HardAffiliationHandler trigger. If the trigger is enabled, it updates the affiliation type field according to its logic; otherwise, the user-selected value is retained.
5. Save your changes.

See Also

[Salesforce Help: Define a Field Set](#)

[Salesforce Help: Map Direct and Reverse Affiliation Roles](#)

Customize the Table View Appearance

Configure the appearance and search capabilities of the Affiliations table view. Customize the view on the account record page by adjusting pagination and defining the sort order for columns.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access account management

Life Sciences Commercial Admin permission set

[Create Field Sets and Custom Fields for Affiliation Settings](#)

1. From the App Launcher, find and select **Admin Console**.
2. Select **Account Management**, and then select **Affiliations**.
3. For Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
4. Under Table View Settings, configure these settings as needed.

Provider Affiliation Columns Field Set: Select the field set from the Provider Affiliation object that

includes fields to display as columns in the affiliations table view.



Records per Page: Enter the default number of records to show on each page.

Fields and Order for Sorting: Enter comma-separated API names of the fields and their sort order (ASC or DESC). For example, `CreatedDate ASC, EffectiveStartDate DESC`. This setting applies only to the web version of the affiliations table.

 **Note** To find a field's API name, go to the object management settings for the Provider Affiliation object.

Records per Page Dropdown Values: Enter comma-separated values for the Records per Page dropdown. For example, 10, 15, 20, 25. The default values are 5, 10, 20, 30.



Account Search Field: Select text fields from the Account object to use for searching for accounts in the affiliations table view.

See Also

[Salesforce Help: Define a Field Set](#)

Customize the Network View Appearance

Customize the color and thickness of connectors (edges) between accounts in the network view of affiliations by using Use Network View Settings. You can also configure the filters available to users within the network view by referencing field sets on the Provider Affiliation Product object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access account management settings

Life Sciences Commercial Admin permission set

Prerequisite: [Create Field Sets and Custom Fields for Affiliation Settings](#).

1. From the App Launcher, find and select **Admin Console**.
2. Select **Account Management**, and then select **Affiliations**.
3. For Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.

- b. To apply the settings to a specific profile in your org, select **Profile**.
4. Under Network View Settings, configure these settings as needed.

Connector Color Field: Select a custom or formula field containing a hexadecimal code to determine the connector color in the network view. The default value is `#808080` (gray).



Connector Thickness Field: Select a custom or formula number field to determine the thickness of the connectors in the network view. The default is Affiliation Strength Type.



Provider Affiliation Product Filters Field Set: Select the field set from the Provider Affiliation Product object. The fields in this set are available as filters in the network view.



5. Save your changes.

See Also

[Salesforce Help: Define a Field Set](#)

Map Direct and Reverse Affiliation Roles

Simplify relationship management by automatically creating a reverse role for every direct role you define. For instance, when you map a healthcare professional (HCP) as an employee of a healthcare organization (HCO), Life Sciences Cloud automatically creates the reverse relationship, designating the HCO as the HCP's Employer. This automation eliminates manual inverse entries and ensures consistent, efficient relationship management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access account management settings

Life Sciences Commercial Admin permission set

Prerequisite: [Picklist Values Customization for Affiliations](#).

Reverse Affiliations are only created if the Influence Type field on the Provider Affiliation object is selected as either Unidirectional, Bidirectional, or Neutral.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Account Management**, and then select **Affiliation Reverse Role Mapping**.

3. Click **New**.
4. Enter a name.
5. Select a direct role.
6. Select a reversed role.
7. Save your changes.

Streamline Address Management

Keep practitioner addresses up-to-date by automatically adding the primary address from their affiliated organization whenever a hard affiliation is created. This makes sure that the practitioner's workplace address is always listed, without manual updates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access search before create settings	Life Sciences Commercial Admin permission set
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Make sure that the HardAffiliationHandler trigger is active.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Search Before Create** and then select **General Settings**.
3. Select **Enforce Workplace Address Dependency**.
4. Save your changes.

Affiliated Account Summary

The Affiliated Account Summary modal provides a customizable view that surfaces essential information about affiliated accounts. Users get immediate access to key details without having to navigate away from their current screen. The feature also includes a quick action button to help users create a visit directly from the summary.

REQUIRED EDITIONS

-  **Note** Healthcare Provider (HCP) details are shown in the account summary only if the HCP is the primary provider for the account. Address details for an account are shown only if these two conditions are met: the account has an active provider account territory info (PATI) record, and it's linked to an active user territory record. The address is fetched from the preferred address field of the PATI record, which stores the associated contact point address.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

On the web, the Affiliated Account Summary modal only displays information related to the account. On the iPad, the Affiliated Account Summary modal consists of two tabs: Account and Account Plans.

Account tab

Both the default modal on the web and the Account tab on the mobile show account details and a "New Visit" quick action button. If needed, you can tailor the information that's shown in the Account tab by editing the Account Summary Columns field set on the Healthcare Provider and Contact Point Address objects. Before you [add fields to the field set](#), make sure that the user has the appropriate access.

Account Plans tab

On the iPad, the Account Plans tab displays the list of active account plans associated with the account, if any. However, as a prerequisite, you must set up [object metadata cache settings for account plans](#).

Manage Affiliation Alignment Rules

Define affiliation alignment rules to automatically align affiliated accounts to specific territories. Create rules based on criteria such as account type, affiliation role, and specialty to ensure accounts are assigned correctly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To define affiliation alignment rule

Life Sciences Commercial Admin permission set

Prerequisites:

- Add picklist values for the Affiliation Role field on the Territory Provider Affiliation Assignment Rule object. See [Picklist Values Customization for Affiliations](#).
- [Create Care Specialty Records](#).

1. From the App Launcher, find and select **Admin Console**.
2. Select **Territories**, and then select **Affiliation Rules**.

3. Click **New**.
4. Select the required territory and its subordinates from the appropriate level in the territory hierarchy, and click **Next**.
5. To apply the rule to child territories, select **Apply Rule to Child Territories**.
6. Select an account type, and select an affiliation role.
7. Optionally, select **Specialty**, and click **Submit**.
8. Save your changes.

When you delete an affiliation alignment rule for a parent territory that has the Apply Rule to Child Territories option enabled, all the corresponding child affiliation alignment rules are also deleted.

Similarly, if you edit an affiliation alignment rule and deselect Apply Rule to Child Territories, the child affiliation alignment rules are deleted.

After you define the affiliation alignment rules, run the territory management jobs to align affiliated accounts according to those rules. See [Run Territory Management Jobs](#).

Batch Jobs for Affiliations

Affiliation batch jobs efficiently process large volumes of records at once by bypassing the governor limits faced by trigger handlers. These batch jobs automate tasks such as setting affiliation types, creating reciprocal affiliations, and establishing primary affiliations between accounts and parent organizations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

AffiliationDataLoadProcessorBatch

This batch job is an alternative to the HardAffiliationHandler and AffiliationReciprocalHandler trigger handlers. It performs these primary functions:

- It sets the affiliation type on provider affiliation records to hard or soft when the necessary conditions are met, without requiring explicit user input.
- It creates the corresponding reverse affiliation for a given affiliation record. The batch job determines the reverse role for this reverse affiliation by referring to the mapping configured in the Affiliation Reverse Role Mapping.

AccountPrimaryAffiliationBatch

This batch job provides an alternative to the HealthcareProviderAffiliationHandler trigger handler. When

a parent account is specified on the provider's record, the job creates a primary affiliation between the healthcare provider's account and its parent organization account. If an affiliation already exists, it updates the primary flag accordingly.

Run Affiliation Batch Apex Jobs

Run batch Apex jobs from the Developer console to automate tasks such as setting affiliation types, creating reciprocal affiliations, and establishing primary affiliations between accounts and parent organizations. Track the status and health of your batch Apex jobs and terminate them from Setup when necessary.

See Also

[Salesforce Help: Batch Apex](#)

Run Affiliation Batch Apex Jobs

Run batch Apex jobs from the Developer console to automate tasks such as setting affiliation types, creating reciprocal affiliations, and establishing primary affiliations between accounts and parent organizations. Track the status and health of your batch Apex jobs and terminate them from Setup when necessary.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create, edit, and delete Life Sciences Cloud data:

Life Sciences Commercial Admin permission set

Before you run the `AffiliationDataLoadProcessorBatch` batch job, turn off the `HardAffiliationHandler` and the `AffiliationReciprocalHandler` trigger handlers. Before you run the `AccountPrimaryAffiliationBatch` batch job, turn off the `HealthcareProviderAffiliationHandler` trigger handler.

Run the batch Apex job using this Apex code:

```
Map<String, Object> paramMap = new Map<String, Object>{ 'batchName' => '{your_batch_name}', 'batchSize' => '{your_batch_size}', 'isCreatedByCurrentUser' => '{your_is_created_by_current_user_boolean}', 'createdAfter' => '{your_datetime}', 'whereClause' => '{your_where_clause_string}' }; // Call Boolean result = (Boolean) (lsc4ce.LifeScienceApi.getInstance(lsc4ce.LifeScienceApi.Command.AffiliationBatchJ
```

The `batchSize`, `createdAfter`, `isCreatedByCurrentUser`, and `whereClause` parameters are optional. For

instructions on how to run batch Apex jobs, see [Executing Anonymous Apex Code](#).

 **Example** Map<String, Object> paramMap = new Map<String, Object>{ 'batchName' => 'AffiliationDataLoadProcessorBatch', 'batchSize' => 200, 'isCreatedByCurrentUser' => true, 'lastModifiedTime' => Datetime.newInstance(2025, 8, 1, 0, 0, 0), 'whereClause'=> 'AffiliationStrengthType = \'\u26aa\' OR AffiliationStrengthType = \'\u26ab\'', 'result' => Boolean.valueOf(true) }; Boolean result = (Boolean) (lsc4ce.LifeScienceApi.getInstance(lsc4ce.LifeScienceApi.Command.AffiliationBatch).execute()); System.debug('Result: ' + result); This code runs the AffiliationDataLoadProcessorBatch job, setting the where clause to only the records that were created by the logged in user on the 1st of August 2025 at 0 hours. It executes the records and sets the result type as high.

Bulk Update for Account-Related Records from Related Lists

Give your users an efficient way to update multiple account-related records in a single action from a related list. To allow bulk updates from related lists, enable bulk edits for the user profile, create a custom button, and add the custom button to the account page layout.

[Enable Users to Make Changes in Bulk](#)

Allow users to edit multiple account-related records at from the mobile app once by enabling the bulk edit capability for a specific user profile or all user profiles in your org.

[Create a Custom Button for Bulk Update](#)

Create a custom button that enables users to perform bulk updates on records directly from a related list.

[Add the Custom Button to Account Layout](#)

To make the custom button accessible to users from a related list, add it to the account page layout.

Enable Users to Make Changes in Bulk

Allow users to edit multiple account-related records at from the mobile app once by enabling the bulk edit capability for a specific user profile or all user profiles in your org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To enable Bulk Edit:

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.

2. Select **Mobile** and then select **Profile Based App Settings**.
3. Select **Let users perform bulk edit**.
4. Save your changes.

Create a Custom Button for Bulk Update

Create a custom button that enables users to perform bulk updates on records directly from a related list.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create or change custom buttons or links: Customize Application

1. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**.
2. Search for and select the object to which you want to add the custom button.
3. Select **Buttons, Links, and Actions**, and then select **New Button or Link**.
4. Provide a label and name for the button. For example, Bulk Update.
5. For Display Type, select **List Button**.
6. If **Display Checkboxes (for Multi-Record Selection)** is selected, clear it.
7. For Behavior, select a behavior for the button.
8. Select the content source as **URL**, and provide the URL in this format: `{ !URLFOR("/lightning/n/ LS4CE__BulkUpdate?c__parentRecordId='"+{ParentObjectName}.Id+"&c__relatedObject={RelatedObj...")}`
9. Check syntax.
10. Save your changes.

Add the Custom Button to Account Layout

To make the custom button accessible to users from a related list, add it to the account page layout.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To customize buttons on page layouts: [Customize Application](#)

1. From Setup, in the Quick Find box, find and select **Object Manager**.
2. Search for and select the object you want to edit. The related list is shown on this object's record page.
3. Select Page Layouts, and then select the page layout you want to edit.
4. From the palette, select **Related Lists**.
5. Drag the related list you want to edit from the palette to the layout.
6. In the layout, click  to edit the related list.
7. From the related list properties, click  to expand the Buttons section.
8. Move the custom button from the Available Buttons list to the Selected Buttons list.
9. Click **OK**.
10. Save your changes to the layout.

Data Change Request

Use Data Change Request to manage how data changes are submitted, validated, and implemented across the Life Sciences Cloud for Customer Engagement app. Reduce manual corrections, prevent unapproved changes from being applied, and make sure that data consistency across both web and mobile apps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Set Up Data Change Request by User Profile](#)

Control how data updates are governed for various objects in the Life Sciences Cloud for Customer Engagement app. Specify whether changes apply immediately or require review before finalization. This set up makes sure that data updates comply with your organization's review policies and support profile-specific handling of data changes.

[Set Up Data Change Request Validation Types](#)

Use validation types to define how data change requests are validated for different record types. Configure each request to go through internal validation, which your organization manages, or external validation, managed by OneKey. Select the option that aligns with your organization's quality requirements.

[Create Life Science Data Change Definition Managed Fields](#)

Managed fields determine which updates trigger a Data Change Request for supported objects. Creating records for each object makes sure that changes to critical data are reviewed, validated, and approved through the Data Change Request workflow.

Approve or Reject a Data Change Request

Review and act on Data Change Requests submitted by users directly from the Life Sciences Cloud for Customer Engagement app. Use the built-in Lightning component to create a new tab to approve or reject a change request.

Mobile App Configuration for Data Change Request

Configure database schema for the supported Data Change Request objects. Generate a metadata cache to package the object scheme configuration into a downloadable metadata cache that the mobile app uses for online and offline access.

Set Up Data Change Request by User Profile

Control how data updates are governed for various objects in the Life Sciences Cloud for Customer Engagement app. Specify whether changes apply immediately or require review before finalization. This set up makes sure that data updates comply with your organization's review policies and support profile-specific handling of data changes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Data Change Request features and objects:

Life Sciences Commercial Admin

! **Important** Data Change Request is supported for these objects: Account, HealthcareProvider, HealthcareProviderSpecialty, HealthcareProviderNPI, ContactPointAddress, ContactPointPhone, ContactPointSocial, ContactPointEmail, BusinessLicense, and ProviderAffiliation.

- Create object metadata cache configuration for LifeSciDataChgDefMngFld object. Add one record per field or multiple records for the same field when different configurations are required. See [Create Object Metadata Cache Configuration](#).
- Create records for UserAdditionalInfo object for the authenticated user with preferred country and available country sets. In addition, create associated LifeSciCountry records.

1. From the App Launcher, find and select **Life Sciences Commercial**.
2. Click **Admin Console**.
3. In the Life Sciences Customer Engagement Setup page, click **Account Management**.
4. In the navigation pane, click **Data Change Request**.
5. To activate the Account object and its related Data Change Request object, turn on **Object Status**.
6. In the Profile Settings section, select a default behavior from the **Default Settings** dropdown to

determine when the changes reflect across web and mobile apps.

On the mobile app, the changes reflect immediately if the configuration is set to apply immediately.

The mobile users can see the changes made on the web app only after the app's next sync.

- Don't apply changes immediately: Sends DCR for approval first on the web app. Changes appear on the mobile app after approval on the next sync.
- Apply changes to each field individually: Applies all the changes on the mobile app immediately. Creates a data change request for review. If the changes are later rejected by the authorizer, the updates will be reverted on the next sync.
- Apply changes immediately: Applies changes at the field level; controls how changes are applied to each field. On the web app, if the changes are rejected then the changes are reverted on the mobile app on the next sync.

7. To apply the selected default behavior, turn on **Active**.

8. Configure different behaviors for specific profiles.

a. In the Profile section, click **Add**.

b. Select a profile.

For example, select **System Administrator**.

c. Select the field update type for the profile.

d. To apply the rule, turn on **Active**.

9. Save your changes.

10. Similarly, set up Data Change Request for the other objects.

Set Up Data Change Request Validation Types

Use validation types to define how data change requests are validated for different record types.

Configure each request to go through internal validation, which your organization manages, or external validation, managed by OneKey. Select the option that aligns with your organization's quality requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Data Change Request features and objects:

Life Sciences Commercial Admin

1. From the App Launcher, in the Quick find and select **Life Sciences Commercial**.
2. Click **Admin Console**.
3. In the Life Sciences Customer Engagement Setup page, click **Account Management**.
4. In the navigation pane, click **Data Change Request Validation Types**.

5. In the Data Change Request Validation Types Setup page, add record types for a specific country or for all countries, and provide the validation type.
 - a. Select the type of the account.
For example, Person Account or Institution.
 - b. Select the country.
The default selection is All.
 - c. Select the validation type.
For example, Internal or External.
 - d. For internal validation, turn on **Requires Approval** to restrict the creation of records, either through the related list or SBC, without approval.
If this option is disabled, it creates records but doesn't create a data change request.
 - e. For external validation, enter the name of the external validation system.
Uses OneKey by default. If your organization uses a OneKey contract, restrict external DCR configuration (Record Types and Managed Fields) to only the regions supported by that contract. Including unsupported regions can cause access issues and prevent DCR records from being processed. In such cases, manually update the status of the DCR records for unsupported regions.
 - f. To add a specific country, click **Add Country**.
Adding a specific country is useful when you have different configurations for multiple countries.
6. Save your changes.
7. Similarly, set up Data Change Request validation types for the other objects as needed.

External Validation Requirements for Data Change Requests

Prevent downstream OneKey rejections and rework by making sure your setup is aligned from the start. Before enabling external validation for Data Change Requests, make sure your data model and integration mappings meet specific requirements.

External Validation Requirements for Data Change Requests

Prevent downstream OneKey rejections and rework by making sure your setup is aligned from the start. Before enabling external validation for Data Change Requests, make sure your data model and integration mappings meet specific requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure App Alerts:

Life Sciences Commercial Admin

Supported Operations

External validation via OneKey supports Create and Update operations. Delete operations aren't supported out of the box. If a delete request is submitted for external validation, the request is rejected before it reaches the external provider. Handle the delete operation through manual data governance processes or custom logic.

For the Create operation to succeed, follow this sequence:

- Create a business account. When creating a business account, make sure these objects and their respective fields are created: Account, ContactPointAddress, HealthcareProvider, and HealthcareProviderSpecialty.
- After it's approved, create a Person account associated with the business account. When creating a Person Account, make sure these objects and their respective fields are created: Account, ContactPointAddress, HealthcareProvider, HealthcareProviderSpecialty, and ProviderAffiliation.

Minimum Data Thresholds

To pass validation, records must meet specific minimum data thresholds. If these are missing, the Data Change Request will be rejected before it reaches the external provider.

- A Person Account record must include at least one primary Provider Affiliation and one primary Healthcare Provider Specialty.
- A Business Account record must include at least one primary Healthcare Provider Specialty.

Only workplace-to-individual (Hard) affiliations are supported for Data Change Request syncing.

Mandatory External Managed Fields

Mandatory External Managed Fields for the Create operation to succeed:

- Account: Name, Phone, Fax, PersonGender, PersonMobilePhone, and PersonBirthdate
- ContactPointAddress: Name and Address
- HealthcareProvider: Name, Status, ProfessionalTitle, TotalLicensedBeds, ProviderType, and ProviderClass
- HealthcareProviderSpecialty: Name and SpecialtyId
- ProviderAffiliation: Role, EffectiveStartDate, and EffectiveEndDate

Integration & Mapping (MuleSoft)

- Picklist Alignment: Each picklist value in Salesforce must have a corresponding mapping in your MuleSoft transformation layer.
- Failure Risk: If a user selects a value in Salesforce that isn't mapped, the Data Change Request will fail with a Missing Fields error, even if the field itself is populated.

Create Life Science Data Change Definition Managed Fields

Managed fields determine which updates trigger a Data Change Request for supported objects. Creating records for each object makes sure that changes to critical data are reviewed, validated, and approved through the Data Change Request workflow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Data Change Request features and objects:	Life Sciences Commercial Admin
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Create managed field records for all the supported Data Change Request objects: Account, HealthcareProvider, HealthcareProviderNpi, HealthcareProviderSpecialty, ContactPointAddress, ContactPointEmail, ContactPointPhone, ContactPointSocial, BusinessLicense, and ProviderAffiliation.

1. From the App Launcher, find and select **Life Sciences Data Change Definition Managed Fields**.
2. Click **New**.
3. Enter the name of the record.
Use [object name_field name] format, for example, HealthCareProvider_SourceSystemIdentifier.
4. In the Life Science Data Change Definition field, select an object that it applies to.
For example, Account.
5. Enter the Field API name.
6. To apply the data changes immediately, select **Apply Change Immediately**.
This option is relevant when Default Settings is set to Apply changes to each field individually. It makes sure that changes appear on the mobile app immediately and a DCR is created. If the changes are later rejected by the approver, those changes are reverted on the mobile app after the next sync.
7. Select the validation type.
For example, select **Internal** or **External**. Make sure the validation type matches the one configured in the validation types setup in the admin console.
8. If needed, search for and select the country.
9. Save your changes.

Approve or Reject a Data Change Request

Review and act on Data Change Requests submitted by users directly from the Life Sciences Cloud for Customer Engagement app. Use the built-in Lightning component to create a new tab to approve or reject a change request.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To approve or reject a Data Change Request:

Life Sciences Commercial Admin

Life Sciences Key Account Manager

1. In Setup, search for **Tabs** and select it.
2. In the Custom Tabs page, under the Lightning Component Tabs, click **New**.
3. In the New Lightning Component Tab page, select **Isc4ce:dataChangeListWithApproveReject**.
4. Enter the tab label.
5. Enter the name of the tab.
6. For Tab Style, click the **Search** icon, and select the style for the tab.
7. Click **Next**.
8. Choose the user profiles for which the new Lightning Component tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.
By default, Apply one tab visibility to all profiles is enabled.
9. Apply for different tab visibility for each profile.
10. Save your changes.

Mobile App Configuration for Data Change Request

Configure database schema for the supported Data Change Request objects. Generate a metadata cache to package the object scheme configuration into a downloadable metadata cache that the mobile app uses for online and offline access.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Data Change Request features and objects:

Life Sciences Commercial Admin

When you create database schema configurations for Data Change Request, make sure that you select the type as mentioned in the table.

Object	Type
DbSchema_LifeSciDataChangeDef	Configuration
DbSchema_LifeSciDataChgDefRecType	Configuration
DbSchema_LifeSciDataChgPersonaDef	Configuration
DbSchema_LifeSciDataChangeRequest	Data
DbSchema_LifeSciDataChgDefMngFld	Data
DbSchema_UserAdditionalInfo	Data
DbSchema_LifeSciCountry	Data

Important After you create these configurations, make sure to generate a metadata cache. This step is important because it makes sure that the mobile app accesses the latest metadata definitions, including any schema changes for supported objects.

Lists and Filters

Use Lists and Filters to organize and prioritize accounts and associated data in the Life Sciences Cloud for Customer Engagement app. Sales reps manage and refine large volumes of accounts into meaningful segments, helping them to focus on accounts that align with specific criteria based on business priorities, territory requirements, or engagement strategies.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

Lists are static. Once you add accounts to a list, they remain there until you manually remove or add more accounts. Filters are dynamic. They automatically update the results to show accounts that match the defined criteria. For example, a filter that selects accounts by specialty shows only accounts that belong to that specialty.

Users can create and refine lists and filters using specific criteria, such as account specialty, recent interactions, or location by zip code. These lists can be saved and used to plan visits, schedule follow-ups, or launch actions from the user's workflow. If needed, generate reports and export the data to a CSV file.

[Lists and Filters Data Model](#)

Lists and Filters data model stores and makes data interoperable, helping users organize and prioritize

large volumes of account-related data.

Enable Actions for Lists

Give users access to perform various actions on lists: select multiple accounts, run actions on the selected accounts, update actions for different accounts, and export lists to a CSV file.

Configure Filters

Give sales reps access to the available filter-related actions and features. Enable sales reps to create, edit, and manage large volumes of account data to identify and focus on target accounts.

Configure Columns for Lists

Create a configuration set to define the fields and columns structure for Lists. Configure the fields that appear as columns, the fields that support sorting, and the default filter columns available in the Life Sciences Cloud for Customer Engagement app.

Account Search Preferences for Lists and Filters

Define account search preferences to control how accounts appear in the Life Sciences Cloud for Customer Engagement app. Enable map view to let users view accounts, set default filters, and use searchable fields to enhance their search results.

Mobile App Configuration for Lists and Filters

Create object metadata cache configuration for supported List and Filter objects. Generate a metadata cache to make the feature available for users in the Life Sciences Cloud Mobile app.

Lists and Filters Data Model

Lists and Filters data model stores and makes data interoperable, helping users organize and prioritize large volumes of account-related data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

Object	description
LifeSciAccountListColumn	Represents the information of the columns selected from accounts or its supported direct relationship objects in account filters.
LifeSciAccountListMember	Represents information about account static lists and routines.
LifeSciAcctListFilterCrit	Stores the rules and conditions derived from the Account object or its supported direct relationship objects to filter Life Sciences accounts.
LifeScienceAccountList	Represents the type of account lists, such as filter,

Object	description
	static list, and routine.
LifeScienceAccountListObject	Represents the object that is referenced in the provider account list.

Enable Actions for Lists

Give users access to perform various actions on lists: select multiple accounts, run actions on the selected accounts, update actions for different accounts, and export lists to a CSV file.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

USER PERMISSIONS NEEDED

To configure Lists and Filters:	Life Sciences Commercial Admin
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1. From the App Launcher, find and select **Admin Console**.
2. Click **Lists and Filters**.
3. On the navigation panel, click **Accounts List Actions**.
4. From the Select Type field, select the profile that you want to apply this action to.
For example, you can assign a Medical Sales Representative profile if you want them to perform this action.
5. In the List Export section, select **Let users export account lists to CSV files**.
Users can now see the option in the Lists and Filters settings.
6. Save your changes.

Configure Filters

Give sales reps access to the available filter-related actions and features. Enable sales reps to create, edit, and manage large volumes of account data to identify and focus on target accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

USER PERMISSIONS NEEDED

To configure Lists and Filters:

Life Sciences Commercial Admin

- When you create Provider Account Territory Info (PATI) records, make sure you add this criteria for Account to appear for Lists and Filters: the IsAvailableOffline field must be set to True, the preferred address field can't be null, and the territory must be aligned to the current active territory.
 - A matching ObjectTerritory2Association record must exist where ObjectId is the accountId and Territory2Id is the current active territory.
1. From the App Launcher, find and select **Admin Console**.
 2. Click **Lists and Filters**.
 3. On the navigation panel, click **Filters**.
 4. In the Select Type field, select an option to control filter access.
 5. In the Select Profile field, select a profile.
For example, you can assign a Medical Sales Representative profile if you want them to perform this action.
 6. In the General Settings section, enable the required checkboxes to customize filter behavior.
 - a. To let users create account filters, select **Let users create account filters**.
 - b. To let users share filters, select **Let users share filters**.
 - c. To let users search for and view shared accounts on the web, select **Let users view and search shared accounts**.
 - d. To let users view and apply advanced filters, select **Let users view Advanced Filters**.
 7. In the Available Fields section, define the fields that users can use when creating account filters.
If no fields are defined, all fields the user has access to will be available by default.
 8. To help users see the recommended accounts on the Life Sciences Cloud for Customer Engagement mobile app, in the Next Best Customer Settings, select Let users view the next best customer filter.
 9. To determine the default number of days to snooze an account, enter a number in the Days to Mute field.
 10. Save your changes.

Configure Columns for Lists

Create a configuration set to define the fields and columns structure for Lists. Configure the fields that appear as columns, the fields that support sorting, and the default filter columns available in the Life Sciences Cloud for Customer Engagement app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

USER PERMISSIONS NEEDED

To configure Lists and Filters:

Life Sciences Commercial Admin

1. From the App Launcher, find and select **Life Sciences Commercial**.
2. Click **Admin Console**, and then click **Lists & Filters**.
3. On the navigation panel, click **Accounts List**.
4. Click **New**.
5. Enter a name for the accounts list configuration.
6. Select the user profiles to which the configuration applies.
7. Select the type of accounts list configuration.
 - a. Default: Shows aligned accounts.
 - b. Search: Shows all Accounts.
 - c. Static: Shows static lists and routines.

 **Note** On mobile, the Default is applied to all accounts, and Static is used for lists. The Search configuration type isn't supported on mobile.

8. Select the type of account this configuration is associated with.
For example, Person Account, Business Account, Institution, or Medical Professional.
9. Configure the columns for the list view.
 - a. Enter the field name using the Object Name.Field Name format to display it as the second column in the list view.
 - b. Enter the field name using the Object Name.Field Name format to display it as the third column in the list view.
 - c. Enter the field name using the Object Name.Field Name format to display it as the fourth column in the list view.
 - d. Enter the field name using the Object Name.Field Name format to display it as the fifth column in the list view.
 - Only field API names from these objects are supported: Account, HealthcareProvider, ContactPointAddress, ProviderAcctTerritoryInfo, ContactPointPhone (Use de-normalized field in HCP), ContactPointEmail (Use de-normalized field in HCP), ContactPointSocial (Use de-normalized field in HCP), HealthcareProviderNpi (Use de-normalized field in HCP), HealthcareProviderSpecialty (Use de-normalized field in HCP).
 - If you don't provide an object prefix, for example, ContactPointAddresses.Name, the system assumes the field belongs to the Account object. For example, PersonEmail (query from Account); ContactPointAddresses.Name (query from ContactPointAddress).
 - You can also provide multi-level queries. For example, ProviderAccountTerritoryInfoAccount.NextProviderVisit.ShippingAddress.Id will query ContactPointAddressId.
 - If you do not configure these columns in the additional search preferences section of Account Management in the admin console, then the list will show these default columns: Column1: Account Name and Address, Column2: Last Provider Visit, Column3: Target Value, Column4: Activity Plan, Column5: Progress Bar.
 - On mobile, only the two most recently created records for denormalized fields are displayed. Additional values are grouped into a +N counter that tells how many more records exist beyond the visible ones.

- On the web, only the three most recently created records for denormalized fields are displayed. Additional values are grouped into a +N counter.
10. Select the checkbox to override the second column field with the previous and next visit details.
11. Select an option from the dropdown to override the fifth column field with the Activity Plan field. The values in this dropdown are sourced from the Provider Activity Measure Type object.
12. In the Sort Column Field Set, select an option to sort column fields. Select fields from the Provider Account Territory Information object. If the field set is empty, fields available for filtering by default are: First Name, Last Name, Full Name, Address, State or Province, City, Zip or Postal Code, Next Provider Visit Date, Last Provider Visit Date, and Specialty.
13. To activate the configuration, select **Is Active**.
14. Save your changes.

Account Search Preferences for Lists and Filters

Define account search preferences to control how accounts appear in the Life Sciences Cloud for Customer Engagement app. Enable map view to let users view accounts, set default filters, and use searchable fields to enhance their search results.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

USER PERMISSIONS NEEDED

To configure Lists and Filters: Life Sciences Commercial Admin

1. From the App Launcher, find and select **Life Sciences Commercial**.
2. Click **Admin Console**, and then click **Account Management**.
3. In the Account Management Setup page, click **Account Search Preferences**.
4. Select the **Apply Settings To** as Profile.
5. Select the profile.
6. Configure the Advanced Search Preferences section.
 - a. To enable the map view (LSC Mobile app only) so users can visualize accounts on a map, select **Show accounts in a map view**.
 - b. To improve the search results, select the default account type filters.
 - c. To help users find accounts with greater precision, select an additional field from the Provider Account Territory Info record that can be used to search accounts with. The field value is also shown in the search results.
 - d. To configure account record types available for filtering during search, select the required record types and move them to Selected Values.
 - e. To align affiliated accounts, select **Align affiliated accounts automatically after an account is aligned with a territory**.

7. Save your changes.

Mobile App Configuration for Lists and Filters

Create object metadata cache configuration for supported List and Filter objects. Generate a metadata cache to make the feature available for users in the Life Sciences Cloud Mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure Lists and Filters: Life Sciences Commercial Admin

Configure object metadata cache configuration for these objects.

DataBase Schema Name	Type
Dbschema_LifeSciAccountListColumn	Data
Dbschema_LifeSciAccountListMember	Data
Dbschema_LifeSciAcctListFilterCrit	Data
Dbschema_LifeScienceAccountList	Data
Dbschema_LifeScienceAccountListObject	Data
Dbschema_Report	Data
Dbschema_Folder	Data
Dbschema_TerritoryAccountScore	Data
Dbschema_ActivityPlan	Data

 **Important** Generate a metadata cache after you create these configurations. This step is critical to make sure that the mobile app uses the latest metadata definitions, including any schema changes for supported objects.

Next Best Action

Set up Next Best Action to equip your sales reps with AI-driven weekly action plans. Help your sales reps

achieve better time management and strategic engagement by recommending actions, such as visits, meetings, and emails for accounts, in the optimal sequence.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add components to a record page:	Customize Application
-------------------------------------	-----------------------

Before you set up Next Best Action, complete the following prerequisites.

- Configure First Day of Work Week in Planner.
 - Activate the required trigger handlers:
 - TerrAcctRcmdActionSharingHandler
 - TerrAccRcmActStatusUpdateHandler
 - Create a standard user with the Field Sales Representative profile.
 - Make sure that the standard user has access to the required Apex classes:
 - Isc4ce.LogACallController
 - Isc4ce.NextBestActionsController
 - Isc4ce.VisitCreationCallbackController
 - Create a metadata cache for the profile.
 - Create a territory.
 - Create a user with the Field Sales Representative profile.
 - Assign these permissions to the user:
 - Industries Visit
 - Life Sciences Commercial User
 - Life Sciences Field Sales Representative
 - LSC Rep
 - Create Territory Account Recommended Action (TARA) records.
-  **Note** You can create the TARA records of type Visit and Email. The Email type TARA records apply only to the mobile app.

See Also

[Trigger Handler Administration](#)

Add Life Sciences Next Best Action Component to Account Record Page

Show sales reps recommended actions, which they can use to create visits or send emails directly from an account record page.



1. On an account record page, click , and then select **Edit Page**.
2. From the Components pane, in the Search field, enter *Next Best Actions*.
3. Drag and drop the Life Sciences Next Best Actions component from the left pane to the Dashboard tab on the record page.
4. Save your changes.
5. Activate the page.

Next Best Customer

With the Next Best Customer scores, your field reps can identify the highest priority accounts for their next engagement. Next Best Customer leverages user-configured data, such as engagement history and territory alignment, to rank the accounts that are most likely to respond, so your reps can maximize the impact of each interaction.

Show your users a prioritized set of accounts in the Next Best Customer component on the Life Sciences Cloud for Customer Engagement home page. Users can also easily see the recommended accounts by filtering with Next Best Customer in the Account list view and on the Calendar tab.

[Set Up Next Best Customer](#)

To help your sales reps understand and work with the top accounts in their territory, set up the Next Best Customer component, quick actions, and scores.

[Account Scores and Rationales for Next Best Customer](#)

Use the Score Explainability Information field on Territory Account Score records to define how rationales appear in the Next Best Customer component. The Score Explainability Information field stores a JSON containing the store explainability details for a Next Best Customer (NBC) score. The JSON structure allows you to show multiple reasons per category and optionally include a Salesforce chart for a visual representation of the data.

Set Up Next Best Customer

To help your sales reps understand and work with the top accounts in their territory, set up the Next Best Customer component, quick actions, and scores.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Set Up Next Best Customers Component

Configure the Life Sciences Next Best Customers component to show prioritized accounts with clear scoring, intuitive rationale explanations, and rich account insights on the Life Sciences Cloud for Customer Engagement home page.

Configure Next Best Customer Settings for Mobile App

Customize the required settings for the Next Best Customer components in the Life Sciences Cloud mobile app.

Set Up the Data Required for Next Best Customer

Configure the data required to show accounts on the Next Best Customer component and support account score calculations.

See Also

[Get Help for Lightning App Builder](#)

Set Up Next Best Customers Component

Configure the Life Sciences Next Best Customers component to show prioritized accounts with clear scoring, intuitive rationale explanations, and rich account insights on the Life Sciences Cloud for Customer Engagement home page.

REQUIRED EDITIONS

-  **Note** If you've already added the NbcTopResults component to your home page, remove it before adding the Life Sciences Next Best Customers component.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure the Next Best Customer component, Life Sciences Commercial Admin permission set actions, and scores:

1. [Create a card-view type relationship graph](#) using the NBC Card template. You can use the prebuilt graph as is or [customize it according to your business needs](#).
2. Add the Life Sciences Next Best Customers component to the home page by using Lightning App Builder. See [Customize the Home Page](#).
3. Update the component properties.
 - a. For Graph Name, select the name of the card-view type relationship graph.
 - b. For Total Cards, enter the number of cards you want to show on the home page. Enter a value from 5 through 10.

[Customize Next Best Customer Card](#)

Customize the record details you want to show on the next best customer card by defining the relationships between account-related objects using an actionable relationship center (ARC) graph.

Configure Quick Account Summary

Add quick account summary to the Next Best Customer card so users can evaluate account recommendations at a glance, eliminating the need to navigate to rationale pages.

Customize Next Best Customer Card

Customize the record details you want to show on the next best customer card by defining the relationships between account-related objects using an actionable relationship center (ARC) graph.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure a next best customer card: Life Science Commercial Admin permission set

1. From Setup, in the Quick Find box, find and select **Actionable Relationship Center**.
2. Create a relationship graph.
 - a. Click **New Relationship Graph**.
 - b. Create a graph from scratch or select the NBC Card template, and then click **Create Graph**.
 - c. In the properties pane, enter a unique label for the graph.
The API name is automatically populated.
 - d. Add or modify source objects in the graph view, if required.
 - e. For Graph Type, ensure that **Card View** is selected.
3. Configure the card layout.
 - a. From the top left corner of the page, select **Switch to Card**.
If you're creating the graph using the NBC card template, a default section with three preconfigured elements appears. You can customize these elements and apply visibility conditions as needed.
 - b. To display additional information on the Next Best Customer card, create a section and enter a section display text.
 - c. To display record details in the section, click **Add Element**.
You can add up to three elements in a section.
 - d. To control the space an element occupies in a row, use the Column Span field.
Each row in a section is divided into 12 columns. If the column span is set to 12, the element occupies the entire row. If the combined column span of multiple elements equals 12, those elements appear in the same row.
 - e. Select the alignment for item group elements. You can align item groups vertically or horizontally.
 - f. Use the Item Alignment field to control how items in an element are aligned relative to other elements in the same row. For example, selecting **Top** aligns the element to the top of the row when

displayed alongside other elements.

 **Note** Item alignment can't be previewed in the card builder.

- g. Customize the font size and choose whether you want to apply bold style for each item in an element.
4. Save your changes.

 **Note** Distance information is included in the NBC Card template by default but it can't be previewed in the card view. If you're creating the graph from scratch, you can't add distance information to the Next Best Customer card.

 **Note** In addition to these customizations, you can also apply all other customizations described in [Customizing a Provider Card](#) because the next best customer card and provider card use the same card customization framework. Consequently, you can apply the configurations explained in this topic to Provider Card.

Configure Quick Account Summary

Add quick account summary to the Next Best Customer card so users can evaluate account recommendations at a glance, eliminating the need to navigate to rationale pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Before you add a quick summary to the Next Best Customer card, create a custom field for an account-related object.

1. From Setup, in the Quick Find box, find and select **Actionable Relationship Center**.
2. Edit the NBC Card template, and click **Switch to Card**.
3. Add a new element or select an existing element to add the custom field.
4. Click **Add Field**.
5. For Source Object, select the object that you've created a custom field for.
6. For Source Field, select the custom field.
7. Optionally, select the font size.
8. For quick rationale summaries, provide your own data or use [Agentforce for Account Summarization](#).

Configure Next Best Customer Settings for Mobile App

Customize the required settings for the Next Best Customer components in the Life Sciences Cloud mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure the Next Best Customer component, Life Sciences Commercial Admin permission set actions, and scores:

Configure Sorting and Rationale Display Settings

Customize the sorting and rationale display settings for the Next Best Customer components in the Life Sciences Cloud mobile App.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Next Best Customer**, and then select **Next Best Customer Setting**.
3. For Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - To apply the settings to all the profiles in your org, select **SOrg Default**.
 - To apply the settings to a specific profile in your org, select **Profile**.
4. Configure the Next Best Customer Sorting settings.
 - Select whether you want to allow sorting of top customers by distance.
 - Enter the account score threshold value that determines the number of top customers shown on the component. This value defines the number of accounts available for distance-based sorting, so that only this subset of top-scored accounts is sorted by proximity to ensure low-priority accounts don't surface just because they are nearby.

Distance-based sorting applies only to accounts with geolocation data.

5. Select whether you want to show the rationale as a standard Salesforce chart on the Life Sciences Cloud mobile app.

To ensure accounts are accurately sorted by distance, geolocation data must be captured for primary address or preferred address. Distance is calculated from an account's preferred contact point address to the user's real-time location. If the account doesn't have a preferred address, the distance is calculated from its primary contact point address. To update the geolocation data, activate data integration rules on the Contact Point Address object, which uses the Google Maps API to determine latitude, longitude, and accuracy. Alternatively, you can manually update the data by selecting **Check for New Data** from the record's action menu. For accurate distance calculations, ensure users have their device's location services enabled.

Enable Field History Tracking for Total Score

To display the account score history changing chart on the mobile app, enable field history tracking for Total Score of the Territory Account Score object. Whenever a user modifies Total Score field, its old and new field values are added to the History related list as well as the date, time, nature of the change, and user making the change.

1. From Setup, click **Object Manager** and then select **Territory Account Score**.
2. Select **Fields & Relationships**, and then select **Set History Tracking**.
3. In the Track old and new values section, enable Total Score.
4. Save your changes.

Configure Quick Actions

Create quick actions with Next Best Customer as the location to allow users to perform actions directly from the Life Sciences Next Best Customers component.

For instructions on how to create a custom quick action, see [Quick and Custom Action Management](#).

Enable Predefined Next Best Customer Filter

Give your users access to Next Best Customer filter-related actions by making the predefined filter available on the Account Search.

For instructions on how to enable the Next Best Customer filter, see [Configure Filters](#).

Set Up the Data Required for Next Best Customer

Configure the data required to show accounts on the Next Best Customer component and support account score calculations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure the Next Best Customer component, Life Sciences Commercial Admin permission set actions, and scores:

To create and save Lightning pages in Lightning App Builder: Customize Application

1. Create Territory Account Score records for each combination of account and territory.
2. On each Territory Account Score record, update the Score Explainability Information field with the metrics and data that the Next Best Customer logic uses to calculate account scores. See [Account Scores and Rationales for Next Best Customer](#).
3. To make sure that users can see the recommended accounts in their territories, grant access to Territory Account Score records in one of these ways.
 - Share Territory Account Score records with users manually.
 - [Create owner-based sharing rules](#) for Territory Account Score. To specify which users' records are shared and the users who get access to the data, select **Territories**.

 **Note** To maintain the accuracy of distance-based sorting within the Top Next Best Customers component, ensure geolocation data is captured for all accounts.

Account Scores and Rationales for Next Best Customer

Use the Score Explainability Information field on Territory Account Score records to define how rationales appear in the Next Best Customer component. The Score Explainability Information field stores a JSON containing the store explainability details for a Next Best Customer (NBC) score. The JSON structure allows you to show multiple reasons per category and optionally include a Salesforce chart for a visual representation of the data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

 **Note** If you're using Next Best Customer from the Winter'26 release, you can continue to use the existing JSON structure in the Score Explainability Information field.

You can configure the display of categories, scores, reasons, and charts in the Next Best Customer component by using the JSON structure. The JSON contains one top-level array **rationals**.

```
{  
  "rationals": [ ... ]  
}
```

Each item in the rationals array represents one metric that contributes to the overall NBC score, for example: Activity Plan, Digital Engagement, Sales Data, or Territory Changes.

Field	Description
Category	Identifies the scoring category this rationale belongs to.
Score	(Optional) The numeric contribution of this category to the overall NBC score.
Reasons	(Optional) Human-readable explanations describing why this score was assigned.
Charts	(Optional) Embedded report references used to visualize supporting data

Category

```
"category": "{ActivityPlan}"
```

- Represents the scoring dimension or rule group used in the NBC logic.
- When the category value is wrapped in braces, it references a custom label to support localization and translation. If braces aren't used, the value is treated as a literal string.
- Used to group insights and display category headers.

Score (Optional)

```
"score": 70
```

- Indicates the score contribution for a category.
- Represents the weighted score for each metric used in the scoring logic.
- Helps users understand the relative impact across categories.
- Score percentage is calculated by dividing category score by total category score. The Total Score field isn't used for calculating the percentage.
-  **Note** Category scores are exclusive to the Life Sciences Cloud mobile app and are not displayed on the web app.

Reasons (Optional)

```
"reasons": [
    "Dr. Lydia Jones was recently added to the territory",
    "Only 3 of 10 planned visits completed within this cycle.",
    "Coverage is currently at 30%, below the expected pace."
]
```

- A list of plain-language explanations describing the factors influencing the score.
- Multiple reasons can be added for a single category to give more context.

Charts (Optional)

```
"charts": [
  {
    "type": "salesforce",
    "id": "00Ofic000000WHEA2",
    "reportName": "Activity Plan Progress Report no Product",
    "label": "Activity Plan Progress",
    "showRefreshButton": true
  }
]
```

- A visual representation of data to support the rationale.
- Rendered as embedded reports on the Next Best Customer component.
- Only two charts can be shown on the Next Best Customer component. If more than two components are configured, only the first two charts are shown.
-  **Note** The charts functionality is currently exclusive to the Life Science Cloud mobile app.

Chart Attribute	Description
type	The type of the chart. Currently only Salesforce charts are supported.
id	The ID of the Salesforce report used to retrieve the data for the rationale.
reportName	The internal name of the Salesforce report.
label	The title of the chart.
showRefreshButton	Determines whether users can refresh the chart data. When set to <i>true</i> , the Refresh and View Report actions are available on the chart.

Example

```
{
  "rationals": [
    {
      "category": "{ActivityPlan}",
      "chart": {
        "type": "salesforce",
        "id": "00Ofic000000WHEA2",
        "reportName": "Activity Plan Progress Report no Product",
        "label": "Activity Plan Progress",
        "showRefreshButton": true
      }
    }
  ]
}
```

```
"score": 70,  
"reasons": [  
    "Dr. Lydia Jones was recently added to the territory in the latest realignment.",  
    "Only 3 of 10 planned visits completed within this cycle.",  
    "Coverage is currently at 30%, below the expected pace."  
,  
    "charts": [  
        {  
            "type": "salesforce",  
            "id": "00Ofic000000WHEA2",  
            "reportName": "Activity Plan Progress Report with Product",  
            "label": "Activity Plan Progress",  
            "showRefreshButton": true  
        }  
    ]  
},  
{  
    "category": "Digital Interactions",  
    "score": 50,  
    "reasons": [],  
    "charts": []  
}]  
}
```

Provider Cards for Life Sciences

Provider Cards in Life Sciences Cloud consolidates an account's information that's scattered across various objects and fields, such as the provider's locations and specialties and the user's scheduled visits, and displays it all in a one place on the mobile. You can choose which records to show in the card. To create provider cards, you can use the predefined template or create them from scratch.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

 **Note** Provider Cards are displayed only in the mobile interface.

To enable users to access Provider Cards in offline mode in the mobile app, [create object metadata cache configurations](#) of type Data for these objects.

- Account
- Healthcare Provider
- Contact Point Address
- Business License
- Contact Point Best Contact Time
- Provider Account Territory Information
- Healthcare Provider Specialty

If you add objects to your card, create object metadata cache configurations for the addition objects.

[ARC Components for Provider Card](#)

Provider Cards help you get a head start on configuring cards by providing a provider-specific template and a builder where you can choose how you want to render the card interface at run-time.

[Nodes and in Retrieval Limits in Provider Cards](#)

Find out about how nodes and retrieval limits are used in the card interface.

[Configure a Provider Card](#)

To capture the record details that you want to show in the provider card, define the relationships between the account-related objects in an actionable relationship center (ARC) graph. Get started by using the Provider Card template, which includes a customizable graph with nodes related to commonly used objects. You can also create a graph from scratch.

[Add a Provider Card to a Record Page](#)

Help users access the provider card on the account tab in the iPad.

[Customizing a Provider Card](#)

Explore the different ways in which you can showcase your account's information by configuring pills, repeaters, or a combination of both. Configure pills to display information only when it's available. Also, customize the information displayed within a repeater by configuring pills or text blocks. Choose to display the card's sections, elements, and items by configuring the visibility criteria for each component. Make sure your users always have the relevant information at hand by configuring the visibility conditions to dynamically display data from preferred sources or alternate sources if the preferred source isn't populated.

See Also

[Create Object Metadata Cache Configuration](#)

ARC Components for Provider Card

Provider Cards help you get a head start on configuring cards by providing a provider-specific template and a builder where you can choose how you want to render the card interface at run-time.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Graph Components for Cards

Here's a list of components in the ARC graph that support the provider card.

- Provider Card Template: A predefined, customizable graph with 10 nodes that capture information related to records of the following objects:
 - Account
 - Healthcare Provider
 - Contact Point Address
 - Business License
 - Contact Point Best Contact Time
 - Provider Account Territory Information
 - Healthcare Provider Specialty
- Card View graph type: A card-specific graph type that displays the Switch to Card button, through which you can access the card builder.
- Record Retrieval Limit: Helps you select the maximum number of records to fetch for a node.
- Switch to Card and Switch to Graph buttons: To help you easily toggle between the graph and the card builder.

Card Builder

Provider Cards supports a card builder that consists of sections, elements, and items. Each section is made up of elements, while each element is made up of individual items.

Here's a breakdown of the provider card's interface.

- Sections store information about an object's related records, such as information about the provider's specialties, ratings, preferred address, best time to contact the provider, etc.
- Elements help you configure the display of record details specific to a section. Choose how you want to show each element type by using pill groups or repeaters. You can add multiple elements within a section.
- Items represent fields, separators, and display texts. In pill groups, you can represent fields and add a label for the field by using display texts. In repeaters, you add multiple fields that are linked by separators.
- A pill group contains an assortment of pills from multiple data sources (node objects). Each pill can display a text or show information about a field.
- A repeater displays multiple records belonging to the same data source (node object) in a series.

Within a repeater, you can further display your data by using a pill or a text block.

See Also

[Create a Custom ARC Relationship Graph](#)

Nodes and in Retrieval Limits in Provider Cards

Find out about how nodes and retrieval limits are used in the card interface.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Nodes

- Nodes represents objects in the ARC graph. A root node is the primary node in the ARC graph. A root node can have several child nodes. Child nodes have a lookup to the root node.
- You can add any object to the root node but you can add the ARC Relationship Graph Lightning App Builder component only on the record page of the object that you select as the root node. To configure cards in Life Sciences Cloud, the root node must be the account object, and the card must be added to the account's record page.
- A key difference between a pill group and a repeater is that a repeater fetches records (data fields) from only one node (source object) in an element, whereas pill group can fetch records from multiple nodes in an element. For example, in a repeater element, you fetch the specialty name, effective start date, and the date of creation of a healthcare provider's specialty. In a pill group element, you fetch data about whether the account is a target account (Provider Account Territory Information's Targeted Account field), key opinion leader (Healthcare Provider's Classification field), and speaker (Healthcare Provider's Speaker field).

Retrieval Limits

- The record retrieval limit indicates the maximum number of records that you can fetch for a node and whether you can use operators for your elements. The retrieval limit also determines whether you can use a pill group or a repeater.
- The record retrieval limit is only available for graphs of type Card View.
- The record retrieval limit doesn't apply to the root node of a graph, as the graph automatically retrieves the record details of the record page it is added to.
- The pill group can only be applied to the root node and nodes that have the record retrieval limit of 1. The repeater can be applied to records of all nodes, irrespective of the retrieval limit.
- For field items in a pill group type element, you can add visibility conditions for all nodes, regardless of

- the retrieval limit. However, if the node has retrieval limit of none or more than 1, you can only check whether records were fetched.
- You can use operators to add filter conditions only if the node has a retrieval limit of 1. If a node doesn't have a record retrieval limit or the limit is more than 1, you can only check whether records were fetched at a section, element, or item level.

Configure a Provider Card

To capture the record details that you want to show in the provider card, define the relationships between the account-related objects in an actionable relationship center (ARC) graph. Get started by using the Provider Card template, which includes a customizable graph with nodes related to commonly used objects. You can also create a graph from scratch.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure a provider card: Life Science Commercial Admin permission set

1. From Setup, in the Quick Find box, find and select **Actionable Relationship Center**.
2. Create an ARC graph.
 - a. Click **New Relationship Graph**.
 - b. Create a graph from scratch or apply the provider card template, and click **Create Graph**.
 - c. In the properties pane, enter a label for the graph.
The API name is automatically populated.
 - d. For the graph type, select **Card View**.
The Switch to Builder button appears.
 - e. Add nodes to the graph as needed.
You can add the same node object multiple times. To differentiate between them, customize their display labels in the graph's Display tab.
 - f. For Record Retrieval Limit, enter the maximum number of records to fetch for a node.
To understand how retrieval limits affect your graph, see [Nodes and Retrieval Limits in Provider Cards](#).
3. Configure the card interface.
 - a. From the top left corner of the page, select **Switch To Card**.
 - b. Create a section, and add a section header label.
 - c. To display record details in the section, click **Add Element**.
You can add more than one element to a section.
 - d. To display the record details, select a pill group or a repeater.

- Use a pill group to combine attributes from multiple data sources. You can configure a pill group only for nodes that have a record retrieval limit of 1.
 - Use a repeater to display multiple records that belong to the same node object. You can include a pill or a text block in a repeater.
4. Configure the card's visibility. See [Set the Visibility Conditions for Provider Card Component](#)
You can't configure visibility conditions for items in a repeater.
- a. To configure the visibility conditions for sections and elements, select the section or element, and go to the Visibility Conditions tab.
The visibility conditions for pill group items are on the Properties tab.
 - b. Click **Add Condition**.
 - c. Select the node object and field that you want to display, and select an operator.
 - d. Enter the condition logic.
5. Save your changes.

Next, you add the ARC Relationship Graph Lightning App Builder component to the record page of the object that you configure as your root node.

Add a Provider Card to a Record Page

Help users access the provider card on the account tab in the iPad.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add the provider card to a record page: Life Science Commercial Admin permission set

1. From the App Launcher, find and select the Account record.
2. In the top-right corner, click  and select **Edit Page**.
3. Move the Actionable Relationship Graph component onto the record page.
If you create a graph with a root node of your choice, make sure you add the ARC Relationship Graph Lightning App Builder component to the root node's record page.
4. In the properties pane, enter a label for the graph.
5. For Graph Name, select the label of the graph.
6. Create a filter for the card to appear only in the mobile.
 - a. In the Set Component Visibility section, click **Add Filter**.
 - b. Select **Device** as the filter type.
 - c. In Field, select **Form Factor**.
 - d. In Operator, select **Equals**.
 - e. In Value, select **Phone**.

- f. Save your changes.

See Also

[Add ARC Relationship Graph Component to Record Pages](#)

Customizing a Provider Card

Explore the different ways in which you can showcase your account's information by configuring pills, repeaters, or a combination of both. Configure pills to display information only when it's available. Also, customize the information displayed within a repeater by configuring pills or text blocks. Choose to display the card's sections, elements, and items by configuring the visibility criteria for each component. Make sure your users always have the relevant information at hand by configuring the visibility conditions to dynamically display data from preferred sources or alternate sources if the preferred source isn't populated.

[Display Multiple Object Fields in a Provider Card](#)

A repeater displays individual field details of a node object in the same element in the form of a pill or a text block. For example, configure multiple fields of the Healthcare Provider Specialty, such as Specialty Name, Specialty Role, Effective From, Effective To, and so on.

[Set the Visibility Conditions for Provider Card Components](#)

Configure the provider card by using visibility conditions for sections and elements. Show boolean records by configuring the visibility of text items and field items.

[Show Preferred and Alternate Fields in a Provider Card by Using Visibility Conditions](#)

Configure a provider card to dynamically show data from alternative sources when a preferred field isn't populated. For example, make the Healthcare Provider object's Provider Type field your preference, but if the field isn't populated, the card dynamically shows your selected alternate field source, such as the Specialty Role field in the Healthcare Provider Specialty.

See Also

[Get a Quick Snapshot of an Account](#)

Display Multiple Object Fields in a Provider Card

A repeater displays individual field details of a node object in the same element in the form of a pill or a text block. For example, configure multiple fields of the Healthcare Provider Specialty, such as Specialty Name, Specialty Role, Effective From, Effective To, and so on.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add repeaters to a provider card:

Life Science Commercial Admin permission set

Configure Repeaters By Using Pills

Display multiple record details by using repeaters of type Pill.

1. From Setup, in the Quick Find box, find and select **Actionable Relationship Center**.
2. Edit the provider card template, and click **Switch to Card**
3. Create a section, and enter a name for the section.
4. Create an element, and select **Repeater** as the element type.
5. Select the source object, for example, the Healthcare Provider Specialty object.
6. For the display type, select **Pill**.
7. Add the fields to include in a pill.
 - a. Click **Add Field**, and then select a source field.
For example, select the Specialty Name field
 - b. Select a separator.
 - c. Continue adding the fields that you want to include.
For example, select the Specialty Role field.
8. Save your changes.



Configure Repeaters By Using Text

Render multiple records in a text block by configuring repeaters of type Text.

1. From Setup, in the Quick Find box, find and select **Actionable Relationship Center**.
2. Edit the provider card template, and click **Switch to Card**
3. Create a section, and enter a name for the section.
4. Create an element, and select **Repeater** as the element type.
5. Select the source object, for example, the Healthcare Provider Specialty object.
6. For the display type, select **Text**.
7. Add the fields to include in a text.
 - a. Click **Add Field**, and then select a source field.
For example, select the Specialty Name field
 - b. Select a separator.
 - c. Continue adding the fields that you want to include.
For example, select the Specialty Role field.
8. Save your changes.



Set the Visibility Conditions for Provider Card Components

Configure the provider card by using visibility conditions for sections and elements. Show boolean records by configuring the visibility of text items and field items.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To use pill groups in the card builder: Life Science Commercial Admin permission set

Add Visibility Conditions for Sections and Elements

1. From Setup, in the Quick Find box, find and select **Actionable Relationship Center**.
2. Edit the provider card template, and click **Switch to Card**
3. Add a visibility condition for a section.

For example, display a section named Account Details only when the account name is valid.

- a. Click **Add Section**, and enter a section label.
For example, enter Details.
- b. On the Visibility Conditions tab, click **Add Condition**.
- c. Select the node object and related field, such as Account and Account Name.
- d. Configure operators to define the section's visibility condition.
For example, select Is Not Null.

4. Add a visibility condition for an element.

For example, display an element only when the account is active.

- a. Click **Add Element**, and enter an element label.
- b. On the Visibility Conditions tab, click **Add Condition**.
- c. Select the node object and related field, such as Account and Active.
- d. Configure operators for the element's visibility condition.
For example, select Equals, and select True.



Configure Boolean Records with Pill Group Item Visibility

Display a boolean record in two ways. Configure different display texts for each the boolean value. Or, display the field and add Yes or No values according to the boolean value.

You can add visibility conditions only for items that are part of a pill group. However, you can add visibility conditions for the element and the section that contain the repeater.

1. From Setup, in the Quick Find box, find and select **Actionable Relationship Center**.
2. In the provider card's graph, click **Switch to Card**.
3. Create a section, and add a Pill Group element.
4. Configure separate display texts for each the boolean value.
 - a. Click **Add Display Text**, and enter the text to display when the boolean value equals Yes.
For example, enter Dispenses Medication.
 - b. Configure when the display text item is displayed. Click **Add Condition**.
 - c. Select the record's source object and field, such as Healthcare Provider and Dispenses Medication.
 - d. Configure operators to define the display text's visibility.
For example, select Equals and True.
 - e. Save your changes.
 - f. Configure the boolean value when the source field's operator equals false.
For example, create a display text item called Doesn't Dispense Medication, and add the visibility conditions.
5. Display the field and add Yes or No values according to the boolean value.
 - a. To configure the label to display on the card, click **Add Display Text**, and enter the label that represents the boolean field.
For example, enter Speaker?.
 - b. To display boolean values, click **Add Display Text**, and enter a value, such as Yes.
 - c. Configure the condition for the item to be visible, click **Add Condition**.
 - d. Select the record's source object and field, such as Healthcare Provider and Speaker.
 - e. Configure operators to define the display text's visibility.
For example, select Equals and True.
 - f. Save your changes.
 - g. Similarly, configure the boolean value when the source field's operator equals false.

Show Preferred and Alternate Fields in a Provider Card by Using Visibility Conditions

Configure a provider card to dynamically show data from alternative sources when a preferred field isn't populated. For example, make the Healthcare Provider object's Provider Type field your preference, but if the field isn't populated, the card dynamically shows your selected alternate field source, such as the Specialty Role field in the Healthcare Provider Specialty.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add visibility conditions:

Life Science Commercial Admin permission set

By default, the provider card displays a provider's preferred address based on the Provider Account Territory Info record. However, if the record's Preferred Address field isn't populated, the card shows the preferred address in the Contact Point Address field.

1. From Setup, in the Quick Find box, find and select **Actionable Relationship Center**.
2. Edit the provider card template, and click **Switch to Card**
3. Create a section, and enter a section name.
4. Add the preferred field.
 - a. In Element Type, select **Pill Group**, and add a field item.
 - b. Select the source object and source field.
For example, select Healthcare Provider as the object, and select Provider Type as the field.
5. Add the alternate field.
 - a. In Element Type, select **Pill Group**, and add a field item.
 - b. Select a source object and field that represents your alternate data source.
For example, select Healthcare Provider Specialty as the object and select Specialty Role as the field.
6. Save your changes.

Ratings

Ratings help prioritize and organize customer accounts into meaningful segments. Sales reps can use ratings to focus on the right customers, align on relevant accounts, and adjust strategies for maximum efficiency.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Supported Rating Segments

Configure Ratings on different objects to match how sales reps work and where segmentation delivers the most value. Sales reps view these rating segments directly in the Life Sciences Cloud for Customer Engagement app:

- General (Account): Displays all fields configured at the account level and applies to all user profiles linked to an account.
- Product (Provider Account Product Info): Displays ratings of individual products linked to an account for product-level targeting. Helps users understand a product's association to an account by showing

key rating information about it.

- Territory (Provider Account Territory Info): Displays territory-specific ratings linked to an account. Helps users view territory-specific product preferences or scores aligned with the account's assigned territory.
- Team (Provider Account User Group Info): Displays team-specific product ratings that helps users to see preferences or scores based on the group they belong to.
- Address (Contact Point Address): Displays location-specific ratings based on where a healthcare provider operates. Helps users view the account's location-specific ratings when an address exists. The default address is sourced from either the ProviderAcctTerritoryInfo object or the primary address on the Account.

Supported Rating Segments

Configure Ratings on different objects to match how sales reps work and where segmentation delivers the most value. Sales reps view these rating segments directly in the Life Sciences Cloud for Customer Engagement app:

- General (Account): Shows all the fields configured at the account level and applies to all the user profiles linked to an account.
- Product (Provider Account Product Info): Shows ratings of individual products linked to an account for product-level targeting. Helps users understand a product's association to an account by showing key rating information about the product.
- Territory (Provider Account Territory Info): Shows territory-specific ratings linked to an account. Helps users view territory-specific product preferences or scores aligned with the account's assigned territory.
- Team (Provider Account User Group Info): Shows team-specific product ratings that helps users to see preferences or scores based on the group they belong to.
- Address (Contact Point Address): Shows location-specific ratings based on where a healthcare provider operates. It helps users quickly view and assess an account's ratings for a particular location. The default address is sourced from either the ProviderAcctTerritoryInfo object or the primary address on the Account.

Visibility and Access Control

Control the visibility of specific ratings by setting permissions based on user roles and profiles. This flexibility enables sharing a single layout across multiple user profiles while ensuring users see only the ratings they are authorized to access. This access control method helps maintain data security and supports targeted user actions.

[Create a Ratings Layout](#)

In the Life Sciences Cloud for Customer Engagement web and mobile app, rating layouts visually represent ratings on an account's record page. Create a rating layout and add rating fields at various levels, including account, territory, product, team, or address. These layouts make sure that users see only the ratings relevant to their role and permissions.

[Add Ratings Layout to the Account Record Page](#)

Show visual insights about account activity by adding the ratings layout to healthcare professional (HCP) and healthcare organization (HCO) accounts. Embed the Ratings component to the custom tab

in the Lightning page and link it to the configured layout.

Mobile App Configuration for Ratings

Create object metadata cache configuration for supported Ratings objects in the Life Sciences for Customer Engagement mobile app. Generate a metadata cache to package the object metadata cache configuration into a downloadable metadata cache that the mobile app can use for online and offline access.

Create a Ratings Layout

In the Life Sciences Cloud for Customer Engagement web and mobile app, rating layouts visually represent ratings on an account's record page. Create a rating layout and add rating fields at various levels, including account, territory, product, team, or address. These layouts make sure that users see only the ratings relevant to their role and permissions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Ratings:	Life Sciences Commercial Admin
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1. From the App Launcher, find and select **Life Sciences Commercial**.
2. Click **Admin Console**
3. In the Life Sciences Customer Engagement Setup page, click **Ratings**.
4. On the Ratings Layouts page, click **New Layout**.
5. Enter the name for your layout, and click **Create**.
6. Enter the details for a new rating.
 - a. In the layout builder, click  next to the Ratings label.
 - b. From the dropdown list, select the object the rating applies to.
For example, Account, Territory, Product or Team.
7. Add fields from the selected object to the ratings layout.



Note For team-based ratings, if a user belongs to multiple groups, you can ensure a specific group's ratings remain visible by populating the PrimaryUser field in the UserAdditionalInfo object.

- c. In the Display Type section, choose how the rating should appear on the layout.
Based on your selection, a dialog box shows additional options, such as Field, Show Percentage Change, Ranges, or Format.
- d. Complete the required fields, including the source field and a custom name for the rating.
- e. Save your changes.

8. Add fields from the selected object to the ratings layout.

- a. To add the fields to the layout, click the available fields listed under the Ratings section in the pane.
 - b. On the layout canvas, drag and position the rating cards on the layout as needed.
 - c. Hover over the rating card and click  to adjust its size.
 - d. When you add product ratings, they appear grouped under the Ratings column at the bottom. The layout supports one column per product.
- Similarly, drag and arrange team ratings within the appropriate column in the layout.
8. Reorder columns within the ratings card.
 - a. Hover over the section you want to rearrange.
 - b. Click .
 - c. Drag the columns to reposition them as necessary.
 - d. To close the configuration pane and return to the layout builder, click .
 9. To remove a rating from the layout, click  on the rating card.
 10. Save your changes.

The layout is created in the admin console. Next, configure object schema to activate supported objects for Ratings and generate a metadata cache to make this layout available in the mobile app.

Add Ratings Layout to the Account Record Page

Show visual insights about account activity by adding the ratings layout to healthcare professional (HCP) and healthcare organization (HCO) accounts. Embed the Ratings component to the custom tab in the Lightning page and link it to the configured layout.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Ratings:

Life Sciences Commercial Admin

1. From the App Launcher, find and select **Accounts**.
2. In the Accounts list view page, click the name of the HCP or HCO account.
3. To edit the page layout, click the  icon, and then click **Edit Page**.
The Lightning App Builder opens.
4. Click the section where you want to add a Ratings tab.
The Properties pane opens on the pane.
5. Click **Add Tab**.
6. After the new tab is added, click the tab to customize it.
 - a. Select tab label as **Custom**.
 - b. Enter a custom label. For example, Ratings.

- c. Click **Done**.
7. From the Components pane, in the Search field, enter the name of the Lightning component.
8. Drag the Ratings component to the page layout.
Customize the record page layout by dragging components to rearrange them within the page.
9. Add properties to the Ratings component.
 - a. Click the Ratings component you added earlier.
 - b. In the Properties pane, from the dropdown, select the layout you created.
 - c. Select **Group Product Ratings by Detail Type**.
10. Save your changes, and then click **Activation**.
11. In the Activation window, select whether to Assign or Remove your org as default, and follow the prompts to continue. You can also leave it as is and complete your activation.

To make this tab available in the mobile app, generate a metadata cache.

See Also

[Mobile App Configuration for Ratings](#)

Mobile App Configuration for Ratings

Create object metadata cache configuration for supported Ratings objects in the Life Sciences for Customer Engagement mobile app. Generate a metadata cache to package the object metadata cache configuration into a downloadable metadata cache that the mobile app can use for online and offline access.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Configure object metadata cache configuration for these objects.

Object	Type
Account	Data
ProviderAcctTerritoryInfo	Data
LifeSciMarketableProduct	Data
ContactPointAddress	Data
PrvdAccountUserGroupInfo	Data
Group	Data

Object	Type
GroupMember	Data

! **Important** Generate a metadata cache after you create these configurations. This step is critical because it makes sure that the mobile app accesses the latest metadata definitions, including any schema changes for supported objects.

See Also

[Add Ratings Layout to the Account Record Page](#)

[Create Object Metadata Cache Configuration](#)

[Generate Metadata Cache](#)

Territory Management Batch Jobs

Territory management relies on dedicated batch jobs to handle large-scale data processing. These jobs automate the critical task of aligning accounts to specific territories, whether through explicit mappings loaded from external systems or based on geographical representations like zip/postal codes or bricks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

After the Account to Territory, Zip to Territory, and Brick to Territory jobs are run, the Affiliation Alignment job runs automatically if Affiliation Rules have been created in the org. The job looks at the rule criteria Account Type, Affiliation Role, and Specialty that have been created and aligns any Accounts based on Provider Affiliations that meet the criteria for the specified territory(s).

Align Account to Territory

This batch job processes and synchronizes large volumes of manual account-to-territory assignments created by users directly through Salesforce's standard territory management tools or loaded from external systems. It carries out two primary functions:

- It automatically generates or updates corresponding Provider Account Territory Info records and sharing permissions to match manual territory assignments when accounts are manually linked.
- It generates territory-based sharing records and removes orphaned territory assignments and sharing records for inactive accounts or removed manual assignments. Additionally, a Provider Account Territory Info record without a corresponding Object Territory Association record is inactivated and unshared from the territory. This automates cleanup and avoids separate manual maintenance of accurate sales representative access.

Align Zip to Territory

This batch job automates account assignment to territories using predefined Postal/Zip code mappings. A Postal/Zip code defines a postal region, primarily used in the United States. The job processes account and address information to link providers to territories by applying configured geographic assignment rules. It automatically creates and updates the necessary records, providing sales reps with proper access.

Align Brick to Territory

This batch job establishes territory-to-account alignments using preconfigured brick mappings. A brick is a distinct geographical segment, predominantly used in Europe. The job systematically analyzes account and address data. Then, it applies established geographic assignment rules to integrate providers into sales territories. This process leads to the automatic creation and updating of essential records, guaranteeing sales reps appropriate access without manual effort.

Run Territory Management Jobs

Automate the processing of large record volumes by running the Align Account to Territory, Align Zip to Territory, and Align Brick to Territory batch Apex jobs from the Admin Console. You can track their status and terminate them from Setup as needed.

Run Territory Management Jobs

Automate the processing of large record volumes by running the Align Account to Territory, Align Zip to Territory, and Align Brick to Territory batch Apex jobs from the Admin Console. You can track their status and terminate them from Setup as needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To run territory management jobs:	Life Sciences Commercial Admin permission set
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Before you get started with running territory management jobs, make sure that the required mapping or rule records are in place. For aligning account to territory, populate the account's territory mappings as Object Territory Association records. For aligning zip and brick to territory, create the Territory Geo Assignment Rule records with the UsageType set as ZipToTerritory and BrickToTerritory respectively.

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.

2. Select **Territories**, and then select **Territory Management**.
3. Select the batch jobs as per requirements:
 - a. Align Account to Territory
 - b. Align Zip to Territory
 - c. Align Brick to Territory
4. To run the batch job now, click **Run Now**.
5. Select the required territory and its subordinates from the appropriate level in the territory hierarchy.
6. You can drag the slider handle to select the batch size of the job. The default value is 200.
7. Click **Run**.
8. You can schedule the job for later.
 - a. Select the frequency from the dropdown. You can run the job:
 - **Weekly**, to recur every time on the selected day, by selecting the preferred start time from the dropdown.
 - **Daily** by selecting the preferred start time from the dropdown.
 - **Hourly**, every selected hours, by selecting the hour from the dropdown.
 - b. Use the slider handle to select the batch job's size. The default value is 200.
 - c. Save your changes.

You can view the details of the different jobs that run in a table. These include Job Name, Job ID, Job Type, Status, Start Date/Time, Completion Date/Time, and Number of Failures. You can also sort batch jobs in the table by these details.

See Also

[Salesforce Developer Guide: ObjectTerritory2Association](#)

Set Up Engagement Planning Features

Optimize daily schedules, prioritize key events, and manage routines with Calendar. Log and manage time away from your territory with Time Off Territory. Improve your plans' chances of success with reusable goal definition templates. Personalize action plan templates for Key Account Management. Identify growth opportunities and adapt to evolving customer needs with Account Plans. Drive initiatives targeted at key accounts in a region with Territory Business Plans.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Activity Plans](#)

Manage and execute omni-channel cycle plans and call plans by defining specific strategies for the field representatives' interactions with healthcare professionals. Use Activity Plans to set targets by

object type such as an event, meeting, or email, and measure outcomes to incentivize field representatives to achieve those targets. The entire process follows a structured workflow involving different user roles to create, review, and implement plans effectively.

Calendar

Help your sales teams visualize and prioritize key events such as visits, meetings, and time off territory. Schedule events with the best time recommendations to avoid conflicts and create optimized daily plans. Users can save sets of visits as routines and access team member's schedules. With Calendar, users easily identify different types of events alongside their key information and status.

Key Account Management for Customer Engagement

Drive strategic, insight-based customer engagement with Life Sciences Cloud Key Account Management. Foster long-term, high-value partnerships, and achieve common goals by configuring account plans. Implement strategic initiatives focused on specific territories. Identify growth opportunities, anticipate customer concerns, and promote cross-functional collaboration. Enable users to configure records, manage goals, and execute tasks on the web and on an iPad.

Time Off Territory Setup

Let users log and manage their time away from assigned territories. Configure time off territory rules in Planner to prevent users from scheduling events during inconvenient time slots. In addition, create predefined time slot intervals that users can use to create time-offs across multiple days.

Activity Plans

Manage and execute omni-channel cycle plans and call plans by defining specific strategies for the field representatives' interactions with healthcare professionals. Use Activity Plans to set targets by object type such as an event, meeting, or email, and measure outcomes to incentivize field representatives to achieve those targets. The entire process follows a structured workflow involving different user roles to create, review, and implement plans effectively.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

In the pharmaceutical industry, call plans and cycle plans represent a strategic blueprint for the field representatives to network with healthcare professionals. An activity refers to any interaction with a healthcare professional, such as a visit, whereas a channel is the medium in which the interaction or activity is executed, such as a face-to-face meeting.

Activity Plans help transform your provider interaction strategies into an actionable task with defined goals and targets for your field representatives. A plan's lifecycle involves distinct stages, from initial setup by activity plan administrators, review by sales representatives and managers, to final execution. Here's a summary of the key capabilities of Activity Plans.

- Translate your organization's high-level objectives into specific, actionable goals for field teams by creating precise targets based on customer, interaction type, product, and territory.
- Assign different weights or priorities to various activities and give your sales representatives flexibility in choosing how to meet their overall targets and attain their goals.
- Visualize individual and team performance and progress against goals by using dashboards and charts on the home page or account profiles. You can filter by activity and product.
- Instantly see the goal status for specific accounts through contextual indicators shown directly in lists and planners.
- Foster teamwork and a unified view of progress by setting goals that can be shared across multiple territories on aligned accounts.
- Ensure fair and realistic targets by automatically adjusting and prorating goals based on an individual's available working days, accounting for holidays and time off.

Get Your Org Ready for Activity Plans

Before you set up Activity Plans in Life Sciences Cloud, make sure that you have the required user profiles, licenses, and permission sets.

Activity Plans Display Configurations

Prepare your org for Activity Plans by configuring tabs and Lightning App Builder components.

Activity Plan Admin Console Configurations

To help Activity Plan admins define plans without hassle, configure provider activity measure types and batch-related settings.

Activity Plan Process Checklist

Setting up Activity Plans for your organization involves multiple steps, such as defining clear objectives for the field reps, tracking their progress, and making the necessary adjustments to maximize impact. Follow this checklist for a smoother implementation of Activity Plans for your organization.

Activity Plans Setup

To configure activity plan, you must define time periods, plans, activity types, goals, and metrics. But before you start setting up records, learn about the activity plan statuses and activity plan types.

Activity Plan Review

Activity plans offer extended capabilities, such as Activity Plan Review. Find out more about the Activity Plan Review lifecycle conducted by employees (field reps), managers, and admins.

Activity Plan Adjustments

Provide sales representatives and other users with the flexibility to modify their activity plan goals and goal measures as required. Users can track activity types for accounts that aren't in the plan or track additional activity types for accounts that are already in the plan. Also, users can update goal measures and remove accounts from a plan. Activity Plans can be adjusted both from the web and the iPad.

Resolve Issues with Activity Plans

If you encounter issues with activity plans, learn about the potential causes and follow the steps to resolve them.

Get Your Org Ready for Activity Plans

Before you set up Activity Plans in Life Sciences Cloud, make sure that you have the required user

profiles, licenses, and permission sets.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

- Create custom user profiles for sales representatives and sales managers based on the Standard User profile. Associate the profiles with the corresponding user records. See [Create Custom Standard User Profiles for Life Sciences Customer Engagement](#).
- Assign the Life Sciences Core and Life Sciences Field Sales Representative permission sets to sales representatives and sales managers. See [Assign Life Sciences Cloud for Customer Engagement Permission Sets](#).
- Set up HCP accounts, territories, and provider account territory information. See [Set Up Sales Territories for Life Sciences Cloud](#).
- Associate the HCP accounts with an active, primary healthcare specialty. See [Create Care Specialty Records](#).
- Assign territories to the sales representatives and sales managers. You must assign the sales manager to the parent territory of the sales representatives' territory. See [Assign Users to Territories](#).
- Make sure the Activity Plan trigger handlers are active. For details of each trigger handler, including descriptions, and trigger conditions, see the ActivityPlan and ActivityPlanTerritory tables in [Trigger Handlers for the Account - AssessmentTask Objects](#).
 - ActivityPlanTerritoryValidationHandler
 - ActivityPlanValidationHandler
 - ActivityPlanTerritoryModHandler
 - ActivityPlanTerritorySharingHandler
 - PAPATerritoryUpdateHandler
 - PAPAAgreeProcessHandler

Activity Plans Display Configurations

Prepare your org for Activity Plans by configuring tabs and Lightning App Builder components.

[Add a Tab for Activity Plan Reviews](#)

Streamline the activity plan review cycle and help your users easily review the plan by creating a centralized, dedicated tab in the Life Sciences Commercial app. Grant access to the appropriate user profiles to make sure this tab is visible only to your sales teams. Sales representatives can view, review, and request changes in the activity plans, while managers can view, approve, and update the activity plans, all from one place. This phase is optional. If you decide not to allow the Field Review, then you can manually set the status of the plan cycles to Approved.

[Add the Activity Plan Lightning Component to the Account Record Page](#)

Embed performance metrics directly into your standard Account record page to provide sales teams

with a contextual view of account goals and product-specific progress. Standardize this data-rich layout across your organization to ensure a consistent view of performance on every account. Users can also apply various filters to see the actual and potential goal completion rates.

Add the Activity Plan Lightning Component to the Home Page

Embed the Activity Plan Lightning component into the home page of the Life Sciences Commercial app, for at-a-glance visibility. The component shows both a high-level summary of activity plan goals and a more granular, product-by-product performance view. Set this data-rich layout as the new default experience for all sales representatives and managers to keep strategic goals top of mind. Users can also apply filters to see the actual and potential goal completion rates.

Add a Tab for Activity Plan Reviews

Streamline the activity plan review cycle and help your users easily review the plan by creating a centralized, dedicated tab in the Life Sciences Commercial app. Grant access to the appropriate user profiles to make sure this tab is visible only to your sales teams. Sales representatives can view, review, and request changes in the activity plans, while managers can view, approve, and update the activity plans, all from one place. This phase is optional. If you decide not to allow the Field Review, then you can manually set the status of the plan cycles to Approved.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a tab:	Life Sciences Commercial Admin permission set
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The Employee Review and Manager Review stages help ensure buy-in and catch errors before plan activation. Set realistic review periods; for example, 2 weeks for employee review and 1 week for manager review. Communicate review deadlines clearly to users. Use the review period to identify unrealistic goals, missing accounts, or territory assignment issues before the plan goes live.

 **Note** Activity Plan Review is available only on the web.

1. From Setup, use the Quick Find box to search for and select **Tabs**.
2. Under Lightning Component Tabs, click **New**.
3. In Lightning Component, select **Isc4ce:PlanCycle**.
4. Enter a label and name for the tab. For example, enter *Activity Plan Review*.
5. Select a tab style.
6. Enter a description for the tab, and click **Next**.
7. Select the user profiles that require access to the tab, such as sales representatives and sales

managers.

8. Save your changes.

Add the Activity Plan Lightning Component to the Account Record Page

Embed performance metrics directly into your standard Account record page to provide sales teams with a contextual view of account goals and product-specific progress. Standardize this data-rich layout across your organization to ensure a consistent view of performance on every account. Users can also apply various filters to see the actual and potential goal completion rates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure a Lightning component: Life Sciences Commercial Admin permission set

1. On the Account record page, from the Setup menu, click **Edit Page**.
2. On the Lightning App Builder, from the Components section, drag the Activity Plan By Product component to an appropriate spot on the Account page.
3. In the Activity Plan By Product component properties, select a plan cycle type, such as AccountGoal or WeightedTerritoryGoal. The Activity Plan By Product component doesn't support product and activity filters for plan cycle weighted types.
4. Save your changes.
5. Click **Activation**.
6. Click **Assign as Org Default** and select **Desktop and Phone**.
7. Click **Next**, and save your changes.

Add the Activity Plan Lightning Component to the Home Page

Embed the Activity Plan Lightning component into the home page of the Life Sciences Commercial app, for at-a-glance visibility. The component shows both a high-level summary of activity plan goals and a more granular, product-by-product performance view. Set this data-rich layout as the new default experience for all sales representatives and managers to keep strategic goals top of mind. Users can also apply filters to see the actual and potential goal completion rates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure a Lightning component: Life Sciences Commercial Admin permission set

 **Note** : The Activity Plan By Product component is only available for activity plans of type Account Goal and Weighted Territory Goal. It's not available for activity plans of type Account Goal Shared.

1. On the Life Sciences Commercial home page, from the Setup menu, click **Edit Page**.
2. On the Lightning App Builder, from the Components section, in the Custom - Managed list, drag the Activity Plan By Product component to an appropriate spot on the home page.
3. In the Activity Plan By Product component properties, select a plan cycle type, such as AccountGoal or WeightedTerritoryGoal. The Activity Plan By Product component doesn't support product and activity filters for plan cycle weighted types.
4. Save your changes.
5. Click **Activation**.
6. Click **Assign as Org Default** and select **Desktop and Phone**.
7. Click **Next**, and save your changes.

Activity Plan Admin Console Configurations

To help Activity Plan admins define plans without hassle, configure provider activity measure types and batch-related settings.

[Set Up Provider Activity Measure Types for Activity Plans](#)

Provider activity measure types are the types of sales representative activities that an organization wants to track. Define measure types based on the Visit, Provider Visit, Provider Visit Detailing, or Life Science Email object, or any custom object you create. These measure types help organizations track the progress and impact of various activities, making sure that they align with their goals and objectives.

[Set Up Batch Size and Calculations for Activity Plans](#)

Configure operational settings such as the size of batch jobs that govern your entire Activity Plan management. Define the fundamental calculation logic, such as basing performance pace on actual working days. Turn on flexible reporting options to allow users to view their progress by product or non-product activities.

[Batch Jobs for Activity Plans](#)

Batch jobs are automated processes designed to update and manage multiple activity plan records efficiently. Save time, reduce the risk of manual errors, and maintain the integrity and reliability of activity plan data with these jobs. Make sure that all relevant records are updated consistently and accurately by either triggering a job immediately or scheduling it for later.

[Set Up Ratings, Lists, and Filters for Activity Plans](#)

Help your sales representatives and sales managers view and analyze the granular details of activity plans by configuring ratings, lists, and filters. With these configurations, your users can see dedicated list view filters on the Account record page and use default ratings for filtering activity plan records.

Set Up Provider Activity Measure Types for Activity Plans

Provider activity measure types are the types of sales representative activities that an organization wants to track. Define measure types based on the Visit, Provider Visit, Provider Visit Detailing, or Life Science Email object, or any custom object you create. These measure types help organizations track the progress and impact of various activities, making sure that they align with their goals and objectives.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up provider activity measure types: Life Sciences Commercial Admin permission set

Prerequisite

- The Activity Type Field and the Activity Type Field Value fields are optional, but if you want to capture these details for visits, add picklist values to the Channel field on the Visit object. Also, review the fields on the Provider Visit, Provider Visit Detailing, and Life Science Email objects, and add the required picklist values.
 - For non-product activity types, create custom number fields on the Provider Account Territory Information object.
 - Scheduled activity count: Stores total count of scheduled activities.
 - Actual activity value: Stores total goal value from provider activity goals.
 - Actual activity count: Stores total count of completed activities.
1. From the App Launcher, find and select **Admin Console**.
 2. Select **Activity Plans**, and then select **Activity Plan Administration**.
 3. To create a provider activity measure type, click **New**.
 4. On the New Provider Activity Measure Type window, under General Information, complete the fields as needed.
 - a. For Activity Object, select the object that represents the activity or interaction you want to track. Possible values include standard objects like Visit, Provider Visit, Provider Visit Detailing, or Life Science Email, or any custom object you set up.
 - b. Enter a custom label and API name for the activity type.
The label is displayed in reports. The API name represents the unique identifier of the record. For example, for an activity type that represents a visit, enter *Phone Visit* as the label, and

VisitPhoneCall as the API name.

- c. For Activity Type Field, select a field on the activity object that you want to include for tracking.
For example, if you select Visit as the activity object, select one of its fields in Activity Type Field, such as Channel.
 - d. For Activity Type Field Value, enter the value of the field you selected as the activity type.
This field helps you track activities at a granular level. However, make sure that the value you enter exactly matches the field value in the org.
For example, if you select Channel as the Activity Type Field, add the type of channel the activity is performed through, such as *Phone*. Make sure Phone is a valid picklist value in Visit's Channel field.
 - e. If needed, for Activity Type Exclusion Field, select a field you want to exclude from the activity plan.
 - f. For Activity Account Field, select a field on the activity object that references an account.
For activities set up by using custom objects, select a field that has a lookup to the Account object, or select any text field that stores an external identifier of an account.
For example, select the Visit object's Account ID as the activity account field.
 - g. For Activity Territory Field, select a field on the activity object that references a territory.
For activities set up by using custom objects, select a field that has a lookup to the Territory object, or select any text field that stores an external identifier of a territory.
For example, select the Visit object's Territory ID as the activity territory field.
 - h. For Activity Type Date Time Field, select the date time field that stores information about when the activity occurred.
For custom activities, select the corresponding date time type field on the custom object.
For example, select the Visit object's Planned Start Date field.
 - i. Assign a number for the display order.
This field determines the order in which an activity plan is shown on the account page and the home page.
 - j. Select **Active**.
This configuration enables goal tracking for the provider activity.
5. Activity plans track both scheduled (future) and completed (past) activities. In the Activity Status Information section, define the statuses that correspond to each state.
Verify the status values exist or are configured in your org.
- a. For Activity Type Status Field, select the field on the activity object that represents the activity type's status.
For example, select the Visit object's Status field.
 - b. For Activity Type Scheduled Status List, enter a semicolon-separated list of status values that represent scheduled activities.
For example, enter *Planned*.
If you enter multiple values using semicolons, avoid spaces after the semicolons. For example, enter *Planned;Draft;NotStarted*.
 - c. For Activity Type Status List, enter a semicolon-separated list of status values that represent completed activities.
For example, enter *Completed*.
If you enter multiple values using semicolons, avoid spaces after the semicolons. For example, enter *Completed;Done;Over*.
6. Add provider account territory info for non-product-based activities. In the Provider Account Territory Information Field section, add the following fields.

- a. For Aggregated Activity Scheduled Field, enter the custom number field on the Provider Account Territory Information that refers to the scheduled activity count.
 - b. For Aggregated Goal Field, enter the custom number field on the Provider Account Territory Information that refers to the actual activity value.
 - c. For Aggregated Activity Actual Field, enter the custom number field on the Provider Account Territory Information that refers to the actual activity count.
7. Add advanced configurations for related objects when the activity object doesn't directly reference the Account field.
- a. For Level 1 Related Account Object, select the parent object that contains the Account field.
For example, if the activity object is Provider Visit Product Detailing, select Provider Visit.
8. Save your changes.

Set Up Batch Size and Calculations for Activity Plans

Configure operational settings such as the size of batch jobs that govern your entire Activity Plan management. Define the fundamental calculation logic, such as basing performance pace on actual working days. Turn on flexible reporting options to allow users to view their progress by product or non-product activities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up batch size for Activity Plans:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Select **Activity Plan** and then select **Activity Plan Configuration**.
3. Under Batch Size Settings, configure the batch size.
For example, enter 200.
4. Under General Settings, set up how to calculate performance.
 - a. To exclude sales reps' time-offs such as holidays and weekends from the activity plan calculation, select **Enable working days calculations**.
If you don't select this option, the calculation is based on the time length of the activity plan.
 - b. To calculate activity plans only for provider engagements that are associated with a product, select **Use product-based calculations**.
 - c. To calculate activity plans for provider engagements that don't involve a product, such as generic visits, select **Use non-product-based calculations**.
5. Save your changes.

Batch Jobs for Activity Plans

Batch jobs are automated processes designed to update and manage multiple activity plan records efficiently. Save time, reduce the risk of manual errors, and maintain the integrity and reliability of activity plan data with these jobs. Make sure that all relevant records are updated consistently and accurately by either triggering a job immediately or scheduling it for later.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You can find the jobs in the Activity Plan Jobs and Working Days Jobs sections under Activity Plan in the Admin Console. For more information on how to run or schedule a job, see [Run Batch Jobs](#).

Job Name	Description
Validate Activity Plans	<p>Activates and deactivates an activity plan based on its time period. We recommend running it daily.</p> <ul style="list-style-type: none">• Marks the activity plan as Active if the start date of the activity plan is on or before the current date.• Marks the activity plan as Inactive if the end date of the activity plan is before the current date or if the start date is after the current date.
Update Activity Plan Status	<p>Processes plans that have passed their due dates, manages the transition between Employee Review and Manager Review stages, cleans up redundant or invalid plan data, such as Provider Activity Goal Measure and Provider Activity Goal records, and updates the plan's status. We recommend running it daily.</p> <p>The job runs if the activity plan status is Employee Review and the Assignee Due Date is before the current date or if the status is Manager Review and the Reviewer Due Date is before the current date.</p>
Calculate Provider Activity Goal Measures	<p>Calculates the scheduled and submitted counts for all provider activity goal measures associated with an active activity plan. Updates the Total Scheduled Activity Value and Total Actual Activity</p>

Job Name	Description
	<p>Value fields for Provider Activity Goal Measures and Provider Activity Goals. We recommend running it hourly.</p> <p>This job considers only active activity plans. Select a territory for running the job. To include inactive activity plans, go to the Inactive tab on the Job: Calculate Provider Activity Goal Measures window, select up to three inactive plans, and run the job.</p>
Calculate Provider Activity Goal Measures for Shared Activity Plans	<p>Calculates the scheduled and submitted counts for all provider activity goal measures associated with active shared activity plans. We recommend running it hourly.</p> <ul style="list-style-type: none"> Verifies all activities linked to the specified territories and activity plans, and retrieves the Provider Activity Goal Measure records. Updates the Total Scheduled Activity Value and Total Actual Activity Value fields for Provider Activity Goal Measures. Retrieves and updates the Provider Account Territory Information records that match the specified territory and account details.
Reset Provider Account Territory Information	<p>Resets the provider account territory information associated with inactive provider activity goals. We recommend running it daily.</p> <ul style="list-style-type: none"> Identifies inactive Provider Activity Goal records with activity plan type Account Goal, Account Goal Shared, or Weighted Territory Goals. Filters Provider Account Territory Information records based on the linked account. Updates the configured fields in the Provider Account Territory Information records to null.
Calculate Working Days	<p>Calculates the number of working days for all active activity plans, excluding those with the Account Goal Shared type. We recommend running it daily.</p> <ul style="list-style-type: none"> Gets configuration details, such as Time Off Territory Settings, Working Days Config, and BusinessHours. Calculates the total possible working hours, and subtracts the hours for Time Off Territory (TOT) and holidays. Accounts for weekends, holidays, and different types of time off, including full days, partial days, and scheduled time slots.

Job Name	Description
	<ul style="list-style-type: none"> Updates the Working Day Count field for the Activity Plan records, rounding to the nearest 0.5 day.

Set Up Ratings, Lists, and Filters for Activity Plans

Help your sales representatives and sales managers view and analyze the granular details of activity plans by configuring ratings, lists, and filters. With these configurations, your users can see dedicated list view filters on the Account record page and use default ratings for filtering activity plan records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up ratings, lists, and filters for Activity Plans: Life Sciences Commercial Admin permission set

Prerequisite: [Configure ratings](#).

- From the App Launcher, find and select **Admin Console**.
- Select **Activity Plan** and then select **Activity Plan Settings**.
- Choose whether to apply the settings org-wide or to a particular user profile.
- Under the Rating Setting section, select an object and a field.
This field defines what the Rating column shows on the Activity Plan Review tab. Users can sort the accounts within the Activity Plan Review tab by this rating.
- Under the Table View Settings section, select whether you want to show activity plans or weighted activity plans on the Accounts page.
- Save your changes.

Activity Plan Process Checklist

Setting up Activity Plans for your organization involves multiple steps, such as defining clear objectives for the field reps, tracking their progress, and making the necessary adjustments to maximize impact. Follow this checklist for a smoother implementation of Activity Plans for your organization.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

- Complete the prerequisites for Activity Plans setup.
 - Set up [provider activity measure types](#) for activity plans
 - Define a [time period](#).
- Create an activity plan of type Account Goal, Weighted Territory Goal, or Account Goal Shared.
 - Create an [Account Goal Type activity plan](#).
 - Create a [Weighted Territory Goal Type activity plan](#)
 - Create an [Account Goal Shared Type activity plan](#).
- Assign a [territory to the activity plan](#)
- Set [provider activity goals](#) for the activity plan
- Set [provider activity goal measures](#) for the activity plan
- Assign [goals for specific products](#) related to the activity plan
- Explore the extended capabilities of Activity Plans.
 - Learn about [Activity Plan Review](#)
 - Prepare for [Activity Plan Adjustments](#)

Activity Plans Setup

To configure activity plan, you must define time periods, plans, activity types, goals, and metrics. But before you start setting up records, learn about the activity plan statuses and activity plan types.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Activity Plan Status Values

An activity plan goes through various stages before it's approved. The status of an activity plan determines which actions are available to admins.

- In Progress: Refers to the state in which a plan cycle is being drafted. The activity plan is not active yet, and so it's not visible to managers and employees. Activity plan admins manually select this status. The Active checkbox should be unselected.

- Employee Review: Refers to the state that's automatically assigned to the plan when the employees edit the plan or when the activity admin seeks suggestions. The employees can edit the values till the Employee Due Date. Managers and admins have read-only access to the plan. This status is also used when employees provide suggestions for accounts with no goals, where the Is Suggested checkbox is selected and the Overall Goal field is blank.
- Manager Review: Refers to the state that's automatically assigned to the plan when the employees submit the plan or when the employees' due date is reached. The manager reviews and adjusts the values, while the employees and the activity plan admin have only read-only access. The plan moves into the next stage either by manager submission or when the Manager Due Date is reached.
- Submitted: Refers to the state that's automatically assigned to the plan when the manager submits the plan or when the Manager Due Date passes without edits. The plan is now submitted to the admin for a final round of review, and the employee and manager edits are locked unless the admin overrides the settings.
- Admin Review: Refers to the final round of review in which the admin reviews the proposals before providing their approval.
- Approved: Refers to the state in which the activity plan is approved and active. Employees execute the activities against their goals. Admins manually select this status after reviewing and finalizing the plan. The Active checkbox should be unselected for the Approved status.
- Rejected: Admins manually select this status if the plan is not approved during the admin review. The plan does not proceed to execution.

Activity Plan Types

Activity plan are of three types: account goal, weighted territory goal, and account goal shared.

- Account goals are the standard activity plans, created for a singular account.
- Weighted territory goals help you assign weights to activities so that higher-impact activities count more towards a goal.
- Account goal shared helps sales reps share activities in a territory, boosting team-based selling and collaboration.

Define Time Period for the Activity Plan

To help define the duration of an activity plan, configure a Time Period record.

Create Activity Plans

Establish a strategic activity plan to define activity goals for your sales representatives over a specific period. Tailor the plan's structure with flexible goal types, whether for individual accounts, weighted activities, or shared territories. Implement a formal review process with deadlines and thresholds to govern how sales representatives and managers can modify the plan. Give users the flexibility to adjust their goals as needed.

Associate Territories with Activity Plans

Connect your strategic activity plans to the territories where sales representatives perform the required activities. Define objectives for a specific territory, cascade performance goals down to the field level, and help provide clear direction to your sales teams. Create Activity Plan Territory records for associating activity plans with territories.

Set Goals for Activity Plans

Associate an activity plan with individual healthcare accounts and set their high-level performance goals. Define the required targets by breaking down the overall goal into product-specific and non-product-related activities. Establish a baseline to track and populate goal attainment as sales representatives complete their interactions and activities.

Set Goal Measures for Activity Plans

Refine your account-level goals by setting measurable targets for each distinct type of sales activity. Assign a value to each activity by choosing between a simple target count or a weighted model that values some interactions more than others. Build a complete performance framework that connects the high-level strategic plan to the specific, daily tasks your sales representatives perform.

Set Product Goal Measures for Activity Plans

Create a highly targeted activity plan that measures performance not just on the activity, but on the specific product being promoted. Link products to individual sales activities that you've defined for each account. Assign a unique weight to each product to strategically prioritize certain items within a weighted goal plan.

Define Time Period for the Activity Plan

To help define the duration of an activity plan, configure a Time Period record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a time period:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Time Period**.
2. Click **New**.
3. Enter a name for the time period, such as *Q4*.
4. Select the start date and time and the end date and time of the activity plan.
5. Save your changes.

Create Activity Plans

Establish a strategic activity plan to define activity goals for your sales representatives over a specific period. Tailor the plan's structure with flexible goal types, whether for individual accounts, weighted activities, or shared territories. Implement a formal review process with deadlines and thresholds to govern how sales representatives and managers can modify the plan. Give users the flexibility to adjust their goals as needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create activity plans: Life Sciences Commercial Admin permission set

Prerequisites:

- [Create a Provider Activity Measure Type record](#).
- [Create a time period record](#) with the start and end date of the activity plan

Use [Salesforce Data Import](#) to import all activity plan data in bulk from external sources to Salesforce. However, if you must manually set up records for activity plans, follow these steps.

1. From the App Launcher, find and select **Activity Plans**.
2. Click **New**, and enter a name for the plan.
3. Select the status.

To let sales representatives review the plan before it's finalized, select *In Progress*.

To find out more about each Activity Plan status, see [Activity Plans Setup](#).

4. Select the required time period for the activity plan.
5. For Usage Type, select **Provider Plan Cycle**.
6. Select an activity plan type.
 - To set singular goals for an account for each activity type, select **Account Goal**.
 - To set different weights for an account for each activity type, select **Weighted Territory Goals**.
 - To set singular goals for an account that's shared across multiple territories, select **Account Goal Shared**.
7. If you're not using the working days calculation to populate this field, optionally enter the number of working days for the activity plan.
8. To enable plan calculations for this activity plan, select **Calculation Enabled**.
9. Under the Review Details section, set up the review conditions.
 - a. For Assignee Due Date and Reviewer Due Date, enter the dates by when the sales representatives and managers must review the plan.
 - b. For Total Activity Change Review Threshold Percentage, enter the maximum percentage that a sales representative and manager can change the combined goals of all accounts.
 - c. For Total Account Change Review Threshold Percentage, enter the maximum percentage that a sales representative and manager can change the total number of accounts in the plan.
 - d. For Activity Change Review Threshold Percentage, enter the maximum percentage that a sales representative and manager can change an account's activity goal.
10. If you want to enable users to raise adjustment requests, under the Adjustment Details section, set up

- the limits within which an adjustment request must be raised.
- a. For Assignee Plan Adjustment Start Date and Assignee Plan Adjustment End Date, select the date range within which the sales representative can raise an adjustment request.
 - b. For Reviewer Plan Adjustment Start Date and Reviewer Plan Adjustment End Date, select the date range within which the manager can review the adjustment request.
 - c. For Total Account Adjustment Threshold Percentage, enter the maximum percentage by which a goal measure can be adjusted.
 - d. For Total Allowed Adjustment Request Count, enter the maximum number of approved plan adjustment requests allowed for an active activity plan.
11. Complete the remaining fields, as required.
12. Save your changes to activate the plan.

The Validate Activity Plans batch job activates the activity plan based on the associated time period.

Weighted Territory Goal Type Activity Plan

Learn more about activity plans of type Weighted Territory Goal, their calculation logic and prerequisites for setting it up.

Set Up Weighted Goals Plans

To assign different priorities to activities, set up weighted territory goal type activity plans.

Account Goal Shared Type Activity Plan

To help sales reps collaborate seamlessly and share activities in a territory, create account goal shared type activity plans.

Set Up Account Goal Shared Type Activity Plans

To enable sales reps to share activities across a territory, define account goal type activity plans.

Weighted Territory Goal Type Activity Plan

Learn more about activity plans of type Weighted Territory Goal, their calculation logic and prerequisites for setting it up.

Activity plans of type Weighted Territory Goals helps admins set higher priorities for certain activities so that they carry more weightage and count more towards achieving the sales reps' goals. Admins can assign weightage in the range of 0.01 to 9.99, to specific activity types or to channel-product combinations. This configuration helps sales reps achieve their goals through a diverse set of activities.

Calculation Logic for Weighted Goals

With weighted territory goals, the total goal to be attained can be distributed among activities of different weights, with lesser values assigned to activities of greater weights. Weighted territory goals follow this equation to assign weights to activities: $(w_1 \times \text{Activity}) + (w_2 \times \text{Activity}) + \dots = \text{Total Goal}$

Let's follow the example of a scenario where the total goal to be attained is 10, which can be attained through three activities: face-to-face meeting, remote meeting, and email. The admin assigns 1.0 to the face-to-face meeting, 0.5 to the remote meeting, and 0.5 to the email meeting. Sales reps can achieve the total goal by any one of the following ways:

- 10 face-to-face meetings (10×1.0)

- 20 emails (20×0.5)
- 5 face-to-face meetings + 10 remote sessions (5×0.1) + (10×0.5)

 **Note** Activity Plan Adjustment Requests are not available for the weighted territory goal type activity plans' current cycle.

Prerequisite Configurations

To track weighted goals, make sure the following fields are visible.

- Provider Activity Goal's Overall Goal, Total Actual Activity Weighted Value, and Total Scheduled Activity Weighted Value fields.
- Provider Activity Goal Measure's Activity Weight Value, Actual Activity Weighted Value, and Scheduled Activity Weighted Value fields.

For goals associated with products, make sure the following fields are visible.

- Provider Activity Goal Measure's Products Weightage Populated and Scheduled Total Product Activity Weighted Value and Total Actual Product Activity Weighted Value.
- Provider Activity Goal's Total Actual Product Activity Weighted Value and Total Scheduled Activity Weighted Value.

In the admin console, make sure the following are enabled.

- In the admin console, in the Activity Plans tile, under Activity Plan settings, make sure the List weighted activity plans in filters checkbox is selected.
- The Activity Plan By Product component is added to the home page or the healthcare professional's profile page (Account record page), and in the component's properties, the plan cycle type is set as WeightedTerritoryGoals
- Make sure that in the Provider Activity Goal's Activity Plan Type field, the validation rule "ActivityPlanTypeisAccountGoal" is not enabled.

Set Up Weighted Goals Plans

To assign different priorities to activities, set up weighted territory goal type activity plans.

1. Verify that you've created [Set Up Provider Activity Measure Types for Activity Plans](#) to track provider engagement activities.
2. [Create a Time Period record](#) to define the activity plan's duration.
3. Create [the activity plan](#).
4. Create an [Activity Plan Territory record](#) to link the activity plan with a territory.
Make sure that there's only one weighted territory goal type activity plan in a territory.
5. Create [Provider Activity Goal records](#) and define the overall goal.
6. Create [Provider Activity Goal Measure records](#) to define weights. In Type, select Weighted Goal. Assign a number in Activity Weight Value (for example, 1.0).
7. Optionally, [create Provider Activity Goal Measure Product records](#) to define the weightage for specific

product and channel combinations.

Account Goal Shared Type Activity Plan

To help sales reps collaborate seamlessly and share activities in a territory, create account goal shared type activity plans.

Activity plans of type Account Goal Shared enable sales representatives to share and contribute towards a common account goal for multiple territories, boosting team-based provider engagement efforts. For example, if the attainment goal for a healthcare professional's account is 10, any of the sales representatives from any of the linked territories can be assigned activities that add up to the shared target of 10 goals.

-  **Note** Activity Plan Adjustment Requests are not available for the account goal shared type activity plans' current cycle.

Where Account Goal Shared Activity Plans Appear

- In the Activity Plan By Product component on the home page dashboard for tracking goals.
- As a visual progress indicator on the healthcare professional (Account) record.
- In the integrated view for scheduling upcoming activities on the Planner.

Web versus Mobile

- Web: Users can see all shared activities across all participating territories.
- Mobile: Users see only activities in the context of their assigned territories.

Prerequisite Configurations

- Make sure that in the Provider Activity Goal's Activity Plan Type field, the validation rule `ActivityPlanTypeisAccountGoal` is not enabled
- Verify that sales reps are assigned to territories.

Include capped values to ensure workload balance across the team and prevent overattainment of goals.

Set Up Account Goal Shared Type Activity Plans

To enable sales reps to share activities across a territory, define account goal type activity plans.

1. Verify that you've [created a provider activity measure type](#) to track provider engagement activities.
2. Create a [Time Period record](#) to define the activity plan's duration.
3. [Create an activity plan](#). Set the plan type to Account Goal Shared.
4. Assign [multiple territories to the activity plan](#).
5. Create the [Provider Activity Goal](#) records for the shared accounts.
Set capped values for the maximum contribution allowed per activity and channel.
6. Create [Provider Activity Goal Measure records](#).

Associate Territories with Activity Plans

Connect your strategic activity plans to the territories where sales representatives perform the required activities. Define objectives for a specific territory, cascade performance goals down to the field level, and help provide clear direction to your sales teams. Create Activity Plan Territory records for associating activity plans with territories.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create activity plan territory records: Life Sciences Commercial Admin permission set

Use [Salesforce Data Import](#) to import all activity plan data in bulk from external sources to Salesforce. However, if you must manually set up records for activity plans, refer to these steps.

1. From the App Launcher, go to the Life Sciences Commercial app, and select **Activity Plan Territories**.
2. Click **New**.
3. Select the territory.
4. Select the activity plan that you want to use.
5. Save your changes.

Set Goals for Activity Plans

Associate an activity plan with individual healthcare accounts and set their high-level performance goals. Define the required targets by breaking down the overall goal into product-specific and non-product-related activities. Establish a baseline to track and populate goal attainment as sales representatives complete their interactions and activities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set goals: Life Sciences Commercial Admin permission set

Use [Salesforce Data Import](#) to import all activity plan data in bulk from external sources to Salesforce. However, if you must manually set up records for activity plans, refer to these steps.

1. From the App Launcher, go to the Life Sciences Commercial app, and select **Provider Activity Goals**.
2. Click **New**.
3. Select the activity plan and the account of the healthcare professional.
4. For Overall Goal, enter the total target number of all activities associated with the account.
Leave the fields in the Overall Attainment section blank. They're automatically populated when the sales representative schedules, performs, or completes the activities.
5. Under Product Level Attainment, for Product Level Goal, enter the target number of activities that the sales representative must attain for products associated with the account.
Leave the fields in the Product Level Attainment section blank because they're automatically populated when the sales representative schedules, performs, or completes the activities.
6. Under Non Product Level Attainment, for Non Product Level Goal, enter the target number of non-product activities that the sales representative must attain.
Leave the fields in the Non Product Level Attainment section blank. They're automatically populated when the sales representative schedules, performs, or completes the activities.
7. Save your changes.

Repeat these steps for each account associated with the activity plan.

Set Goal Measures for Activity Plans

Refine your account-level goals by setting measurable targets for each distinct type of sales activity. Assign a value to each activity by choosing between a simple target count or a weighted model that values some interactions more than others. Build a complete performance framework that connects the high-level strategic plan to the specific, daily tasks your sales representatives perform.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set goal measures:	Life Sciences Commercial Admin permission set
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Use [Salesforce Data Import](#) to import all activity plan data in bulk from external sources to Salesforce. However, if you must manually set up records for activity plans, refer to these steps.

-  **Note** Activity plans of the Account Goal Shared type can't have weighted goals.

1. From the App Launcher, search for and select **Provider Activity Goal Measures**.

2. Click **New**.
3. Select the provider activity measure type that you created for the required activity type.
4. Select a provider activity goal that you created for the particular provider and activity plan.
5. Do one of the following based on the activity plan type that you initially selected when you created the activity plan.
 - To set a single overall goals for the activity type, for Type, select **Goal**. Then, under the Overall Attainment section, for Overall Goal, enter the total goal value that the sales representative must achieve for the activity type.
 - To set weighted goals for the activity type, for Type, select **Weighted Goal**. Then, under the Overall Attainment section, for Overall Goal, enter the total goal value that the sales representative must achieve for the activity type. Next, under the Adjusted Values section, for Activity Weight Value, enter the goal value that the sales representative must achieve for each occurrence of the activity type.

Repeat these steps for each activity type tracked in the plan.

Set Product Goal Measures for Activity Plans

Create a highly targeted activity plan that measures performance not just on the activity, but on the specific product being promoted. Link products to individual sales activities that you've defined for each account. Assign a unique weight to each product to strategically prioritize certain items within a weighted goal plan.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set product goal measures: Life Sciences Commercial Admin permission set

Use [Salesforce Data Import](#) to import all activity plan data in bulk from external sources to Salesforce. However, if you must manually set up records for activity plans, refer to these steps.

1. From the App Launcher, go to the Life Sciences Commercial app, and select **Provider Activity Goal Measure Products**.
2. Click **New**.
3. Select a provider activity goal measure.
4. Select **Product or Life Sciences Marketable Product**, and then select the product that you want to relate to the activity type.
5. If the associated activity plan is of type Weighted territory Goal, enter the product weightage.
6. Save your changes.

Repeat these steps for each activity type tracked in the activity plan. At a time, you can associate a maximum of ten products with an activity type.

Activity Plan Review

Activity plans offer extended capabilities, such as Activity Plan Review. Find out more about the Activity Plan Review lifecycle conducted by employees (field reps), managers, and admins.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

After the Activity Plan admin creates a plan and associates it with goals and territories, the next step is to move the plan through three review stages. The three personas involved in the review lifecycle are employees (or field reps assigned to a territory), managers, and admins who provide the final approval.

- The Activity Plan admin updates the plan's status to Employee Review, opening the plan up for employees to view their goals. The Update Activity Plan Status batch job can automate this transition based on configured review dates.
- In the Employee Review stage, field representatives review their assigned goals on the web or on mobile. If needed, they propose modifications before submitting the plan for manager approval. The Activity Plan admin updates the plan's status to Manager Review.
- In the Manager Review stage, the manager reviews the field reps' suggestions and proposals, and submits the plan for Admin Review. The Activity Plan admin updates the plan's status to Admin Review.
- In the Admin Review stage, the admin checks the final changes. If the plan is approved, the admin activates the plan and changes the status of the plan to Approved. This means that the plan is live. The Calculate Provider Activity Goal Measures batch job begins tracking the scheduled and completed activities against the goals.

Prerequisites

To ensure that the Activity Plan Review is working as intended, verify that the prerequisite configurations are in place.

- [The Activity Plan Review tab is visible](#) to users.
- In the admin console's Activity Plan tile, [the rating column is defined](#). This helps managers and admins review the reasons for adding or removing accounts.
- The Suggested Activity field is added to the Provider Activity Goal Measure's page layout.
- The roles are assigned to users.
- At each stage, the corresponding status of the plan is correctly assigned.

To read about each type of review, see [Review and Submit Activity Goals for Manager Approval](#) and [Review and Submit Activity Goals for Final Administrator Approval](#).

Activity Plan Adjustments

Provide sales representatives and other users with the flexibility to modify their activity plan goals and goal measures as required. Users can track activity types for accounts that aren't in the plan or track additional activity types for accounts that are already in the plan. Also, users can update goal measures and remove accounts from a plan. Activity Plans can be adjusted both from the web and the iPad.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

-  **Note** You can only make adjustments for activity plans that are active and are of type Account Goal. You cannot make adjustments to activity plans that are of type Weighted Territory Goals. Also, you can only adjust activity goals for non-product based measures.

Users can create the following ad hoc requests:

- Add an activity type and set target goals for an account that's not in the activity plan, thereby adding the account to the plan. Or, track additional activity types for an account that's already in the activity plan. For the latter, users choose an activity type from the list of pre-existing activity types that are already part of the plan. In both scenarios when the reviewer approves the request, the system creates the corresponding provider activity goal measures.
- Removal of an account from an activity plan. When the reviewer approves the request, all the related provider activity goal measures are deleted.
- Modification of the assignee goals in an existing activity plan. When the reviewer approves the request, all the related provider activity goal measures are updated.

The Activity Plan Adjustment Request quick action appears in an Account record page's highlights panel. It also appears in the dropdown for each account that's listed in the following places.

- In the Aligned Accounts list on the Account tab
- in the Activity Plan filter on the Account tab
- In custom lists and filters on the Account tab
- On the Attainment Percentage tab of the Activity Plans component on the home page.

Adjustments must be within the threshold percentage defined for the activity plan. Adjustment requests adhere to date ranges for adjustment start and end dates for both the assignee and the reviewer.

Prepare for Activity Plan Adjustments

Help users request for activity plan adjustments by setting up the relevant records and picklist values

for creating adjustments. Configure a quick action button to create activity plan adjustments requests.

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REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up data for activity plans:	Life Science Commercial Admin permission set
To create actions:	Customize Application

1. Make sure you set up data for activity plans.
 - a. Create Provider Activity Measure Type records.
 - b. Create custom picklist values for Provider Activity Plan Adjustment's Adjustment Reason field.
2. Create a quick action button for adjusting activity plans.
 - a. For Action Name, select **Activity Plan Adjustment Request**.
 - b. For Location, select **Search**.
 - c. Assign the quick action to the profiles of your choice.
 - d. Select **Account** as the associated object (SObject).
 - e. Save your changes.
3. To show the quick action button on the highlights panel of the account's record page, add the quick action to the page layout.

See Also

[Salesforce Help: Adjust the Goals for Your Activity Plans](#)

Resolve Issues with Activity Plans

If you encounter issues with activity plans, learn about the potential causes and follow the steps to resolve them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Activities Aren't Counting Toward Goals

Field representatives log visits, but the scheduled or actual counts on provider activity goals remain zero. Activities are complete but goal attainment shows 0%.

Potential Cause	Solution
Inclusion criteria mismatch: The visit record's field value doesn't match the provider activity measure type configuration.	Verify inclusion criteria: Verify the visit record's Channel (or relevant field) matches exactly the Activity Type Field Value in the provider activity measure type. Check for case sensitivity, leading or trailing spaces, and spelling differences.
Exclusion criteria triggered: The visit record meets exclusion criteria and is filtered out.	Check the exclusion logic: Review the Activity Type Exclusion Field configuration. View the visit record and evaluate whether the exclusion field evaluates to TRUE. If yes, adjust either the visit record or the exclusion criteria.
The activity plan is inactive: The plan's Active checkbox is blank or the current date is outside the time period dates.	Confirm that the activity plan is active: Open the activity plan record and verify Active is selected and Status is Approved. Verify today's date falls within the time period's start date and end date.
Batch job isn't running: The Calculate Provider Activity Goal Measures job hasn't run recently.	Run the batch job manually: Go to the Admin Console, select Activity Plans, select Activity Plan Jobs, and click Run Now for Calculate Provider Activity Goal Measures. Select the affected plan and measure, then verify if counts update.
Status value mismatch: The visit's status value doesn't match the configured scheduled or completed status values.	Validate status configuration: Compare the visit's Status value against the Activity Type Scheduled Status value and Activity Type Status List fields in the provider activity measure type. Add any missing status values.
Territory mismatch: The visit's territory doesn't match the activity plan's territory.	Verify territory alignment: Confirm the visit record's Territory field matches a territory linked in the Activity Plan Territories related list.

After you correct the issue, verify the fix. Log a test Visit with the correct field values and run the batch job manually. Verify the Provider Activity Goal's scheduled count increases by 1. Update the test Visit's status to a completed value and re-run the batch job. Verify that the actual count increases and the scheduled count decreases by 1.

Batch Jobs Are Failing

The Activity Plan Jobs history shows jobs with a Failed Records count greater than zero, or shows jobs stuck in “In Progress” status indefinitely.

Potential Cause	Solution
Record locking conflicts: Another process is editing the activity plan or related records during batch execution.	Check for locked records: Review the Failed Records report to identify specific records that failed. Check if users are actively editing activity plan records or if other batch jobs are processing the same records. Schedule the job to run during off-peak hours when users aren’t actively editing data.
Governor limits exceeded: Too many records processed in a single batch exceeds CPU time or Data Manipulation Language limits.	Reduce batch size: In Activity Plan Configuration, lower the Batch Size from the default 1,000 to 500 or 200. This reduces the number of records processed per transaction and helps avoid governor limits. Test with the reduced batch size and monitor for failures.
Missing required fields: Visit or Activity Plan records are missing the required fields needed for calculations.	Validate required fields: Query Provider Visit records for the activity plan’s time period and verify all required fields (AccountId, TerritoryId, Status, ProviderVisitType, Date/Time) are populated. Fix any null values. Enforce field validation rules to prevent future null values.
Circular dependencies: Process builders or workflows are triggering updates that interfere with batch job logic.	Review automation: Disable or modify any process builders, flows, or workflows on Activity Plan objects that trigger during batch updates. These can cause recursive updates or locking conflicts. Use “Only when a record is created” conditions instead of “When a record is created or edited” to avoid interference.
Insufficient heap size: Large data volumes are causing heap size limit exceptions.	Increase processing capacity: For activity plans with 10,000+ goals, consider partitioning data by running calculations for specific territories or time periods separately. Use the Run Now option rather than processing all active plans at the same time.

After you correct the issue, verify the fix. Schedule a test run of the batch job during a maintenance window. Monitor the job execution from start to finish using the Activity Plan Jobs history. Verify that

Failed Records count is zero and the Status is Completed. Spot-check several Provider Activity Goals to confirm counts updated correctly.

Goal Calculations Don't Match Expected Values

Scheduled counts include completed activities, or counts are duplicated. Attainment percentages seem too high or too low.

Potential Cause	Solution
Status mapping confusion: Completed activity status values are listed in the scheduled status configuration (or vice versa).	Review status mapping: Open the Provider Activity Measure Type and verify Activity Type Scheduled Status Value contains ONLY scheduled statuses (for example, “Planned;In Progress”) and Activity Type Status List contains ONLY completed statuses (for example, “Completed”). Remove any overlap between these two fields. Re-run calculations after correcting.
Overlapping activity types: Multiple Provider Activity Measure Types with overlapping inclusion criteria are counting the same visits.	Audit activity type definitions: List all Provider Activity Measure Types and review inclusion criteria for overlaps. For example, if one type filters Channel = “Phone” and another filters Channel = “All Channels,” the same visits will be counted twice. Ensure each activity type has mutually exclusive inclusion criteria.
Provider Account Territory Information fields shared: The same PATI custom field used for multiple activity types is causing overwriting.	Create dedicated PATI fields: For each non-product activity type, create a unique set of custom Number fields on the Provider Account Territory Information object (e.g., phone visits scheduled count, phone visits actual count, remote visits scheduled count, remote visits actual count). Update Provider Activity Measure Type configurations to reference the correct dedicated fields. This prevents overwriting.
Date/time field incorrect: The wrong date/time field is selected, causing activities to be counted in the wrong time period.	Validate date/time field: Confirm the Activity Date Time Field is set to the appropriate field for your business process (typically Planned Start Time for future visibility). If activities appear in the wrong period, visits may be using Actual Start Time but the metadata is configured for Planned Start Time. Adjust metadata configuration to match your visit logging practices.
Product association errors: Product-based	Verify product linkages: For product-based

Potential Cause	Solution
measures are missing product linkage or linked to the wrong products.	measures, check that Provider Activity Goal Measure Products records exist linking the correct products. Query Provider Visit Product Detailing records for visits that should count and verify their Product field values match the linked products exactly. Case sensitivity and spelling matter.

After you correct the issue, verify the fix. Reset the affected Provider Activity Goal records by manually clearing counts (or use Reset Provider Account Territory Information job). Re-run the Calculate ProviderActivityGoalMeasure job for the affected plans. Manually calculate expected counts by querying Provider Visit records with the exact inclusion criteria, then compare to the calculated values. Investigate any discrepancies by reviewing individual Provider Visit records.

Working Days Calculations are Incorrect

With working days calculations enabled, goal progress percentages are incorrect or unexpected. Activities are counted on days that should be excluded (holidays, time-off-territory).

Potential Cause	Solution
Holiday calendar incomplete: Holidays are not configured in Salesforce for all territories.	Complete holiday calendar: From Setup, select Company Settings, and then Holidays and add all holidays for each territory's region. Include national, regional, and company-specific holidays. Ensure holiday dates are set to "All Day" events to properly exclude the full day.
Time Off Territory not logged: Field representatives aren't consistently logging TOT records.	Enforce TOT logging: Train field representatives on the importance of logging Time Off Territory records consistently. Create validation rules or flows that remind users to log TOT at the end of each day. Consider integrating TOT data from external systems (HR systems, calendars) if manual logging is unreliable.
Working Days Job not scheduled: The batch job calculating working days isn't running regularly.	Schedule Working Days Job: Go to Admin Console, select Activity Plans, then select Activity Plan Job. Schedule the Working Days Job to run daily. This job must run before Calculate Provider Activity Goal Measures to ensure accurate working day counts are available for attainment calculations.
Time zone mismatches: Time zones on Activity	Standardize time zones: Review time zone settings

Potential Cause	Solution
Plan, Territory, or User records don't align, causing date calculation errors.	on Activity Plan records, Territory records, and User records. Ensure all use the same time zone (typically the territory's primary time zone). Mismatched time zones can cause activities to be counted on the wrong date when working days are calculated.

After you correct the issue, verify the fix. Manually calculate expected working days for a test period: (End Date - Start Date) - Holidays - TOT Days. Compare it to the working days value stored on the Activity Plan record after running the Working Days Job. If values don't match, review the holiday calendar and TOT records for the test period. Consider disabling working days calculations if data quality cannot be ensured.

Reviewers Don't See Activity Plans During Review Stages

Field representatives or managers cannot see activity plans during Employee Review or Manager Review stages. Status doesn't automatically transition between review stages.

Potential Cause	Solution
Insufficient user permissions: Users lack read access to Activity Plan objects.	Grant object permissions: From Setup, select Users, then select Permission Sets (or Profiles) and ensure users have Read access to the Activity Plan, Provider Activity Goal, and Provider Activity Goal Measure objects. Create a permission set if needed and assign it to field representatives and managers.
Territory assignment issues: Users aren't assigned to the territories linked to the activity plan.	Verify Territory assignments: Check that field representatives and managers are assigned to the correct territories in Territory Management. Users only see Activity Plan records for territories they're assigned to. Review Activity Plan Territories related list and cross-reference with territory assignments.
Review dates not configured: The Time Period object or Activity Plan doesn't have review start/end dates configured.	Configure Review Dates: If using automated status transitions, configure Employee Review Start Date, Employee Review End Date, Manager Review Start Date, and Manager Review End Date fields on the Activity Plan or Time Period object. These dates control when the Update Activity Plan Status job transitions the plan between stages.
Update Activity Plan Status job not running: The	Schedule status job: Go to Admin Console, select

Potential Cause	Solution
batch job that transitions statuses isn't scheduled.	Activity Plans, then select Activity Plan Jobs and schedule "Update ActivityPlan Status" to run daily. This job checks review dates and moves plans to the appropriate status automatically. Without this job, status transitions must be manual.
Profile-specific settings: Activity Plan Settings configured at profile level exclude certain users.	Verify Activity Plan Settings: Go to Admin Console, select Activity Plans, then select Activity Plan Settings. Verify settings are configured at Org level or that profile-specific settings include all relevant profiles. Restrictive profile settings can hide activity plan features from certain user groups.

After you correct the issue, verify the fix. Log in as a test field representative user assigned to the activity plan's territory. Go to the Activity Plan tab or related component and verify the plan appears with the correct status. Test that the user can view their Provider Activity Goal records and make any permitted edits during the review stage. Repeat for a manager user to verify manager-level access.

Calendar

Help your sales teams visualize and prioritize key events such as visits, meetings, and time off territory. Schedule events with the best time recommendations to avoid conflicts and create optimized daily plans. Users can save sets of visits as routines and access team member's schedules. With Calendar, users easily identify different types of events alongside their key information and status.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Prerequisites for Calendar](#)

Before you configure and use Calendar, complete the required setup tasks for the Visits, Lists and Filters, Account Address, and Best Time features.

[Configure Calendar Parameters](#)

Configure parameters to set up your calendar, organization's business hours, routine management, and event indicators.

[Configure Calendar Events](#)

Create calendar events using the calendar metadata to allow users to create and filter events on the calendar.

[Map Business Hours to Holidays](#)

Prevent users from scheduling visits or time off territory events during holidays by mapping holidays to your business hours.

[Configure Mirror Territory](#)

Configure the parameters so that your users can view events from shared territories in Calendar.

[Set Up My Team for Managers](#)

Enable managers to view the schedules of their team and their assigned territories by assigning the relevant permission sets and creating a custom tab.

Prerequisites for Calendar

Before you configure and use Calendar, complete the required setup tasks for the Visits, Lists and Filters, Account Address, and Best Time features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To complete the prerequisite setup tasks for Calendar:	Life Sciences Commercial Admin permission set
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To create holidays:	Manage Business Hours Holidays
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To set business hours:	Manage Business Hours Holidays
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Configure Visit Settings

Prevent the creation of additional visits for the same account on the same day or within a defined period.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Visit Administration**, and then select **Visit Settings**.
3. In Visit Settings, set these values: Visit Conflict Validation Period in Days, Visit Conflict Validation Mode.
4. Save your changes.

Configure Filter Settings

Let your users view and search data related to shared accounts directly from Planner.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Lists and Filters**, and then select **Filters**.

3. In General Settings, select **Let users view and search shared accounts**.
4. Save your changes.

Create Accounts List Configuration

Customize the columns visible to users and enable key preferences based on their business needs.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Lists and Filters**, and then select **Accounts List**.
3. Click **New**.
4. Enter the details for all the required fields.
5. Save your changes.

Other Prerequisites

- [Configure Account Address](#).
- [Configure Best Time for an account address](#).
- [Set up Provider Territory fields](#).

Configure Calendar Parameters

Configure parameters to set up your calendar, organization's business hours, routine management, and event indicators.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up Calendar:

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Planner**, and then select **Planner Settings**.
3. For Apply Settings To, select whether you want to apply the settings to all the profiles in your org or to a specific profile.
 - a. To apply the settings to all the profiles in your org, select **SOrg Default**.
 - b. To apply the settings to a specific profile in your org, select **Profile**.
4. Customize your calendar by configuring these general settings as needed.
 - First Day of Work Week
 - Day View Fieldset for Visit

- Account Type Icon
- Assessment Task Display Name
- Colleague Visit Field
- Work Day Start Time
- Hourly Slots Viewable on Calendar
- Time Format
- Hide customer address
- Show visits to colleagues
- Enable Time Off Territory Adjustment
- Enable Advanced Account Search in the mobile app
- Enable preview for denormalized visits in the mobile app
- Share calendar events with mirror territory users
- Allow users to create an event by clicking on the calendar grid

5. Manage user routines by enabling these settings.

- Enable Routine
- Allow users to share routines
- Allow users to create a routine that spans across multiple days
- Don't rollback changes when there's an error saving a routine

6. Configure these business hour settings as needed.

Global Business Hours	Standard working hours for an organization.
Business Hours for Visits	Working hours during which a visit can be scheduled.

7. Change default colors of events by entering a Hex color code for these events.

- Planned Visit
- Confirmed Visit
- Completed Visit
- Time Off Territory
- General Event
- Holiday
- Assessment Task

8. Under Account Record Types, select the record types of the accounts that you want to show on the calendar.

9. Save your changes.

Configure Calendar Events

Create calendar events using the calendar metadata to allow users to create and filter events on the calendar.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create calendar events: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Planner**, and then select **Calendar Events**.
3. Click **New** and then complete the fields using the information provided in the table.
4. Save your changes.

Metadata for Calendar Events

Event Label	Developer Name	Event Indicator Color (HEX)	DML Instance Class	Optional	Object	Override Event Indicator Color	Active	Modal Title Custom Label Field
Time Off Territory	TimeOffTerritory	#FF5D2D	CalendarTerritoryUserDownTimeDML	false	TerritoryUserDowntime	ColorTimeOffTerritory	true	Event_TimeOffTerritory
General Event	Event	#01C3B3	CalendarEventDM	false	Event	ColorGeneralEvent	true	Event_GeneralEvent
Completed	Completed	#A0A0A0	CalendarLogAVisitEventDM	false	Visit	ColorCompletedCall	true	EventCompletedVisit
Planned	Planned	#AACBFF	CalendarLogAVisitEventDM	false	Visit	ColorPlannedCall	true	EventPlannedVisit
Confirmed	Confirmed	#0B5CAB	CalendarLogAVisitEventDM	false	Visit	ColorConfirmedCall	true	EventConfirmedVisit
Holiday	Holiday	#FFBA90		false	Holiday	ColorHolidayEvent	true	Event_Holiday
Assessment	Assessment	#E4A201	Calendar	true	Assessment	ColorToDo	true	Event_To

Event Label	Developer Name	Event Indicator Color (HEX)	DML Instance Class	Optional	Object	Override Event Indicator Color	Active	Modal Title Custom Label Field
nt Task	ntTask		AssessmentTaskDML		ntTask	o		Do

Map Business Hours to Holidays

Prevent users from scheduling visits or time off territory events during holidays by mapping holidays to your business hours.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To map business hours to holidays:	Life Sciences Commercial Admin permission set
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Before you map business hours to holidays, complete these tasks.

- [Create a Holiday](#)
- [Create Business Hours](#)

1. From the App Launcher, find and select **Admin Console**.
2. Select **Planner**, and then select **Business Hours and Holiday Mapping**.
3. Click **New** and then complete the required fields.
 - a. Give a name for the mapping.
 - b. Select a business hour.
 - c. Select a holiday.
4. Save your changes.

Configure Mirror Territory

Configure the parameters so that your users can view events from shared territories in Calendar.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure mirror territory: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Territories**, and then select **Territory Management Settings**.
3. For Mirror Territory Field, enter the API name of a field from the Territory2 object that contains the territory information of a mirror (shared) territory.
4. For User Name for Mirror Territory Field, enter the API name of a custom field on the Territory2 object that contains the name of the user associated with the mirror territory.
5. Save your changes.

Set Up My Team for Managers

Enable managers to view the schedules of their team and their assigned territories by assigning the relevant permission sets and creating a custom tab.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up My Team: Life Sciences Commercial Admin permission set

1. [Create a user](#) with the District Manager profile or any other custom manager profile you've created.
2. Assign these permission sets to the new user.
 - Life Sciences Field Sales Representative
 - Health Cloud Provider Relationship Management
 - Health Cloud Starter
3. [Assign the user to a territory](#).
4. [Create a custom tab](#) with these details:
 - Label: My Team
 - Name: MyTeam

- Mobile UI Type: Tab
 - Tab Name: lsc4ce__MyTeamTab
 - Tab Order: 5 (or any preferred number)
 - Profiles: District Manager, Regional Manager, or any other custom manager profile you've created
 - Is Active: Select the checkbox
5. [Generate metadata cache.](#)

Key Account Management for Customer Engagement

Drive strategic, insight-based customer engagement with Life Sciences Cloud Key Account Management. Foster long-term, high-value partnerships, and achieve common goals by configuring account plans. Implement strategic initiatives focused on specific territories. Identify growth opportunities, anticipate customer concerns, and promote cross-functional collaboration. Enable users to configure records, manage goals, and execute tasks on the web and on an iPad.

Key Account Management Plans and Objects

Key Account Management includes objects and plans to help account managers and medical science liaisons to nurture partnerships. Learn about the differences between account plans and territory plans and the objects and records that inform the plans.

[**Key Account Management Prerequisites**](#)

Review and complete the prerequisites for Key Account Management. Assign permissions, activate trigger handlers, and create object metadata cache configurations for offline access in the mobile app.

[**Create Picklist Values for Key Account Management Records**](#)

Tailor records according to the needs of your organization with custom picklist values. Define different role types, influencer levels, and strength categories for stakeholders. Create statuses for goals, plans, objectives, sprints, and tasks.

[**Add a Key Account Management Quick Action Button to a Page Layout**](#)

Configure quick action buttons to let account managers add stakeholders to an account plan and connect participants and stakeholders.

[**Configure a Participant Role for an Account Plan**](#)

Help account managers implement an account plan by adding participant users.

[**Configure Account Plan Statuses**](#)

To enable Account Plans to ascertain the progress of each plan and display the plan's completion percentage, map the completion statuses of the Account Plan, Account Plan Objective, and Action Plan records. Also configure the default status value of Action Plan records.

[**Configure Territory Plan Statuses**](#)

Enable trigger handlers to seamlessly track records across the hierarchies by configuring status completion mappings for territory plans, action plans, and goals in your org.

[**Configure Sprint Completion Statuses**](#)

Add status values to indicate that a sprint is complete.

[**Configure Sprints for Key Account Management**](#)

Help key account managers monitor and execute assigned tasks in a timely manner with sprints.

[**Create Goals, Tasks, and Measures for Plan Templates**](#)

Help key account managers meet business targets for the accounts and territories by creating design-time records for template goals, plans, and tasks. Define goals at global, affiliate, and territory levels. Devise measures for achieving the goals, and break down each measure into actionable, executable tasks by using action plan template items.

Customize the Columns in the Action Plan Framework

To customize the action plan framework, rearrange the fields in the action plan's page layout. Add or remove fields as needed.

Key Account Management Plans and Objects

Key Account Management includes objects and plans to help account managers and medical science liaisons to nurture partnerships. Learn about the differences between account plans and territory plans and the objects and records that inform the plans.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Account Plans and Territory Business Plans

An account plan is a dynamic, collaborative strategy that helps you adapt to the changing needs of a customer while boosting engagement and driving improved patient outcomes. Use an account plan to enhance the precision of your targeting measures, build loyalty, and foster mutually beneficial partnerships. Dedicated account managers can focus on nurturing relationships by identifying stakeholders, creating plans informed with strategic analysis, and helping the plan's participants liaise directly with stakeholders.

A territory plan promotes initiatives based on a specific territory. Medical science liaisons (MSLs) can build relationships with medical professionals and gather insights about research, clinical trials, and products. MSLs also define and execute strategies to achieve target goals in a region.

Design-Time Objects and Run-Time Objects

During design, you define template goals (goal definitions), template measures (action plan templates and template versions), and individual steps (action plan template items) to achieve the measures.

At run-time, when users import the templates into plans, the design-time goal definition is instantiated as a goal assignment in a territory plan, and as an account plan objective in an account plan. In case of both account plans and territory plans, the design-time action plan template and template version are combined and instantiated as an action plan. The design-time action plan template item is instantiated

as an action plan item and an assessment task.

Both design-time objects and their run-time counterparts exist in a hierarchical structure. Action plan template items roll up to action plan templates and action plan template versions, which together roll up to goal definitions. The run-time objects follow a similar hierarchy—assessment tasks are nested under action plans, which in turn are nested under account plan objectives or goal assignments (territory business plans). Further, account plan objectives roll up to account plans, while goal assignments roll up to territory plans.

Here's a mapping of design-time objects and run-time objects in the Account Plan hierarchy and the Territory Business Plan hierarchy.

Hierarchy	Design-Time Objects	Run-Time Objects in Account Plans	Run-Time Objects in Territory Plans
Strategic plans	None	Account Plan	Territory Business Plan
Goals and objectives	Goal Definitions	Account Plan Objectives	Goal Assignments
Tactics	Action Plan Template, Action Plan Template Version	Action Plan	Action Plan
To-Dos	Action Plan Template Item	Action Plan Item and Assessment Tasks	Action Plan Item and Assessment Tasks

Objects Commonly Used by Account Plans and Territory Plans

Object	Definition
Goal Definition	A reusable template goal that is added to account plan or territory plan. Goal definitions that are associated with action plan templates and tasks can also be imported into an account plan and territory plan.
Action Plan Template	A reusable strategy to achieve a goal. Each strategy consists of measurable steps that can be reused.
Action Plan Template Version	The version of an action plan template.
Action Plan Template Item	The instance of an item in an action plan template version. Represents measurable steps to execute a strategy that's defined in a reusable framework. An action plan template item is the design-time counterpart of an assessment task and action plan item.
Action Plan	A set of tasks that are created from an action plan

Object	Definition
	template and added to a goal assignment at run time. An action plan is the run-time counterpart of an action plan template and action plan template version.
Action Plan Item	The instance of an action plan item. An action plan item and assessment task are the run-time counterparts of an action plan template item.
Assessment Task	A measurable step that's a part of an action plan. An assessment task and action plan item are the run-time counterparts of an action plan template item.

Account Plans Objects

Object	Definition
Account Plan	A comprehensive plan to grow a relationship with a customer.
Account Plan Objective	An instantiated goal definition that consists of plans and tasks tailored to the requirements of an account plan.
Account Plan Product	The product associated with an account plan.
Account Plan Relationship	The relationship between two account plans.
Account Plan Related Object Analysis	The strategic analyses of internal and external factors that impact an account plan.
Account Plan Stakeholder	The individuals who can influence an account's actions.
Account Plan Participant	The users or groups that participate in the account plan.
Account Plan Participant Stakeholder	The junction between an account plan participant and an account plan stakeholder that enables the participant to liaise directly with the stakeholder.
Account Plan Stakeholder Product	A product that's related to a stakeholder who's part of the account plan.
Account Plan Stakeholder Action	An action that's related to a stakeholder who's part of the account plan.

Territory Plans Objects

Object	Definition
Territory Business Plan	A comprehensive plan to drive initiatives focused on all accounts within a territory.
Goal Assignment	An instantiated goal definition that consists of plans and tasks tailored to the requirements of a territory plan.

Key Account Management Prerequisites

Review and complete the prerequisites for Key Account Management. Assign permissions, activate trigger handlers, and create object metadata cache configurations for offline access in the mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Permissions

Assign these permission sets to admins.

- Health Cloud Starter
- Life Sciences Commercial Admin

Assign these permission sets to users.

- Health Cloud Starter
- Life Sciences Key Account Management

Trigger Handlers

To make sure the action plans and territory business plans work as intended, [activate these trigger handlers](#).

Account Plans Trigger Handlers

- UpdateSprintCompletionPercentage
- UpdateAccountPlanCompletionPercentage

- UpdateAccountPlanObjectiveCompletionPercentage
- DeleteActionPlanChildAssessmentTasks
- DeleteAccountPlanChildActionPlans
- UpdateAccountPlanCompletionStatus
- ShareAccountPlanWithParticipant
- ShareAssessmentTaskWithAssignee
- DeleteChildActionPlanItems

Territory Plans Trigger Handlers

- UpdateActionPlanCompletionPercentage
- UpdateGoalAsgmtCompletionPercentage
- UpdateTerrBusPlanCompletionPercentage
- UpdateTerrBusPlanStatus
- DeleteGoalAssignments
- DeleteTerritoryBusinessPlans
- DeleteActionPlanItemAssessmentTasks

Object Metadata Cache Configurations

To enable offline access to Key Account Management on the mobile, [create object metadata cache configurations](#) of type Data for the following objects.

Account Plan Objects

- Goal Definition
- Goal Definition Product
- Action Plan Template Assignment
- Action Plan Template
- Action Plan Template Version
- Action Plan Template Item
- Action Plan Template Item Value
- Account Plan
- Account Plan Objective
- Action Plan
- Action Plan Item
- Assessment Task
- Account Plan Stakeholder
- Account Plan Participant
- Account Plan Participant Stakeholder
- Participant Role
- Sprint

Territory Plan Objects

- Territory Business Plan

- Goal Assignment
- Action Plan
- Action Plan Template
- Action Plan Template Version
- Action Plan Item
- Assessment Task
- Action Plan Template Assignment
- Goal Definition
- Territory2
- Sprint

See Also

[Generate Metadata Cache](#)

[Trigger Handler Administration](#)

[Trigger Handlers for the Account - AssessmentTask Objects](#)

[Trigger Handlers for the Case - GoalAssignment Objects](#)

Create Picklist Values for Key Account Management Records

Tailor records according to the needs of your organization with custom picklist values. Define different role types, influencer levels, and strength categories for stakeholders. Create statuses for goals, plans, objectives, sprints, and tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create picklist values:

Life Sciences Commercial Admin permission set

1. Create picklist values for the Account Plan Stakeholder's Role Type field.
Some examples of role types are internal and external.
 - a. From the Account Plan Stakeholders object management settings, go to Field & Relationships.
 - b. Click **Role Type**.
 - c. Under Role Type Picklist Values, click **New**.
 - d. Enter each picklist value on a separate line, such as to indicate whether a stakeholder is internal or external.
 - e. Save your changes.
 - f. Repeat these steps to add picklist values for the Influencer Level and Strength fields.
Examples of influencer levels are district, national, and international. A stakeholder's strength can be defined as low, medium, or high.

2. Create status values for territory business plans, account plans, account plan objectives, and sprints.
 - a. From the Territory Business Plans object management settings, go to Field & Relationships.
 - b. Click **Status**.
 - c. Under Status Picklist Values, click **New**.
 - d. Enter each picklist value on a separate line.
 - e. Save your changes.
 - f. Repeat these steps for account plans, account plan objectives, and sprints.
3. Create categories for assessment tasks, such as approve, survey, and claim.
 - a. From the Assessment Task object management settings, go to Field & Relationships.
 - b. Click **Category**.
 - c. Under Category Picklist Values, click **New**.
 - d. Enter each picklist value on a separate line.
 - e. Save your changes.

See Also

[Add or Edit Picklist Values](#)

Add a Key Account Management Quick Action Button to a Page Layout

Configure quick action buttons to let account managers add stakeholders to an account plan and connect participants and stakeholders.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit account plan page layouts: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Account Plans**.
2. Select an account plan.
3. In the top-right of the page, click  and select **Edit Object**.
4. From Page Layout, click **Account Plan Layout**.
5. Under Salesforce Mobile and Lightning Experience Actions, click **Override the predefined actions**.
6. In the Account Plan Layout editor, go to the Mobile & Lightning Action section, and move the Import Stakeholder button from the palette to the editable part of the page.
7. Save your changes.
8. Repeat these steps to add the Assign or Unassign Participant button to the Account Plan Stakeholder page and the Assign or Unassign Stakeholder button to the Account Plan Participant page.

See Also

[Quick Actions](#)

Configure a Participant Role for an Account Plan

Help account managers implement an account plan by adding participant users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a participant role:	Life Sciences Commercial Admin permission set
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1. From Setup, in the Quick Find box, enter and select **Participant Roles**.
2. Click **New**.
3. Enter a name for the participant role.
The API name is automatically populated.
4. For the parent object, select **Account Plan**.
5. Select **Read/Write** as the default access level, and then select **Active**.
6. Save your changes.

Configure Account Plan Statuses

To enable Account Plans to ascertain the progress of each plan and display the plan's completion percentage, map the completion statuses of the Account Plan, Account Plan Objective, and Action Plan records. Also configure the default status value of Action Plan records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To map account plan statuses:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Select **Key Account Management**.

3. In the left navigation pane, select **KAM Settings**.
4. For Action Plan Completion Status, select **Completed**.
5. For Account Plan Objective Completion Status, select **Completed**.
6. For Account Plan Completion Status, select the value that indicates that the plan is complete.
7. For Action Plan Default Status, select the initial value to assign to an action plan when it's created.
8. Save your changes.

Configure Territory Plan Statuses

Enable trigger handlers to seamlessly track records across the hierarchies by configuring status completion mappings for territory plans, action plans, and goals in your org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To map territory plan status values in the admin console: Life Sciences Commercial Admin permission set

 **Note** Make sure you create status values for Territory Business Plans.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Key Account Management**.
3. In the left navigation pane, select **KAM Settings**.
4. For Action Plan Completion Status, select **Completed**.
5. For Goal Assignment Completion Status, select **Completed**.
6. For Territory Business Plan Completion Status, select the status that indicates that the plan is complete.
7. For Action Plan Default Status, select the initial status you want to assign to action plans when the action plans are created.
8. Save your changes.

Configure Sprint Completion Statuses

Add status values to indicate that a sprint is complete.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure sprint completion statuses: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Key Account Management**.
3. In the left navigation pane, select **Sprints Settings**.
4. Add the sprint values that represent that the sprint is over to the Selected Values list.
5. Save your changes.

Configure Sprints for Key Account Management

Help key account managers monitor and execute assigned tasks in a timely manner with sprints.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create sprints: Life Sciences Commercial Admin permission set

 **Note** Sprints are available for both account plans and territory plans.

1. From the App Launcher, find and select **Sprints**.
2. Click **New**.
3. Enter a name for the sprint.
4. Enter the start and end dates.
5. Select the sprint's status.
6. Save your changes.

Create Goals, Tasks, and Measures for Plan Templates

Help key account managers meet business targets for the accounts and territories by creating design-time records for template goals, plans, and tasks. Define goals at global, affiliate, and territory levels. Devise measures for achieving the goals, and break down each measure into actionable, executable tasks by using action plan template items.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

The design-time records help key account managers tailor the templates according to requirements of the accounts they manage. Key account managers import the templates into an account plan or a territory plan to create the run-time records of goal assignments, action plans, and assessment tasks.

[Create Goal Definitions for Account Plans and Territory Plans](#)

A goal definition represents a broad business objective that you can reapply across global, national (affiliate), and territory levels.

[Create a Goal Definition Product](#)

To help users refine the search for goal definition templates and filter goal definitions by product, associate a goal definition with a Product record.

[Configure Action Plan Templates for Key Account Management](#)

Create an action plan template of commonly used strategies that can be customized and tailored to your goals. Let account managers add assessment tasks on the go, even when they're not part of the template plan.

[Add a Template Assignment to a Goal Definition](#)

To use an action plan template for a specific goal, you must create an Action Plan Template Assignment record.

Create Goal Definitions for Account Plans and Territory Plans

A goal definition represents a broad business objective that you can reapply across global, national (affiliate), and territory levels.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create goal definitions:

Life Sciences Commercial Admin permission set

Make sure that the Goal Definition page layout includes the Scope Type field.

 **Note** Goal definitions are available for both account plans and territory plans.

1. From the App Launcher, find and select **Goal Definition**.
2. Click **New**.
3. Enter a name for the goal definition.
4. For status, select **Active**.
5. For the goal type, select **Top Goal**.
6. Save your changes.

See Also

[Create Account Plan Objectives](#)

[Create Goal Assignments for Territory Plans](#)

Create a Goal Definition Product

To help users refine the search for goal definition templates and filter goal definitions by product, associate a goal definition with a Product record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create goal definition products: Life Sciences Commercial Admin permission set

 **Note** Goal definition products are available for both account plans and territory business plans.

1. From the App Launcher, find and select **Goal Definition Products**.
2. Click **New**.
3. Choose a sellable product (a Product record) or non-sellable product (a Life Sciences Marketable Product record).
4. Select the goal definition.
5. Save your changes.

Configure Action Plan Templates for Key Account Management

Create an action plan template of commonly used strategies that can be customized and tailored to your goals. Let account managers add assessment tasks on the go, even when they're not part of the template plan.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create action plan templates: Life Sciences Commercial Admin permission set

To categorize assessment tasks, first set up picklist values for Assessment Tasks' Category field.

 **Note** Action plan templates are available for both account plans and territory plans.

Each strategy (action plan template) is made up of trackable, actionable steps (action plan template items) that are tailored to your plan's specific needs. When the key account manager adds the template to a plan, action plan templates and template items are instantiated to create run-time records of action plans and assessment tasks.

1. Create an action plan template.
 - a. From the App Launcher, find and select **Action Plan Template**.
 - b. Click **New**.
 - c. Enter a name for the template.
 - d. For Action Plan Type, select **Key Account Management**.
 - e. To enable users to create tasks on the go, select **Let users add items to action plans**.
This configuration displays the New Assessment Task button in the dropdown next to each assessment task in the action plan framework at run-time.
 - f. Select the target object for the action plan.
For territory plans, choose Goal Assignment. For account plans, choose Account Plan Objectives.
2. Add an action plan template item to the action plan template.
 - a. In the action plan template, click **New Assessment Task**.
 - b. Enter a name for the assessment task.
 - c. Select a category.
 - d. Save your changes.
3. To make the action plan template available, click **Publish Template**.
After you publish an action plan template, you can't edit it.
4. In the mobile interface, to add an action plan template item, complete these steps.
 - a. In the Action Plan Template record, tap **Related**.
 - b. Select the action plan template version, and tap **Related**.
 - c. Tap **Edit**.
 - d. Select **Published** as the status of the version.
 - e. Save your changes.

See Also

[Manage Action Plans and Tasks in the Account Plan Hierarchy](#)

[Manage Action Plans and Tasks in the Territory Plan Hierarchy](#)

Add a Template Assignment to a Goal Definition

To use an action plan template for a specific goal, you must create an Action Plan Template Assignment record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To associate an action plan template assignments Life Sciences Commercial Admin permission set with a goal definition:

-  **Note** You must add the template to a goal definition for both account plans and territory plans.
1. From the App Launcher, find and select **Action Plan Template Assignment**.
 2. Click **New**.
 3. For Associated Object, select the Goal Definition record that you want to associate with the action plan template.
 4. Select an action plan template version.
 5. Save your changes.

Customize the Columns in the Action Plan Framework

To customize the action plan framework, rearrange the fields in the action plan's page layout. Add or remove fields as needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit the action plan page layout:

Life Sciences Commercial Admin permission set

 **Note** The action plan framework is available for both account plans and territory plans.

1. In the Actions Plans object management settings, select **Page Layout**.
2. Select **Related Lists**.
3. Move Assessment Tasks to the Related Lists section, and then select .
4. Move the fields that you want to display to Selected Fields.
5. Use the up and down buttons to change the order of the fields.
6. Click **OK**, and then save your changes.

See Also

[Customize Related Lists](#)

Time Off Territory Setup

Let users log and manage their time away from assigned territories. Configure time off territory rules in Planner to prevent users from scheduling events during inconvenient time slots. In addition, create predefined time slot intervals that users can use to create time-offs across multiple days.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Configure Time Off Territory Rules](#)

Configure the rules to determine how users can manage their time-off territory events in Planner. These rules help prevent scheduling conflicts by defining whether a type of Time Off Territory (TOT) event can be created during certain events.

[Configure Time Slot Intervals](#)

Configure predefined time slots with specific time intervals and help your users create multiday time-off requests with autopopulated start and end times based on the selected slot type.

Configure Time Off Territory Rules

Configure the rules to determine how users can manage their time-off territory events in Planner. These rules help prevent scheduling conflicts by defining whether a type of Time Off Territory (TOT) event can be created during certain events.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage time off territory settings: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Time Off Territory** and then select **Time Off Territory Rules**.
3. Turn on Time Off Territory Rules.
4. Select the profile for which you want to apply the Time Off Territory rules. To apply the rules to all the profiles in the org, select **Default**.
5. Select a rule for which you want to set the parameters.
 - Select an existing rule to update its parameters.
 - Select **Default** to set the default rule parameters.
 - To create a new rule and its parameters, select **New Rule**, and then enter a name for it.
6. Select the parameters for the default rule.
The default rule determines whether a time-off entry can be created during an event. It applies to all the associated TOT types
7. To override the default rule for a specific TOT type, update the values for the events in the corresponding row. If you don't select a value, the default rule is applied for the TOT type for the event.
8. Save your changes.

Configure Time Slot Intervals

Configure predefined time slots with specific time intervals and help your users create multiday time-off requests with autopopulated start and end times based on the selected slot type.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage time off territory settings: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Time Off Territory** and then select **Time Slot Intervals**.
3. Select the profile for which you want to apply the Time Slot Interval settings. To apply the settings to all the profiles in the org, select **Default**.

4. To allow users to create time-off spanning across multiple days, select **Let users create time-off slots across multiple days**.
5. For the All Day, Morning, Afternoon, and Evening time slots, select the time interval during which you want to allow users to create time-off entries.
If users select a slot when creating a time off territory record, the corresponding start and end times are automatically populated.
6. Save your changes.

Set Up Engagement Execution Features

Streamline scheduling, pre-visit planning, in-visit execution, and post-visit reporting processes with Visit Management. Capture, manage, and honor consent and communication preferences of healthcare professionals with Consent Management. Use Remote Engagement to host virtual meetings with customers. Use Medical Inquiries to deliver fast, compliant, and trusted responses to every HCP inquiry. Use Surveys to collect feedback from customers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Consent Management

Consent Management enables users to capture, synchronize, and honor the communication preferences of healthcare professionals across different subscription types and channels. This feature helps limit outreach to healthcare professionals who have provided consent, which helps organizations stay compliant with data privacy regulations.

Medical Inquiries

Capture, manage, and respond to critical questions from healthcare professionals (HCPs). Help your sales representatives and medical science liaisons streamline the inquiry creation process, provide accurate and timely responses, and handle a variety of inquiry types, including general medical inquiries, adverse events, and product quality complaints. Leverage configurable workflows and robust compliance capabilities to ensure that all medical inquiries are handled quickly and in accordance with medical, legal, and regulatory standards.

Medical Insights

Use Medical Insights to provide field teams a structured way to capture and share insights from their engagements with HCPs and HCOs. Show relevant insight data for collaboration through customized record pages with specific field sets and related lists. Streamline the user workflow by creating quick actions and defining granular permissions to control how users interact with insights.

Remote Engagement

Remote engagement facilitates virtual meetings by providing tools to start and manage remote visits

with healthcare professionals. When users schedule remote visits, healthcare professionals receive invitations with the necessary details such as the meeting link and passcode. During the meeting, users can manage participants, share screens, and end the session, streamlining virtual interactions and eliminating the need for in-person visits.

Surveys

Surveys enable you to design and distribute questionnaires to gather structured feedback from healthcare professionals. Use this data to analyze behavioral trends, monitor patient-related outcomes, and strengthen provider relationships. These insights support innovation, treatment planning, and strategic decision-making.

Visit Management

Visit Management optimizes the face-to-face visit experience for your field users and clients by simplifying visit scheduling, planning, visit engagement, and postvisit reporting. Because this reduces administrative tasks, field users can focus on building strong relationships with healthcare providers. Engage seamlessly with accounts across all channels by using intelligent content and remote capabilities. Manage sample distribution and direct-to-practitioner requests confidently with built-in compliance controls.

Consent Management

Consent Management enables users to capture, synchronize, and honor the communication preferences of healthcare professionals across different subscription types and channels. This feature helps limit outreach to healthcare professionals who have provided consent, which helps organizations stay compliant with data privacy regulations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

Add a Tab for Consent Management on a Record Page

Provide a central location for viewing a healthcare professional's (HCP) consent status, subscriptions, and communication preferences by adding a custom tab for Consent Management on the account's record page. This Consent page provides sales reps with immediate visibility into their HCPs' subscription and channel preferences.

Manage Subscriptions and Channels

Quickly create a record from an object's homepage that is necessary to use the features within Consent Management.

Set Up Consent Management

Use Consent Management to capture, manage, and track a healthcare professional's (HCP) consent for various communication channels and subscription preferences. Define consent statuses, signature requirements, geolocation settings, and filtering rules to make sure that outreach activities comply with applicable regulatory requirements.

Add a Logo to the Consent Page

Use static resources to upload a logo or image that you can reference in the Life Sciences Cloud for Customer Engagement app. This logo appears in the signature section when sales reps collect consent from healthcare professionals, helping your organization maintain brand consistency.

Mobile App Configuration for Consent Management

Create object metadata cache configuration for supported Consent Management objects and generate a metadata cache to make sure your sales reps can view and update consents on the Life Sciences Cloud Mobile app.

Send a Confirmation Email

Send a personalized follow-up email to a healthcare professional (HCP) after you capture their consent or signature.

Batch Jobs for Consent Management

When account and territory mapping is changed, Consent Management batch jobs help in aligning the sharing records for Communication Subscription Consent and Communication Subscription Compliance Snapshot objects.

Add a Tab for Consent Management on a Record Page

Provide a central location for viewing a healthcare professional's (HCP) consent status, subscriptions, and communication preferences by adding a custom tab for Consent Management on the account's record page. This Consent page provides sales reps with immediate visibility into their HCPs' subscription and channel preferences.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects: Life Sciences Commercial Admin

To create and save Lightning pages in the Lightning App Builder: Customize Application

1. From the App Launcher, find and select **Life Sciences Commercial**.
2. Click **Accounts**.
3. On the Accounts list view page, select a record to add the tab.
4. From the Setup Menu, click **Edit Page**.
5. To add a tab, click the **Tabs** pane on the canvas, and in the properties section, click **Add Tab**.
6. To customize a tab, select the newly added tab component in the properties pane, then select a

standard label, or click **Custom** to enter the tab name you want.

For example, Consent.

7. In the components pane, find **Consent**, and then drag it to the newly created tab.
8. Similarly, in the Components pane, find the Related List - Single component, and drag it to the newly created tab.
9. If you can't find the related-list component, go to Object Manager from Setup, and click the **Account** and **Person Account** page layout.
See [Add the Files Related List to Page Layouts](#).
10. In the Related List properties pane, in the Related List field, find and select **Communication Subscription Consents**.
11. Save your changes.
12. To make your customized record page available to your Lightning Experience web and mobile users, click **Activate** in the activation window.
 - a. In the confirmation window, select **App, Record Type, and Profile** tab, and then click **Assign to App, Record Type, and Profile**.
 - b. Select the **Life Sciences Commercial** Lightning app, and click **Next**.
 - c. Select the Form Factor as **Desktop and Mobile**, and click **Next**.
 - d. Select the Record Type as **Person Account**, and click **Next**.
 - e. Select the **Standard User** and **System Administrator** profiles, and click **Next**.
 - f. Save your changes.

Based on your business needs, you can also set the page as an Org Default to show it for all account records or as an App Default for the specific app.

To see this tab on the Life Sciences Cloud Mobile app, generate a metadata cache.

See Also

[Generate Metadata Cache](#)

Manage Subscriptions and Channels

Quickly create a record from an object's homepage that is necessary to use the features within Consent Management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Add a New Subscription](#)

Create a Communication Subscription record to add new subscription topics to the Consent page on the Life Sciences Cloud for Customer Engagement app.

[Create a Data Use Purpose Record](#)

Associate a Life Sciences Marketable Product to a Communication Subscription by creating a Data Use Purpose record to manage and organize consents for specific products.

Add a Channel to the Subscription

Create Communication Subscription Channel types to add new communication channels to a subscription. These records define the channel types, such as Email, SMS, or Direct Mail, that healthcare professionals can choose from as their primary mode of communication.

Add a New Engagement Channel Type

Create a new channel type by creating an Engagement Channel Types record. Adding new channel types makes these options available on the Consent page.

See Also

[Set Up Consent Management](#)

Add a New Subscription

Create a Communication Subscription record to add new subscription topics to the Consent page on the Life Sciences Cloud for Customer Engagement app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects: Life Sciences Commercial Admin

To update and create a new communication subscription: Life Sciences Field Sales Representative

1. From the App Launcher, find and select **Communication Subscriptions**.

2. Click **New**.

3. Enter the name of the new Subscription.

4. Select a Data Use Purpose.

This record creates the link between a Life Sciences Marketable Product and a Communication Subscription. If no records exist, create a Data Use Purpose record.

5. In the Filter Attribute List field, enter comma-separated attributes to filter subscriptions.

The values must match the values of an Account or Account Territory field that was configured in the Admin Console for Subscription Filtering Fields.

For example, if you select Account Name as a filtering field in the setup, you enter specific account names, separated by a comma, in the Filter Attribute List field. Subscriptions will then only appear for those specific accounts. If the Filter Attribute List field is empty, the system shows subscriptions for all

accounts.

6. Save your changes.

See Also

[Create a Data Use Purpose Record](#)

Create a Data Use Purpose Record

Associate a Life Sciences Marketable Product to a Communication Subscription by creating a Data Use Purpose record to manage and organize consents for specific products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects:	Life Sciences Commercial Admin
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1. From the App Launcher, find and select **Data Use Purpose**.
2. Click **New**.
3. Enter the name of the new Data Use Purpose.
4. In the Purpose field, select Life Sciences Marketable Product from the dropdown menu, and then search for the corresponding product record to link it to the Data Use Purpose for the communication subscription.
5. Save your changes.

See Also

[Add a New Subscription](#)

Add a Channel to the Subscription

Create Communication Subscription Channel types to add new communication channels to a subscription. These records define the channel types, such as Email, SMS, or Direct Mail, that healthcare professionals can choose from as their primary mode of communication.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects:

Life Sciences Commercial Admin

1. From the App Launcher, find and select **Communication Subscription Channel Types**.
2. Click **New**.
3. Enter the name of the new Data Use Purpose.
4. Select the Communication Subscription that you want to align a channel to.
5. Select the Engagement Channel Type.
If you want to create a new channel type, see [Add a New Engagement Channel Type](#).
6. Save your changes.

Add a New Engagement Channel Type

Create a new channel type by creating an Engagement Channel Types record. Adding new channel types makes these options available on the Consent page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects:

Life Sciences Commercial Admin

1. From the App Launcher, find and select **Engagement Channel Types**.
2. Click **New**.
3. Enter the name of the new channel type.



Note This name appears as the channel name that is shown on the Consent page.

4. Select the contact point type that this channel applies to.
5. Select the engagement channel type.
This selection determines the Contact Point object from which the values are populated on the consent page.
6. To activate the engagement channel type, select **Active**.
7. Save your changes.

Set Up Consent Management

Use Consent Management to capture, manage, and track a healthcare professional's (HCP) consent for various communication channels and subscription preferences. Define consent statuses, signature requirements, geolocation settings, and filtering rules to make sure that outreach activities comply with applicable regulatory requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects: Life Sciences Commercial Admin

- The Consent page in the Life Sciences Cloud for Customer Engagement app works by creating a series of connected Communication Subscription records and related object data: Communication Subscription, Engagement Channel Types, Communication Subscriptions Channel Types, Data Use Purpose, Compliance Statement Definition, Communication Subscription Consent, Communication Subscription Compliance Snapshot, Contact Point Address, Contact Point Phone, Contact Point Email, Contact Point Social, Digital Signatures.
 - [Add the Consent component to the Account page layout in a new tab.](#)
1. From the App Launcher, find and select **Life Sciences Commercial**.
 2. Click **Admin Console**.
 3. In the Life Sciences Customer Engagement Setup page, find and select **Consent Administration**.
 4. Configure general settings based on your requirements.
 - a. Enable users to add multiple values for consent channels.
Users see an Add More option on the consent tab.
 - b. Allow users to select Not Asked as the consent status in addition to Opt In and Opt Out.
-  **Note** Only the Opt-in and Opt-out statuses are supported when saving the consent.
- c. Allow sales reps to lock the consent capture screen.
Prevents healthcare professionals from navigating to other pages while signing the consent.
 - d. Allow users to view the signature captured in the consent's last update.
5. In the Signature Section, specify the signature requirement.
 - Required
 - Not Required
 - Optional
 6. To capture geolocation data during consent signing, select **Capture geolocation during consent signing**.

7. Configure the attachment requirements for desktop and mobile.
 - a. In the Attachment Requirement for Desktop Site field, select an option to determine whether an attachment is required or not when capturing consent on a desktop site.
 - b. In the Attachment Requirement for Mobile App field, select an option to determine whether an attachment is required or not when capturing consent on the Life Sciences Cloud Mobile app.
8. In the Product Restriction section, select **Show restricted products**.
Show or hide disabled subscriptions associated with the restricted products.
9. Configure the subscription filtering fields.
 - a. For Account Territory Fields, select a field to filter the subscriptions available for the account.
 - b. For Account, select the field from the account object to filter subscriptions shown to the account when a provider account territory info record isn't available.
10. Configure the disclaimer filtering fields.
 - a. For Account Territories, select the field from the provider account territory info object to filter the disclaimer.
 - b. For Account, select the field from the provider account territory info object to filter the disclaimer when a provider account territory info record isn't available.
11. Configure terms & conditions filtering fields.
 - a. For Account Territories, select the fields from the provider account territory info object to filter the terms and conditions.
 - b. For Account, select the field from the provider account territory info object to filter the terms and conditions when a provider account territory info record isn't available.
12. Save your changes.

See Also

- [Manage Subscriptions and Channels](#)
- [Generate Metadata Cache](#)
- [Customize the Life Sciences Cloud Mobile App](#)
- [Consent Management Trigger Handlers](#)

Add a Logo to the Consent Page

Use static resources to upload a logo or image that you can reference in the Life Sciences Cloud for Customer Engagement app. This logo appears in the signature section when sales reps collect consent from healthcare professionals, helping your organization maintain brand consistency.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects: Life Sciences Commercial Admin

To create static resources: Customize Application

1. From Setup, create a static resource, and enter the name as *SignatureAreaLogo*.
See [Create a Static Resource](#).
2. Configure the logo in the Life Sciences Cloud Mobile app's UI.
 - a. From the App Launcher, find and select **Life Sciences Commercial**.
 - b. Click **Admin Console**.
 - c. In the Life Sciences Customer Engagement Setup page, click **Mobile**.
 - d. In the navigation pane, click **UI Settings**.
 - e. For the Filter field, select **Static Resource**.
 - f. Click **New**, and enter a label for the UI.
 - g. Enter a unique name for this configuration.
 - h. Enter a label that describes the purpose.
For example, Consent Logo for Users.
 - i. Select **Static Resource** as the Mobile Type, and in the Resource Name, select the static resource that you created earlier.
For example, **SignatureAreaLogo**.
 - j. Select the profile this configuration applies to.
For example, **System Administrator**.
 - k. To activate the configuration, select **IsActive**.
 - l. Save your changes.

To see the logo on the Life Sciences Cloud Mobile app, generate a metadata cache.

See Also

[Generate Metadata Cache](#)

Mobile App Configuration for Consent Management

Create object metadata cache configuration for supported Consent Management objects and generate a metadata cache to make sure your sales reps can view and update consents on the Life Sciences Cloud Mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects:

Life Sciences Commercial Admin

Here's the list of objects used for managing consents.

Name	Type
DbSchema_EngagementChannelType	Data
DbSchema_DigitalSignature	Data
DbSchema_DataUsePurpose	Data
DbSchema_ComplianceStatementDef	Data
DbSchema_CommSubscriptionConsent	Data
DbSchema_CommSubscriptionChannelType	Data
DbSchema_CommSubscription	Data
DbSchema_CommSubConsentCmplSnpsh	Data

 **Important** After you create these configurations, make sure to generate a metadata cache. This step is important because it makes sure that the mobile app accesses the latest metadata definitions, including any schema changes for supported objects.

See Also

[Create Object Metadata Cache Configuration](#)

[Generate Metadata Cache](#)

Send a Confirmation Email

Send a personalized follow-up email to a healthcare professional (HCP) after you capture their consent or signature.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Consent Management features and objects:

Life Sciences Commercial Admin

Consent confirmation emails confirm the subscriptions and channels that the HCP selected. Configure the feature to send the email automatically or only when the Request receipt option is selected during consent capture.

To send the email to the correct recipient, Life Sciences Cloud for Customer Engagement automatically selects the primary Contact Point Email associated with the account that has the highest preference rank. Sent emails appear in the account's Activity History.

1. [Create an email template](#).
2. To use the email template for consent confirmation, select **Template for consent acknowledgment**.
3. [Create a metadata cache configuration](#) for the LifeSciEmailTemplate object.
4. For consent confirmation emails, when creating the configuration set, add this condition in the Where Clause.

```
AND HassSendConsentAcknowledgement = FALSE
```

5. Create and run the code for the Send SDK method, or add the code to the previously implemented one. Here's the code sample.

```
Map<String, Object> paramMap = new Map<String, Object>
{
    'emailTemplateId' => '1LLWs000000YtbZOAS',
    'accountId' => '001Ws00004MXTqvIAH',
    'attachmentIds' => new Set<Id>{''}, '',
    'relatedId' => 'relatedId', 'relatedLookupApiName' => 'relatedLookupA' };
Boolean result = (Boolean)
lsc4ce.LifeScienceApi.getInstance
(lsc4ce.LifeScienceApi.Command.EmailSendService).execute(paramMap);
```

Batch Jobs for Consent Management

When account and territory mapping is changed, Consent Management batch jobs help in aligning the sharing records for Communication Subscription Consent and Communication Subscription Compliance Snapshot objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Available Batch Jobs

- CommSubscriptionConsentShareMgmtBatch: Realigns sharing for Communication Subscription

- Consent records.
- `CommSubConsentCmplSnpshShareMgmtBatch`: Realigns sharing for Communication Subscription Compliance Snapshot records.

Run and Schedule a Batch Job

To make sure that new sharing records stay aligned with the latest account and territory changes, use this Apex code snippet in the Developer Console. See [Run Batch Jobs for Life Sciences Cloud for Customer Engagement app].

```
// Create Map of Input Parameters
Map<String, Object> paramMap = new Map<String, Object>{
    'batchName' => 'CommSubscriptionConsentShareMgmtBatch', // mandatory field
    'territoryName' => 'California', // optional field
    'batchSize' => '200' // optional field , default is 200
};
// Call
Boolean result = (Boolean) (LifeScienceApi.getInstance(LifeScienceApi.Command.ConsentBatchJob).execute(paramMap));
System.debug('Result: ' + result);
```

To schedule a batch job, create a scheduled flow based on your business needs. See [Schedule a Batch Job](#).

See Also

[Salesforce Help: Batch Apex](#)

Medical Inquiries

Capture, manage, and respond to critical questions from healthcare professionals (HCPs). Help your sales representatives and medical science liaisons streamline the inquiry creation process, provide accurate and timely responses, and handle a variety of inquiry types, including general medical inquiries, adverse events, and product quality complaints. Leverage configurable workflows and robust compliance capabilities to ensure that all medical inquiries are handled quickly and in accordance with medical, legal, and regulatory standards.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Here's a summary of the key capabilities of Medical Inquiries.

- Improves response times and HCP satisfaction through an efficient inquiry process.
- Offers intuitive web and mobile interfaces for easy submission, documentation attachment, and status tracking.
- Features robust workflows and queues for prompt inquiry assignment.
- Enhances security and data integrity with a dedicated data model and role-based access permissions.
- Reduces noncompliance risks with an effective approval process for non-standard responses.
- Enforces organizational policies, such as mandatory signatures, with custom validation rules.
- Manages different statuses, actions, and records for each stage and role.

Get Your Org Ready for Medical Inquiries

Before you set up Medical Inquiry in Life Sciences Cloud, make sure you have the required user profiles, licenses, and permission sets.

Define Statuses for Medical Inquiries

Medical inquiries move through a series of steps from creation to closure. To get a clear understanding of the progress and assignment of requests, it's critical to track the real-time status of inquiries. Define appropriate status values to help your sales representatives and medical science liaisons use the Medical Inquiry workflow efficiently.

Set Up the Inquiry Record Page for Medical Inquiries

Add tabs and Lightning components to the Inquiry record page so that your sales representatives can easily create and submit medical inquiry requests, and medical science liaisons can submit their response to the inquiry questions.

Configure Action Buttons on the Inquiry Record Page

Help your users to handle medical inquiries in an efficient and timely manner by customizing the target action of the New and Edit buttons on the Inquiry record page. This setup configures a multi-object Lightning component that enables users to manage both inquiry and case records in one go.

Set Up the Account Record Page for Medical Inquiries

Add tabs and Lightning components to the Account record page so that your sales representatives and medical science liaisons can easily manage and track all inquiries related to the healthcare professional.

Configure Action Buttons on the Account Record Page

Let users create medical inquiries directly from the Account record page rather than navigating to the Inquiry page. Add a button on the Account record page and make it easier for the sales representatives to get a better context of the healthcare professional while creating the inquiry.

Configure Support Process and Record Types for the Medical Inquiry Workflow

Create support process and record types for the objects used in the medical inquiry workflow. Assign profiles and page layouts to the record types to determine which one apply when users create, edit, or view records.

Define Sharing Settings for Medical Inquiries

Promote effective management of medical inquiries by configuring sharing settings for the Inquiry Question object. This configuration makes sure that the inquiry question and its associated parent case have the same sharing settings.

Create a Custom Field for Medical Inquiries

Set up a formula-derived custom field on the Inquiry object to capture your unique business data for medical inquiries. The field helps to achieve conditional display of action buttons based on the user profile or persona. This configuration promotes a seamless workflow by ensuring that sales representatives can only draft, sign, and submit medical inquiries whereas medical science liaisons can only assign and respond to the inquiries.

[Set Up Workflow Actions for Medical Inquiry Management](#)

Define relevant workflow actions for tasks that users must perform in the medical inquiry process, such as inquiry submission, assignment, and more. With the help of workflow actions, you can show contextual action buttons on the Inquiry record detail page depending on the current stage of the inquiry workflow. For example, the Submit button appears when the inquiry is ready to be submitted by the sales representative.

[Set Up the Workflow Stages to Manage Medical Inquiries](#)

Enhance efficiency, maintain compliance, and promote data integrity with configurable workflow paths. The workflow outlines the journey of an object through various stages and helps you manage the different statuses, actions, and record permissions. For the medical inquiry process, set up a workflow path based on the Inquiry object and its different stages.

[Batch Jobs for Medical Inquiries](#)

Batch jobs are automated processes designed to share and manage multiple medical inquiry records consistently and efficiently. Save time, reduce the risk of manual errors, and maintain the integrity and reliability of inquiry data by using the MIRF Share Management job.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Get Your Org Ready for Medical Inquiries

Before you set up Medical Inquiry in Life Sciences Cloud, make sure you have the required user profiles, licenses, and permission sets.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

- [Enable Admin Console](#).
- [Create user profiles](#) for sales representatives and medical science liaisons based on the Standard User profile and associate the profiles with the corresponding user records.
- Assign the Life Sciences Core and Life Sciences Field Sales Representative permission sets to sales representatives.
- Assign the Life Sciences Core and Life Sciences Field Medical permission sets to medical science liaisons.

See Also

- [Salesforce Help: Create and Submit a Medical Inquiry](#)
- [Salesforce Help: Review and Respond to a Medical Inquiry](#)

Define Statuses for Medical Inquiries

Medical inquiries move through a series of steps from creation to closure. To get a clear understanding of the progress and assignment of requests, it's critical to track the real-time status of inquiries. Define appropriate status values to help your sales representatives and medical science liaisons use the Medical Inquiry workflow efficiently.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add case status:	Life Sciences Commercial Admin permission set
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1. From Setup, open the Object Manager, and go to the Case object.
2. Under Fields & Relationships, click **Status**.
3. In the Case Status Picklist Values section, click **New**.
4. Enter these exact inquiry status values, each on its own line: *Draft*, *Signed*, *Submitted*, *Assigned*, and *Responded*.
5. Save your changes.
6. Set Draft as the default status.
7. Set Responded as the closed status.
8. Save your changes.

See Also

- [Salesforce Help: Create and Submit a Medical Inquiry](#)
- [Salesforce Help: Review and Respond to a Medical Inquiry](#)

Set Up the Inquiry Record Page for Medical Inquiries

Add tabs and Lightning components to the Inquiry record page so that your sales representatives can easily create and submit medical inquiry requests, and medical science liaisons can submit their response to the inquiry questions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up the Inquiry record page: Life Sciences Commercial Admin permission set

Prerequisite: [Create a field set](#) for the Inquiry Question Answer object.

1. From Setup, go to Object Manager, and select **Inquiry**.
2. Under Lightning Record Pages, select the inquiry record page and click **Edit**.
3. Drag the LifeSciStagePathContainer component to an appropriate spot on the page.
4. Save your changes.
5. [Add a tab](#) named Inquiry Question Answer.
6. Drag the Related List - Life Sciences component to the Inquiry Question Answer tab, and then set up these fields.
 - Object Name: InquiryQuestionAnswer
 - Field Set Name: Enter the name of the Inquiry Question Answer field set.
 - Label: Inquiry Question Answer
 - Icon Name: standard: work_plan_rule
 - Handler for update/delete: StandardUpdateDeleteHandler
 - Where Clause: InquiryQuestion.InquiryId = 'recordId'
 - Component name for the New action: StandardNewAction
 - Relationship Field API Name: Inquiry.InquiryQuestionId
 - View All Components: StandardViewAll
 - Show record count: true
7. To view the timeline details for inquiries, drag the Timeline component to the page and configure the component details.
8. Click **Activation**.
9. Click **Assign as Org Default**, and select **Desktop and Phone**.
10. Click **Next** and save your changes.

After you're done setting up Lightning components and tabs, you can [configure action buttons](#) on the Inquiry record page.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Configure Action Buttons on the Inquiry Record Page

Help your users to handle medical inquiries in an efficient and timely manner by customizing the target action of the New and Edit buttons on the Inquiry record page. This setup configures a multi-object Lightning component that enables users to manage both inquiry and case records in one go.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure action buttons:	Life Sciences Commercial Admin permission set
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1. From Setup, open the Object Manager, and go to the Inquiry object.
2. Click **Buttons, Links, and Actions**.
3. For the New label, click , and then click **Edit**.
4. Under Lightning Experience Override, select **Lightning component**, and then select **Isc4ce:MultiEntityCreateOverride**.
5. If the Inquiry object has multiple record types, select **Skip record type selection page**.
6. Save your changes.
7. On the Buttons, Links, and Actions page, for the Edit label, click , and then click **Edit**.
8. Under Lightning Experience Override, select **Lightning component**, and then select **Isc4ce:MultiEntityEditOverride**.
9. Save your changes.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Set Up the Account Record Page for Medical Inquiries

Add tabs and Lightning components to the Account record page so that your sales representatives and medical science liaisons can easily manage and track all inquiries related to the healthcare professional.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed

package.

USER PERMISSIONS NEEDED

To set up the Account record page: Life Sciences Commercial Admin permission set

Prerequisite: [Create a field set](#) for the Inquiry object.

1. From Setup, go to Object Manager, and select **Account**.
2. Under Lightning Record Pages, select the account record page and click **Edit**.
3. [Add a tab](#) named Inquiry.
4. Drag the Related List - Life Sciences component to the Inquiry tab, and then set up these fields.
 - Object Name: Inquiry
 - Field Set Name: Enter the name of the Inquiry field set.
 - Label: Inquiry
 - Icon Name: standard: work_plan_rule
 - Handler for update/delete: StandardUpdateDeleteHandler
 - Where Clause: Case.AccountId = '{recordId}'
 - Component name for the New action: StandardNewAction
 - Relationship Field API Name: Case.AccountId
 - View All Components: StandardViewAll
 - Show record count: True
5. Click **Activation**.
6. Click **Assign as Org Default**, and select **Desktop and Phone**.
7. Click **Next** and save your changes.

After you're done setting up Lightning components and tabs, you can [configure action buttons](#) on the Account record page.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Configure Action Buttons on the Account Record Page

Let users create medical inquiries directly from the Account record page rather than navigating to the Inquiry page. Add a button on the Account record page and make it easier for the sales representatives to get a better context of the healthcare professional while creating the inquiry.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure action buttons:

Life Sciences Commercial Admin permission set

1. From Setup, open the Object Manager, and go to the Account object.
2. Click **Buttons, Links, and Actions**.
3. Create the action button.
 - a. Click **New Action**.
 - b. For Action Type, select **Lightning Component**, and then select **Isc4ce:CreateNewInquiry** as the lightning component.
 - c. Enter a label, name, and description for the action. We recommend naming the action button *New Inquiry*.
 - d. Save your changes.
4. Add the action to the layout.
 - a. Go to Page Layouts, and select the appropriate layout for the Account record page.
 - b. Click **Edit**, and select **Mobile and Lightning Experience Actions**.
 - c. Drag the New Inquiry action to the Salesforce Mobile and Lightning Experience Actions section.
 - d. Save your changes.

Depending on your business needs, you can also add a New Inquiry action button to the Visit record page using these steps.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Configure Support Process and Record Types for the Medical Inquiry Workflow

Create support process and record types for the objects used in the medical inquiry workflow. Assign profiles and page layouts to the record types to determine which one apply when users create, edit, or view records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up record types and support processes:

Life Sciences Commercial Admin permission set

1. To configure a tailored workflow with specific stages, create a support process for medical inquiries.

- a. From Setup, in the Quick Find box, enter and select **Support Processes**.
 - b. Click **New**.
 - c. From Existing Support Process, select **Master**.
 - d. Enter a name and description for the support process, and save your changes.
 - e. Select the **Draft**, **Signed**, **Submitted**, **Assigned**, and **Responded** case statuses.
 - f. Save your changes.
2. For the Case object, [create a record type](#) based on the support process that you created. We recommend naming the record type *Medical Inquiry*.
 3. For the Inquiry object, [create a record type](#). We recommend naming the record type *Medical Inquiry*.
 4. [Assign record type to profiles](#).

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Define Sharing Settings for Medical Inquiries

Promote effective management of medical inquiries by configuring sharing settings for the Inquiry Question object. This configuration makes sure that the inquiry question and its associated parent case have the same sharing settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create sharing settings:

Life Sciences Commercial Admin permission set

OR

Manage Sharing

-
1. From Setup, in the Quick Find box, enter and select **Sharing Settings**.
 2. In the Organization-Wide Defaults section, click **Edit**.
 3. For the Inquiry Question object, set the default internal and external access to **Controlled by Parent**.
 4. Save your changes.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Create a Custom Field for Medical Inquiries

Set up a formula-derived custom field on the Inquiry object to capture your unique business data for medical inquiries. The field helps to achieve conditional display of action buttons based on the user profile or persona. This configuration promotes a seamless workflow by ensuring that sales representatives can only draft, sign, and submit medical inquiries whereas medical science liaisons can only assign and respond to the inquiries.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a custom field:

Life Sciences Commercial Admin permission set

OR

Customize Application

1. From Setup, go to Object Manager, and select **Inquiry**.
2. Go to Fields & Relationships and click **New**.
3. Select **Formula** and click **Next**.
4. Enter a name for the field, such as *IsCreatorOrResponder*.
5. Select **Text** and click **Next**.
6. In the Simple formula section, [enter a formula](#) to assign text to the field based on the user profile. This example shows how to assign text for each profile.

```
IF($Profile.Name = '<Enter the profile name of Medical Science Liaison>',  
'<Text1>', IF($Profile.Name = '<Enter the profile name of Sales representative>', '<Text2>', ''))
```

You can replace “Medical Science Liaison” and “Sales Representative” for “Text1” and “Text2.”

7. Click **Next**.
8. [Complete the custom field setup](#) and save your changes.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Set Up Workflow Actions for Medical Inquiry Management

Define relevant workflow actions for tasks that users must perform in the medical inquiry process, such as inquiry submission, assignment, and more. With the help of workflow actions, you can show contextual action buttons on the Inquiry record detail page depending on the current stage of the inquiry workflow. For example, the Submit button appears when the inquiry is ready to be submitted by the sales representative.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up workflow actions:	Life Sciences Commercial Admin permission set
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Prerequisite: Create a compliance statement definition record. Select Statement Type as Disclaimer and Module Type as Medical Inquiry. Add the disclaimer text in Statement Text.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Workflow Configuration**, and then select **Workflow Actions**.
3. On the Workflow Actions page, click **New** and select **Update Record**.
4. Create action buttons for submission, assignment, and response using these details.

	Submission Action	Assignment Action	Response Action
Action Name	Submit Medical Inquiry	Assign Medical Inquiry	Respond to Medical Inquiry
Button Label	Submit	Assign to Me	Move Status to Responded
Object	Inquiry	Inquiry	Inquiry
Field	Case ID	Case ID	Case ID
Parent Record Field	Status	Status	Status
New Field Value	Submitted	Assigned	Responded
Parameters	None	None	None

5. Save your changes.
6. On the Workflow Actions page, click **New** and select **Open Component**.
7. Create component actions for signature, response preference, and response using these details.

	Signature Action	Response Preference Action	Response Action
Action Name	Add Signature	Add Response Preference	Add Response
Button Label	Add Signature	Add Response Preference	Add Response
Object	Inquiry	Inquiry	Inquiry
Component Name	lsc4ce:InquirySignature Modal	lsc4ce:responsePreferenceSelector	lsc4ce:inquiryAnswerModal
Component Parameters	"status":"Signed","isTopicEnabled":true, "disclaimerText":"Disclaimer Text "	None	None

8. Save your changes.
 9. Click **Deploy**.
- The actions are active, and you can add them to a workflow path.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Set Up the Workflow Stages to Manage Medical Inquiries

Enhance efficiency, maintain compliance, and promote data integrity with configurable workflow paths. The workflow outlines the journey of an object through various stages and helps you manage the different statuses, actions, and record permissions. For the medical inquiry process, set up a workflow path based on the Inquiry object and its different stages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up a workflow path:	Life Sciences Commercial Admin permission set
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To create the workflow, add operations for each stage and define the permissions to create, edit, or delete records based on the user's role or context. Associate workflow actions to each operation, and set

up conditions that must be met to grant permissions and enable actions. The validations help control the visibility of responses, records, and fields.

Prerequisite: [Configure the required workflow actions for the medical inquiry process](#).

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Create a Workflow Path

1. From the App Launcher, find and select **Admin Console**.
2. Select **Workflow Configuration**.
3. On the Workflow Paths screen, click **New**, and enter a name for the medical inquiry workflow.
4. From the Object API Name list, select **Inquiry**
5. From the Field API Name list, select **Status**.
6. Click **Continue**.

Set Up the Draft Status Stage

1. On the workflow screen, from the workflow path, select **Draft**.
2. Under Stage Operations, click  and enter a name for the operation. We recommend using *Medical Inquiry Draft*.
3. Select **Create**, **Edit**, and **Delete**.
4. Set the priority to 1, and save your changes.
5. Add actions to the stage operation.
 - a. Under Stage Operation Actions, click **Add Actions** and select **Open Component**.
 - b. Select the **Add Signature** and **Add Response Preference** actions.
 - c. Save your changes.
6. On the Stage Operation Conditions tab, add a condition with these values, if necessary.
 - a. For Field, enter the name of the [formula field](#) you created earlier.
 - b. For Operator, enter *Equals*.
 - c. For Value, enter the text that you configured as Text2 in the formula field.
 - d. Save your changes.
7. Under Other Permissions, select **Salesforce Files**, and then select **Create**, **Edit**, and **Delete**.
8. Create a child stage operation for managing inquiry questions.
 - a. Next to the Medical Inquiry Draft operation, click , and enter a name for the operation.
 - b. For the object, select **InquiryQuestion**, and select **Create**, **Edit**, and **Delete**.
 - c. Set the priority to 1, and save your changes.
9. Create a child stage operation for managing subject assignments.
 - a. Next to the Medical Inquiry Draft operation, click , and enter a name for the operation.
 - b. For the object, select **SubjectAssignment**, and select **Create**, **Edit**, and **Delete**.
 - c. Set the priority to 2, and save your changes.

Set Up the Signed Status Stage

1. On the workflow screen, from the workflow path, select **Signed**.
2. Under Stage Operations, click  and enter a name for the operation. We recommend using **Medical Inquiry Signed**.
3. Set the priority to 1, and save your changes.
4. Add actions to the stage operation.
 - a. Under Stage Operation Actions, click **Add Actions** and select **Update Record**.
 - b. Select the **Submit Medical Inquiry** action.
 - c. Save your changes.
5. On the Stage Operation Conditions tab, add a condition with these values.
 - a. For Field, enter the name of the **formula field** you created earlier.
 - b. For Operator, enter *Equals*.
 - c. For Value, enter the text that you configured as Text2 in the formula field.
 - d. Save your changes.
6. Under Other Permissions, select **Salesforce Files**.
Don't select **Create**, **Edit**, or **Delete**.
7. Create a child stage operation for managing inquiry questions.
 - a. Next to the Medical Inquiry Signed operation, click , and enter a name for the operation.
 - b. For the object, select **InquiryQuestion**.
Don't select **Create**, **Edit**, or **Delete**.
 - c. Set the priority to 1, and save your changes.
8. Create a child stage operation for managing subject assignments.
 - a. Next to the Medical Inquiry Signed operation, click , and enter a name for the operation.
 - b. For the object, select **SubjectAssignment**.
Don't select **Create**, **Edit**, or **Delete**.
 - c. Set the priority to 2, and save your changes.

Set Up the Submitted Status Stage

1. On the workflow screen, from the workflow path, select **Submitted**.
2. Under Stage Operations, click  and enter a name for the operation. We recommend using **Medical Inquiry Submitted**.
3. Set the priority to 1, and save your changes.
4. Add actions to the stage operation.
 - a. Under Stage Operation Actions, click **Add Actions** and select **Update Record**.
 - b. Select the **Assign Medical Inquiry** action.
 - c. Save your changes.
5. On the Stage Operation Conditions tab, add a condition with these values.
 - a. For Field, enter the name of the **formula field** you created earlier.
 - b. For Operator, enter *Equals*.
 - c. For Value, enter the text that you configured as Text1 in the formula field.
 - d. Save your changes.
6. Under Other Permissions, select **Salesforce Files**.

Don't select **Create**, **Edit**, or **Delete**.

7. Create a child stage operation for managing inquiry questions.
 - a. Next to the Medical Inquiry Submitted operation, click , and enter a name for the operation.
 - b. For the object, select **InquiryQuestion**.
Don't select **Create**, **Edit**, or **Delete**.
 - c. Set the priority to 1, and save your changes.
8. Create a child stage operation for managing subject assignments.
 - a. Next to the Medical Inquiry Submitted operation, click , and enter a name for the operation.
 - b. For the object, select **SubjectAssignment**.
Don't select **Create**, **Edit**, or **Delete**.
 - c. Set the priority to 2, and save your changes.

Set Up the Assigned Status Stage

1. On the workflow screen, from the workflow path, select **Assigned**.
2. Under Stage Operations, click  and enter a name for the operation. We recommend using **Medical Inquiry Assigned**.
3. Set the priority to 1, and save your changes.
4. Add actions to the stage operation.
 - a. Under Stage Operation Actions, click **Add Actions** and select **Update Record**.
 - b. Select the **Respond to Medical Inquiry** action.
 - c. Save your changes.
 - d. Under Stage Operation Actions, click **Add Actions** and select **Open Component**.
 - e. Select the **Add Response** action that you created earlier.
 - f. Save your changes.
5. On the Stage Operation Conditions tab, add a condition with these values.
 - a. For Field, enter the name of the **formula field** you created earlier.
 - b. For Operator, enter *Equals*.
 - c. For Value, enter the text that you configured as Text1 in the formula field.
 - d. Save your changes.
6. Under Other Permissions, select **Salesforce Files**.
Don't select **Create**, **Edit**, or **Delete**.
7. Create a child stage operation for managing inquiry questions.
 - a. Next to the Medical Inquiry Assigned operation, click , and enter a name for the operation.
 - b. For the object, select **InquiryQuestion**.
Don't select **Create**, **Edit**, or **Delete**.
 - c. Set the priority to 1, and save your changes.
8. Create a child stage operation for managing subject assignments.
 - a. Next to the Medical Inquiry Assigned operation, click , and enter a name for the operation.
 - b. For the object, select **SubjectAssignment**.
Don't select **Create**, **Edit**, or **Delete**.
 - c. Set the priority to 2, and save your changes.

Set Up the Responded Status Stage

1. On the workflow screen, from the workflow path, select **Responded**.
2. Under Stage Operations, click  and enter a name for the operation. We recommend using **Medical Inquiry Responded**.
3. Set the priority to 1, and save your changes.
4. Create a child stage operation for managing inquiry questions.
 - a. Next to the Medical Inquiry Responded operation, click , and enter a name for the operation.
 - b. For the object, select **InquiryQuestion**.
Don't select **Create**, **Edit**, or **Delete**.
 - c. Set the priority to 1, and save your changes.
5. Create a child stage operation for managing subject assignments.
 - a. Next to the Medical Inquiry Responded operation, click , and enter a name for the operation.
 - b. For the object, select **SubjectAssignment**.
Don't select **Create**, **Edit**, or **Delete**.
 - c. Set the priority to 2, and save your changes.

Activate the Workflow

1. On the workflow screen, click **Activate**.
2. Save your changes.
The medical inquiry workflow is ready for use to manage inquiries.

Depending on your business needs, configure custom scripts and associate the scripts with the workflow.

- [Set up validation scripts](#) to run each time a user performs an action and to prevent incorrect actions or alert users about errors.
- [Set up checklist scripts](#) to show an information icon for users to see the next steps to take.

Batch Jobs for Medical Inquiries

Batch jobs are automated processes designed to share and manage multiple medical inquiry records consistently and efficiently. Save time, reduce the risk of manual errors, and maintain the integrity and reliability of inquiry data by using the MIRF Share Management job.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You can find the job under Territories in the Admin Console. Depending on your business needs, you can either trigger the job immediately or schedule it for later. For more information on how to run or

schedule a job, see [Run Batch Jobs](#).

Job NAME	Description
MIRF Share Management	Shares all inquiry records within a territory to all sales representatives under that territory. Run this job after the Align Account to Territory job.

See Also

[Salesforce Help: Create and Submit a Medical Inquiry](#)

[Salesforce Help: Review and Respond to a Medical Inquiry](#)

Medical Insights

Use Medical Insights to provide field teams a structured way to capture and share insights from their engagements with HCPs and HCOs. Show relevant insight data for collaboration through customized record pages with specific field sets and related lists. Streamline the user workflow by creating quick actions and defining granular permissions to control how users interact with insights.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

[Get Your Org Ready for Medical Insights](#)

Before you set up Medical Insights in the Life Sciences Cloud, make sure that you enable all the necessary system components and data structures.

[Add Medical Insights Tab to App Launcher](#)

Make Medical Insights available to users by adding a tab in the Life Sciences mobile app. This tab enables users to view their insights as well as insights captured by the same profile within their territories.

[Configure Medical Insights Objects](#)

Configure Medical Insight and Medical Insight Accounts objects by customizing the record page layout and creating required field sets. This customization makes sure that users see relevant medical insights data on Account and Visit records.

[Customize Medical Insights Record Page](#)

Customize the Medical Insights record page by changing the template and removing the Activity component to provide a seamless user experience when navigating medical insights.

[Customize Account and Visit Record Pages](#)

Add necessary components to capture insights from these Account and Visit record pages.

[Configure Insights](#)

Configure the settings in Admin Console to enable users to capture insights, add more details and

mandate certain required fields before saving them.

Manage Insights Quick Actions

Configure the quick actions to allow users to capture medical insights directly from the Home, Account, and Visit pages.

Get Your Org Ready for Medical Insights

Before you set up Medical Insights in the Life Sciences Cloud, make sure that you enable all the necessary system components and data structures.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To get your org ready for medical insights: Life Sciences Commercial Admin permission set

- Configure database schema for the supported Medical Insights objects.
 - Account
 - User
 - UserReaction
 - MedicalInsight
 - MedicalInsightAccount
 - MedicalInsightProduct
 - Subject
 - SubjectAssignment
- Activate the [Medical Insights trigger handlers](#).
 - PublishMedicalInsightEventHandler
 - RecalculateParentLinkedInsightsHandler
 - MedicalInsightSharingHandler
 - UserReactionMedicalInsightHandler
 - RecalculateInsightTopicNameHandler
 - InsightCascadeDeleteTriggerHandler
 - TopicValidationHandler

See Also

[Salesforce Help: Trigger Handler Administration](#)

[Salesforce Help: Create Object Metadata Cache Configuration](#)

Add Medical Insights Tab to App Launcher

Make Medical Insights available to users by adding a tab in the Life Sciences mobile app. This tab enables users to view their insights as well as insights captured by the same profile within their territories.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add medical insights tab to App Launcher: Life Sciences Commercial Admin permission set

1. From Setup, in the Quick Find box, find and select **App Manager**.
2. Go to Life Sciences Commercial in the list.
3. Click the  icon, and select Edit.
4. Select Navigation Items from the App Settings section.
5. Find and select Medical Insights from Available Items. Move it to Selected Items.
6. Save your changes.

Configure Medical Insights Objects

Configure Medical Insight and Medical Insight Accounts objects by customizing the record page layout and creating required field sets. This customization makes sure that users see relevant medical insights data on Account and Visit records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure medical insights objects: Life Sciences Commercial Admin permission set

1. From Setup, go to Object Manager.
2. In the **Medical Insight** object, find and select **Page Layout**.
 - a. Select medical insight layout from the list.
 - b. Select and drag Medical Insight Accounts, Medical Insight Products, Subject Assignments and User

Reactions from the component palette onto the record page's Related Lists section.

3. Select **Field Sets** to [create a field set](#) linking visits and medical insights.
 - a. Enter **VisitInsightsRLFieldSet** as the label.
 - b. Drag and drop Name, Source Type and Content into the field set.
 - c. Save your changes.
4. Repeat the above step for the **Medical Insight Accounts** object to create a field set linking accounts and medical insights. However, enter **AccountInsightsRLFieldSet** as the label and drag Name, Medical Insight and Reason Type into the field set.

Customize Medical Insights Record Page

Customize the Medical Insights record page by changing the template and removing the Activity component to provide a seamless user experience when navigating medical insights.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To customize medical insights record page: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Medical Insights**.
2. Select a record from the list.
3. Click the  icon, and then select **Edit Page**.
4. To change the template, select the current page template and click the **Change** button next to the Template value.
 - a. Select **Header and One Region** template.
 - b. Click **Next** and then **Done**.
5. To remove the Activity component, select the component and click the  icon on the component's upper right corner.
6. Save your changes.
7. If prompted, activate the updated record page.
 - a. Assign the page to apps, record types and profiles.
 - b. Select Life Sciences Commercial for app and desktop and phone for the app's form factors.
 - c. Select master record type.
 - d. Select system administrator and medical sales representative profiles.
 - e. Review the assignments and save.

Customize Account and Visit Record Pages

Add necessary components to capture insights from these Account and Visit record pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To customize account and visit record pages: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Accounts** tab in the Life Sciences Commercial app.
2. Select a record from the list.
3. Click the  icon, and then select **Edit Page**.
4. Select the **Related** tab on the page canvas.
5. Add the list component to the tab.
 - a. Select **Related List – Life Sciences** in the left component panel.
 - b. Drag and drop it into the Related List tab.
6. Configure the component by selecting it and entering the following values in the right panel.
 - **Object API Name:** MedicalInsightAccount
 - **Field Set API Name:** AccountInsightsRLFieldSet
 - **Label API Name:** Medical Insights
 - **Where Clause:** MedicalInsightAccount.AccountId = '{recordId}'

Clear the value in **New Action Handler API Name** field and select the show record count check box.
7. Save your changes.
8. If prompted, activate the updated record page.
 - a. Assign the page to Life Sciences Commercial App for Desktop and Phone for relevant profiles and record types.
 - b. Review the assignments and save.
9. Repeat the above steps for **Visits** tab. However, enter the following values for configuring the component.
 - **Object API Name:** MedicalInsight
 - **Field Set API Name:** VisitInsightsRLFieldSet
 - **Label API Name:** Medical Insights
 - **Where Clause:** MedicalInsight.VisitId = '{recordId}'

Configure Insights

Configure the settings in Admin Console to enable users to capture insights, add more details and mandate certain required fields before saving them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure medical insights: Life Sciences Commercial Admin permission set

1. From App Launcher, find and select **Admin Console**.
2. Select **Insights** and then select **Insight Settings**.
3. Apply settings to the required profile selected from the drop down.
4. Configure the required permissions by selecting the check boxes.
 - a. Enable users to capture insights from the account page using a button.
 - b. Add the associated product to an insight. Hide an insight's associated account and tag when displaying the details of an insight.
 - c. Make sure that users can save insights only if they add details like account, product and tag.

Manage Insights Quick Actions

Configure the quick actions to allow users to capture medical insights directly from the Home, Account, and Visit pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage insights quick actions: Life Sciences Commercial Admin permission set

1. From App Launcher, find and select **Admin Console**.
2. Select **Quick and Custom Action Administration** and then select **Quick Actions**.
3. To create a quick action, click **New**.
 - a. Add details like name and label.
 - b. Select Create Medical insights from the action name drop down.
 - c. For Sort Order, enter a suitable number to manage the order of displaying quick actions.
 - d. For Profiles, select System Administrator and Medical Sales Representative from Available and move them to Chosen.

4. Add the quick action to various touch points.
 - a. To capture insights from the Home page, select it as the location. Restrict capturing insights to the mobile app by selecting the mobile only check box.
 - b. To capture insights from an Account record page and the custom Visits page, select Search for the location and Account from the SObject drop down.
 - c. To capture insights from the standard Visit Record Page, select Visit for the location and SObject drop down.

Remote Engagement

Remote engagement facilitates virtual meetings by providing tools to start and manage remote visits with healthcare professionals. When users schedule remote visits, healthcare professionals receive invitations with the necessary details such as the meeting link and passcode. During the meeting, users can manage participants, share screens, and end the session, streamlining virtual interactions and eliminating the need for in-person visits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Remote Engagement Permissions](#)

Discover the permissions used to provide access to remote engagement capabilities within Life Sciences for Customer Engagement.

[Set Up Remote Engagement](#)

Configure video call settings, add phone numbers, and define terms and conditions. Set up remote engagement trigger handlers to generate session keys and passcodes and send invitation emails.

Update external credential details and add authentication parameters for video call connections. Add Twilio WSS endpoints as trusted URLs and set up Experience Cloud sites for customer access to remote engagement visits.

[Mobile Configuration for Remote Engagement](#)

Set up object metadata cache configurations for Life Sciences remote engagement objects. Generate a metadata cache to package the object schema configuration that the Life Sciences Cloud mobile app uses for online and offline access. This configuration defines how the mobile app fetches and stores the necessary metadata when a network connection is unavailable.

Remote Engagement Permissions

Discover the permissions used to provide access to remote engagement capabilities within Life Sciences for Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Org Permissions

Permission	Type	Description
Life Sciences: Remote engagement	Permission	Makes the Remote Engagement feature and its objects available.

User Permissions

Permission	Type	Purpose
Use Life Sciences Remote Engagement	Permission	Provides access to the Remote Engagement feature and its objects.
Life Sciences Commercial Admin	Permission set	Admin users can create and manage settings for remote engagement.
Access Remote Engagement for Digital Experience	Permission set	Provides access to remote engagement features in digital experiences.

Set Up Remote Engagement

Configure video call settings, add phone numbers, and define terms and conditions. Set up remote engagement trigger handlers to generate session keys and passcodes and send invitation emails. Update external credential details and add authentication parameters for video call connections. Add Twilio WSS endpoints as trusted URLs and set up Experience Cloud sites for customer access to remote engagement visits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

package.

1. [Create a Remote Engagement Channel Value](#)

To represent a remote visit conducted via video call, add a new value to the Channel field on the Visit object. This field is a dynamic enum and is used by the application to determine the visit communication type. The new channel value is used to configure video call settings.

2. [Set Up Experience Cloud Sites for Remote Engagement](#)

Set up a customer portal for your Salesforce org so attendees can join video calls. To support portal access, create a profile and add it as a member to the portal. Grant users access by using the Access Remote Engagement for Digital Experience permission set.

3. [Set Up Twilio for Remote Engagement](#)

The Life Sciences Customer Engagement managed package includes named and external credentials for the Twilio account. Finish setting up the account by updating the external credential details. Make sure that participants can connect to the video call by adding Twilio WSS endpoints as trusted URLs in your Salesforce org. Use the Admin Console to define video call settings and add phone numbers.

4. [Remote Engagement Admin Console Settings](#)

Enable remote engagement trigger handlers to generate session keys and passcodes. Set up email templates to send invitation emails to attendees. Add a quick action to support ad hoc remote sessions for accounts.

5. [Configure Video Call Terms and Conditions](#)

Add terms and conditions that participants see and must accept upon joining a video call.

6. [Add the Video Call Recordings List to the Visit Page](#)

To make video call recordings for visits available to your users, add a related list to the visit record page.

Create a Remote Engagement Channel Value

To represent a remote visit conducted via video call, add a new value to the Channel field on the Visit object. This field is a dynamic enum and is used by the application to determine the visit communication type. The new channel value is used to configure video call settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create field picklist values:

Customize Application

-
1. In Object Manager, find and select **Visit**.
 2. Select **Fields & Relationships**, and then select **Channel**.
 3. In the Channel Picklist Values section, select **New**.

4. Enter a value for the option. For example, Video Call or Remote.
5. Save the picklist value.

Set Up Experience Cloud Sites for Remote Engagement

Set up a customer portal for your Salesforce org so attendees can join video calls. To support portal access, create a profile and add it as a member to the portal. Grant users access by using the Access Remote Engagement for Digital Experience permission set.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Create an Experience Cloud Site for Remote Engagement](#)

To support attendees joining a video call remote session via the Experience Cloud site, configure the site.

[Grant Accounts Access to Your Experience Cloud Site](#)

To give users access to your customer portal for remote engagement or presentations, create a profile and add it as a member to your Experience Cloud site. If you skip these steps, healthcare professionals (HCPs) can still join remote sessions or view presentations as guest users.

Create an Experience Cloud Site for Remote Engagement

To support attendees joining a video call remote session via the Experience Cloud site, configure the site.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create an Experience Cloud site:

Create and Set Up Experiences

AND

Setup and Configuration

USER PERMISSIONS NEEDED

To customize or publish an Experience Cloud site:

Create and Set Up Experiences AND View Setup and Configuration AND be a member of the site

OR

View Setup and Configuration AND be a member of the site AND have appropriate role-based site access

To assign Permission sets:

Manage Profiles and Permission Sets

Before you create an Experience Cloud site, [configure Twilio credentials](#) and [enable digital experiences](#).

1. [Create an Experience Cloud site](#) by using an Aura Template.
If you already created an [Experience Cloud site for the presentation player](#), you can add new pages to that site instead.
2. From Builder, create a page for the video call.
3. Select **Components** and then drag the **HCP Remote Platform Conference** component onto the page. The HCP Remote Platform Conference component is under Custom Components. You can also find it through the search bar.
4. For language support, select **Components** and drag the **Language Selector** component onto the page.
5. To support viewing video call recordings, create a video call player page.
 - a. Select **Components** and then drag the **recordingPlayer** component onto the page.
 - b. From Setup, in the Quick Find box, search for and select **Trusted URLs**.
 - c. Select **New Trusted URL**.
 - d. Enter an API name and in the URL field enter `https://*.amazonaws.com`.
 - e. Select **Active**.
 - f. Set the CSP Context to **All**, and then select **media-src (audio and video)**.
 - g. Save your changes.
6. In Properties, set Page Access to Public.
7. Publish the site.
8. Assign these permission sets to the guest user of the site.
 - Access Remote Engagement for Digital Experience
 - The permission set created in Configure Twilio Credentials
9. Activate the site.



Tip Take note of the video call page URL. You need it when you [configure video call settings](#). You can view the URL of the published page in the Builder's general settings for the page.

See Also

[Customize Sites with Experience Builder](#)

[Manage Your Site's Pages and Their Properties in Experience Builder](#)

Grant Accounts Access to Your Experience Cloud Site

To give users access to your customer portal for remote engagement or presentations, create a profile and add it as a member to your Experience Cloud site. If you skip these steps, healthcare professionals (HCPs) can still join remote sessions or view presentations as guest users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create or edit profiles:	Manage Profiles and Permission Sets
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To create an Experience Cloud Site	Create and Set Up Experiences
------------------------------------	-------------------------------

AND

Setup and Configuration

If you have one Experience Cloud site for remote engagements and for healthcare professionals (HCPs) to view presentations, you only need to perform these steps one time.

1. Create a profile.
 - a. Clone a standard external profile like Customer Community Plus User or Customer Community Plus Login User.
 - b. Name the new profile *HCP User*.
 - c. Save the profile.
2. Add the profile to the Experience Cloud site.
 - a. From Setup, in the Quick Find box, search for and select **Feature Settings**.
 - b. Go to Digital Experiences and select **All Sites**.
 - c. For your site, select **Workspaces**.
 - d. Select the **Administration** tile, then select **Members**.
 - e. In Select Profiles, use Customer in search to narrow results.
 - f. Add the profile that you created earlier to Selected Profiles.
 - g. Save the changes.

Set Up Twilio for Remote Engagement

The Life Sciences Customer Engagement managed package includes named and external credentials for the Twilio account. Finish setting up the account by updating the external credential details. Make sure that participants can connect to the video call by adding Twilio WSS endpoints as trusted URLs in your

Salesforce org. Use the Admin Console to define video call settings and add phone numbers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Configure Twilio Credentials](#)

Twilio's named and external credentials are delivered in the Life Sciences Cloud for Customer Engagement managed package. To finalize the setup, add authentication parameters such as the Twilio account ID, authorization token, API key, and secrets.

[Assign Trusted Twilio URLs](#)

To support attendees connecting to the video call, add Twilio WSS endpoints as trusted URLs in your Salesforce org.

[Configure Video Call Settings with Twilio](#)

To support remote sessions with Twilio, configure video call settings in the Admin Console. These settings help you define and manage specific details about how your users access and interact with remote sessions.

[Add Video Call Phone Numbers for Twilio](#)

To allow remote users to join meetings from their phones, define dial-in options for Twilio.

Configure Twilio Credentials

Twilio's named and external credentials are delivered in the Life Sciences Cloud for Customer Engagement managed package. To finalize the setup, add authentication parameters such as the Twilio account ID, authorization token, API key, and secrets.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create, edit, or delete external credentials: Manage Named Credentials or Customize Application

-
1. From Setup, in the Quick Find box, search for and select **Named Credentials**.
 2. Select **External Credentials**, and then select **Twilio External Credentials**.

3. In the Principals section, edit the Twilio credentials.
4. In the Authentication Parameters section, add these parameters.

Parameter Name	Parameter Value
accountId	Enter the Twilio account ID (Account SID).
authToken	Enter the Twilio authorization token (Auth Token).
apiKey	Enter the Twilio API key.
secret	Enter the Twilio API secret.
awsAccessKeyId	Enter the aws s3 access key for reading the recording files.
awsSecret	Enter the aws s3 secret for reading the recording files.

 **Note** The awsAccessKeyId and awsSecret are required only if Twilio compositions are configured to be stored on an external s3 bucket. If you use the s3 bucket, the policy for the access key requires read access to recording files.

5. Save your work.
6. Create a permission set that provides access to Twilio credentials.
 - a. Create a permission set.
 - b. Select **External Credential Principal Access**, and then select **Edit**.
 - c. Move **twilioExternalCredential - Twilio Credentials** from Available External Credential Principals to Enabled External Credential Principals, and then select **Save**.
 - d. Select **Permission Set Overview**, and then select **Object Settings**.
 - e. Select **User External Credentials**, and then select **Edit**.
 - f. Turn on Read permissions, and then save your work.
 - g. Assign the permission set to users who work with video calls.

See Also

[Named Credentials](#)

[Create Permission Sets](#)

Assign Trusted Twilio URLs

To support attendees connecting to the video call, add Twilio WSS endpoints as trusted URLs in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create, read, update, and delete trusted URLs:

Customize Application

AND

Modify All Data

1. From Setup, in the Quick Find box, enter *Trusted URLs*, then select **Trusted URLs**.
2. Select **New Trusted URL**.
3. Enter an API name, set the URL to `wss://global.vss.twilio.com`, and verify that the URL is set to Active.
4. Set the CSP Context to Experience Builder Sites, and set the CSP Directive to **connect-src (scripts)**.
5. Select **Save & New**.
6. Similarly, add `wss://sdkgw.us1.twilio.com` as a trusted URL.
7. Save your work.

See Also

[Manage Trusted URLs](#)

Configure Video Call Settings with Twilio

To support remote sessions with Twilio, configure video call settings in the Admin Console. These settings help you define and manage specific details about how your users access and interact with remote sessions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage video call settings

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Remote Engagement**, and then select **Twilio Settings**.
3. Set the required video call fields.

Field	Value
Remote Visit Channel	Select the value added in Create a Remote Engagement Channel Value .
Video Call Link	Enter the URL of the video call Experience Cloud site page created in Create an Experience Cloud Site for Remote Engagement .

4. To include a link to your organization's general video call scheduling location, enter it in the Customer Video Call Link field.
5. Configure the settings for meeting invitations and messaging to meet your business needs.
 - **Send invitations with WhatsApp:** The host can send invitations through their WhatsApp account from the remote player.
 - **Don't send invitations for ad-hoc visits:** Prevent sending invitations for spontaneous (ad hoc) visits.
 - **Don't send invitations for past visits:** Prevent sending invitations for visits scheduled in the past.
6. Configure the settings for the video call experience based on your business needs.

 **Note** You can set these attendee settings only at the org level or guest user profile level.

 - **Attendees can share their screens**
 - **Hosts can record video calls**
 - **Attendees' microphone on by default:** Automatically turn on the participant's microphone when they join the remote session.
 - **Attendees' cameras on by default:** Automatically turn on the participant's camera when they join the remote session.
 - **Use unsupported browsers:** Unsupported browsers can still join remote sessions.
7. Configure the settings to capture signatures or consent from attendees during the session.
If needed, [set up confirmation emails](#) to send personalized follow-ups after capturing HCP consent preferences or signatures.
 - **Remote signatures:** Hosts can trigger remote requests during the session to capture signatures for direct-to-practitioner products, samples, or product discussions.
 - **Remote consent:** Capture consent remotely during video calls.
8. Save the video call settings.

See Also

[Configure a Custom Domain for Your Experience Cloud Site](#)

Add Video Call Phone Numbers for Twilio

To allow remote users to join meetings from their phones, define dial-in options for Twilio.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage video call phone numbers: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Remote Engagement**, and then select **Twilio Dial-In Settings**.
3. Select **New**.
4. Enter a name, country, and the phone number for dial-in users.



Note Make sure that you enter the phone number exactly as it appears in Twilio, including the country code. For example, for a phone number with the country code "1" format it as:
+17775555454.

5. If applicable, select **Toll Free**.
6. If needed, enter messages to show to participants. All messages support speech-to-text.
 - Welcome Message
 - Error Message
 - Timeout Message
 - Room Not Started Message
7. Save your work.
8. Select **Activate** from the dropdown for the dial-in setting.

Remote Engagement Admin Console Settings

Enable remote engagement trigger handlers to generate session keys and passcodes. Set up email templates to send invitation emails to attendees. Add a quick action to support ad hoc remote sessions for accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Set Up Remote Engagement Trigger Handlers](#)

To generate session keys and passcodes and send invitation emails to attendees, use remote engagement trigger handlers.

[Set Up Invitation Emails](#)

Automatically send invitation emails to attendees when a planned visit record is created. Send additional emails notifying attendees of any changes to the visit.

[Set Up Remote Signatures](#)

Enable your field reps to capture signatures from healthcare professionals (HCPs) during remote visits. Hosts can trigger requests to capture signatures for direct-to-practitioner products, samples, product discussions, or consent.

[Manage the Start Remote Session Quick Action](#)

To support starting ad-hoc remote sessions from account records, configure the Start Remote Session action.

Set Up Remote Engagement Trigger Handlers

To generate session keys and passcodes and send invitation emails to attendees, use remote engagement trigger handlers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage trigger handlers: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**
2. Select Trigger Handler Administration.
3. Turn on these trigger handlers:

Trigger Handler Name	Object
RemoteSessionInvitationPVHandler	Provider Visit
RemoteSessionInvitationVisitHandler	Visit

Set Up Invitation Emails

Automatically send invitation emails to attendees when a planned visit record is created. Send additional emails notifying attendees of any changes to the visit.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create, edit, and delete email templates: Life Sciences Commercial Admin permission set

Create an email template. You can include information about the video call invitation URL `{ {remotesession.url} }`, the phone access number `{ {remotesession.phoneNumbersForEmail} }` in the email template body. You can also include the phone access number `{ {remotesession.phoneNumbersForICS} }` in the iCalendar description. Here's an example of an invitation email template that includes the URL and phone number:

```

Dear {{recipient.firstname}} {{recipient.lastname}},

    {{sender.name}} scheduled a call with you on {{visit.PlannedVisitStartTime}}.

    You can access it using the link: {{remotesession.url}}

    Alternatively, you can dial in to the call: {{remotesession.phoneNumbersForEmail}}.

    Thank you,
    {{sender.name}}

```

When you attach iCalendar files to email templates, the email invitations use the Life Sciences email address for RSVPs. After recipients accept or reject invitations, responses are sent to the RSVP address, and the response status is updated on the related Life Sciences Email records.

1. Make sure that your org uses the Life Sciences RSVP email address.
 - a. From Setup, in the Quick Find box, find and select **Life Sciences for Customer Engagement Setup**.
 - b. Verify that the RSVP email address is turned on.
2. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
3. Select **Email**, and then **Email Templates**.
4. Select **New Email Template**.
5. Upload a ZIP file of the email template.
6. Enter a subject, name, effective start and end dates, and these additional values.

Field	Value
Automated Email Invitation Context	Provider Visit
Automated Email Invitation Action	Create
Template for automated emails	Selected
Attach iCalendar file	Selected
iCalendar Description	Enter a description to include in the iCalendar

Field	Value
	attachment.

7. Select **Upload and Save**.
8. In the list view, select the template you created, and then select **Edit**.
9. Align the email template to the territories of the users associated with the template.
10. Save and activate the template.
11. Similarly, create two more templates for the *Update* and *Cancel* automated email invitation action types.

See Also

[Upload and Create Email Templates](#)

Set Up Remote Signatures

Enable your field reps to capture signatures from healthcare professionals (HCPs) during remote visits. Hosts can trigger requests to capture signatures for direct-to-practitioner products, samples, product discussions, or consent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create, edit, and delete email templates:	Life Sciences Commercial Admin permission set
--	---

With remote signatures for products, meeting hosts can capture electronic signatures for the direct-to-practitioner products, samples, or product discussions that are added to the visit. When sales reps request signatures during the remote session, HCPs can review the added products and sign directly in their browser window.

With remote signatures for consent, sales reps can access the consent page and request signatures during remote sessions. HCPs receive notifications in their browser. Then, they can review the consent topics, opt in or opt out, and provide an electronic signature without leaving the visit.

1. Enable hosts to capture signatures during remote visits.
 - a. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
 - b. Select **Remote Engagement**, and then select **Twilio Settings**.
 - c. To enable hosts to capture signatures for direct-to-practitioner products, samples, or product discussions, select **Remote signatures**.

Make sure that your org is set up for [product management](#).

- d. To enable hosts to capture signatures for consent, select **Remote consent**.
Make sure that your org is set up for [consent management](#).
e. Save your changes.
2. Set the signature requirements for the products that you want to capture signatures for.
 - a. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Products**.
 - b. Select **Product Hierarchy**.
 - c. Select the product that you want to capture signatures for, and then select **Edit**.
 - d. Set the Signature Requirement Level to **Optional** or **Mandatory**.
If you don't see the Signature Requirement Level field, [add it to the page layout](#) for Life Science Marketable Product.
 - e. Save your changes.
3. Make sure that products are assigned to the appropriate territories for your sales reps so that they can capture signatures for those products.
 - a. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Products**.
 - b. Select **Product Alignment**.
 - c. Verify the territory alignments for your products.
4. If needed, [set up confirmation emails](#) to send personalized follow-ups after capturing HCP signatures.

Manage the Start Remote Session Quick Action

To support starting ad-hoc remote sessions from account records, configure the Start Remote Session action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage the start remote session quick action:

Life Sciences Commercial Admin permission set

AND

Customize Application

-
1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
 2. Select **Quick and Custom Action Administration**, and then select **Quick Actions**.
 3. From the dropdown for the Start Remote Session action, select **Edit**.
 4. Enter a label and set the location to *Search*.
 5. Enter a value for the sort order and select the profiles and permission sets that can access the quick action.
 6. In the SObject field, select **Account**.

7. (Optional) If you use account record types in your org, select the record types that can use the quick action.
8. Save your work.

See Also

[Quick and Custom Action Management](#)

Configure Video Call Terms and Conditions

Add terms and conditions that participants see and must accept upon joining a video call.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage video call settings: Life Sciences Commercial Admin permission set

To create, edit, or delete library permissions: Manage Content

OR

Manage Salesforce CRM Content

To create libraries: Create Libraries

OR

Manage Salesforce CRM Content

Before you configure the video call terms and conditions, [create a remote engagement Experience Cloud site](#).

1. From Setup, in the Quick Find box, enter *CRM content*, and then select **Salesforce CRM Content**.
2. Enable Salesforce CRM.
3. From the App Launcher, find and select **Files**, and then select **Libraries**.
4. Create a new library called *Terms and Conditions*.
5. Open the Terms and Conditions library, and then select **Add Files**.
6. Upload a file that contains your terms and conditions. To make sure that the file is used for the correct user language, make sure the filename has the language appended and saved in the .html format. For example, for US terms and conditions in English, use `Terms_en_us.html`.



Tip To support terms and conditions in multiple languages, make sure that the Language Selector component is added to the Experience Cloud site and that the additional terms and conditions files are uploaded to the library.

7. On the Terms and Conditions library page, select **Manage Members**.
8. Grant viewer access to Experience Cloud site users and guest users.
9. Open your Experience Cloud site in Builder, and then edit the video call page.
10. Select the **HCP Remote Platform Conference** component and in the Enter the Terms and Conditions Base Name field, enter *Terms*.
11. Save and activate the page.

Add the Video Call Recordings List to the Visit Page

To make video call recordings for visits available to your users, add a related list to the visit record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit the visit page layout:

Life Sciences Commercial Admin permission set

AND

Customize Application

1. From the Setup menu on a visit record page, select **Edit Page**.
2. Drag the **Video Call Recording** List component to the related lists section of the page.
3. Configure the page properties.
 - **Enable Play Recording Action**: Makes the Play button available for users.
 - **Enable Refresh Recording Link Action**: Supports generating a new link if the current video call link expires.
 - **Enable Copy Recording Link Action**: Makes the Copy Link button available to users.
 - **Enable Toggle Access Action**: Makes the Change Recording Access button available to users.
4. Save your work.

Mobile Configuration for Remote Engagement

Set up object metadata cache configurations for Life Sciences remote engagement objects. Generate a metadata cache to package the object schema configuration that the Life Sciences Cloud mobile app

uses for online and offline access. This configuration defines how the mobile app fetches and stores the necessary metadata when a network connection is unavailable.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up Life Sciences Customer Engagement data: Life Sciences Commercial Admin permission set

To set up offline access for the objects that support remote engagement in the Life Sciences Cloud mobile app, create these object metadata cache configurations. Make sure that you also set up offline access for other areas of the app, such as [visits](#), [presentations](#), [emails](#), and [consent](#).

Object	Type
VideoCall	Data
VideoCallParticipant	Data
VideoCallPtcpSession	Data
VideoCallRecording	Data

! **Important** After you create these configurations, you must generate a metadata cache. This step is important because it makes sure that the mobile app accesses the latest metadata definitions, including any schema changes for supported objects.

See Also

[Create Object Metadata Cache Configuration](#)

[Generate Metadata Cache](#)

Surveys

Surveys enable you to design and distribute questionnaires to gather structured feedback from healthcare professionals. Use this data to analyze behavioral trends, monitor patient-related outcomes, and strengthen provider relationships. These insights support innovation, treatment planning, and strategic decision-making.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Survey Sharing Strategy

Send surveys to a specific account or territory. Create a record of the Survey Subject object that links your survey invitation to relevant users or groups.

The SurveyInvitationSharingHandler is a trigger handler on the Survey Subject object. It runs automatically whenever a new Survey Subject record is created or an existing one is updated. This trigger's purpose is to automatically create Survey Invitation Share records based on one of three distinct strategies, which convey the sharing logic.

- - Account-Based Sharing: When you link a Survey Subject record to an account, the trigger handler automatically creates Survey Invitation Share records for users or territories listed in the related account's Account Share records. This logic doesn't apply to records where the rowCause field is set to Owner.
- - Life Sciences Marketable Product-Based Sharing: When you link a Survey Subject record to a Life Sciences Marketable Product, the trigger creates corresponding Survey Invitation Share records for accounts or territories. The product availability and the alignment type (such as Territory Subordinates, Territory Inclusion, or Territory Exclusion) is determined based on the Product Territory Availability object to create these records.
- - Territory-Based Sharing: When a Survey Subject record is linked to a territory, the trigger creates Survey Invitation Share records for that territory and its subordinates.

The Survey Engagement Context and Survey Response Offline objects follow a delegate-sharing model, where their sharing is delegated to the Survey Invitation object. This behavior is governed by the LifeSciCustEngmtBase org preference, which, when enabled, activates the delegate sharing mechanism.

Survey Listing Strategy

The SurveyListView Lightning component is used on an account or account plan page to show survey invitations. This component shows all invitations associated with a specific account or account plan, as well as those available within a territory. Survey invitations appear to users in two primary ways.

- For a Specific Account: To show invitations for a particular account, create records for the Survey Invitation, Account, and Survey Subject objects. The Survey Subject record links the account and the survey invitation.
- For a Territory: To show invitations available within a territory, create records for the Survey Invitation, Survey Subject, and Survey Engagement Context objects. The Survey Engagement Context record

controls where invitations appear. For example, if you set contextType to Account, invitations show for all accounts within that territory. For an account plan, set contextType to AccountPlan.

Enable retaking the same survey version, enabling users to retake the survey. The retake link becomes active when you enable this feature; otherwise, it remains inactive. When users retake a survey, a new survey invitation and a new survey subject record are created.

How Data Sync Works

When a sales representative submits a survey from a mobile device, the responses are captured in two objects: Survey Response Offline and Survey Question Response Offline. To ensure that the data is accessible for reporting and analysis, the responses must sync with the core Salesforce objects: Survey Response and Survey Question Response.

Set up the sync process by creating a schedule-triggered flow that activates the built-in Sync Survey Response Offline Records batch job. The batch job syncs 50 records at a time.

Create a Survey to Collect Targeted Feedback

Design engaging and easy-to-use surveys for users to collect feedback and information from healthcare professionals. The survey builder provides a simple drag-and-drop interface with eight different question types to suit your data needs. After you add a question, customize its properties, reorder it, and specify the valid responses that users can choose from.

Generate a Survey Invitation

To distribute a survey, either target specific accounts or associate the survey with a territory. Based on your sharing strategy, survey invitation share records are automatically created. You can generate a survey invitation directly from the survey builder.

Association of a Survey Invitation With an Account or Territory

Create a record of the Survey Subject record using Workbench to associate a survey invitation with a specific target, such as an account or territory.

Set up a Scheduled Flow to Sync Survey Responses

Sync survey responses to Salesforce objects by using the built-in Sync Survey Response Offline Records batch job. Create a schedule-triggered flow to invoke this batch job and merge your offline data.

Add a Lightning Component to Show Surveys on a Record Page

Show a list of survey invitations on a record page by adding the built-in SurveyListView Lightning component. Enable users to retake a survey by making the survey link clickable.

Mobile App Configuration for Surveys

Define the database schema for supported Surveys objects in the Life Sciences for Customer Engagement mobile app. Generate a metadata cache to package the database schema configuration into a downloadable metadata cache that the mobile app can use for offline access.

Refresh Survey Sharing Data

Recalculate the survey sharing logic and generate survey invitation records for a specified territory by triggering a batch job. This batch job recursively retrieves all subordinate territories under the selected territory, identifies all associated account records for the provider account territory info object, and then fetches all survey invitation records linked to those accounts.

Create a Survey to Collect Targeted Feedback

Design engaging and easy-to-use surveys for users to collect feedback and information from healthcare professionals. The survey builder provides a simple drag-and-drop interface with eight different question types to suit your data needs. After you add a question, customize its properties, reorder it, and specify the valid responses that users can choose from.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Survey features and objects:

Life Sciences Commercial Admin

1. From the App Launcher, find and select **Admin Console**.
2. In the Admin Console, click **Surveys**.
3. Click **New**.
4. Enter a survey name.
5. Select the survey type as Offline Mobile Survey.
6. If necessary, use the survey as a template, select **Create survey as a template**, and then click **Continue**.
7. Edit the survey's Welcome page.
8. In the survey builder, if you want your survey to have multiple pages, click **+Add Page**.
9. To add a question to the page, click **Add Question**.

There are a total of eight question types for the Offline Mobile Survey type: Date, Long Text, Multiple Selection, Picklist, Rating, Short Text, Single Selection, and Slider.

- a. Enter your question and, if necessary, a description.
- b. If you've selected the question type as Multiple Selection, Picklist, or Single Selection, enter a choice, and to add more choices, click **Add Choices**.
- c. If you've selected the question type as Rating, then select the type of rating.
There are five rating types: Star, Static Emoji, Thumbs Up, Heart, and Dynamic Emoji (define the rating scale).
- d. If you've selected the question type as Short Text, then select the Response Validation Type: No Validation, Number, or Custom (enter the formula in the custom field).
- e. If you've selected the question type as Slider, enter a minimum value, interval, and a maximum value.
- f. To reorder questions on a survey page, use the up arrow and down arrow above the rich text editor of the questions.
- g. To change the question's properties, click the  icon.

10. If necessary, edit the survey's Thank You page.
11. To pause working on the survey and continue later, click **Save**.
12. To see the survey as you work on it, click **Preview**.
13. Activate the survey, then click **Got It** on the confirmation window.

Create a metadata cache after you create or update a record.

Generate a Survey Invitation

To distribute a survey, either target specific accounts or associate the survey with a territory. Based on your sharing strategy, survey invitation share records are automatically created. You can generate a survey invitation directly from the survey builder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Survey features and objects:

Life Sciences Commercial Admin

1. From the App Launcher, find and select **Surveys**.
 2. Open the survey that you just created or the one that you want to generate an invitation link for.
 3. To create an invitation, on the top navigation bar of the survey builder, click **Send**.
 4. Click **Get Invitation**.
- A survey invitation record is created.

Association of a Survey Invitation With an Account or Territory

Create a record of the Survey Subject record using Workbench to associate a survey invitation with a specific target, such as an account or territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Use this sample code to create a Survey Subject record.

```
SurveySubject s = new SurveySubject();  
s.ParentId = '0Kixx0000004F5ICAU'; // SurveyInvitationId  
s.SubjectId = '001xx000003H8IdAAK'; // accountId  
s.Name = 'surveySubject';  
insert s;
```

Set up a Scheduled Flow to Sync Survey Responses

Sync survey responses to Salesforce objects by using the built-in Sync Survey Response Offline Records batch job. Create a schedule-triggered flow to invoke this batch job and merge your offline data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Surveys features and objects: Life Sciences Commercial Admin

1. From the App Launcher, find and select **Flows**.
2. Click **New**.
3. On the New Automation screen, click **Scheduled**, and then click **Schedule-Triggered Flow**.
4. In the flow builder, set a schedule by selecting the start date and time, and if necessary, the frequency.
5. Add an action element to trigger the batch job.
 - a. In the Search Actions search bar, find and select the API name **Lsc4ce_surveys__Fetch_Survey_Response_Offline_Batch_Job** of Sync Survey Response Offline Records batch job.
 - b. Enter a label and an API name.
 - c. If necessary, enter a description.
 - d. Save your changes.
 - e. In the Save the Flow window, enter the name of the flow, and if necessary, add a description.
 - f. Save the flow.
6. Activate the flow.
7. To start the sync process, run the flow.

Verify if sync was successful.

- Check if SurveyResponse and **SurveyQuestionResponse** records are created.
- Verify that the status of the **SurveyResponseOffline** record is **CompletedAndMigrated**.

Add a Lightning Component to Show Surveys on a Record Page

Show a list of survey invitations on a record page by adding the built-in SurveyListView Lightning component. Enable users to retake a survey by making the survey link clickable.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Survey features and objects: Life Sciences Commercial Admin

To create and save Lightning pages in the Lightning App Builder: Customize Application

1. In the Record page that you want to add a Lightning component to, from the Settings Menu, click **Edit Page**.

2. From the Components pane, in the Search field, enter *SurveyListView* and select it.



Note This SurveyListView Lightning component is restricted to Account and Account Plan record pages.

3. Click and drag the component from the left pane to where you'd like to place it in the right pane.
4. To access the properties pane, click the component that you just added.
 - a. To enable users to retake the survey, select **Let users retake a survey after submitting responses**.
 - b. To auto-populate fields with prior responses when users retake a survey in the Life Sciences Cloud for Customer Engagement app, select **Pre-fill responses from previous survey submission**.
5. Save your changes, and then click **Activation**.
6. In the Activation window, to choose whether you want to Assign or Remove your Salesforce org as default, follow the prompts. You can also leave it as is.
7. Close the window.

Mobile App Configuration for Surveys

Define the database schema for supported Surveys objects in the Life Sciences for Customer Engagement mobile app. Generate a metadata cache to package the database schema configuration into a downloadable metadata cache that the mobile app can use for offline access.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Configure the object schema for the supported Survey objects to work on the mobile app. Select the type as Data.

- Survey
- SurveyVersion
- SurveyPage
- SurveyInvitation
- SurveyQuestion
- SurveyQuestionChoice
- SurveyQstnResponseOffline
- SurveyResponseOffline
- SurveySubject

Configure the database schema for these objects if the user wants to view surveys completed on the web in mobile as well. Select the type as Data.

- SurveyResponse
- SurveyQuestionResponse

Configure the database schema for these objects if surveys are taken on Account Plan or Provider Visits. Select the type as Data.

- SurveyEngagementContext

After you create these configurations, to make sure that the app can access the latest metadata definitions, including any schema changes for supported objects, generate a metadata cache.

Refresh Survey Sharing Data

Recalculate the survey sharing logic and generate survey invitation records for a specified territory by triggering a batch job. This batch job recursively retrieves all subordinate territories under the selected territory, identifies all associated account records for the provider account territory info object, and then fetches all survey invitation records linked to those accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and configure Survey features and objects:

Life Sciences Commercial Admin

1. From the App Launcher, find and select **Admin Console**.
2. From the Admin Console setup page, click **Territory Management**.
3. On the navigation bar, select **Share Survey**.
4. In the Share Survey Setup page, click **Run Now**.
5. In the Run Share Survey Invitation and Responses, in the Hierarchy field, search for and select a territory.
6. Click **Run**.

For each invitation, the batch job determines the relevant territories or accounts associated with the corresponding accounts, excluding rowCause as owner. It creates survey invitation share records to associate each identified group or user with the appropriate survey invitation, ensuring that survey access is correctly propagated based on the account's territorial hierarchy.

Visit Management

Visit Management optimizes the face-to-face visit experience for your field users and clients by simplifying visit scheduling, planning, visit engagement, and postvisit reporting. Because this reduces administrative tasks, field users can focus on building strong relationships with healthcare providers. Engage seamlessly with accounts across all channels by using intelligent content and remote capabilities. Manage sample distribution and direct-to-practitioner requests confidently with built-in compliance controls.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Use Visit Management to help your users:

- Seamlessly interact with accounts across all channels, leveraging built-in intelligent content and remote capabilities for enhanced field user engagement.
- Quickly access related features such as Field Emails, Medical Inquiries, and Surveys from a central app, streamlining their workflow.
- Confidently manage expense allocations, sample distribution, and shipping requests with built-in rules for compliance, including limits, license validation, and digital signatures.

Visit Lifecycle

The lifecycle of a visit includes three main stages: Plan, Engage, and Report. Let's dive deeper into the activities usually performed in each stage.

Plan	Engage	Report
<ul style="list-style-type: none"> • Schedule the visit • Add attendees • Confirm visit objectives • Review last visit details • Review account summaries • Review recommended messages and presentations • Add details to the visit (such as presentations and samples) • Add visitors (users) 	<ul style="list-style-type: none"> • Share presentation slides • Launch remote engagement sessions • Share product information and messages • Record sample drops or Direct to Practitioner samples • Capture signatures • Record survey responses • Capture medical inquiries • Schedule next visit 	<ul style="list-style-type: none"> • Update visit information, product details, discussions, marketing items (leave behinds) • Record next visit objectives • Add expenses and allocate to the attendees • (KAM only) Update the status of the account plan related assessment tasks • Update ratings • Send follow-up emails • Submit the visit

Visit Pages

Visit pages support users throughout the visit lifecycle. For streamlined user experiences, users interact with two pages throughout the visit lifecycle:

- Visit Engagement Page (Edit Visit)
 - This is the Life Sciences Cloud specific, purpose-built page that helps users plan, engage, and follow-up on the visit within a single page to complete their visit engagements efficiently and compliantly, such as sharing approved content, products and messages, and capturing samples. This page is accessible only for planned visits.
- Visit Record Page (View Visit)
 - This is standard lighting record page to view the visit details and all the relevant activities related to the visit.
 - While the Visit Engagement page focuses on important activities and information you need during a visit, you can only access and manage some previsit or postvisit activities, such as visitors, expenses, ratings, assessment tasks, and file attachments, on the visit record page.

Visit Data Model

Visit management uses a one-to-one relationship between visit and provider visit records. As a result, for each visit record created, a corresponding provider visit record is automatically created. Provider Visit is a Life Sciences Cloud object that is used to extend the standard Visit object. See the [Visit Management](#)

data model to learn about these objects and how work together to support visit management.

Get Your Org Ready for Visit Management

Before you get started with visits in Life Sciences Cloud for Customer Engagement, complete a few tasks to prepare your org for visit management features.

Visit Management Admin Console

To configure what information fields users can see and how they can interact with and manage visit records, use the Admin Console.

Next Best Message

Next Best Message provides tailored and relevant messages for each product associated with an account. These recommendations are dynamically generated based on real-time data, allowing field sales teams to provide this information during visits with their customers.

Get Your Org Ready for Visit Management

Before you get started with visits in Life Sciences Cloud for Customer Engagement, complete a few tasks to prepare your org for visit management features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

- Configure the Visit page layout, and then create a metadata cache to push changes to the mobile app. Create a metadata cache any time changes are made to the page layout.
- (Optional) Create record types:
 - Account
 - Visit
 - Provider Visit
 - Provider Visit Product Discussion

If you use record types, you must create matching record types for Visit and Provider Visit with identical API names and labels. Then, add the record type to the Visit page. This links the Visit and Provider Visit objects to support showing standard and custom Provider Visit fields on the Visit page layout.

Use Provider Visit Product Discussion record types to help field users capture product-specific information during interactions with healthcare professionals.

- Configure Next Best Message data. See [Next Best Message](#).
- Configure visit management settings in the Life Sciences Customer Engagement Admin Console. After you've configured the settings, create a metadata cache to make your changes available for users in the mobile app.
- (Optional) [Override record type selection options for visits and provider visits](#). If you use the web version of visit management and you also use record types for Visit and Provider Visit, configure the

New button that is shown on the home and list view pages.

! **Important** You must configure the New button for both Visit and Provider Visit.

- Configure the Visit page layout, and then create a metadata cache to push changes to the mobile app. Create a metadata cache any time changes are made to the page layout.

When to Create a Metadata Cache

A metadata cache takes the changes you make, and makes them available for your users. However, not every type of change requires a new metadata cache. Let's take a closer look at what types of changes require a metadata cache:

Type	Visit Engagement Page		Visit Record Page	
	Web	Mobile	Web	Mobile
Page Layout	Yes	Yes	No	Yes
Record Page	Yes	Yes	No	Yes
Admin Console Settings	No	Yes	No	Yes
Object Configuration (Field Sets, Record Types, Picklist Values)	Yes	Yes	No	Yes
Translation (Custom Labels, Object and Field Labels)	Yes	Yes	No	Yes
Data Setup	No	No	No	No

Configure the Visit Engagement Page

To customize visit details and improve user efficiency, configure page layout and sidebar menu options. You control which fields and sidebar options appear, so your team can access the information they need to conduct effective visits.

Mobile App Configuration for Visit Management

Configure the object schema for supported Visit Management objects and generate a metadata cache to make sure your field users can view and update visits on the Life Sciences Cloud mobile app. You must also do this for Visit Management to work for desktop users.

See Also

[Configure Visit Settings](#)
[Create a Metadata Cache](#)

Tailor Business Processes to Different Record Type Users

Configure the Visit Engagement Page

To customize visit details and improve user efficiency, configure page layout and sidebar menu options. You control which fields and sidebar options appear, so your team can access the information they need to conduct effective visits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Visit Information

To define the visit information that users can view, configure the Visit and Provider Visit page layouts.

On the Visit page layout, the Account, Place, Planned Start Time, and Planned End Time fields are hard-coded. By default, these fields appear in the same order to users, even if you remove them on the page layout. Add the Channel and Status fields, and any other standard or custom field you need to meet your business requirements. If you use Visit and Provider Visit record types in your org, you must add the Record Type ID field to the Visit page layout.

To support next visit objectives, add a single-column section to the Provider Visit page layout and name it *Next Visit Objectives*. Add one of these fields to the section:

- Provider Visit Next Visit Objective: Supports multiline text input.
- Provider Visit Next Visit Objective Type: Supports multiselect picklist input. If you use this field, you must configure picklist values for it in object manager.

Next, select a value (None, Picklist, Text, or Picklist and Text) for the Next Visit Product Objective Fields Type setting in the Admin Console Visit Settings. If you select Picklist or Picklist and Text, you must also create a Next Visit Objective message record in Product Guidance and align the objective message to applicable territories.

Sidebar Menu

To configure sidebar menu options for the visit engagement screen in the mobile app, add them as related lists to the page layout.

The Recommendations sidebar menu option appears as the first item, but it only appears for users when recommended messages or presentations are available for the account. You can't add or remove it from

the sidebar menu.

Additional sidebar menu options appear based on your Visit page layout related list configuration. You can add a maximum of 10 related lists (8 out-of-the-box and up to 2 custom objects), including:

- Presentation Forums
- Provider Visit Product Detailings
- Product Disbursements
- Provider Visit Requested Samples
- Provider Visit Marketing Items
- Attendees
- Custom Objects

If you use Product Messages, you must add the Provider Visit Product Detailing Message related list to the page layout to show the associated product messages to users. Similarly, if you use Product Discussion, you must add the Provider Visit Product Discussion related list to the page layout to show the + Add Discussion link to users. Provider Visit Product Messages and Provider Visit Product Discussions don't appear in the sidebar. Instead, they appear in the product area of the visit engagement page.

The sidebar menu options appear in the same order as the related lists on the Visit page layout. By default, the system shows the related list object names as the sidebar menu option labels. You can override the labels by renaming the object labels in Setup. The sidebar menus are also translatable.

[Override Record Type Selection Options for Visits and Provider Visits](#)

If you use the web version of visit management and you also use record types for Visit and Provider Visit, configure the New button that is shown on the home and list view pages.

See Also

- [Configure Visit Settings](#)
- [Define Messages and Objectives for Product Detailing](#)
- [Page Layouts](#)
- [Rename Object, Tab, and Field Labels](#)

Override Record Type Selection Options for Visits and Provider Visits

If you use the web version of visit management and you also use record types for Visit and Provider Visit, configure the New button that is shown on the home and list view pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage buttons, links, and actions: Customize Application

1. From the management settings for the Visit object, go to **Buttons, Links, and Actions**.
2. From the dropdown for New, select **Edit**.
3. For Lightning Experience Override, select **Lightning component**, and then, from the dropdown, select **Isc4ce:LogAVisitAction**.
4. Select **Skip record type selection page**.
5. Save your work.
6. Repeat these steps for the Provider Visit object.

Mobile App Configuration for Visit Management

Configure the object schema for supported Visit Management objects and generate a metadata cache to make sure your field users can view and update visits on the Life Sciences Cloud mobile app. You must also do this for Visit Management to work for desktop users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up and manage visits: Life Sciences Commercial Admin

To enable offline access for the objects that support Visit Management in the Life Sciences Cloud mobile app, create these object metadata cache configurations.

To limit the data that's downloaded to the mobile device, make sure to specify the SOQL Filter Condition.

Object	Type	Notes
LifeSciMetadataRecord	Configuration	Set the category to AccountProviderVisitRecordType Mapping .
LifeSciMetadataRecord	Configuration	Set the category to ProviderVisitSettings.
LifeSciMetadataRecord	Configuration	Set the category to StateLicenseNumberSettings.
BusinessLicense	Data	None

Object	Type	Notes
BusinessLicenseProduct	Data	None
ComplianceStatementDef	Data	None
ContentDocument	Data	Required for file attachments.
ContentDocumentLink	Data	Required for file attachments.
ContentDocumentLinkVersion	Data	Required for file attachments.
DigitalSignature	Data	None
Expense	Data	None
ExpenseParticipant	Data	None
ExpenseType	Data	None
InventoryCountAssessment	Data	Not required if Sample Inventory isn't managed.
InventoryOperation	Data	Not required if Sample Inventory isn't managed.
LifeSciCustomScript	Data	None
LifeSciMarketableProduct	Data	None
LifeSciProductAcctRstrc	Data	None
Location	Data	None
PresentationClickStrmEntry	Data	None
PresentationForum	Data	None
Product2	Data	None
ProductBatchItem	Data	<ul style="list-style-type: none"> • Not required if Sample Inventory isn't managed. • Select Web-to-Mobile Sync.
ProductDisbursement	Data	None
ProductGuidance	Data	None
ProductionBatch	Data	Not required if Sample Inventory isn't managed.
ProductItem	Data	None
ProductTerrDtlAvailability	Data	None

Object	Type	Notes
ProductTerritoryAvailability	Data	None
ProviderAcctTerritoryInfo	Data	None
ProviderSampleLimit	Data	Select Web-to-Mobile Sync.
ProviderSampleLimitTemplate	Data	Select Web-to-Mobile Sync.
ProviderSmplLmtTmplAssignment	Data	Select Web-to-Mobile Sync.
PrvdVstSmplLmtDiscrepancy	Data	None
PrvdVstSmplLmtTransaction	Data	None
ProviderVisit	Data	None
ProviderVisitDtlProductMsg	Data	None
ProviderVisitMarketingItem	Data	None
ProviderVisitProdDetailing	Data	None
ProviderVisitProdDiscussion	Data	None
ProviderVisitRqstSample	Data	None
TerritoryAcctProdMsgScore	Data	None
TerritoryProdtQtyAllocation	Data	Select Web-to-Mobile Sync.
Time Period	Data	None
Visit	Data	If a related list is configured, set the attachment download method to Cache.
Visitor	Data	None

! **Important** After you create these configurations, make sure to generate a metadata cache. This step is important because it makes sure that the mobile app accesses the latest metadata definitions, including any schema changes for supported objects.

See Also

- [Create Object Metadata Cache Configuration](#)
- [Generate Metadata Cache](#)

Visit Management Admin Console

To configure what information fields users can see and how they can interact with and manage visit records, use the Admin Console.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Configure Visit Settings

To customize the visit user experience at the org, user profile, or individual user level, configure the visit settings in the Admin Console.

Map Visit Types to Accounts

If you use record types to tailor visit management processes for your users, create maps that define the associations between account record types and visit record types.

Configure Product Discussion Settings

To help field users capture product-specific information during interactions with healthcare professionals, create provider visit product discussion record types. Then, define the provider visit product discussion record types to use for specific marketable products and conditions.

Update Provider Account Territory Information

To calculate year-to-date visits, next visit, and last visit values for Provider Account Territory Information records, run the Provider Account Territory Information job.

Run Visit Share Management Jobs

To share historical account visit records after territory realignments, run the visit share management job. This provides field users with continued access to account visit data in their updated territories.

Configure Visit Settings

To customize the visit user experience at the org, user profile, or individual user level, configure the visit settings in the Admin Console.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage visit settings:

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Visit Administration**, and then select **Visit Settings**.
3. From the **Select Type** dropdown, select the type of settings to configure. You can configure visit

settings for the org default, specific profiles, or users.

4. Select **Visit Settings** options and enter values to meet your business needs.

These settings put you in command of how users plan, manage, and submit visits. They govern the entire scheduling process, from skipping the visit preview screen and setting a default duration to enforcing future visit limits and managing visit conflicts. You can also use these settings to configure submission-related details, manage late submissions, and even unlock submitted visits.

5. Select **Geolocation Settings** options and enter values to meet your business needs.

These settings give you control over geolocation capture for compliance and data integrity. Define when the system captures a user's location—specifically, at the point of signature and at the moment of submission. To make sure that the user's recorded location remains within a valid range of the visit's location, you can set a maximum allowed distance.

6. Select **Product Detailing Settings**.

These settings help you to customize the product details your users see. You can choose whether to show recent details and a product selector, and you can define whether users can discuss off-label products. You can also specify the field type for next visit product objectives.

7. Select **Samples and Items Settings**.

These settings give you control over sample management. You can specify which healthcare organization types can receive samples and items, and determine whether users must enter a batch number, or whether they can show expired batches. To make sure that users stay within defined limits and inventory counts for both samples and territory quantity allocations, you can also govern how the system validates samples.

8. Select **Signature Settings**.

These settings help you to customize the signature and document experience. You can choose whether to show the document ID and whether the request receipt appears on the signature page.

9. Select profiles in the User Profiles Available in Visitor Search field in Visitor Settings.

10. Save your work.

Map Visit Types to Accounts

If you use record types to tailor visit management processes for your users, create maps that define the associations between account record types and visit record types.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage visit record type mappings: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Visit Administration**, and then select **Visit Record Type Mappings**.
3. Select **New**.
4. Enter a name, and then select an account record type and a visit record type.
5. Save your work.

Configure Product Discussion Settings

To help field users capture product-specific information during interactions with healthcare professionals, create provider visit product discussion record types. Then, define the provider visit product discussion record types to use for specific marketable products and conditions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage product discussion settings: Life Sciences Commercial Admin permission set

Before you can define product discussion settings, you must configure products and product types and create provider visit product discussion record types.

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Visit Administration**, and then select **Product Discussion Settings**.
3. Select a product from the product list.
4. Move record types from Available Record Types to Selected Record Types.
5. Save your work.

See Also

[Configure Products and Product Types](#)
[Get Your Org Ready for Visit Management](#)

Update Provider Account Territory Information

To calculate year-to-date visits, next visit, and last visit values for Provider Account Territory Information records, run the Provider Account Territory Information job.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To run the Provider Account Territory Information job: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Visit Administration**, and then select **Visit Jobs**.
3. Select **Run Now or Schedule**.

Run Visit Share Management Jobs

To share historical account visit records after territory realignments, run the visit share management job. This provides field users with continued access to account visit data in their updated territories.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To start the Visit Share Management job: Life Sciences Commercial Admin permission set

 **Tip** Run this job after running the Update Provider Account Territory Information job.

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Territory Management**, and then select **Visit Share Management**.
3. Select **Run Now or Schedule**.

After the job is run, visits are shared with territories based on account territory alignment.

See Also

[Territory Management Batch Jobs](#)

Next Best Message

Next Best Message provides tailored and relevant messages for each product associated with an account. These recommendations are dynamically generated based on real-time data, allowing field sales teams to provide this information during visits with their customers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Configure Next Best Message data by using your own predictive model and loading the data into the Territory Account Product Message Score object.

Alternatively, you can create the records manually.

- Create a Territory Account Product Message Score record. Enter an Account, Product Guidance, Territory, Total Score, and Rank.
- For rationale, enter the Score Explainability Information in this format: {"metric": value}. Integer and String are the only accepted values. Here's an example of Score Explainability Information in the correct format:

```
{"Message Priority": "Top for this quarter",
  "HCP Interest Level": "High interest shown",
  "Recent Reaction": "Asked for clinical data",
  "Messages sent this month": 4,
  "Last Discussed": "Discussed on 08/10"}.
```

To make sure that users can see the recommended product messages in their territories, grant access to Territory Account Product Message Score records in one of these ways.

- Share Territory Account Product Message Score records with users manually.
- Create owner-based sharing rules for Territory Account Product Message Score. To specify which users' records are shared and the users who get access to the data, select Territories.

See Also

[Next Best Data Model](#)

Set Up Intelligent Content Features

Equip field teams with a comprehensive content library so they can deliver impactful presentations and monitor engagement. Enable personalized communications with healthcare professionals and organizations by providing your field team with preapproved, customizable email templates.

Emails and Templates

Configure email templates and fragments that streamline email communication between sales reps and healthcare professionals (HCPs). Manage and capture consent to help ensure that your organization meets relevant compliance requirements, and monitor email analytics to optimize campaign performance. Sales reps can send emails to HCPs by using preapproved templates throughout Life Sciences Cloud for Customer Engagement and the Life Sciences Cloud mobile app.

Presentations

Streamline content management so that field users can deliver tailored presentations to healthcare professionals (HCPs) during face-to-face and remote interactions. Create and manage effective presentations that use the most current materials. Give users access to the right content at the right time by using activation dates and linking presentations to specific products, messages, and territories. Use feedback and engagement metrics from every interaction to improve marketing strategies and make content more relevant.

Intelligent Content Reference

Create the content and source files for Life Sciences Customer Engagement presentations and email templates.

Emails and Templates

Configure email templates and fragments that streamline email communication between sales reps and healthcare professionals (HCPs). Manage and capture consent to help ensure that your organization meets relevant compliance requirements, and monitor email analytics to optimize campaign performance. Sales reps can send emails to HCPs by using preapproved templates throughout Life Sciences Cloud for Customer Engagement and the Life Sciences Cloud mobile app.

Unlike standard Salesforce email templates, Life Sciences email templates and reusable fragments provide a controlled framework for sales reps to send emails that are personalized, adherent to industry standards, and aligned with brand strategy.

Get Your Org Ready for Emails

Before you get started with email administration in Life Sciences Customer Engagement, complete a few tasks to prepare your org for email features.

Mobile Configuration for Emails

Set up object metadata cache configurations for the supported Life Sciences email objects. Generate a metadata cache to package the object schema configuration that the Life Sciences Cloud mobile app uses for online and offline access. This configuration defines how the mobile app fetches and stores the necessary metadata when a network connection is unavailable.

Configure Email Settings

Customize the behavior of email templates and the email queue, and define how sales reps can use email templates in the field. Optimize email delivery, tracking, and consent management. For granular control, apply settings for the entire org, for certain profiles, or for specific users.

Manage Email Templates

Create and manage the email templates that you want your sales reps to use in the field. Link email templates and their fragments to specific products or align them with specific territories so that they're available to the right users.

Schedule Email Jobs

Email jobs enable efficient and timely large-scale communication with healthcare professionals (HCPs) and healthcare organizations (HCOs). Schedule jobs to send emails at specific times or intervals. Track email status and collect engagement metrics for sent emails.

Monitor and Manage the Email Queue

Get an administrative view into the flow of emails. Monitor and manage emails that were sent recently or are awaiting delivery.

Use a Third-Party Email Service

The Life Sciences Cloud for Customer Engagement managed package includes the EmailQueueProcessor Apex interface to integrate with a third-party email service provider and handle email operations. Create an Apex class that implements the EmailQueueProcessor interface.

Get Your Org Ready for Emails

Before you get started with email administration in Life Sciences Customer Engagement, complete a few tasks to prepare your org for email features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up Life Sciences Customer Engagement data: Life Sciences Commercial Admin permission set

To update page layouts and add picklist values: Customize Application

1. Make sure that your org uses the Life Sciences RSVP email address.
 - a. From Setup, in the Quick Find box, find and select **Life Sciences for Customer Engagement Setup**.
 - b. Verify that the RSVP email address is turned on.
2. To control what content can be attached to emails, [add a picklist value](#) to this Life Science Email Template field.

Field	Picklist Values
AttachmentObjectType	Add Account as a picklist value so that users can attach account records to emails.

3. To enable users to send emails from the home page, accounts, presentations, and more, [configure Email quick actions](#).
4. Enable users to send emails to multiple accounts at once.
 - a. Enable [bulk actions on account lists](#).
 - b. [Create a quick action](#) with these values, and assign the action to the correct permission sets and profiles.

Field	Value
Action Name	Email
Location	Search
Object	Account

5. To enable users to sort and filter email templates by theme, [configure topics](#) for the Life Science Email Template object.
6. To honor communication preferences across different subscription types and channels, set up [Consent Management](#).
7. To track sent emails, set up the [Activity Timeline](#) for accounts.
8. To enable admins to upload email templates by using the content management Connect API, make sure that admin users have the System Administrator profile or a profile that's cloned from it. Or, [enable field level security](#) for the correct profiles on all fields on these objects.
 - LifeSciEmailTemplate
 - LifeSciEmailTmpSnapshot
 - LifeSciEmailTmpFragment
 - LifeSciEmailTmpRelaFrgmt

Mobile Configuration for Emails

Set up object metadata cache configurations for the supported Life Sciences email objects. Generate a metadata cache to package the object schema configuration that the Life Sciences Cloud mobile app uses for online and offline access. This configuration defines how the mobile app fetches and stores the necessary metadata when a network connection is unavailable.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up Life Sciences Customer Engagement data: Life Sciences Commercial Admin permission set

To enable offline access for the objects that support emails in the Life Sciences Cloud mobile app, create these object metadata cache configurations.

Object	Type	Notes
CommSubscription	Data	None
CommSubscriptionChannelType	Data	None
CommSubscriptionConsent	Data	None
ContentDocument	Data	None
ContentDocumentLink	Data	None
ContentVersion	Data	None
DataUsePurpose	Data	None
LifeSciEmailTemplate	Data	None
LifeSciEmailTmpIFragment	Data	None
LifeSciEmailTmpIRelaFrgmt	Data	None
LifeSciEmailTmpISnapshot	Data	Set the attachment download method to Cache.
LifeScienceEmail	Data	None
LifeSciMarketableProduct	Data	None
Survey	Data	None
Topic	Data	None
TopicAssignment	Data	None

! **Important** After you create these configurations, you must generate a metadata cache. This step is important because it makes sure that the mobile app accesses the latest metadata definitions, including any schema changes for supported objects.

See Also

[Create Object Metadata Cache Configuration](#)

[Generate Metadata Cache](#)

Configure Email Settings

Customize the behavior of email templates and the email queue, and define how sales reps can use email templates in the field. Optimize email delivery, tracking, and consent management. For granular control, apply settings for the entire org, for certain profiles, or for specific users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To adjust email settings: Life Sciences Commercial Admin permission set

1. From App Launcher, find and select **Admin Console**.
2. Select **Email**, and then select **Email Settings**.
3. Choose whether to apply settings at the organization level, or select the user profile or the individual user to apply settings for.
4. Under General Settings, configure these settings as needed.

Setting	Description
Edit subject before sending	Sales reps can edit the subject line defined in the email template.
Add CC recipients	Sales reps can add colleagues as CC recipients when sending emails.
Schedule emails to send later	Sales reps can choose whether to send an email immediately or schedule it to send at a later date and time. Scheduled emails still adhere to template availability, start and end dates, and subscription settings.
Sort templates by last modified	Sort templates by the Last Modified Date in Life Sciences Cloud for Customer Engagement.

5. Under Delivery Settings, configure these settings as needed.

Setting	Description
Send to healthcare organizations (HCOs)	Sales reps can send emails directly to an HCO account in addition to individual healthcare professionals (HCPs).
Send unless recipient opted out	Sales reps can send emails to all addresses that didn't specifically opt out or unsubscribe from a communication subscription.

Setting	Description
Show additional addresses when primary contact opts out	If the main contact for an account chooses not to receive emails, sales reps can see other email addresses linked to that HCO account.
Email Service	The name of the Apex class for a third-party email service. See Use a Third-Party Email Service .

6. Under Language Settings, configure these settings as needed.

Setting	Description
Account Language Filter	The field to use to match the account's language to the email template's language. Email templates are filtered automatically to match the HCP or HCO account's preferred language so that recipients receive content in their chosen language.
User Language Filter	The field to use to filter email templates automatically to match the user's preferred language so it's easier to find and use relevant templates.
Filter templates by language	Sales reps can filter templates by language when sending an email.

7. Under Email Limits, configure these settings as needed.

Setting	Description
Email Send Limit Warning	Show a warning on the Email Queue page when there are this many emails left before the org email sending limit.
Email Batch Size	The number of emails to send in each email queue batch. Configure email queue jobs on the Email Jobs page. See Schedule Email Jobs .
Retry Attempts	The number of times to retry when an email fails.

8. Under Tracking Settings, configure these settings as needed.

Setting	Description
Days to Track Status	The number of days to monitor email and delivery status, such as when emails are opened.
Days to Keep Sent Emails	The number of days to store sent emails.
Days to Check History	The number of days to check sent history to prevent sending duplicate emails to the same account.
Status Tracking Batch Size	The number of emails to process each time the status tracking job

Setting	Description
	runs.

9. Under Consent Settings, configure these settings as needed.

Setting	Description
Turn off Add Email Addresses	Prevent sales reps from entering additional email addresses manually when sending emails. Sales reps can select only existing addresses.
Ignore consent verification	Send emails without checking the account's opt-in status for a channel or topic.

10. Save your changes.

Manage Email Templates

Create and manage the email templates that you want your sales reps to use in the field. Link email templates and their fragments to specific products or align them with specific territories so that they're available to the right users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Open the Email Templates page from the Email tile in the Admin Console. See all available templates, or filter to see only the templates for a certain product or territory. Activate, deactivate, or delete templates directly from the list.

[Upload and Create Email Templates](#)

Upload ZIP files to create email templates that help users draft emails faster.

[Distribute Email Templates to Territories](#)

Assign relevant territories to email templates so that only the sales reps for those territories can access the templates.

[Manage Email Template Attachments](#)

Work with email template attachments and upload new versions.

[Manage Email Template Versions](#)

Rather than creating a new email template, you can upload new versions to make smaller changes such as updating email text or images.

[Manage and Share Email Fragments](#)

Fragments are reusable HTML content blocks that sales reps can insert into the body of an email template to customize email content. For example, a fragment can contain a preapproved product blurb, such as key benefits or usage instructions. When the user with access to that fragment uses the related email template, they can select that blurb to include product details.

Upload and Create Email Templates

Upload ZIP files to create email templates that help users draft emails faster.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To upload and create email templates: Life Sciences Commercial Admin permission set

Before you create email templates in Salesforce, [create the email template ZIP files](#). In each ZIP file, include:

- An `index.html` file for each supported language
- A `thumbnail.jpg` file
- (Optional) An `attachments` folder with attachments in supported formats (documents, images, audio, video, and archives) and required attachments marked with a `required_` prefix
- (Optional) A `fragments` folder with individual fragments, which are HTML content blocks that users can combine in the email body text to customize the email

1. From the App Launcher, find and select **Admin Console**, and then select **Email**.
2. Select **Email Templates**, and then click **New**.
3. Upload the email template ZIP file.
4. Enter general information for the email template, such as:
 - Email subject
 - Template name
 - Start and end dates
5. If needed, enter more details about the email template.
 - The type of email address to use as the email sender and for replies
 - The topics to categorize the template under, so sales reps can find it when they search or filter
 - The product to apply so the template shows up when sales reps send an email related to that product
 - The survey to include in emails sent from the template
 - Whether sales reps can edit the email subject line or email content
 - The email addresses to include in the BCC list by default

- Whether sales reps can share presentations as unique links in the email content
6. If the ZIP file includes index.html files for multiple languages, select the languages to use for this template.
 7. Set up the email template for automated use cases or for remote sessions. For more information, see [Set Up Invitation Emails](#).
 - a. In the Automated Email Invitation Context field, select the type of visit to use this email template for.
 - b. In the Automated Email Invitation Action, select the visit action that triggers Salesforce to send an email automatically.
 - c. To use this template as the default template for emails sent automatically for this context and action, select **Template for automated emails**.
 - d. To generate and attach iCalendar invitations to emails sent from the template, select **Attach iCalendar file**.
 - e. In the iCalendar Invitation field, enter the information to include in the iCalendar attachment.
 8. Manage subscriptions and consent for the template.
 - a. In the Communication Subscription field, select the communication subscription record that stores opt-in and opt-out preferences for email communications.
 - b. To use this template to send a customized email when consent is captured, select **Template for consent acknowledgment**.
This template isn't visible to users.
 - c. To ignore email consent preferences for this template and send emails to recipients who haven't subscribed, select **Ignore opt-out preferences**.
 9. Save your changes.
 10. To make the template available to users, activate the template.

After you upload and activate your email template, edit it or deactivate it so that it's no longer available for use. Share the template's fragments with sales reps so they can customize email content.

See Also

[Manage and Share Email Fragments](#)

Distribute Email Templates to Territories

Assign relevant territories to email templates so that only the sales reps for those territories can access the templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To distribute email templates:	Life Sciences Commercial Admin permission set
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Before you distribute email templates to territories, configure account territories and the territory hierarchy.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Email**, and then select **Email Templates**.
3. Open a template, and then click **Edit**.
4. Under Territory Search, search for the territory name, or expand the territory alignment tree to find the right territory.
5. To assign the template to individual territories, select the checkboxes.
6. To assign the template to a parent territory and all child territories, double-click the parent checkbox.
If you assign a template to a parent territory all existing and future child territories under the parent territory are also aligned to that template.
7. Save your changes.

See Also

[Set Up Sales Territories for Life Sciences Cloud](#)

Manage Email Template Attachments

Work with email template attachments and upload new versions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage email template attachments:	Life Sciences Commercial Admin permission set
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When you create an email template, you can upload attachments as part of the template ZIP file. These steps open the attachment's file page so that you can work with existing email template attachments.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Email**, and then select **Email Templates**.
3. Open a template, and then open the file from the Attachments section.
4. Use the file to perform the necessary action.
 - Preview the content.
 - Download the current version.
 - Upload a new version.

- Edit file details.
- Share the file with users and choose whether to allow those users to share it.
- Create a public link to share a file publicly, select the file's expiration date, and choose whether it requires a password.

Manage Email Template Versions

Rather than creating a new email template, you can upload new versions to make smaller changes such as updating email text or images.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage email template versions: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Email**, and then select **Email Templates**.
3. Open a template, and then scroll to Email Template Version History.
4. To see details about a previous version of the template, click the version number.
5. To upload a new version of the template, click **New Version**.
6. In the New Email Template window, upload the new ZIP file and update the template's details. Fragments and email attachments in the ZIP file are also updated. If the new ZIP file version doesn't contain fragments, the previous fragments are deleted.
7. Save your changes.
If the template is already active, the new version is available for use.
8. To share new or updated fragments from the new template version so the right sales reps see them when they send emails, click **Update Fragments**.

See Also

[Manage and Share Email Fragments](#)

Manage and Share Email Fragments

Fragments are reusable HTML content blocks that sales reps can insert into the body of an email template to customize email content. For example, a fragment can contain a preapproved product blurb, such as key benefits or usage instructions. When the user with access to that fragment uses the related email template, they can select that blurb to include product details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage and share fragments and run email fragment jobs: Life Sciences Commercial Admin permission set

When you upload an email template ZIP file that contains a Fragments folder, Life Science Email Template Fragments records are created automatically. You can also create or update Life Science Email Template Fragments records manually or by using Data Loader. To create a fragment manually, upload the fragment's HTML file and associate its related Content Document record with the Life Science Email Template Fragment record. When you create fragments manually, include:

- Record names that match the file names in the email template ZIP file, excluding the file extensions. Record names are case-sensitive and must be fewer than 80 characters.
- Descriptions to show to sales reps when they select fragments.

After you create or update fragments, there are two ways to share fragments so that sales reps can access them when they send emails.

Share Fragments for One Template

Update fragments sharing for one template from the template's details.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Email**, and then select **Email Templates**.
3. Open a template.
4. To share the fragments for the template, click **Update Fragments Sharing**.

Share Fragments for All Templates

Run or schedule an email fragment job to recalculate sharing rules for fragments across all email templates.

You can run the job manually, or you can schedule the job to run later or at a regular interval. For example, to make sure that new sales reps have access to the right fragments, schedule an email fragment job that runs daily.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Email**, and then select **Email Fragment Jobs**.

3. [Run or schedule](#) the email fragment batch job.

In the table, you can see the status of the email fragment jobs and who initiated them.

See Also

[Data Loader Guide](#)

Schedule Email Jobs

Email jobs enable efficient and timely large-scale communication with healthcare professionals (HCPs) and healthcare organizations (HCOs). Schedule jobs to send emails at specific times or intervals. Track email status and collect engagement metrics for sent emails.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To schedule email jobs:	Life Sciences Commercial Admin permission set
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You can use two types of email jobs.

- Send Email jobs send emails in the queue at a determined time and cadence.
- Track Email Status jobs track information such as when emails are sent, delivered, opened, clicked, or bounced.

1. From the App Launcher, find and select **Admin Console**.

2. Select **Email**, and then select **Email Jobs**.

3. To schedule an email job, click **Schedule**.

For each email job type, there are three slots so that you can customize the cadence.

4. Choose whether to run the job once or on a regular schedule, and then select the schedule.

You can change the schedule later.

5. Save your changes.



Example To send emails in the queue every 20 minutes, schedule all three time slots for the Send Email job. For each slot, select the Hourly frequency. For the first slot, select an offset of 00 minutes. For the next slot, select an offset of 20 minutes. For the final slot, select an offset of 40 minutes.

Monitor and Manage the Email Queue

Get an administrative view into the flow of emails. Monitor and manage emails that were sent recently or

are awaiting delivery.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To monitor the email queue: Life Sciences Commercial Admin permission set

Use the email queue to monitor email transactions. For example, you can monitor failed email attempts and troubleshoot by adjusting the batch size or editing attachments that exceed file size limits directly from the email queue. You can also see notifications when your org has exceeded or is close to exceeding the daily email limit.

1. From App Launcher, find and select **Admin Console**.
2. Select **Email**, and then select **Email Queue**.
3. Sort or filter to find the emails you want to see in the queue.
4. Review details for each email in the queue, such as the sender, the recipient, email addresses in the CC and BCC lists, job failures, and job status. Emails can have these statuses.

Status	Description
Preparing	The email is saved but not sent.
New	The email is scheduled to be sent.
Retry	The email failed to send, but there are still retries left to send the email again automatically. This is an intermediate status before the transaction is processed or fails.
Success	The email was sent successfully.
Failed	The email failed to send.
Canceled	The email was canceled and won't be sent.

5. You can work with emails in the queue in these ways.
 - Download the email's body content.
 - Open and download email attachments.
 - Edit the email job record and update the template, attachments, recipients, CC and BCC addresses, consent, related presentation, tracking and status information, and more.
 - Send emails immediately or retry sending them by adding them to the next scheduled job queue.
 - Cancel emails that haven't been sent.

Use a Third-Party Email Service

The Life Sciences Cloud for Customer Engagement managed package includes the EmailQueueProcessor Apex interface to integrate with a third-party email service provider and handle email operations. Create an Apex class that implements the EmailQueueProcessor interface.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access the EmailQueueProcessor Apex interface:	Life Sciences Commercial Admin permission set
To define an Apex class:	Author Apex

1. Open the Setup menu, and then select **Developer Console**.
2. Create a global Apex class that implements the Lsc4ce.EmailQueueProcessor interface.
3. In the Apex class, include all methods and match the method signatures. If you don't need to implement a method's logic, leave the method body blank.

Method	Description
<code>initialize(List<LifeScienceEmail> records)</code>	Initializes resources and setup for the third-party email service and prepares to process Life Science Email records.
<code>setParameters(Map<String, Object> parameters)</code>	We recommend leaving this method empty.
<code>addMessage(LifeScienceEmail IScEmail)</code>	Converts a Life Science Email record to the third-party service's format and validates the email before adding it to the queue. Returns <code>true</code> if successful.
<code>exceededLimits()</code>	Checks if the current email batch size will exceed limits for the third-party service. Returns <code>true</code> if the batch size will exceed limits.
<code>canExceedLimits(Integer emails)</code>	Checks if sending the specified number of emails will exceed email sending limits. Returns <code>true</code> if sending will exceed limits

Method	Description
<code>sendEmail()</code>	Send the queued emails through the third-party service and return a list of error messages. Returns a null value if the email is sent successfully.
<code>cleanUp(List<LifeScienceEmail> emails)</code>	Updates the status of processed Life Science Email records.
<code>updateAttemptStatus(List<LifeScienceEmail> emailAttemptsToProcess)</code>	Updates Life Science Email records with the status of email attempts from the third-party service
<code>finish()</code>	Closes the connection to the third-party email service.

4. Save your changes.
5. If needed, create a named credential and external credential to securely store API keys.
See [Named Credentials as Callout Endpoints](#).
6. From the Email tile in the Admin Console, update email settings so that Life Sciences Cloud for Customer Engagement uses your Apex class to send emails and track status.
See [Configure Email Settings](#).

EmailQueueProcessor Interface

The EmailQueueProcessor interface handles email operations for a third-party email service, including sending emails and updating the tracking status in Salesforce. You can add additional implementations for different email service providers.

EmailQueueProcessor Example

This example creates an Apex class that implements the EmailQueueProcessor interface to integrate a third-party email service with Life Sciences Cloud for Customer Engagement.

See Also

[Apex Developer Guide](#)

EmailQueueProcessor Interface

The EmailQueueProcessor interface handles email operations for a third-party email service, including sending emails and updating the tracking status in Salesforce. You can add additional implementations for different email service providers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed

package.

Namespace

Isc4ce

Typed

Strongly typed

Signature

Access	Signature
global	<pre>void initialize(List<LifeScienceEmail> records);</pre>
global	<pre>void setParameters(Map<String, Object> params);</pre>
global	<pre>Boolean addMessage(LifeScienceEmail lScEmail);</pre>
global	<pre>Boolean exceededLimits();</pre>
global	<pre>Boolean canExceedLimits(Integer emails);</pre>
global	<pre>List<String> sendEmail();</pre>
global	<pre>void cleanUp(List<LifeScienceEmail> records);</pre>
global	<pre>List<LifeScienceEmail> updateAttempt</pre>

Access	Signature
	<pre>Status(List<LifeScienceEmail> emailAttemptsToProcess);</pre>
global	<pre>void finish();</pre>

Methods

Method	Description
initialize(List<LifeScienceEmail> records)	Initializes resources and setup for the third-party email service and prepares to process Life Science Email records.
setParameters(Map<String, Object> parameters)	Configures required parameters for the email processor, and stores API credentials, configuration, and connection parameters.
addMessage(LifeScienceEmail IScEmail)	Converts a Life Science Email record to the third-party service's format and validates the email before adding it to the queue. Returns <code>true</code> if successful.
exceededLimits()	Checks if the current email batch size will exceed limits for the third-party service. Returns <code>true</code> if the batch size will exceed limits.
canExceedLimits(Integer emails)	Checks if sending the specified number of emails will exceed email sending limits. Returns <code>true</code> if sending will exceed limits.
sendEmail()	Send the queued emails through the third-party service and return a list of error messages. Returns a null value if the email is sent successfully.
cleanUp(List<LifeScienceEmail> emails)	Updates the status of processed Life Science Email records.
updateAttemptStatus(List<LifeScienceEmail> emailAttemptsToProcess)	Updates Life Science Email records with the status of email attempts from the third-party service.
finish()	Closes the connection to the third-party email service.

Example Implementation

See [EmailQueueProcessor Example](#).

EmailQueueProcessor Example

This example creates an Apex class that implements the EmailQueueProcessor interface to integrate a third-party email service with Life Sciences Cloud for Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Example EmailQueueProcessor Interface Implementation

This example implementation of the EmailQueueProcessor interface uses example helper classes.

```
public without sharing class SampleEmailQueueProcessor implements EmailQueueProcessor {  
  
    private Map<Id, Attachment> bodyAttachments;  
    private Map<Id, ContentVersion> bodyContentVersions;  
    private final List<SampleEmailMessage> emailMessages = new List<SampleEmailMessage>();  
  
    public void initialize(List<LifeScienceEmail> records) {  
        Set<Id> attachmentIds = new Set<Id>();  
  
        for(LifeScienceEmail record : records) {  
            if (!String.isBlank(String.valueOf(record.BodyAttachmentIdentifier))) && (record.BodyAttachmentIdentifier instanceof Id) {  
                attachmentIds.add((Id) record.BodyAttachmentIdentifier);  
            }  
        }  
  
        bodyAttachments = new Map<Id, Attachment>();  
        bodyContentVersions = new Map<Id, ContentVersion>();  
  
        if (!attachmentIds.isEmpty()) {  
    }
```

```
        List<Attachment> attachments = [SELECT Id, Body, ContentType, Name
FROM Attachment WHERE Id IN :attachmentIds];
        bodyAttachments = new Map<Id, Attachment>(attachments);

        List<ContentVersion> contentVersions = [SELECT Id, VersionData FRO
M ContentVersion WHERE Id IN :attachmentIds];
        bodyContentVersions = new Map<Id, ContentVersion>(contentVersion
s);
    }

}

public Boolean addMessage(LifeScienceEmail lscEmailRecord) {
    SampleEmailMessage email = new SampleEmailMessage();
    email.setSenderAddress(String.valueOf(lscEmailRecord.SenderEmailAddres
s));
    email.setSenderName(String.valueOf(lscEmailRecord.SenderUserName));
    email.addRecipient(String.valueOf(lscEmailRecord.SentToEmailAddress));
    email.setCCAddress(String.valueOf(lscEmailRecord.CcEmailAddressList).s
plit(',');
    email.setBCCAddress(String.valueOf(lscEmailRecord.BccEmailAddressLis
t).split(',');
    email.setSubject(String.valueOf(lscEmailRecord.SubjectText));

    String body = null;

    if (!String.isBlank(String.valueOf(lscEmailRecord.BodyAttachmentIdentifi
er))) {
        Attachment bodyAsAttachment = bodyAttachments.get(lscEmailReco
rd.BodyAttachmentIdentifier);
        if (bodyAsAttachment == null) {
            ContentVersion bodyAsContentVersion = bodyContentVersion
s.get(lscEmailRecord.BodyAttachmentIdentifier);

            if (bodyAsContentVersion == null) {
                // Exception - No Body Found
            } else {
                body = bodyAsContentVersion.VersionData.toString();
            }
        } else {
            body = bodyAsAttachment.Body.toString();
        }
    }
}
```

```
    }

    email.setBody(body);
    emailMessages.add(email);
    return true;
}

public Boolean exceededLimits() {
    Integer remainingEmails = SampleEmailAPI.getRemainingEmails();
    Integer numberEmailsToBeSent = 0;
    for (SampleEmailMessage email : emailMessages) {
        numberEmailsToBeSent += email.getRecipients().size();
        numberEmailsToBeSent += email.getCCs().size();
        numberEmailsToBeSent += email.getBCCs().size();
    }
    return remainingEmails >= numberEmailsToBeSent;
}

public Boolean canExceedLimits(Integer numEmails) {
    Integer remainingEmails = SampleEmailAPI.getRemainingEmails();
    return remainingEmails >= numEmails;
}

public List<String> sendEmail() {
    List<String> errorMessages = SampleEmailAPI.sendEmails(emailMessages);
    return errorMessages;
}

public void cleanUp(List<LifeScienceEmail> records) {
    update(records);
}

public List<LifeScienceEmail> updateAttemptStatus(List<LifeScienceEmail> emailAttemptsToProcess) {
    List<LifeScienceEmail> emailRecordsToUpdate = new List<LifeScienceEmail>();
    for (LifeScienceEmail email : emailAttemptsToProcess) {
        SampleEmailStatus status = SampleEmailAPI.getEmailStatus(email);
        if (status != null) {
            email.IsBounced = status.getIsBounced();
            email.BouncedReason = status.getBouncedReason();
            email.BouncedDate = status.getBouncedDate();
            email.LastOpenedDate = status.getLastOpenedDate();
            email.FirstOpenedDate = status.getFirstOpenedDate();
        }
    }
}
```

```
        email.LastEventDateTime = System.now();
    }
}

return emailAttemptsToProcess;
}

public void finish() {
    SampleEmailAPI.someMethod();
}

public void setParameters(Map<String, Object> params) {
    // Nothing - Not called yet, reserved for future use
}
}
```

Example Helper Classes

This example helper class stores an email.

```
public class SampleEmailMessage {

    private String senderAddress;
    private String senderName;
    private List<String> recipientAddress;
    private List<String> ccAddress;
    private List<String> bccAddress;
    private String subject;
    private String body;

    public String getSenderAddress() {
        return senderAddress;
    }

    public void setSenderAddress(String senderAddress) {
        this.senderAddress = senderAddress;
    }

    public String getSenderName() {
        return senderName;
    }

    public void setSenderName(String senderName) {
        this.senderName = senderName;
    }
}
```

```
public List<String> getRecipients() {
    return recipientAddress;
}
public void setRecipientAddress(List<String> recipientAddress) {
    this.recipientAddress = recipientAddress;
}
public void addRecipient(String recipientEmailAddress) {
    this.recipientAddress.add(recipientEmailAddress);
}

public List<String> getCCs() {
    return ccAddress;
}
public void setCCAddress(List<String> ccAddress) {
    this.ccAddress = ccAddress;
}
public void addCC(String recipientCC) {
    this.ccAddress.add(recipientCC);
}

public List<String> getBCCs() {
    return bccAddress;
}
public void setBCCAddress(List<String> bccAddress) {
    this.bccAddress = bccAddress;
}
public void addBCC(String recipientBCC) {
    this.bccAddress.add(recipientBCC);
}

public String getSubject() {
    return subject;
}
public void setSubject(String subject) {
    this.subject = subject;
}

public String getBody() {
    return body;
}
public void setBody(String body) {
    this.body = body;
}
```

This example helper class stores an email's status.

```
public class SampleEmailStatus {  
  
    private Datetime SentDateTime;  
    private Datetime BouncedDate;  
    private String BouncedReason;  
    private Boolean IsBounced;  
    private Datetime FirstOpenedDate;  
    private Datetime LastOpenedDate;  
  
    public Datetime getSentDateTime() {  
        return SentDateTime;  
    }  
    public void setSentDateTime(Datetime SentDateTime) {  
        this.SentDateTime = SentDateTime;  
    }  
  
    public Datetime getBouncedDate() {  
        return BouncedDate;  
    }  
    public void setBouncedDate(Datetime BouncedDate) {  
        this.BouncedDate = BouncedDate;  
    }  
  
    public String getBouncedReason() {  
        return BouncedReason;  
    }  
    public void setBouncedReason(String BouncedReason) {  
        this.BouncedReason = BouncedReason;  
    }  
  
    public Boolean getIsBounced() {  
        return IsBounced;  
    }  
    public void setIsBounced(Boolean IsBounced) {  
        this.IsBounced = IsBounced;  
    }  
  
    public Datetime getFirstOpenedDate() {  
        return FirstOpenedDate;  
    }  
    public void setFirstOpenedDate(Datetime FirstOpenedDate) {  
        this.FirstOpenedDate = FirstOpenedDate;  
    }  
}
```

```
}

public Datetime getLastOpenedDate() {
    return LastOpenedDate;
}
public void setLastOpenedDate(Datetime LastOpenedDate) {
    this.LastOpenedDate = LastOpenedDate;
}
}
```

This is an example helper class to make external API calls to the third-party email system. To make valid API calls, update the endpoints.

```
public class SampleEmailAPI {

    public static Integer getRemainingEmails() {
        // Replace with valid request
        HttpRequest req = new HttpRequest();
        req.setEndpoint('https://www.examplesite.com/some/api/endpoint');
        req.setHeader('Authorization', 'someauth');
        req.setHeader('Content-Type', 'application/json');
        req.setMethod('GET');
        req.setBody('Request Body');

        Http httpReq = new Http();
        HttpResponse response;

        try {
            response = httpReq.send(req);
        } catch (Exception ex) {
            // Handle
        }

        String body = response.getBody();
        Map<String, Object> results = parseBody(body);

        // Assumes this value will be returned from the API
        return Integer.valueOf(results.get('emails_remaining'));
    }

    public static List<String> sendEmails(List<SampleEmailMessage> emails) {
        // Replace with valid request
        List<String> errorMessages = new List<String>();
        for (Integer i = 0; i < emails.size(); i++) {

```

```
try {
    // Send Message - Replace with valid request
    HttpRequest req = new HttpRequest();
    req.setEndpoint('https://www.examplesite.com/some/api/endpoint');
    req.setHeader('Authorization', 'someauth');
    req.setHeader('Content-Type', 'application/json');
    req.setMethod('POST');
    req.setBody('Request Body');

    Http httpReq = new Http();
    HttpResponse response;

    try {
        response = httpReq.send(req);
    } catch (Exception ex) {
        // Handle
    }

    String body = response.getBody();
    Map<String, Object> results = parseBody(body);

    // Check results if needed
} catch (Exception x) {
    errorMessages.add(i, x.getMessage());
}
}

return errorMessages;
}

public static SampleEmailStatus getEmailStatus(LifeScienceEmail email) {
    // Replace with valid request
    HttpRequest req = new HttpRequest();
    req.setEndpoint('https://www.somesite.com/some/api/endpoint');
    req.setHeader('Authorization', 'someauth');
    req.setHeader('Content-Type', 'application/json');
    req.setMethod('GET');
    req.setBody('Request Body');

    Http httpReq = new Http();
    HttpResponse response;

    try {
        response = httpReq.send(req);
    }
}
```

```
        } catch (Exception ex) {
            // Handle
        }

        String body = response.getBody();
        Map<String, Object> results = parseBody(body);

        SampleEmailStatus status = new SampleEmailStatus();
        // Assumes these values will be returned from the API
        status.setSentDateTime(Datetime.parse(String.valueOf(results.get('sent_time'))));
        status.setIsBounced(Boolean.valueOf(results.get('is_bounced')));
        status.setBouncedReason(String.valueOf(results.get('bounced_reason')));
        status.setBouncedDate(Datetime.parse(String.valueOf(results.get('bounced_date'))));
        status.setLastOpenedDate(Datetime.parse(String.valueOf(results.get('last_opened'))));
        status.setFirstOpenedDate(Datetime.parse(String.valueOf(results.get('first_opened'))));

        return status;
    }

    public static void someMethod() {
        // Replace with valid request
        HttpRequest req = new HttpRequest();
        req.setEndpoint('https://www.somesite.com/some/api/endpoint');
        req.setHeader('Authorization', 'someauth');
        req.setHeader('Content-Type', 'application/json');
        req.setMethod('GET');
        req.setBody('Request Body');

        Http httpReq = new Http();
        HttpResponse response;

        try {
            response = httpReq.send(req);
        } catch (Exception ex) {
            // Handle
        }

        String body = response.getBody();
        Map<String, Object> results = parseBody(body);
```

```
    }

    private static Map<String, Object> parseBody(String body) {
        Map<String, Object> m = (Map<String, Object>) JSON.deserializeUntyped(b
ody);
        return m;
    }
}
```

Presentations

Streamline content management so that field users can deliver tailored presentations to healthcare professionals (HCPs) during face-to-face and remote interactions. Create and manage effective presentations that use the most current materials. Give users access to the right content at the right time by using activation dates and linking presentations to specific products, messages, and territories. Use feedback and engagement metrics from every interaction to improve marketing strategies and make content more relevant.

Managing, presenting, and optimizing content involves multiple stakeholders throughout each presentation's lifecycle. With Intelligent Content:

- Admins can upload approved presentations and pages by using the Admin Console or content management REST API resources. Then, they can manage distribution and maintain granular control over content visibility, activation, and expiration.
- Field teams can use the content library to find approved, up-to-date presentations that are tailored to each interaction—even offline. In the presentation player, users have the flexibility to deliver personalized presentations, use interactive tools, and capture HCP feedback in real time.
- Commercial teams can leverage data-driven insights and HCP engagement patterns to improve messaging and optimize presentation content based on what resonates most with HCPs.

Get Your Org Ready for Presentations

Before you get started with Intelligent Content, complete a few tasks to prepare your org for presentations.

Mobile Configuration for Presentations

Set up object metadata cache configurations for Life Sciences presentation objects. Generate a metadata cache to package the object schema configuration that the Life Sciences Cloud mobile app uses for online and offline access. This configuration defines how the mobile app fetches and stores the necessary metadata when a network connection is unavailable to provide a seamless experience whether users are online and offline.

Configure Presentation Settings

Presentation settings help to manage how your field users can find, share, and work with presentations in the content library and the presentation player. Manage data tracking, feedback capture, search settings, sharing settings, and so on. For granular control, apply settings for the entire org, for certain profiles, or for specific users.

Create and Manage Presentations

Use a centralized content management hub to manage presentations throughout their lifecycle. Create presentations by uploading source files, or assemble new presentations from existing pages in your org. Make sure that field users can access relevant content by linking presentations to specific products and messages and distributing presentations to specific territories. To help ensure compliance and consistency, manage version control and activation schedules.

Recommended and Targeted Presentations

Help your field users deliver the most relevant and effective content for each account and healthcare professional (HCP). Targeted presentations help to make sure that users see and present only the right content. Recommended presentations suggest the best content to use during interactions.

Smart Content Search

Expand your search beyond just presentation names and metadata properties. Use Data 360 to create an index of searchable strings from your presentation content. In the content library, your field users can find presentations by searching within presentation content and see why presentations match their search terms.

Send Presentations as Links

Help your users improve engagement with healthcare professionals (HCPs) by sending presentations as secure links. Field users can select multiple presentations and embed links automatically into approved email templates, and HCPs can review presentations in a dedicated portal without downloading email attachments. Links reflect the latest version of the presentation and expire after a defined amount of time, so HCPs know they're seeing the most up-to-date content. Rich engagement data—including pages viewed, time spent per page, and the HCP's navigation path—helps you to optimize presentations for future interactions.

Understand Mandatory Pages in Presentations

Mandatory presentation pages help to keep interactions compliant by making sure that field users present specified key messages, disclaimers, or safety information. When you configure presentations, you can designate specific pages as mandatory to prevent users from bypassing or overlooking critical content.

Understand Presentation Metrics

When sales reps deliver presentations, metrics are tracked during the interaction so that you can get detailed insights into usage and performance. Engagement data is captured in presentation click stream entry records. To analyze engagement and improve presentation strategy, build custom reports and dashboards by using presentation click stream entry data.

See Also

[Compare the Life Sciences Cloud Mobile App and Desktop Site](#)

Get Your Org Ready for Presentations

Before you get started with Intelligent Content, complete a few tasks to prepare your org for presentations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up Life Sciences Customer Engagement data: Life Sciences Commercial Admin permission set

To work with field sets and topics: Customize Application

1. Enable your users to access presentations and work with Intelligent Content features. Make sure that these [object permissions](#) are enabled on the right permission sets or profiles.

Object	Permissions
Presentation Click Stream Entries	Read, Create, Edit, Delete
Presentation Forums	Read, Create, Edit, Delete
Presentation Linked Pages	Read, Create, Edit, Delete
Presentation Page Products	Read
Presentation Pages	Read
Presentation Party Accesses	Read, Create, Edit, Delete
Presentations	Read

2. Enable users to create custom presentations in the Life Sciences Cloud mobile app.

- Enable these additional object permissions on the right permission sets or profiles.

Object	Permissions
Presentation Linked Pages	Create, Edit
Presentations	Create, Edit
Topic Assignments	Create

- From the Presentations tile in the Admin Console, open the Presentation Settings page and enable **Create custom presentations** for the same permission sets or profiles.

3. To report on more presentation fields, [add fields to these field sets](#).

Object	Field Set
Presentation	Presentation Reporting

Object	Field Set
Presentation Page	Presentation Page Reporting

4. To enable users to sort and filter presentations and pages by theme in the content library, [configure topics](#) for these objects.
 - Presentation
 - Presentation Page
5. To set up the presentation player so that users can capture medical inquiries, [create a quick action](#) with these values. Assign the action to the correct permission sets and profiles.

Field	Value
Action Name	Inquiry
Location	Intelligent Content
Object	Account

6. To set up the presentation player so that users can start or resume surveys, [create a quick action](#) with these values. Assign the action to the correct permission sets and profiles.

Field	Value
Action Name	Survey
Location	Intelligent Content
Object	Account

7. Enable admins to upload presentations by using the [content management REST API](#).

Make sure that admin users have the System Administrator profile or a profile that's cloned from it. Or, [enable field level security](#) for the correct profiles on all fields on these objects.

- LifeSciMarketableProduct
 - Presentation
 - PresentationPage
 - PresentationLinkedPage
 - PresentationPageProduct
 - ProductGuidance
8. Because record sharing is based on territory assignments, make sure that your Salesforce org uses the default sharing settings.
 - a. In the [sharing settings](#) for the Presentation and Presentation Page objects, verify that default internal access is set to **Private**.
 - b. On each user profile, verify that the **View All Records** permission is turned off for the Presentation object.
 9. Make sure that your org has enough [Salesforce Files storage](#) available to upload and store presentation files.

Mobile Configuration for Presentations

Set up object metadata cache configurations for Life Sciences presentation objects. Generate a metadata cache to package the object schema configuration that the Life Sciences Cloud mobile app uses for online and offline access. This configuration defines how the mobile app fetches and stores the necessary metadata when a network connection is unavailable to provide a seamless experience whether users are online and offline.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up Life Sciences Customer Engagement data: Life Sciences Commercial Admin permission set

To enable offline access and improve performance for the objects that support presentations in the Life Sciences Cloud mobile app, create these object metadata cache configurations.

Object	Type
ContentDocument	Data
ContentDocumentLink	Data
ContentVersion	Data
LifeSciMarketableProduct	Data
Presentation	Data
PresentationPage	Data
PresentationLinkedPage	Data
PresentationPageProduct	Data
ProductGuidance	Data
Survey	Data
Topic	Data
TopicAssignment	Data

-  **Important** After you create these configurations, you must generate a metadata cache. This step is important because it makes sure that the mobile app accesses the latest metadata definitions, including any schema changes for supported objects.

See Also

- [Create Object Metadata Cache Configuration](#)
[Generate Metadata Cache](#)

Configure Presentation Settings

Presentation settings help to manage how your field users can find, share, and work with presentations in the content library and the presentation player. Manage data tracking, feedback capture, search settings, sharing settings, and so on. For granular control, apply settings for the entire org, for certain profiles, or for specific users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To adjust presentation settings: Life Sciences Commercial Admin permission set

1. From App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **Presentation Settings**.
3. Select how to apply settings.



Tip Start by applying settings at the org level. Then, customize settings for specific profiles or roles, such as Field Sales Representatives or Medical Science Liaisons. Apply settings at the user level only when it's necessary.

Org Default	Applies settings for all users unless you make more specific assignments.
Profile	Applies settings only for the profiles that you select and overrides the org default.
User	Applies settings only for the user that you select and overrides all other assignments.

4. Under Search Settings, configure these settings to determine how users can search in the content library.

Setting	Description
Use advanced search for accounts	Show Advanced Search filters and search options in the content library to help users find accounts based on presentation details. See Account Search .
Presentation Search Field	<p>Select the standard field, custom text field, or formula field on the Presentation object that's used for keyword searches in the content library.</p> <p>With formula fields, users can use multiple criteria in a single search. For example, create a formula field that combines multiple values such as name and language into a single searchable string.</p>
Presentation Page Product Search Field	To extend keyword search capabilities, select which field on the Presentation Page Product object is searchable. Users can find presentations by searching on page properties such as linked products or messages.
Use Data Cloud to search presentation content	Use a Data 360 search index so that users can find relevant presentations by using phrases and related concepts to search presentation content. See Smart Content Search .
Search Index API Name	Enter the API name of the Data 360 search index that you created for searching presentation content. See Set Up Smart Content Search .
File Types to Index	Select the file types to index for searching presentation content with Data 360. PDFs are indexed automatically, and each additional type consumes extra storage. To maximize search potential, we recommend indexing HTML files.

5. Under Targeted Presentation Settings, configure these settings as needed.

Setting	Description
Show Next Best Message	Show suggested presentations in the content library based on the Next Best Messages suggested for an account. Users see other presentations that have the same assigned product messages. See Next Best Message .
Targeting Context	<p>Select the behavior for targeted presentations.</p> <ul style="list-style-type: none"> • Warn shows users which presentations are targeted while providing access to other presentations. • Restrict shows users only targeted presentations. <p>See Set Up Presentation Targeting.</p>

6. Under Presentation Player Settings, select or deselect the options to determine how sales reps can see and interact with content in the presentation player.

To make sure that sales reps can easily access the presentation player menu, we recommend enabling these settings at the org level.

Setting	Description
Show page name in presentation player	To improve navigation and clarity, show the page title instead of the page number.
Use drawing tools in presentation player	Users can annotate or draw to circle or highlight content during interactions.
Use laser pointer in presentation player	Users can point to content by using a virtual laser pointer.
Show icon to open player menu	Show an icon to open the presentation player. When you don't show an icon, users must swipe or tap to open the menu. In each presentation's details, use the Player Gesture and Side field to select the side of the page and the motion that opens the menu.

7. Under Content Library Settings, configure these settings as needed to determine how sales reps can work with presentations in the content library.

Setting	Description
Create custom presentations	In the Life Sciences Cloud mobile app, users can create custom presentations in the content library by using approved pages from HTML presentations. To create custom presentations, users must have create and edit access on the Presentation and Presentation Linked Page objects.
Collapse content categories	To improve navigation, organize the content library into collapsible categories based on the topics that you define.

8. Under Tracking Settings, configure these settings as needed.

Setting	Description
Use geolocation tracking	Capture the GPS location where the field user delivered the presentation.
Pause tracking when player launches	Pause tracking automatically when a presentation starts so that you don't capture metrics during training sessions. Field users can

Setting	Description
	<p>select the play icon in the presentation player to start tracking metrics again.</p> <p>Field users can also preview presentations in the content library to review content without tracking metrics.</p>
Turn off participant tracking	<p>Don't capture participant metrics such as the content viewed, the time spent on each page, and the products or messages presented.</p> <p>This setting is useful for organizations with privacy or compliance requirements or for use cases where there aren't specific participants.</p>
Turn off presenter tracking	<p>Don't capture presenter metrics such as the content presented, the time spent on each page, and the pages shown.</p> <p>This setting is useful for organizations with relevant privacy requirements or for training or internal use cases.</p>

9. Under Access Control Settings, configure these settings as needed.

Setting	Description
Lock presentation	Prevent other admins from editing or deactivating presentations and their pages after the presentation is finalized.
Lock player on mobile	<p>Automatically lock the presentation player on mobile devices during face-to-face visits. Healthcare professionals (HCPs) can handle field users' devices and navigate the presentation without accessing other parts of the app.</p> <p>To unlock the presentation player, field users enter their PIN code.</p>

10. Under Share Settings, configure these settings to determine how field users can share presentations with HCPs.

Setting	Description
Send presentations as email attachments	<p>Users can share presentations as email attachments and select the specific pages to include. To review the presentation content, HCPs download email attachments.</p> <p>In each presentation's details, select Send presentation by email.</p>

Setting	Description
	The presentation files must also include a PDF version of the presentation.
Send presentations as email links	Users can share presentations as unique links in email content. HCPs can see the latest version of the presentation content in the Digital Experience site that you specify without downloading email attachments. See Send Presentations as Links .
Days Until Link Expires	When field users send presentations as email links, presentation links are valid only for the number of days that you specify. Access to presentations is also controlled by the presentation's activation and expiration date, status, and any other visibility rules.
Digital Experience Site URL	When field users send presentations as email links, HCPs view presentations in this Digital Experience site. See Create an Experience Cloud Site for Presentations

11. Under Feedback Settings, select or deselect these options to configure how field users can capture HCP feedback and complete surveys during or after presentations.

Setting	Description
Capture feedback in player menu	Users can capture the HCP's feedback for a page by using thumbs up and thumbs down icons in the presentation player menu.
Capture feedback on presentation screen	Users can capture the HCP's feedback by tapping or clicking the page in the presentation player. A flash indicates captured feedback without interrupting the presentation flow. In each presentation's details, use the Content Feedback Side field to select the side of the page where users can capture feedback.
Retake survey	Users can open a survey that was completed previously and collect a new, independent set of responses for each interaction. Previous responses are stored for historical context.
Retake survey and copy last response	Users can open a survey that was completed previously with the most recent responses prepopulated to reduce data entry. Then, users update or confirm the data before submitting the new response. Previous responses are stored for historical context.

12. Save your changes.

Create and Manage Presentations

Use a centralized content management hub to manage presentations throughout their lifecycle. Create presentations by uploading source files, or assemble new presentations from existing pages in your org. Make sure that field users can access relevant content by linking presentations to specific products and messages and distributing presentations to specific territories. To help ensure compliance and consistency, manage version control and activation schedules.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Intelligent Content in the Admin Console

PRESENTATION NAME	AVAILABILITY	PRODUCTS	SOURCE SYSTEM ID	LAST MODIFIED DATE	CUSTOM	EDIT PAGES	UPDATE PAGES	ACTIVE	REMOVE
Immunexis Treatment	Available			2/5/2026, 08:49:51 AM	<input type="checkbox"/>	<button>Edit</button>	<button>Upload</button>	<button>Deactivate</button>	<button>X</button>
Immunexis Risks	Available	Immunexis	immunexisrisks	12/23/2025, 12:41:58 AM	<input type="checkbox"/>	<button>Edit</button>	<button>Upload</button>	<button>Deactivate</button>	<button>X</button>
Immunexis Presentation	Available	Immunexis	immunexispresentation	12/23/2025, 12:41:20 AM	<input type="checkbox"/>	<button>Edit</button>	<button>Upload</button>	<button>Deactivate</button>	<button>X</button>
Immunexis Graph	Available	Immunexis	immunexisgraph	12/23/2025, 12:40:48 AM	<input type="checkbox"/>	<button>Edit</button>	<button>Upload</button>	<button>Deactivate</button>	<button>X</button>

You manage presentations under Intelligent Content in the Admin Console. The Presentations page provides a centralized view of all of the presentations in your org. In the list of presentations, you can:

- Filter to find the presentation that you need.
- Remove filters to see all presentations.
- Get details about presentations, such as the presentation's name, whether it's active, the products that are linked to it, and when it was last updated.
- See the custom presentations that sales reps created in the content library, and activate or deactivate custom presentations.
- Create presentations.

- Click **Edit** to update the products and messages associated with presentation pages in bulk.
- Click **Upload** to update presentation files and manage content versions.
- Activate presentations to make them available in the content library.
- Deactivate presentations so that users can no longer see them in the content library.
- Remove presentations.

Create Presentations

You can create presentations in one of two ways.

- Upload PDFs or HTML source files.
- Select and combine existing pages into a new presentation.

Edit Presentations

Open a presentation from the list and click **Edit**. When you edit an existing presentation, you can:

- Update presentation settings including the status, activation dates, topics, territory alignment, and so on.
- Manage the pages in the presentation by adding, reordering, or removing pages.

You can also update existing presentations by editing the products and messages assigned to each page individually or in bulk. Or, you can upload new versions.

Control Presentation Availability

To make the presentation available for your field users only within a certain period, select dates for activation and deactivation. Activating the presentation makes it available in the content library only within that range. If you don't set the activation schedule, the presentation is available until you deactivate it. If you no longer need a presentation, you can also remove it from the list.

[Create Presentations by Uploading Pages](#)

Upload source files and create presentations. Each page in the presentation file is stored as a unique presentation page record.

[Create Presentations from Existing Pages](#)

Create presentations by selecting and combining from pages from existing presentations. Assembling presentations by reusing pages makes maintaining content easier and makes your presentations more consistent.

[Monitor the Presentation API Job Queue](#)

Monitor the status of presentations that are uploaded to Life Sciences Cloud for Customer Engagement via the content management REST API.

[Distribute Presentations to Territories](#)

Assign relevant territories to presentations so that only the sales reps for those territories can access them in the content library.

Edit Products and Messages for Individual Pages

Individual pages can be reused across presentations. View page details and file versions. Update the products and messages associated with each page, and select whether the page is mandatory for sales reps to present.

Edit Products and Messages for Pages in Bulk

Easily update multiple pages in a presentation. Assign new products and messages to all presentation pages, or make several pages mandatory at once.

Reorder Presentation Pages

After you upload presentation files, you can reorder the pages to customize the content or improve engagement.

Update and Manage Presentation Versions

Create new versions of existing presentations. Upload new presentation files, remove old content, or reorder the pages.

Remove Presentations

Remove presentations from your org when you no longer need them.

Create Presentations by Uploading Pages

Upload source files and create presentations. Each page in the presentation file is stored as a unique presentation page record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To upload pages and create presentations: Life Sciences Commercial Admin permission set

Before you can upload a presentation, [create the presentation source files](#). These file types are supported.

- ZIP files with an HTML file and a JPEG thumbnail for each presentation page
- PDFs

You upload presentations from the Admin Console. For larger files, you can also use the [content management REST API resources](#). Presentations must meet these file size limits.

Upload Method	File Type	File Size Limit
Admin Console	HTML ZIP files	1 GB

Upload Method	File Type	File Size Limit
Admin Console	PDFs	500 MB
Content Management REST API	HTML ZIP files	2 GB
Content Management REST API	PDFs	200 pages

Presentation files that you upload are stored as Salesforce Files. When you manage presentation content, keep storage and file size limits in mind. Review all large files for compliance, performance, and storage impact.

Upload Presentation Pages

1. From the App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **Presentations**.
3. Click **Upload New Pages**.
4. On the Presentation Files page, select the presentation ZIP files or a single PDF, and then click **Upload Files**.
5. After Salesforce validates the presentation files, click **Next**.

The file type that you upload determines the page order in the presentation. To reorder pages, set up and save the presentation first.

Configure Presentation Pages

In the Presentation Pages window, add products and messages to each page and configure page settings as needed.

Adding products and messages allows each presentation page to support cross-product content, scientific data, or targeted messaging and guidance that's aligned with specific products. You can:

- Link each page to one or more products
- Link each page to one or more messages
- Assign a specific product message to each page
- Leave pages unassigned

1. To select the messages and products that you want to link to presentation pages, click **Add**.
2. Under Products, search for and select the products to assign to presentation pages, and then select the related product messages.
3. Save your changes.
4. To update pages with the selected products and messages, select the pages, and then click **Apply Products and Messages**.
5. Update each page's name.
For uploaded ZIP files, the default name for each page is based on the file name. For PDFs, the default name is based on the sequential number of the page, starting at 1.
6. Select whether the pages are mandatory in the presentation.

7. If custom fields are configured, populate them for each page as needed.
8. Click **Next**.

Configure Presentation Settings

In the Presentation Settings window, finalize the presentation.

1. Give the presentation a name.
2. To determine when the presentation is available in the content library, select dates for activation and deactivation.
3. To categorize the presentation, create topics.
Sales reps can use these topics to search and filter presentations in the content library.
4. To determine how sales reps and healthcare professionals (HCPs) can interact with content in the presentation player, customize presentation settings.
 - a. Select the gesture that opens the presentation player and the side of the screen where it appears.
Select an option that doesn't interfere with the dynamic content in your presentations.
 - b. Select the side of the presentation player screen where sales reps can capture feedback from HCPs.
Select a location that doesn't overlap with the presentation content.
 - c. Select whether sales reps can double-tap to magnify content, which can enhance engagement and improve interactions during visits.
 - d. Enter the name for public content that appears during remote engagements.
The name that you enter helps HCPs understand the content that they're opening. For example, Legal Disclaimer.
 - e. Enter the URL of the public content.
This URL is the direct link that opens the resource for HCPs, such as product or legal information.
 - f. Select whether sales reps can email presentations to HCPs.
For sales reps to be able to email a presentation, the presentation's files must include a PDF version of the presentation.
5. Save your changes.
6. To make the presentation available in the content library, click **Activate**.
Active presentations are available in the content library within the activation and deactivation dates. If you don't set activation and deactivation dates, the presentation is available until you deactivate it.

After you create the presentation, you can open it from the presentation list view to edit its settings and add or reorder pages. You can also upload new pages, distribute the presentation to specific territories, or deactivate it so that it's no longer available for use.

See Also

[Salesforce Files](#)

Create Presentations from Existing Pages

Create presentations by selecting and combining from pages from existing presentations. Assembling presentations by reusing pages makes maintaining content easier and makes your presentations more consistent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create presentations:	Life Sciences Commercial Admin permission set
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When you create a presentation from existing pages, your new presentation references the original pages rather than creating copies. Any updates to the original page are reflected automatically in all presentations that use that page.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **Presentations**.
3. Click **Use Existing Pages**.
4. Enter a presentation name.
5. Enter details about the presentation as needed.
 - To categorize the presentation, create topics.
 - Select how sales reps and healthcare professionals (HCPs) can open the menu, capture feedback, and zoom in on content in the presentation player.
 - To make the presentation available in the content library only within a certain period, select dates for activation and deactivation.
 - To include links to product or legal information that HCPs can access during remote sessions, enter the name and URL for the public content.
6. Under Presentation Pages, click **Add**.
7. Search for and select the pages that you want to use.
You can select only active presentation pages.
8. Select the territories to distribute the presentation to.
See [Distribute Presentations to Territories](#)
9. Save your changes and activate the presentation.
Activating the presentation makes it available in the content library within the activation and deactivation dates. If you don't set these dates, the presentation is available until you deactivate it.

After you create the presentation, you can open it from the presentation list view to edit its settings and add or reorder pages. You can also upload new pages, or deactivate the presentation so that it's no longer available for use.

Monitor the Presentation API Job Queue

Monitor the status of presentations that are uploaded to Life Sciences Cloud for Customer Engagement via the content management REST API.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To see the API job queue:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **API Job Queue**.
3. In the job queue, view the status of presentations uploaded through the content management REST API.
You can see each job's name, type, status, who initiated the job, and when the job started.

Distribute Presentations to Territories

Assign relevant territories to presentations so that only the sales reps for those territories can access them in the content library.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To distribute presentations:	Life Sciences Commercial Admin permission set
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Before you distribute email templates to territories, configure account territories and the territory hierarchy.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **Presentations**.
3. Open a presentation, and then click **Edit**.
4. Under Territory Distribution, search for the territory name, or expand the territory alignment tree to find the right territory.
5. To select territories that aren't aligned with the products assigned to the presentation pages, turn on **Select unassigned territories**.
6. To select individual territories to distribute the presentation to, select the checkboxes.
7. To assign the presentation to a parent territory and all child territories, double-click the parent

checkbox.

If you assign a presentation to a parent territory, all existing and new child territories are also aligned to that presentation.

8. Save your changes.

See Also

[Set Up Sales Territories for Life Sciences Cloud](#)

Edit Products and Messages for Individual Pages

Individual pages can be reused across presentations. View page details and file versions. Update the products and messages associated with each page, and select whether the page is mandatory for sales reps to present.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To update presentation pages:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.

2. Select **Intelligent Content**, and then select **Pages**.

3. Sort or filter the list to find the page that you want.

The Active column shows whether the page is active and available to use in presentations. You can also see details such as the file type, linked products, and the version number.

4. Open a page, and then click **Edit**.

5. Edit the page's details. These properties are editable.

- Whether the page is mandatory for sales reps to present.
- The email template associated with this presentation page. If you configure the template in the presentation file's HTML, and if sales reps start an email from this presentation page, the email uses this template by default.
- The products and messages associated with the page.
- Any custom field values in the Reporting section.

6. Save your changes.

The previous page version is deactivated. If the page was already active, the new page version is active automatically.

After you save your changes, you can activate or deactivate the page. If you deactivate the page, you can't activate it again.

Edit Products and Messages for Pages in Bulk

Easily update multiple pages in a presentation. Assign new products and messages to all presentation pages, or make several pages mandatory at once.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To update presentation pages in bulk: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **Presentations**.
3. Sort or filter to find the presentation that you want to update in the list, and then click **Edit**.
4. On the Presentation Pages page, select additional products and messages, and then apply them to the presentation's pages.
5. Update each page's attributes such as its name, whether it's a mandatory page in presentations, and custom field values.
6. Click **Next**.
7. Adjust the presentation settings, if necessary.
8. Save your changes.

Reorder Presentation Pages

After you upload presentation files, you can reorder the pages to customize the content or improve engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To reorder presentation pages: Life Sciences Commercial Admin permission set

When you upload a presentation in the Admin Console, the file type determines the page order.

- PDF pages follow the sequence in the document.
- HTML pages follow the file order in the ZIP folder.

After you upload and save the presentation, you can reorder pages manually.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **Presentations**.
3. Open a presentation, and then click **Edit**.
4. Under Presentation Pages, drag pages to reorder them.
5. Save your changes.

Update and Manage Presentation Versions

Create new versions of existing presentations. Upload new presentation files, remove old content, or reorder the pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To upload new pages and manage presentation versions: Life Sciences Commercial Admin permission set

 **Note** When you update presentation content from the Admin Console, you must upload the entire presentation file again. To update individual pages, use the Content Management REST API.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **Presentations**.
3. Sort or filter the list to find the presentation that you want to update, and then click **Upload**.
4. Select the new presentation ZIP files or PDF to upload.
5. After Salesforce validates your selected files, click **Next**.
6. Under Presentation Pages, in the Page to Update column, select the existing presentation page to map the new file to.
If the page names match, the new file is mapped to the existing presentation page automatically.
7. If needed, apply products and messages, reorder the pages, update page names, and update which pages are mandatory.
8. Click **Next**.
9. Adjust the presentation settings, if necessary.
10. Save your changes.

Uploading new presentation files increases the number of presentation and page versions

automatically and deactivates the previous versions.

See Also

[Life Sciences Cloud Developer Guide: Content Management](#)

Remove Presentations

Remove presentations from your org when you no longer need them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To remove presentations:	Life Sciences Commercial Admin permission set
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Removing a presentation from the Intelligent Content tile in the Admin Console updates the presentation record's status to Deleted but doesn't delete the record permanently. The presentation record remains in Salesforce for auditing and data integrity.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Intelligent Content**, and then select **Presentations**.
3. Sort or filter the list to find the presentation that you want to remove.
4. Click **Remove** ().

After you remove the presentation, update the related files in Salesforce Files manually to make sure that:

- No presentation pages reference the files
- Your organization doesn't require the content for compliance, reporting, or audit purposes

 **Important** Always validate regulatory and data retention requirements before you delete files. Deleting files permanently can impact audit trails and historical reporting.

Recommended and Targeted Presentations

Help your field users deliver the most relevant and effective content for each account and healthcare professional (HCP). Targeted presentations help to make sure that users see and present only the right content. Recommended presentations suggest the best content to use during interactions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Use recommended and targeted presentations together or separately to meet your business needs. This approach makes sure that your field teams can access presentations in alignment with your engagement strategy, compliance requirements, and regional practices.

[Set Up Recommended Presentations](#)

Define recommended presentations to help sales reps engage more effectively with their accounts.

When users open the content library or the presentation player from an account, they can filter by recommended presentations to select the best content for that account and territory.

[Set Up Presentation Targeting](#)

To help field users see the right materials and show content to the right audiences, target presentations to specific accounts and territories. Guide users to the most appropriate presentations for their context, or show users only presentations that are specifically targeted. Show warnings if sales reps add accounts that aren't targeted to a presentation, or prevent reps from adding accounts that aren't targeted.

Set Up Recommended Presentations

Define recommended presentations to help sales reps engage more effectively with their accounts.

When users open the content library or the presentation player from an account, they can filter by recommended presentations to select the best content for that account and territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up recommended presentations:

Life Sciences Commercial Admin permission set

When you create and save presentations in the Admin Console, Salesforce automatically generates unique IDs for each presentation record. Before you set up recommended presentations, open the list of presentation records from the App Launcher and add the Presentation ID field to the list view.

Find and save the IDs for the presentations that you want to recommend. Select recommended

presentations based on engagement history, account profiles, and preferences or specialties.

1. To populate Provider Account Territory Info records and permissions, [run the Align Account to Territory batch job](#).

2. On each Provider Account Territory Info record, update the Recommended Presentation Information field.

In JSON format, enter the IDs of the presentations to recommend and the order to recommend them in.

```
{  
    "Data": [  
        { "Id": <presentation id>, "Order": 1 },  
        { "Id": <presentation id>, "Order": 2 }  
    ]  
}
```

3. Save your changes.

Set Up Presentation Targeting

To help field users see the right materials and show content to the right audiences, target presentations to specific accounts and territories. Guide users to the most appropriate presentations for their context, or show users only presentations that are specifically targeted. Show warnings if sales reps add accounts that aren't targeted to a presentation, or prevent reps from adding accounts that aren't targeted.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up presentation targeting: Life Sciences Commercial Admin permission set

Before you set up presentation targeting, find the Source System IDs of the presentations from the App Launcher or from the Intelligent Content tile in the Admin Console. Source System IDs are unique, customer-provided IDs on presentation records.

1. To populate Provider Account Territory Info records and permissions, [run the Align Account to Territory batch job](#).
2. On each Provider Account Territory Info record, update the Targeted Presentation Information field. Enter a semicolon-delimited list of the presentation Source System IDs to target to that account and territory.

1111;2222

3. From the App Launcher, find and select **Admin Console**.
4. Select **Intelligent Content**, and then select **Presentation Settings**.
5. Under Targeted Presentation Settings, set the targeting context to determine the presentations that users can see and the accounts that they can add.

Warn	<p>Use the Warn context to guide users to the most appropriate content while still providing access to other presentations.</p> <ul style="list-style-type: none">• Sales reps can see which presentations are targeted for a healthcare professional (HCP) during a visit.• Sales reps can add accounts that aren't targeted to a presentation, but they see a warning.
Restrict	<p>Use the Restrict targeting context for regulated environments, sensitive content, or to enforce compliance.</p> <ul style="list-style-type: none">• Sales reps can see only presentations that are targeted for the current account during a visit.• Sales reps can add only targeted accounts to a presentation.

6. Save your changes.

Smart Content Search

Expand your search beyond just presentation names and metadata properties. Use Data 360 to create an index of searchable strings from your presentation content. In the content library, your field users can find presentations by searching within presentation content and see why presentations match their search terms.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

How the Search Index Works

To create a search index, Data 360 processes raw presentation file text, extracts its meaning, and chunks

presentation content into manageable, semantically meaningful units. Then, Data 360 generates vector embeddings from the chunks and adds them to your search index. The vector embeddings for your presentation content capture the meaning, context, and relationships between concepts.

After the vector embeddings are added to the search index, your field users can perform vector searches to find the right presentation quickly, even when they don't know the exact presentation title or tag. Vector searches return results based on your users' search intent and semantic similarity. Search results are ranked by a relevance score, and users only see presentations with a score of 75% or higher to ensure high confidence matches.

How Smart Content Search Works

In the content library, field users search to find approved presentations for interactions with healthcare professionals (HCPs). In a search for "autoimmune disease outcomes," smart content search returns presentations that contain content about autoimmune conditions, clinical outcomes, or related concepts and terminology. Search results for "heart disease" include presentations that discuss cardiovascular risk, cardiac outcomes, or coronary conditions, even if the content doesn't include the search terms.

Smart content search requires online access. When users are offline, search results include standard keyword-based matches on presentation names, tags, and metadata properties.

[Set Up Smart Content Search](#)

Use Data 360 to create a vector search index of searchable strings from your presentation content.

Set Up Smart Content Search

Use Data 360 to create a vector search index of searchable strings from your presentation content.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up Data Cloud: Data Cloud Architect permission set

To configure presentations and settings: Life Sciences Commercial Admin permission set

Before you set up smart content search, make sure that Data 360 is set up for your Salesforce org. See [Set Up Data 360 for Life Sciences Cloud for Customer Engagement](#).

 **Note** If you upload a presentation before you set up smart content search, the presentation content

isn't included in your search index. To make older content searchable, upload new versions of existing presentations.

1. [Deploy the Life Sciences Data Kit.](#)

The Life Sciences Data Kit sets up the presentation data streams, data model objects (DMOs), and data lake objects (DLOs) that support smart content search.

2. In Data 360, verify that these presentation data streams were created as part of the Life Sciences Data Kit installation. If you don't see these data streams, [create them manually](#).

- Presentation_Home
- PresentationPage_Home
- PresentationLinkedPage_Home

3. [Set up file attachment ingestion](#) so that Data 360 can ingest the files that are attached to presentation page records and include the file content in your search index.

This configuration sets up data streams for and maps DLOs and DMOs to these Salesforce objects.

- Content Document
- Content Document Link
- Content Version Home

4. [Create a vector search index](#) by using the advanced setup option and these values.

When you save your search index, take note of the search index configuration's API name. You need it when you configure presentation settings.

Page	Section, Field, or Button	Value
Search Type and Source Object	Select Search Type	Vector Search
Search Type and Source Object	Select Source Object	Presentation Page
Chunking	Select Fields to Chunk	Select at least one field to use for chunking.
Chunking	Include File Attachments	<p>Select Include File Attachments, and then select Content Document Version.</p> <p>This setting makes sure that the presentation page file attachments are included in the search index.</p>
Vectorization	Select embedding Model	<p>Select any model.</p> <p>The embedding model that you select affects search quality and relevance.</p>

5. Assign and update Data 360 permission sets.

- a. To enable users to search within presentation content in the content library, assign them the Data Cloud User permission set.
 - b. In the App Permissions for the Data Cloud Salesforce Connector permission set, make sure that the **Query Non Vetoed Files** permission is enabled.
6. In the Life Sciences Commercial app, configure presentation settings.
- a. From the Admin Console, select **Intelligent Content**, and then select **Presentation Settings**.
 - b. Under Search Settings, select **Use Data Cloud to search presentation content**.
 - c. Enter the API name of the Data 360 search index that you created for presentations and presentation pages.
 - d. Select the file types to include in your search index for presentation content.
We recommend indexing HTML files. PDF files are indexed automatically.
 - e. Save your changes.

See Also

[Billing Considerations for Unstructured Data and Search Index](#)

Send Presentations as Links

Help your users improve engagement with healthcare professionals (HCPs) by sending presentations as secure links. Field users can select multiple presentations and embed links automatically into approved email templates, and HCPs can review presentations in a dedicated portal without downloading email attachments. Links reflect the latest version of the presentation and expire after a defined amount of time, so HCPs know they're seeing the most up-to-date content. Rich engagement data—including pages viewed, time spent per page, and the HCP's navigation path—helps you to optimize presentations for future interactions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

When field users email presentations to HCPs, the presentation links are generated automatically just before the email is sent. To generate unique links, Salesforce creates a presentation party access record for each presentation, account, and sharing event that includes:

- The email recipient
- The start and end dates for when the link is valid
- The link's unique access identifier token

Links are valid only for the amount of time that you define, and recipients lose access to deactivated presentations automatically. If the HCP forwards the email or shares the link, the link expiration dates and visibility controls still apply.

1. Create an Experience Cloud Site for Presentations

Provide healthcare professionals (HCPs) with secure, token based access to a dedicated portal for reviewing presentations. When field users share presentations as email links, HCPs can view content in the presentation player without logging in or downloading attachments. In your Experience Cloud site, HCPs always see the latest version of the presentation content, and Life Sciences Cloud for Customer Engagement tracks presentation metrics and engagement data.

2. Configure Guest User Access for Your Presentation Site

Assign required permission sets so that healthcare professionals (HCPs) can open email links and view presentations in your Experience Cloud site without logging in.

3. Configure Email Templates and Presentation Settings

Update the email templates that support sharing presentations with healthcare professionals (HCPs). Configure presentations and settings so that field users can share presentations as unique links in the email content. Together, these settings provide control over where presentation links appear and what presentations users can share.

Create an Experience Cloud Site for Presentations

Provide healthcare professionals (HCPs) with secure, token based access to a dedicated portal for reviewing presentations. When field users share presentations as email links, HCPs can view content in the presentation player without logging in or downloading attachments. In your Experience Cloud site, HCPs always see the latest version of the presentation content, and Life Sciences Cloud for Customer Engagement tracks presentation metrics and engagement data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create an Experience Cloud site:

Create and Set Up Experiences

AND

Setup and Configuration

To customize or publish an Experience Cloud site:

Create and Set Up Experiences AND View Setup and Configuration AND be a member of the site

OR

View Setup and Configuration AND be a member

USER PERMISSIONS NEEDED

of the site AND have appropriate role-based site access

To assign Permission sets:	Manage Profiles and Permission Sets
----------------------------	-------------------------------------

Before you create an Experience Cloud site, [enable digital experiences](#).

1. [Create an Experience Cloud site](#) by using an Aura Template.
If you created an Experience Cloud site for remote engagement sessions, you can add a new page to that site instead.
2. From Builder, create a page for viewing presentations.
3. Select **Components** and then drag the **Presentation Player Digital Experience component** to the page.
You can find the Presentation Player Digital Experience component under Custom Components or by using the search bar.
4. For language support, select **Components** and drag the **Language Selector** component to the page.
5. In Properties, set Page Access to **Public**.
6. Publish the site.
7. [Assign the Access Presentation Player for Digital Experience permission set to guest users](#).
Updating the guest user profile allows healthcare professionals (HCPs) to view presentations in your Experience Cloud site without logging in.
8. [Grant accounts access to your Experience Cloud site](#).
These steps grant access to your sites to specific permission sets or profiles. If you have an Experience Cloud site for remote engagement sessions and you've granted access to the site, skip this step.
9. In the Builder's general settings for the page, find and save the presentation page URL. You need it when you configure presentation settings in Life Sciences Commercial.
This URL directs emailed links to open presentations in your Experience Cloud site.
10. Activate the site.

See Also

[Customize Sites with Experience Builder](#)

[Manage Your Site's Pages and Their Properties in Experience Builder](#)

Configure Guest User Access for Your Presentation Site

Assign required permission sets so that healthcare professionals (HCPs) can open email links and view presentations in your Experience Cloud site without logging in.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To customize or publish an Experience Cloud site:

Create and Set Up Experiences AND View Setup and Configuration AND be a member of the site

OR

View Setup and Configuration AND be a member of the site AND have appropriate role-based site access

To assign Permission sets:

Manage Profiles and Permission Sets

1. From Setup, in the Quick Find box, search for and select **All Sites** under Digital Experiences.
2. Select **Builder** next to your Experience Cloud site for presentations.
3. In the Builder, select **Settings**.
4. From the General settings, select the guest user profile.
The profile overview page opens in Setup.
5. Select **Assigned Users**.
6. Open the record for the Site Guest User that's associated with your Experience Cloud site.
The Site Guest User represents all unauthenticated visitors who access your Experience Cloud site from email links.
7. Under Permission Set Assignments, select **Edit Assignments**.
8. Move the Access Presentation Player for Digital Experience permission set to the Enabled Permission Sets list.
9. Save your changes.
Guest users can now open email links to view presentations in your Experience Cloud site.

Configure Email Templates and Presentation Settings

Update the email templates that support sharing presentations with healthcare professionals (HCPs). Configure presentations and settings so that field users can share presentations as unique links in the email content. Together, these settings provide control over where presentation links appear and what presentations users can share.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up email templates and configure presentation settings:

Life Sciences Commercial Admin permission set

Before you configure email templates and presentation settings, [create or update the Digital Experience site where HCPs can view presentations](#). Take note of the presentation page URL.

To help ensure compliance, you must complete four steps before users can send presentations as links:

- Add placeholders for links in the email template content.
- Configure the email template record.
- Configure sharing settings for presentations.
- Configure the presentation record.

When configured, users can share links to approved presentations only in email templates that are authored and configured for that purpose.

1. In the email template ZIP file, update the index.html file. Include this placeholder where you want presentation links to appear in the email.

```
<div class="LSC_PresentationLinks" ></div>
```

Just before the email is sent, Salesforce generates the presentation links and inserts them where you add this placeholder.

2. Upload the email template ZIP file and configure email templates in Life Sciences Commercial.
 - a. From the Admin Console, find and select **Email**, and then select **Email Templates**.
 - b. Create an email template or upload a new version of an existing template.
 - c. In the email template details, select **Send presentations as links**.
3. Configure sharing settings for presentations in Life Sciences Commercial.
 - a. From the Admin Console, find and select **Intelligent Content**.
 - b. Select Presentation Settings, and then scroll to Sharing Settings.
 - c. Select **Send presentations as links**.
You can also select **Send presentations as attachments** so that users can share presentations in both ways.
 - d. Enter how many days the links are valid for.
The presentation's activation and expiration dates, status, and any other visibility rules also control access to presentations.
 - e. Enter the URL of the Digital Experience site where HCPs can view presentations.
 - f. Save your changes.
4. In each presentation's settings, set which presentations sales reps can send by email.
Field users can email only these presentations to HCPs. Email actions aren't available for other presentations.
 - a. From the Admin Console, find and select **Intelligent Content**.
 - b. On the Presentations page, create a presentation or open an existing one to edit its settings.
 - c. In the presentation settings, select **Send presentation by email**.

- d. Repeat these steps for each presentation that you want sales reps to be able to share with HCPs as email links.

See Also

- [Create an Experience Cloud Site for Presentations](#)
- [Configure Presentation Settings](#)
- [Create Presentations by Uploading Pages](#)
- [Guidelines for Life Sciences Email Templates](#)

Understand Mandatory Pages in Presentations

Mandatory presentation pages help to keep interactions compliant by making sure that field users present specified key messages, disclaimers, or safety information. When you configure presentations, you can designate specific pages as mandatory to prevent users from bypassing or overlooking critical content.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Mandatory Pages in Setup

You designate pages as mandatory when you set up and manage presentations in the Admin Console. First, work with your legal or compliance teams to define the required pages for field users to present. Then, when you upload presentation files or when you edit presentation pages individually or in bulk, mark pages as mandatory.

When you define mandatory pages, keep these considerations in mind.

- Mandatory pages represent content that users must show at least one time per presentation session.
- You can mark one or more pages as mandatory within a presentation.
- If a mandatory page contains multiple slides, all slides within that page are mandatory.

Mandatory Pages in Custom Presentations

Life Sciences Cloud for Customer Engagement helps to make sure that custom presentations meet your organization's compliance guidelines. When your field users create custom presentations, required pages are denoted with an asterisk. If users add another page from a presentation that has mandatory pages, they must add all mandatory pages to their presentation. To remove a mandatory page, they must remove all other pages from that presentation too.

Mandatory Pages in the Presentation Player

During interactions with healthcare professionals (HCPs), users can navigate presentations freely in the content library and the presentation player. In the presentation player, Life Sciences Cloud for Customer Engagement:

- Denotes mandatory pages with an asterisk
- Tracks whether users have presented all mandatory pages
- Prevents users from closing or switching presentations before they share required content by displaying a message and highlighting the mandatory pages

Understand Presentation Metrics

When sales reps deliver presentations, metrics are tracked during the interaction so that you can get detailed insights into usage and performance. Engagement data is captured in presentation click stream entry records. To analyze engagement and improve presentation strategy, build custom reports and dashboards by using presentation click stream entry data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

When Metrics Are Tracked

When and how metrics are tracked can vary.

- The metrics that are tracked depend on whether settings such as participant tracking or presenter tracking are enabled.
- When sales reps present content during a visit, records are synced to Salesforce after the visit is saved or submitted.
- When you cancel a presentation, metrics aren't tracked.
- When session tracking is paused, metrics aren't tracked or associated with the related visit. Users see a reminder on each presentation and page so that they can start or resume tracking when it's appropriate.

What Metrics Are Tracked

Each page in the presentation can contain multiple slides, and one record is created for each slide presented. Metrics are tracked when users spend at least 3 seconds on a slide.

Tracked metrics for each slide can include:

- Presentation details, including pages and content versions.
- Products, messages, and guidance related to presentation pages.
- Information about the related healthcare professional (HCP) account and the visit or remote engagement during which metrics were captured.
- Details about how the participant accessed the presentation, including their browser, device type, and operating system.
- Timestamps for when the user opened and left a page, and the total time spent on the page.
- Content feedback from the participant during or after the presentation.

For details about all metrics collected, see [PresentationClickStrmEntry](#) in the Life Sciences Cloud Developer Guide.

See Also

[Reports and Dashboards](#)

Intelligent Content Reference

Create the content and source files for Life Sciences Customer Engagement presentations and email templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Guidelines for Life Sciences Email Templates](#)

Create predefined email templates with dynamic variables, rich text, content fragments, and advanced queries so that field users can send personalized emails to healthcare professionals (HCPs). In the email template ZIP file, include structured layouts, images, text, fragments, and attachments. Then, admins can upload the ZIP files to Life Sciences Customer Engagement and create email templates.

[Guidelines for Life Sciences Presentations](#)

Create presentation source files that admins can upload to Life Sciences Customer Engagement and distribute to sales reps. To personalize content for healthcare professionals (HCPs) and healthcare organizations (HCOs), include dynamic content in presentation files. Life Sciences Customer Engagement supports two types of source files for presentations: ZIP files and PDFs.

Guidelines for Life Sciences Email Templates

Create predefined email templates with dynamic variables, rich text, content fragments, and advanced queries so that field users can send personalized emails to healthcare professionals (HCPs). In the email template ZIP file, include structured layouts, images, text, fragments, and attachments. Then, admins can upload the ZIP files to Life Sciences Customer Engagement and create email templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Email Template ZIP Files

Create a ZIP file that contains email template data. In Life Sciences Customer Engagement, admins upload these ZIP files to create and share email templates with field users.

Dynamic Capabilities for Email Templates

Life Sciences Customer Engagement uses a Mustache template processor to process and display dynamic content in email templates. Before a page loads, data is collected as a JSON string and fed into the Mustache template processor, which uses it to fill in the content placeholders in the email template. In the Send Email window, users see the populated email template.

Email Template ZIP Files

Create a ZIP file that contains email template data. In Life Sciences Customer Engagement, admins upload these ZIP files to create and share email templates with field users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

In each email template ZIP file, include these content types.

Content	Required	Description
Index HTML File	Required	An HTML file that contains the HTML code for the email template. Salesforce inserts the HTML file content into email bodies. The file name must be index.html. To use several languages within a single email template so that users can send emails based on the recipient's language, include

Content	Required	Description
		<p>1 additional index.html file for each language in the ZIP file. In the file name, include a language suffix to match the ISO code, for example, index_en_US.html or index_fr.html. ISO codes are case-sensitive.</p>
Thumbnail File	Required	<p>A JPG file to use as the preview image for the email template. The file name must be thumbnail.jpg.</p> <ul style="list-style-type: none"> • The thumbnail file size limit is 2.97MB. • The optimal image resolution is 220x280 pixels.
Attachments Folder	Optional	<p>A folder that contains email attachments. The folder name must be attachments.</p> <ul style="list-style-type: none"> • These attachment formats are supported: <ul style="list-style-type: none"> - Documents - Images - Audio - Video - Archives • To mark attachments as required, include a required__ prefix in the file name. Users can't deselect, modify, or remove these attachments. • Attachment file names can't include semicolons. • For emails to process correctly, attachments must be under 6

Content	Required	Description
		MB.
Fragments Folder	Optional	A folder of fragments, which are HTML content blocks that users can combine in the email body text to customize the email. The folder name must be <code>fragments</code> .

This example email template shows the customer's name and the sales rep's name. For information about the attributes that you can include in the template, see [Supported Attributes in Email Templates](#).

```
<!DOCTYPE html>
<html>
  <body>
    <p>
      Hi {{recipient.name}}, this is an email from a {{sender.firstname}}
      {{sender.lastname}}
    </p>
  </body>
</html>
```

Dynamic Capabilities for Email Templates

Life Sciences Customer Engagement uses a Mustache template processor to process and display dynamic content in email templates. Before a page loads, data is collected as a JSON string and fed into the Mustache template processor, which uses it to fill in the content placeholders in the email template. In the Send Email window, users see the populated email template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Supported Attributes in Email Templates](#)

Using Mustache variables, you can access Life Sciences Customer Engagement attributes dynamically from an email template.

Supported Content in Email Templates

Add additional content into email template HTML and ZIP files.

JSON Structure for Email Templates

Understand the hierarchy and structure of the JSON properties that are available to the Mustache template processor in Life Sciences Customer Engagement email templates.

Querying Data in Email Templates

Query Life Sciences Customer Engagement data in email templates and show results in emails.

Supported Attributes in Email Templates

Using Mustache variables, you can access Life Sciences Customer Engagement attributes dynamically from an email template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

These attributes are supported only for email templates in the Life Sciences Cloud mobile app. When users send emails on desktop, only attributes on the user and account objects, which represent the email sender and recipient, are supported.

Supported Formula Fields

Formula fields are supported as variables in Life Sciences email templates only for the user and account objects, which represent the email sender and recipient.

All [standard formula operators and functions](#) are supported in the Life Sciences Customer Engagement mobile app except for these.

- CURRENCYRATE
- DISTANCE
- GETRECORDIDS
- GETSESSIONID
- HTMLENCODE
- HYPERLINK
- IMAGEPROXYURL
- INCLUDE
- ISCLONE
- JSENCODE
- JSINHTMLENCODE
- JUNCTIONIDLIST

- LINKTO
- REQUIRESCRIPT
- URLENCODE
- URLFOR
- VLOOKUP

Supported Object Attributes

All populated fields on these objects and their associated objects are supported as variables in Life Sciences email templates. If you use lookup or relationship fields as variables, the ID of the related record shows in the email body. Enter all field names in lowercase.

Object	Description	Format
sender	Fields on the User object, which represents the email sender.	<code>{ {sender.fieldname} }</code>
sender.userAdditionalInfo	Fields on the associated UserAdditionalInfo object.	<code>{ {sender.useradditionalinfo.fieldname} }</code>
sender.lifeScienceMobileApp	Fields on the associated LifeScienceMobileApp record.	<code>{ {sender.lifescimobileapp.fieldname} }</code>
recipient	Fields on the Account object, which represents the email recipient.	<code>{ {recipient.fieldname} }</code>
recipient.healthcareProvider	Fields on the associated HealthcareProvider object.	<code>{ {recipient.healthcareprovider.fieldname} }</code>
recipient.healthcareProviderSpecialty	Fields on the associated HealthcareProviderSpecialty object. Returns a single primary specialty. Returns only active records that are set to isPrimary, ordered by preference rank.	<code>{ {recipient.healthcareproviderspecialty.fieldname} }</code>
recipient.contactPointAddress	Fields on the associated ContactPointAddress object. Addresses are used in this order. <ul style="list-style-type: none"> • If the preferred address is set 	<code>{ {recipient.contactpointaddress.fieldname} }</code>

Object	Description	Format
	<p>on the related ProviderAcctTerritoryInfo, that address is used.</p> <ul style="list-style-type: none"> • If the preferred address isn't set but a related ContactPointAddress record is set to primary, that address is used. • Otherwise, the primary address that was created most recently is used. • If there's no recent primary address, the address that was created most recently is used. 	
recipient.contactPointEmails	<p>Fields on the associated ContactPointEmail object.</p> <p>Returns only records that are set to isPrimary, ordered by preference rank.</p>	<pre>{ {recipient.contactpointemails.0.fieldname} }</pre>
recipient.contactPointPhones	<p>Fields on the associated ContactPointPhone object.</p> <p>Returns only records that are set to isPrimary, ordered by preference rank.</p>	<pre>{ {recipient.contactpointphones.0.fieldname} }</pre>
recipient.contactPointSocials	<p>Fields on the associated ContactPointSocial object.</p> <p>Returns the records that were updated most recently first.</p>	<pre>{ {recipient.contactpointsocials.0.fieldname} }</pre>
visit	<p>Fields on the Visit object.</p> <p>Supported in email templates for remote engagement invitations.</p>	<pre>{ {visit.fieldname} }</pre>
visit.providerVisit	Fields on the associated ProviderVisit object.	<pre>{ {visit.providervisit.fieldname} }</pre>

Supported Variables

These variables are supported in email templates.

Variable	Description
<i>surveyDeveloperName</i>	The developer name of a survey. To reference this variable, include <code> {{surveyDeveloperName}} </code> in the email template.
<i>surveyInvitationLink</i>	A link to a survey. To reference this variable, include <code> {{surveyInvitationLink}} </code> in the email template.
<i>remotesession.url</i>	The URL that's generated for a remote session with a specific account. This variable is supported in email templates for remote engagement invitations.

Supported Content in Email Templates

Add additional content into email template HTML and ZIP files.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Date/Time Picker

Add a date, time, or date and time picker to an email template.

Add a date picker without a predefined date so that the current date is prepopulated. Use a `span` element with the `LSC_DateTimeInput` class, for example:

```
<span class="LSC_DateTimeInput">
</span>
```

Add a time picker without a predefined time so that the current time is prepopulated. Use a `span` element with the `LSC_DateTimeInput` class and a `time` attribute, for example:

```
<span class="LSC_DateTimeInput" time>  
</span>
```

Add a time picker without a predefined time and with a time zone stamp so that the current time is prepopulated with the time zone. Use a `span` element with `LSC_DateTimeInput` class and a `time timezone` attribute, for example:

```
<span class="LSC_DateTimeInput" time timezone>  
</span>
```

Add a date or time picker with a predefined value. Use a `span` element with `LSC_DateTimeInput` class, and include the predefined date or time value inside the class, for example:

```
<span class="LSC_DateTimeInput">  
30/07/2025  
</span>
```

Deep Link Tokens

Add the ability to use a token and a link within an email template so that healthcare professionals (HCPs) can easily open and log into their company site. A Salesforce admin must first add a custom field to the account object to store the required tokens. For example, a Salesforce admin adds these custom fields to the account object.

- `orchestrationlogintokenlong__c`
- `orchestrationlogintokenthshort__c`

In the email template, you can use these Mustache variables to insert the token into the link.

- `{{recipient.orchestrationlogintokenlong__c}}`
- `{{recipient.orchestrationlogintokenthshort__c}}`

For example, this link uses a token.

```
https://examplesite.com/portal?token={{recipient.orchestrationlogintokenlon  
g__c}}
```

Dropdown Fields and Values

Add dropdown fields with predefined text or URL values to an email template. Users can select these sections or tags in the template and preview the content before they send the email.

To add a dropdown and values, use a `span` element with the `LSC_DropDownInput` class. These attributes are supported.

Attribute	Description
option	The predefined values for the dropdown. You can configure several options, but users can select only one.
default	The default value for the dropdown.
link	A dropdown value that's a URL link. Include the URL address and link text.
subject	<p>Dropdown values with this parameter can override the email template subject so that users can select from predefined email subjects.</p> <p>The subject parameter supports recipient attributes, for example, “Hello, dear {{recipient.fieldname}}.”</p>

See this example.

```
<span class="LSC_DropDownInput">
<span>option1</span>
<span link="https://www.google.com">option2</span>
<span default>option3</span>
</span>
<span class="LSC_DropDownInput" subject>
<span>option1 subject</span>
<span default link="https://www.google.com">option2 subject</span>
<span>option3 subject</span>
</span>
```

Fragments

Email fragments are pieces of HTML code that users can select and combine in the body of an email to customize the content. In the email template ZIP file, add the email fragments in the `fragments` folder. Fragment file names are mapped to fragment record names in Salesforce.

To enable users to select fragments in the email body, add the `LSC_EmailFragments` class to the template's `index.html` file. These attributes are supported.

Attribute	Description
min	<p>The minimum number of fragments that users can select for the template.</p> <ul style="list-style-type: none"> • To make fragment selection optional, set <code>min="0"</code>. • To make fragment selection mandatory, enter any number that's greater than 0.
max	<p>The maximum number of fragments that users can select for the template.</p>

See this example.

```
<table class = "LSC_EmailFragments" min="1" max="3">
</table>
```

When you include fragments in your email template, keep these considerations in mind.

- Enclose fragments in a `<table>` tag.
- To render fragments correctly, enclose fragments in `<tr><td>` tags.
- To include images or links, use the `<a href>` tag.
- You can include other attributes supported for Life Sciences Customer Engagement.
- You can't include HTML start and end tags, such as `<HTML>` or `<BODY>`.

See this fragment example.

```
<tr>
  <td>
    <table>
      <tr>
        <td>
          <a href="https://www.google.com/">Link</a>
        </td>
      </tr>
    </table>
  </td>
</tr>
```

Presentation Links

Add a placeholder for presentation links where you want links to appear in the email content. In the

Send Email window, users can see the presentation names and links, reorder them, and delete them. When users share presentations, links are generated automatically and inserted in the email. See [Send Presentations as Email Links](#).

To add a rich text section in an email template, add an element with the `LSC_PresentationLinks` class, for example:

```
<div class="LSC_PresentationLinks">  
</div>
```

Rich Text Section

Add a rich text section to the email template. When users preview email content, they can select these sections to enter and format text before they send the email.

To add a rich text section in an email template, add an element with the `LSC_RichTextInput` class, for example:

```
<div class="LSC_RichTextInput">  
</div>
```

When you include a rich text section in your email template, keep these considerations in mind.

- To make the rich text field mandatory, add the `required="true"` attribute.
- To use the `LSC_RichTextInput` class with predefined text, include only the text, text tags, such as `<p>` and ``, and text formatting tags, such as `<i>` and ``.
- The template styling controls the text size in the rich text section.

When users send emails, the text editor supports these options.

- Bold text
- Italic text
- Underlined text
- Strikethrough text
- Align left
- Align center
- Align right
- Numbered list
- Bulleted list
- Indent formatting
- Outdent formatting

User Pictures

To add a user picture in the email template, include this code in the template's HTML where you want the picture to appear. These attributes are supported.

Attribute	Description
height	The picture's height, in pixels.
width	The picture's width, in pixels.
alt	The text that users see when they hover over the image.

See this example.

```
{ {{#sender.useradditionalinfo.userpictureurl}}

{{/sender.useradditionalinfo.userpictureurl}}
```

JSON Structure for Email Templates

Understand the hierarchy and structure of the JSON properties that are available to the Mustache template processor in Life Sciences Customer Engagement email templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

In the Life Sciences Cloud mobile app, all populated account and user fields, along with the associated objects, are available in lowercase within the JSON. Formula fields aren't included.

```
{
  "sender" : {
    "firstname" : "John",
    "lastname" : "Doe",
    "username" : "john.doe@company.com",
    "email" : "john.doe@company.com",
    ...
    "useradditionalinfo" : {
```

```
        "userpictureurl" : "https://publicurltopicture.com/use  
r-picture",  
        "secondaryphone" : "555-5555",  
        ...  
        "secondaryemail" : "jdoe@anotheremail.com"  
},  
"lifesciencemobileapp" : {  
        "devicemetadataversion" : ""  
        ...  
        "isdownloadsyncsuccessful" : true  
}  
,  
"recipient" : {  
        "firstname" : "Jane",  
        "lastname" : "Smith",  
        "personemail" : "jane.smith@recipient.com",  
        ...  
        "healthcareprovider" : {  
            "providertype" : "Medical Doctor",  
            ...  
            "phoneticname" : "Jayn Doe"  
        },  
        healthcareproviderspecialty : {  
            "specialtycode" : "1234567",  
            ...  
            "specialtytype" : "Oncology"  
        }  
        contactpointaddress : {  
            "addresstype" : "Business",  
            ...  
            "address" : "123 Main St, San Francisco, CA, 94115"  
        },  
        contactpointemail : [  
        {  
            "emailaddress" : "jsmith@companyemail.com",  
            ...  
            "preferencerank" : "1"  
        },  
        {  
            "emailaddress" : "jsmith2@companyemail.com"  
            ...  
        }  
    ],  
    contactpointphones : [
```

```
{
    "telephonenumber" : "555-5550",
    ...
    "isprimary" : true
},
{
    "telephonenumber" : "555-5551",
    ...
}

],
contactpointsocials : [
{
    "socialplatformprovider" : "Facebook",
    ...
    "socialhandlename" : "Jane Doe"
},
{
    "socialplatformprovider" : "Twitter"
    ...
}
],
},
"visit" : {
    "status" : "Planned",
    ...
    "visitpriority" : "High",
    "providervisit" : {
        "isadhocprovidervisit" : true,
        ...
        "isconfirmed" : true
    }
},
"surveyinvitationlink" : "https://invitationtosurvey.com/link",
"surveydevelopername" : "Survey Developer Name",
"remotesession.url" : "https://urltosession.com/session-id"
}
```

This code enables you to use the raw JSON that's supplied to the Mustache template processor as a JavaScript object variable.

```
<script type="text/javascript">
<script type="text/javascript">
    var allData = {{ . }};
```

```
</script>
```

Querying Data in Email Templates

Query Life Sciences Customer Engagement data in email templates and show results in emails.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[doLoad Function](#)

Executes code automatically as soon as the Life Sciences email loads.

[fetchWithParams Function](#)

Queries Life Sciences Customer Engagement data and returns results to the specified callback method.

[fetchValidationFailed Function](#)

Prevent sending emails with empty or invalid query data in Life Sciences Customer Engagement.

doLoad Function

Executes code automatically as soon as the Life Sciences email loads.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Syntax

```
doLoad()
```

Usage

Include any code that you want to execute automatically when the template loads inside of this method.

Example

```
function doLoad() {  
    EmailTemplate.fetchWithParams(  
        'SELECT Id, Name FROM Account WHERE Id = \'{{recipient.id}}\'',  
        {'batchSize' : 20},  
        'getAccountRecordsCallback'  
    )  
}
```

fetchWithParams Function

Queries Life Sciences Customer Engagement data and returns results to the specified callback method.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Syntax

```
EmailTemplate.fetchWithParams (query, params, callbackMethod)
```

Arguments

Argument	Description
query	The query as a string.
params	<p>Optional. The ability to specify the batch size.</p> <p>In the params argument, use the batchSize attribute to set the number of records to return. A maximum of 100 records can be returned in each call. This example returns 75 records.</p> <pre>EmailTemplate.fetchWithParams ('SELEC T Id FROM Account', {'batchSize': 75})</pre>

Argument	Description
	<pre>5} , 'processFetch');</pre>
callbackMethod	<p>The name of the JavaScript method that represents the queried results in the email and handles errors.</p> <p>Enclose the callback method in single or double quotes.</p>

Usage

- You can fetch 100 records at once.
- To fetch related records, use a separate query.
- You can use aggregated and relationship queries.

JavaScript Support

In the email template HTML, place JavaScript scripts inside the `<script type="text/javascript">` tag.

To make sure that JavaScript scripts execute in order, avoid using asynchronous functions such as `setTimeout`, `setInterval`, and `promises`. Otherwise, Life Sciences Customer Engagement doesn't know when the template body is complete and ready for users to preview content or send emails.

Limitations

- You can't query Long Text Area-type fields with a `WHERE` clause.
- Child relationship queries such as `SELECT Id, (SELECT Id FROM Contacts) FROM Account` aren't supported.
- Avoid using global CSS styles, for example `div {background: red}`, as global styles are applied to the whole page. Instead, use parent based styles such as `.some-custom- container-class div {background: red}`.

Results

In the Life Sciences Cloud mobile app, these events are logged so that you can identify how many times the function executes in the email.

- Delete
- Upsert

- Fetch
- Target isn't specified

Example

This example email template uses the `doLoad` and `EmailTemplate.fetchWithParams` functions.

```
<!DOCTYPE html>
<html>
    <script type="text/javascript">
        function doLoad() {
            EmailTemplate.fetchWithParams('SELECT Id, Name FROM Account', {'batchSize': 100}, 'getAccountRecordsCallback2');

            EmailTemplate.fetchWithParams('SELECT Id, Name FROM Account', {'batchSize': 1}, 'getAccountRecordsCallback3');
        }

        function getAccountRecordsCallback2(data) {
            if(data.state === 'success') {
                const mustacheTarget = document.querySelector('#mainDiv2');
                const html = data.records.map((el)=>{
                    if(el.Name) {
                        return '<div class="renderedData">' +
                            '<span>' + el.Name + '</span>' +
                            '</div>';
                    }
                    EmailTemplate.fetchValidationFailed('No Name');
                }).join('');
                const div = document.createElement('div');
                div.innerHTML = html;
                mustacheTarget.append(div);
            }
        }

        function getAccountRecordsCallback3(data) {
            if(data.state === 'success') {
                const mustacheTarget = document.querySelector('#mainDiv3');
                const html = data.records.map((el)=>{
                    if(el.Name) {
                        return '<div class="renderedData">' +
                            '<span>' + el.Name + '</span>' +
                            '</div>';
                    }
                    EmailTemplate.fetchValidationFailed('No Name');
                }).join('');
                const div = document.createElement('div');
                div.innerHTML = html;
                mustacheTarget.append(div);
            }
        }
    </script>

```

```
        }).join('');
    const div = document.createElement('div');
    div.innerHTML = html;
    mustacheTarget.append(div);
}
}
</script>
<body>
<title>Email query example with batch</title>

<h1>Email query example with batch</h1>
<h2>Account object (batch = 100):</h2>

    <p>EmailTemplate.fetchWithParams will pass the Names from Account object (batch = 100):</p>
    <div id="mainDiv2"></div>

<h2>Account object (batch = 1): </h2>
    <p>EmailTemplate.fetchWithParams will pass the Names from Account object (batch = 1):</p>
    <div id="mainDiv3"></div>
</body>
</html>
```

fetchValidationFailed Function

Prevent sending emails with empty or invalid query data in Life Sciences Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Syntax

`EmailTemplate.fetchValidationFailed (string)`

Arguments

Argument	Description
string	<p>Optional. Contains a specific error message that users see when the query fails for a specific recipient. If left blank, users see the default error message.</p> <p>After users remove the account from the list of recipients, they can send the email.</p>

Usage

Add the `EmailTemplate.fetchValidationFailed (string)` function in addition to `EmailTemplate.fetchWithParams (query, CallbackMethod)`.

Example

This example uses the `EmailTemplate.fetchValidationFailed` function with the `doLoad()` and `EmailTemplate.fetchWithParams` functions.

```
<html>
    <script type="text/javascript">

        function doLoad() {
            EmailTemplate.fetchWithParams('SELECT Id, Name FROM Account WHERE Id = 
\'' + {{recipient.id}} + '\'', {'batchSize': 100}, 'getAccountRecordsCallback');
        }

        function getAccountRecordsCallback(data) {
            if(data.state === 'success') {
                const mustacheTarget = document.querySelector('#mainDiv');
                const html = data.records.map((el)=>{
                    //Validates that the name field isn't empty.
                    if(el.Name) {
                        return '<div class="renderedData">' +
                            '<span>' + el.Name + '</span>' +
                            '</div>';
                    } else {
                        //Marks the email invalid.
                        EmailTemplate.fetchValidationFailed('Type is missing');
                    }
                });
                mustacheTarget.innerHTML = html;
            }
        }
    </script>
</html>
```

```
        }

        }).join('');
        const div = document.createElement('div');
        div.innerHTML = html;
        mustacheTarget.append(div);
    }
}

</script>
<body>
    <p>Account Name:</p>
    <div id="mainDiv"></div>
</body>
</html>
```

Guidelines for Life Sciences Presentations

Create presentation source files that admins can upload to Life Sciences Customer Engagement and distribute to sales reps. To personalize content for healthcare professionals (HCPs) and healthcare organizations (HCOs), include dynamic content in presentation files. Life Sciences Customer Engagement supports two types of source files for presentations: ZIP files and PDFs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

When you create source files for Intelligent Content presentations, design content to be responsive for different iOS devices.

[ZIP Files as Sources for Presentations](#)

To use ZIP files as the source for Intelligent Content presentations, create a separate ZIP file for each page in the presentation. In each individual ZIP file, include the HTML content for the presentation page. In Life Sciences Customer Engagement, pages are grouped into presentations, and each page shows separately in the presentation player. Admins can also associate each presentation page with a product and a key message, and Salesforce tracks presentation metrics for each page so that you can analyze and improve performance over time.

[PDFs as Sources for Presentations](#)

To create PDF source files for Intelligent Content presentations, include all presentation content in a single PDF. Each page of the PDF source file shows as a separate presentation page in the presentation player.

Best Practices to Send Presentations in Emails

Follow this guidance when you create presentation source files to send in emails in Life Sciences Customer Engagement.

Dynamic Capabilities for Presentations

Life Sciences Customer Engagement uses a presentation player that's powered by a Mustache template processor to display dynamic content. Before a page loads, data is collected as a JSON string and fed into the template processor, which uses it to fill in the content placeholders on the presentation page. In the presentation player, users see the fully populated presentation page.

ZIP Files as Sources for Presentations

To use ZIP files as the source for Intelligent Content presentations, create a separate ZIP file for each page in the presentation. In each individual ZIP file, include the HTML content for the presentation page. In Life Sciences Customer Engagement, pages are grouped into presentations, and each page shows separately in the presentation player. Admins can also associate each presentation page with a product and a key message, and Salesforce tracks presentation metrics for each page so that you can analyze and improve performance over time.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Life Sciences Customer Engagement downloads presentations and pages, and the presentation player runs the HTML, CSS, and JavaScript code to show each page.

Presentation Page Contents

In the ZIP file for each presentation page, include these items.

Content	Required	Description
HTML files	Required	<p>HTML files contain the code for each slide. For each HTML file name, use the format XX_name.html, where XX is the slide number. Start at page 01, and increment sequentially for each additional page.</p> <p>In the HTML files, refer to CSS</p>

Content	Required	Description
		and JavaScript files for styles and actions.
A JPEG file	Required	<p>JPEGs represent each page's thumbnail. For each JPEG file name, use the format <code>XX_thumbnail.jpg</code>, where XX is the page number.</p> <p>Limit the thumbnail size to less than 3050 KB or 2.97 MB. The optimal resolution for each image is 328 by 232 pixels. For other resolutions, the image uses the Aspect Fill method.</p>
CSS and JavaScript files	Optional	Static resources that the HTML files reference.

File Name Recommendations for ZIP Source Files

Follow these guidelines for PDF file names. When admins upload presentation ZIP files to Life Sciences Customer Engagement, presentation pages are sorted alphabetically.

- Use the format `XX_name.zip` for each page's ZIP file name, where XX is the page number and name is a descriptive title. The page number can't be longer than 2 characters. The descriptive title must contain at least 2 characters.
- Limit the file name size to 960 bytes or fewer.
- Valid characters are A-Z, a-z, and 0-9.
- HTML file names can't include spaces.
- For presentations that admins upload in Life Sciences Customer Engagement:
 - These special characters are supported: -, ., _, !, *, ', (,)
 - These special characters aren't supported: /, \, and combinations `` and `''.
 - We recommend avoiding any other special characters.
- For presentations uploaded via the content management Connect API, special characters aren't supported.
- File extensions are case-sensitive and must be in lowercase, for example, `.jpg`.
- Double-byte kana, katakana, and numbers are supported, but different operating systems can cause mutations.

Content Recommendations for ZIP Source Files

-  **Note** If you create ZIP files on MacOS, the ZIP file can include a system folder. Make sure that you remove any system folders before admins upload ZIP files to Life Sciences Customer Engagement.

Follow these guidelines for presentation content in ZIP source files.

- Each ZIP file must contain at least one HTML file and its corresponding thumbnail JPEG file. For example, `02_secondSlide.html` and `02_thumbnail.jpg`.
- Each HTML file must include a corresponding thumbnail.
- Thumbnails must be in JPEG format. PNG and GIF files aren't supported.
- If one presentation page ZIP file contains more than 100 slides, we recommend creating separate page ZIP files for every set of 100 slides.
- Each presentation page ZIP file must be 1 GB or smaller.
- CSS and JavaScript files aren't required in presentation page ZIP files.
- In each presentation page ZIP file, you can include multiple HTML, JPEG, CSS, and JavaScript files.
- HTML and JPEG files must be at the top level in each presentation page ZIP file. If you include multiple CSS and JavaScript files, you can create folders for these.
- If you create a presentation as one HTML file and use `<div>` elements to represent each page, the content appears as a single presentation page in the presentation player.

Adding PDFs to Presentations

You can include video files in presentation page ZIP files and refer to the videos in a presentation page's HTML code. This example presentation page HTML code includes a reference to a PDF.

```
<a href="dam/iselling/pdf/example.pdf">EXAMPLE PDF FILE</a>
```

Adding Videos to Presentations

You can include video files in presentation page ZIP files and refer to the videos in a presentation page's HTML code. The video appears on that page in the presentation. The presentation player supports these video formats. In the HTML code, include the `type` attribute.

Video Format	HTML Type Attribute
MP4	"video/mp4"
MOV	"video/quicktime"
M4V	"video/x-m4v"

This example presentation page HTML code includes a reference to an MP4 video file.

```
<video width="320" height="240" controls> <source src=".//assets/movie.mp4" type="video/mp4"> Your browser does not support the video tag. </video>
```

Using Videos for Remote Engagement

Videos are supported for remote sessions when your Salesforce org uses Twilio as the service provider. Embedded videos and animation can behave differently in the presentation player during remote sessions. To include animations, we recommend using HTML or JavaScript code instead.

Linking to External Content in Presentations

You can link to external web pages from the presentation page HTML code. Links to PDFs or external content always open in a separate window. To link to an external web page, use this format.

```
<a href="https://www.google.com/">Google.com</a>
```

For details about the characters that you can include in URLs, see the RFC 3986 standard.

Adding Additional Content to Presentations

In presentation ZIP files, you can add additional content as PDF files and use links to reference those files from any page in the presentation. To mark a PDF as additional context, add `isadditionalcontent_` as a prefix in the file name. To link to an additional content PDF file, use the `gotoSlide()` function.

When admins upload additional content as part of a ZIP file presentation in Life Sciences Customer Engagement, the Additional Content checkbox is selected automatically on the presentation page record. Admins can also upload additional content PDFs as presentation source files when they upload or update presentations in bulk.

Using iFrame in Presentations

You can use iFrames in the presentation page HTML code. Scrolling is supported within the iFrame. These attributes are supported.

- `allow`
- `height`
- `name`
- `sandbox`
- `src`
- `srcdoc`
- `width`

Optimizing ZIP File Performance on iPad

To make sure that presentations load quickly and perform well on iPads, follow these guidelines when you build presentation page ZIP files.

- Compress images before you add them to presentations.
- Avoid adding extensive JavaScript logic to each page, such as navigation bars, tabs, tooltips, and dropdown menus.
- Don't use a content management system (CMS) to generate pages, as the CMS can add unnecessary code and slow down page load times.
- Divide complex pages into multiple simple pages. For example, if you have one page with horizontal or vertical tabs, create a separate page for each tab instead.
- Add a background, a simple image, or a color to the body tag that shows when the page is loading.
- Make sure that users are using supported mobile devices.

Example HTML Page in ZIP File Presentations

This example HTML page lists all customers and prints their names.

```
<!DOCTYPE html>
<html>
  <head>
    <link type="text/css" rel ="stylesheet" href="media/css/style.css">
  </head>
  <body>
    <div id="screen-container">
      HELLO
      {{#customers}} <!--this is a mustache loop -->
        <span id="doc_name" class="template">{{firstName }} {{ lastName}}
      {{/customers}}
      ,<br/>DO YOU WANT TO START THE VISIT?</span>
    </div>
  </body>
</html>
```

PDFs as Sources for Presentations

To create PDF source files for Intelligent Content presentations, include all presentation content in a single PDF. Each page of the PDF source file shows as a separate presentation page in the presentation player.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

File Name Recommendations for PDF Source Files

Follow these guidelines for PDF file names.

- Limit the file name size to 960 bytes or fewer.
- Valid characters are A-Z, a-z, and 0-9.
- For presentations that admins upload from Life Sciences Customer Engagement:
 - These special characters are supported: -, ., _, !, *, ', (,)
 - These special characters aren't supported: /, \, and combinations `“ and `”.
 - We recommend avoiding any other special characters.
- For presentations uploaded via the content management Connect API, special characters aren't supported.
- Format file extensions in lowercase.
- Double-byte kana, katakana, and numbers are supported, but different operating systems can cause mutations.

Content Recommendations for PDF Source Files

Follow these guidelines for presentation content in PDF source files.

- Upload landscape versions of the PDF files.
- Create PDF presentations that are less than 1 GB or 200 pages.
- To make sure that PDF content displays correctly on iOS, test PDFs in the Preview app on an Apple device.
- To avoid performance issues and make sure that PDFs render correctly on devices with low memory, optimize the PDF file structure. For example, use the print production tools in Adobe Acrobat to flatten the PDF. We recommend these parameters:
 - Raster/Vector Balance: 0
 - Line Art and Text resolution: 160 pixels per inch (PPI), or up to 192 PPI for newer iPad Pros
 - Gradient and Mesh resolution: 160 PPI, or up to 192 PPI for newer iPad Pros
 - Color: JPEG
 - Apply to PDF: All pages in document
- To create thumbnail images, PDF pages are cropped based on the first page's crop box. To show full images, remove the crop marks, or set the crop box to fit the part of the page that you want to show.
- To enable navigation between pages in the presentation player, add navigation links to specific pages in the PDF presentation source file.

Limitations for PDF Source Files

Videos aren't supported in PDF source files for presentations.

Best Practices to Send Presentations in Emails

Follow this guidance when you create presentation source files to send in emails in Life Sciences Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

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- In ZIP source files for presentations, also include a PDF file of the presentation. The PDF file is sent as the email attachment.
- To make the page or presentation file mandatory, add the `required_` prefix to the file name in the email template ZIP file. If the presentation is marked as required, users can't deselect the attachment when they send an email that uses the template.
- When an admin user uploads a PDF or ZIP file, the files are uploaded to Salesforce. When the PDF is less than 3 MB, it's attached to the presentation page record by default. For files that are larger than 3 MB, add the PDF file to the presentation page's files manually.

Dynamic Capabilities for Presentations

Life Sciences Customer Engagement uses a presentation player that's powered by a Mustache template processor to display dynamic content. Before a page loads, data is collected as a JSON string and fed into the template processor, which uses it to fill in the content placeholders on the presentation page. In the presentation player, users see the fully populated presentation page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Before each page loads in the presentation player, data for each presentation and the associated visit are collected and provided as a JSON string so that the Mustache template processor can populate placeholders on the presentation page. The JSON data can also be stored as a JavaScript variable, allowing for direct access in presentation ZIP files.

Supported Attributes in Presentations

Using Mustache variables, you can access Life Sciences Customer Engagement attributes dynamically from presentation ZIP files.

JSON Structure for Presentations

Understand the hierarchy and structure of the JSON properties that are available to the Mustache template processor for Intelligent Content presentations.

Presentation Player Functions

You can include JavaScript code in the presentation ZIP file for Life Sciences Customer Engagement. When the JavaScript function is called during presentations, the action is performed in the presentation player.

Callback Event Function

When an event occurs in the Life Sciences Cloud mobile app, you can use a callback event function to notify the page's JavaScript, HTML, or template. For example, events can be triggered when users pause or resume tracking presentation metrics.

Supported Attributes in Presentations

Using Mustache variables, you can access Life Sciences Customer Engagement attributes dynamically from presentation ZIP files.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Keep these considerations in mind when you reference Salesforce objects and fields as variables in presentation ZIP files.

- Formula and lookup fields aren't supported.
- When you reference a standard Salesforce field, don't use a prefix or suffix.
- When you reference a custom field in your Salesforce org, use the custom suffix `_c`.
- Format mustache variables in lowercase, for example, `accounttype`.
- Users must have access to the Salesforce objects and fields that the presentation template references.

Account Objects and Fields

In the JSON structure, account fields appear in the `customers` node.

Object	Fields	Additional Details
Account	All standard and custom Account object fields.	<ul style="list-style-type: none"> accountType returns HCP for Person Accounts and HCO for Business Accounts. recordType returns the name and ID of the account's record type.
ContactPointAddress	An array of the account's associated ContactPointAddress records and fields. Only active records are returned.	<p>Addresses are used in this order.</p> <ul style="list-style-type: none"> If the preferred address is set on the related provider account territory info, that address is used. If the preferred address isn't set but a related contact point address record is set to primary, that address is used. If the account has more than one primary address, the primary address that was created most recently is used. If there's no recent primary address, the address that was created most recently is used.
HealthcareProviderSpecialties	An array of the account's associated HealthcareProviderSpecialties.	<p>To access the first specialty in the array, use this code.</p> <pre data-bbox="1046 1431 1449 1748"> {{#customers}} Customer Name: {{name}} Specialty: {{healthcareProviderSpecialties.0.name}} {{/customers}} </pre> <p>Returns only active records that are set to primary, ordered by most recently modified.</p>

Object	Fields	Additional Details
ContactPointEmail	An array of the account's associated ContactPointAddress records and fields.	Returns only records that are set to primary, ordered by preference rank.
ContactPointPhone	An array of the account's associated ContactPointPhone records and fields.	Returns only records that are set to primary, ordered by preference rank.
ContactPointSocials	An array of the account's associated ContactPointSocial records and fields.	Returned records are ordered by the social platform provider.
HealthCareProvider	All fields on the account's related HealthcareProviderRecord.	None

Presentation Fields

Field	Description
id	The presentation ID.
name	The presentation name.
sourceSystemIdentifier	A user-provided unique, external identifier for the presentation.
Pages	<p>A predefined list of page fields.</p> <ul style="list-style-type: none"> • id • sourceSystemIdentifier • contentDocumentId • name • slides: <ul style="list-style-type: none"> - name
isCustom	<p>Identifies whether the presentation is a custom presentation created by a field user (<code>true</code>) or not (<code>false</code>). Depending on the variable's value in the variable, you can apply custom logic.</p> <p>See this HTML code example.</p>

Field	Description
	<pre> <dl> {{#presentations}} <dt>Name: {{name}}</dt> <dt>Is Custom: {{#isCustom}} This is a custom presentation. {{/isCustom}} {{^isCustom}} This is a standard presentation. {{/isCustom}} </dt>
 {{/presentations}} </dl> </pre>

User Objects and Fields

Object	Fields	Additional Details
User	All standard and custom fields.	None
UserAdditionalInfo	All standard and custom fields on the associated UserAdditionalInfo record.	None
LifeScienceMobileApp	On the associated LifeScienceMobileApp record, all fields that contain data about the user's device, such as location and last download sync date.	Available only for the Life Sciences Cloud Mobile app.

Visit Fields

Field	Description
id	The visit ID.
accountId	The account ID.
isParent	Returns <code>true</code> when the Parent Visit field is blank.

Field	Description
sourceSystemIdentifier	A user-provided unique, external identifier for the visit.

Top-Level JSON Fields

These fields are at the top level of the JSON hierarchy, before Life Sciences Customer Engagement data.

Field	Description
currentMode	The current mode of the presentation player.
currentTerritoryId	The current territory ID.
currentTerritoryName	The current territory name.
emailTemplateId	The ID of the email template associated with the current presentation page.
state	The saved state of the presentation on the Life Sciences Cloud Mobile app.
presentationIndex	The presentation index in the presentations array.
pageIndex	The page index in the pages array.
slideIndex	The slide index in the slides array.

JSON Structure for Presentations

Understand the hierarchy and structure of the JSON properties that are available to the Mustache template processor for Intelligent Content presentations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

currentMode: The current mode of the presentation player.
 currentTerritoryId: The ID of the current territory.
 currentTerritoryName: The name of the current territory.
 emailTemplateId: The ID of the email template that's associated with the current page.
 state: The saved state of the presentation on the Life Sciences Cloud Mobile a

pp.

presentationIndex: The presentation index in the presentations array.

pageIndex: The page index in the pages array.

slideIndex: The slide index in the slides array.

customers: An array of account records.

- id: The account ID.
- isPrimary: Indicates the account of the primary visit.
- Type: The account type (Account.Type).

PersonEmail: The account email on account. Emails are also captured in contact point email records.

- firstName: The first name of the account.
- lastName: The last name of the account.
- middleName: The middle name of the account.
- nationality: The nationality of the account.
- salutation: The salutation of the account.

healthcareProviderSpecialties: An array of specialties.

- isPrimarySpecialty: Returns only primary specialties.
- isActive: Returns only active specialties.
- name: The specialty name.

name: The name of the account.

accountType: Returns HCP for a person account. Otherwise, returns HCO.

sourceSystemIdentifier: The user-provided unique external identifier for the account.

contactPointAddresses: An array of the account's contact point address records.

- id: The ID of the contact point address.
- street: The street component of the address.
- city: The city component of the address.
- state: The state component of the address.
- postalCode: The postal code for the address.

presentations: An array of presentation records.

- id: The presentation ID.
- name: The presentation name.

isCustom: Identifies whether the presentation is a custom presentation created by a field user.

Pages: An array of page records.

- id: The page ID.

sourceSystemIdentifier: The user-provided unique external identifier for the page.

- slides: An array of slides.

name: The name of slide, for example, 01_index.html.

user: User fields.

- name: The user's full name.
- firstName: The user's first name.

```
lastName: The user's last name.  
userAdditionalInfo: Additional user fields on the associated user additional info record.  
availableCountries: The countries that are available for the user in the context of a search.  
preferredCountry: The user's preferred country.  
visits: An array of visits.  
id: The visit ID.  
accountId: The account ID.  
isParent: Returns true when the Parent Visit field is blank.  
sourceSystemIdentifier: A user-provided unique, external identifier for the visit.
```

This template code example shows how to retrieve data from the JSON structure.

```
<div id="screen-container">  
    HELLO  
    {{#customers}}  <!--This is a Mustache loop -->  
        <span id="doc_name" class="template">{{firstName }} {{ lastName }}</span>  
    {{/customers}}  
    ,<br/>DO YOU WANT TO START THE VISIT?</span>  
</div>
```

This code enables you to use the raw JSON that's supplied to the Mustache template processor as a JavaScript object variable.

```
var configData;  
document.addEventListener('PresentationDOMContentLoaded', function(event) => {  
    configData = event.data;  
});
```

Presentation Player Functions

You can include JavaScript code in the presentation ZIP file for Life Sciences Customer Engagement. When the JavaScript function is called during presentations, the action is performed in the presentation player.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

All of the functions listed are available in the Life Sciences Cloud mobile app. Only these functions are available on desktop.

- `gotoSlide`
- `goPreviousPage`
- `goNextPage`

alert Function

Opens an alert on the user's mobile device with the specified message.

createVisit Function

Creates a visit for the selected attendees and returns the result to the specified callback method. When visits are created, Salesforce applies all configured visit validations.

defineNoSwipeRegion Function

Defines an area of the screen where the presentation player ignores the swipe gesture.

destroyNoSwipeRegion Function

Removes the region ID of an area of the screen where the presentation player ignores the swipe gesture.

disableDismiss and enableDismiss Functions

Dismiss functions control how the presentation player is closed and handled when users select the Visit button. These functions execute long-term operations in the 'returntovisitbuttonpress' event handler.

fetchWithParams Function

Queries data that's not already returned in Mustache variables, and returns results to the specified callback method.

getSurveyFlowJson Function

Searches for a survey and returns it in JSON format. Then, the presentation HTML can parse the survey and show it in the presentation player.

goNextPage Function

Goes to the next page in the presentation. If the current page is the last page in the presentation, nothing happens.

goPreviousPage Function

Goes to the previous page in the presentation. If the current page is the first page in the presentation, nothing happens.

goToSlide Function

Goes to the specified pages and assets within a presentation.

launchApprovedEmail Function

Opens the Send Email window with the email template that's linked to the presentation page, if the presentation page specifies a template. If there's no email template ID specified on the presentation page, the page isn't linked to a template.

launchEmails Function

Opens the Send Email window with the email templates that are available to the user.

logError Function

Logs error messages within the presentation player.

saveState Function

Saves data about the presentation's state to the state property in the JSON that's supplied to the presentation's Mustache template. Stores the state on the user's mobile device so that users can resume a presentation and continue where they left off in the same session or a future session.

setSurveyFlowJson Function

Saves survey results to the database for the current presentation and visit when the related visit is saved or submitted.

startTrackingPage Function

Starts tracking presentation metrics in a new presentation click stream entry record for the specified presentation page.

stopTrackingPage Function

Stops tracking presentation metrics for the current slide.

updateFeedback Function

Sets the feedback from the healthcare professional (HCP) to the specified type during presentations.

upsert Function

Creates and updates records for the specified objects and returns results to the specified callback method.

alert Function

Opens an alert on the user's mobile device with the specified message.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.alert (message)
```

Arguments

Argument	Description
message	The message to show to the user.

createVisit Function

Creates a visit for the selected attendees and returns the result to the specified callback method. When visits are created, Salesforce applies all configured visit validations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

 **Tip** We recommend invoking this function only once per presentation session.

Syntax

```
PresentationPlayer.createVisit(callbackMethod)
```

Arguments

Argument	Description
callbackMethod	The name of the JavaScript method that receives the results of the operation.

Returns

This method returns JSON that contains the ID of the parent visit, for example:

```
{"state": "success", "id": "<parent_visit_uid>"}
```

Usage

When this function is called during a presentation and a visit is created successfully:

- Users can select the Visit button in the presentation player menu to open the visit. All presentation metrics that are tracked during the session are linked to the visit.
- If no attendees were selected before the visit was created, the account field on the visit is blank.
- Product restrictions and presentation targeting apply to the new visit.
- These records are related to the new visit.
 - Provider visit
 - Provider visit product detailing
 - Provider visit detailing product message
 - Presentation forum
 - Presentation click stream entry

Limitations

- The `createVisit` function doesn't populate the new visit's details into Mustache variables that reference visits.
- Don't use the `upsert` function to create visits.

Example

```
<body>
    <input id="name" style="color: black;">
    <input id="customField" style="color: black;">
    <a href="javascript:createVisit();">Create Visit</a>
</body>
<script type="text/javascript">
    function createVisit() {
        PresentationPlayer.createVisit('callbackMethod');
    }
    function callbackMethod(data) {
        console.log(data);
        PresentationPlayer.alert(JSON.stringify(data));
    }
</script>
```

Errors

This function returns errors when:

- Validation rules fail.

- A visit was already created during the presentation session. In this case, the function returns the ID of the visit that was created previously in JSON format.
- The presentation player is opened for an existing visit. In this case, the function returns the ID of the visit that was created previously in JSON format.
- The presentation player is opened in a context that's unrelated to the visit.

This example is an error result in JSON format.

```
{"state":"error", "errorMessage": "<error>", "id": "<optional_id_of_previousl  
y_created_visit>"}
```

defineNoSwipeRegion Function

Defines an area of the screen where the presentation player ignores the swipe gesture.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.defineNoSwipeRegion(regionId, x, y, width, height)
```

Arguments

Argument	Description
regionId	The ID of the region where you don't want users to be able to swipe.
x	The horizontal coordinate of the top-left corner of the area where users can't swipe as an absolute position, in points.
y	The vertical coordinate of the top-left corner where users can't swipe as an absolute position, in points.

Argument	Description
<code>width</code>	The width of the area where users can't swipe, in points.
<code>height</code>	The height of the area where users can't swipe, in points.

Example

In this example, the ID is region.

```
IntelligentContentPlayer.defineNoSwipeRegion("region", 50, 50, 100, 100);
```

destroyNoSwipeRegion Function

Removes the region ID of an area of the screen where the presentation player ignores the swipe gesture.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.destroyNoSwipeRegion(regionId)
```

Arguments

Argument	Description
<code>regionId</code>	The ID of the region where the presentation player ignores the swipe gesture.

disableDismiss and enableDismiss Functions

Dismiss functions control how the presentation player is closed and handled when users select the Visit button. These functions execute long-term operations in the 'returntovisitbuttonpress' event handler.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

PresentationPlayer.disableDismiss()

To prevent the presentation player from being dismissed immediately after the users select the Visit button, call the `PresentationPlayer.disableDismiss()` function before executing long-term database operations such as queries or upserts.

PresentationPlayer.enableDismiss()

To notify and dismiss the presentation player, call the `PresentationPlayer.enableDismiss()` function after long-term operations are finished. If `PresentationPlayer.enableDismiss()` isn't called within 30 seconds, the presentation player is dismissed automatically.

Usage

The `PresentationPlayer.disableDismiss()` and `PresentationPlayer.enableDismiss()` functions control only the presentation that's open in the presentation player. The `'returntovisitbuttonpress'` event is also sent only to the presentation that's currently open when users select the Visit button.

To save data from multiple presentations during one presentation session, users can select the Visit button after presenting a custom presentation. The `'returntovisitbuttonpress'` event is triggered for the current presentation, and any upsert requests are executed. After opening the visit, users can use the Return to Presentation link to return to the same presentation session.

Example

For example, a user opens a custom presentation in the presentation player. When a page is opened, the `PresentationPlayer.disableDismiss()` function is called during the `'viewappearing'` event to prevent the player from being dismissed while long-running operations are in progress.

After the user finishes the presentation and selects the Visit button, the `'returntovisitbuttonpress'` event is triggered, and the presentation executes its long-running database operations, such as fetching or upserting data. Once these operations are complete, the `PresentationPlayer.enableDismiss()` function is called to close the presentation player.

fetchWithParams Function

Queries data that's not already returned in Mustache variables, and returns results to the specified callback method.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

You can query the User, Account, Record Type, Territory2, UserTerritory2Association, Life Sciences Cloud objects, and custom objects. To query records:

- The user must have Read permissions on the queried objects and fields.
- Active object metadata cache configurations must exist for each object and must be synced to the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.fetchWithParams(query, params, callbackMethod)
```

Arguments

Argument	Description
<code>query</code>	<p>The SOQL query as a string, or the query locator value for subsequent fetches. You can include Mustache variables within queries.</p> <p>In the <code>query</code> parameter, specify these values.</p> <ul style="list-style-type: none">• <code>object</code> : The API name of the object.• <code>fields</code> : A comma-separated list of field API names.• <code>where</code> : Optional. A WHERE condition that references field API names.• <code>order by</code> : Optional. The field to order the query by.

Argument	Description
	<ul style="list-style-type: none"> • <code>limit</code>: Optional. The maximum number of records to return. <p>The WHERE clause supports:</p> <ul style="list-style-type: none"> • These logical operators: <code>AND</code>, <code>OR</code>, <code>NOT</code> • These comparison operators: <code>IN</code>, <code>LIKE</code>, <code>=</code>, <code><</code>, <code>></code> <p>To use the IN operator, surround values in brackets, for example, <code>"Id IN {\"val1\", \"val2\"}"</code>.</p> <ul style="list-style-type: none"> • These SOQL keywords. <ul style="list-style-type: none"> - <code>SELECT</code> statements with column names, relations, and aggregate functions, but without subqueries - <code>FROM</code> statements with only one object name - <code>GROUP BY</code> columns or aggregate functions - <code>HAVING</code> statements - <code>WHERE</code> statements that support subqueries and literal sets - <code>LIMIT</code> and <code>OFFSET</code> functions - <code>ORDER BY</code> functions • These literals. <ul style="list-style-type: none"> - <code>INT</code> - <code>FLOAT</code> - <code>STRING</code> - <code>NULL</code> - <code>BOOLEAN</code>
<code>params</code>	<p>Optional. The ability to specify the batch size.</p> <p>In the <code>params</code> argument, use the <code>batchSize</code> attribute to set the number of records to return in each call.</p> <p>A maximum of 100 records can be returned in each call.</p>
<code>callbackMethod</code>	<p>The name of the JavaScript method that receives the query results.</p>

Returns

This function returns a JSON result.

Field Name	Type	Description
<code>records</code>	Array<Object>	The result data.
<code>done</code>	Boolean	Indicates whether all data has been queried (<code>true</code>) or not (<code>false</code>).
<code>totalSize</code>	Integer	The total number of records that were processed in the query.
<code>queryLocator</code>	String	A unique SQL identifier that can be used in future requests.
<code>state</code>	String	The request status, such as success or error.

Usage

Regardless of batch size, queries are limited to a maximum of 100 records. This example sets the batch size to 75 records.

```
PresentationPlayer.fetchWithParams('SELECT FirstName, LastName, Name, Email, Phone, Username FROM User WHERE Id = ' + userId, {'batchSize': 75}, getCurrentUserRecordCallback');
```

If the batch size isn't specified, the `fetchWithParams` function queries 15 records by default. To query additional records when using smaller batch sizes, use the `queryLocator` variable.

This example uses the `queryLocator` variable.

```
function getAccounts() {
    PresentationPlayer.fetchWithParams('SELECT Id FROM Account', {'batchSize': 15}, 'getAccountsCallback');
    // Return 15 records
}

function getAccountsCallback(data) {
    // Process records
    PresentationPlayer.fetchWithParams(data.queryLocator, 'getAccountsCallback');
```

```
}
```

Example

```
<script type="text/javascript">
    var configData;
    document.addEventListener('PresentationDOMContentLoaded', function(event)
=> {
    configData = event.data;

    function getCurrentUserRecord() {
        let userId = ' \\' + configData.parameters.id + '\\' ';
        PresentationPlayer.fetchWithParams('SELECT FirstName, LastName, N
ame, Email, Phone, Username FROM User WHERE Id = ' + userId, {'batchSize': 7
5},
        'getCurrentUserRecordCallback');
    }

    function getCurrentUserRecordCallback(data) {
        if (data.state === 'success') {
            const html = data.records.map((el)=>{
                console.log('User Name: ', el.Name);
                console.log('User Email: ', el.Email);
            });
        } else {
            PresentationPlayer.alert(data.message + '\n' + data.code);
        }
    }
}
</script>
```

Errors

This function returns an error when:

- The query can't access or find a record.
- A SQL error occurs.

getSurveyFlowJson Function

Searches for a survey and returns it in JSON format. Then, the presentation HTML can parse the survey and show it in the presentation player.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

When called, this function:

- Validates input parameters and returns an error if the survey's developer name is missing.
- Loads the survey based on the developer name and the user's access.
- If there's a saved survey for the current presentation and visit, loads the saved responses. If no survey response is found, loads a new survey.
- Once the survey's JSON data loads, triggers the `"surveyflowjsonloaded"` event.
- Shows an error for invalid requests or missing survey data.

Parameters

```
PresentationPlayer.getSurveyFlowJson (Object)
```

Arguments

Argument	Description
<code>Object</code>	A JSON string in this format. <code>{ "developerName": "name of the survey" }</code>

Usage

When survey data is loaded, this function triggers the `"surveyflowjsonloaded"` event automatically. To handle the response, register an event listener.

Example

```
PresentationPlayer.registerEventListener("surveyflowjsonloaded", function(surv
```

```
eyJson
) { // Handle the survey JSON data
  console.log("Survey loaded:", surveyJson);
}

// Call the function
PresentationPlayer.getSurveyFlowJson({ "developerName": "test_survey" });
```

goNextPage Function

Goes to the next page in the presentation. If the current page is the last page in the presentation, nothing happens.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Syntax

```
PresentationPlayer.goPreviousPage()
```

goPreviousPage Function

Goes to the previous page in the presentation. If the current page is the first page in the presentation, nothing happens.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Syntax

```
PresentationPlayer.goPreviousPage()
```

goToSlide Function

Goes to the specified pages and assets within a presentation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

To make sure that this function opens the correct page or asset, use unique names or IDs for pages and assets within the presentation.

Syntax

```
PresentationPlayer.gotoSlide([PageId|PageName|SourceSystemIdentifier], slideName, animation)
```

Arguments

Argument	Description
<code>PageId</code>	The ID of a page in the presentation. If left blank, the current page is used. You can use the <code>PageId</code> argument only to navigate to presentation pages. Use this format. <code>PresentationPage.Id</code>
<code>PageName</code>	The name of a presentation page or asset. Use this format. <code>PresentationPage.Name</code>
<code>SourceSystemIdentifier</code>	An optional external ID for the presentation content, typically provided when users upload presentations via the content API. Use this format.

Argument	Description
	PresentationPage.SourceSystemIdentifier
<code>slideName</code>	The name of the slide.
<code>animation</code>	<p>The animation to use to open the slide. These values are supported.</p> <ul style="list-style-type: none"> • <code>noanimation</code> undefined null: Opens the slide immediately with no animation. • <code>swipeleft</code>: Opens the slide with a left swipe. • <code>swiperight</code>: Opens the slide with a right swipe. <p>Swipe animations can affect performance in the presentation player.</p>

Usage

To reference another page in a presentation, first retrieve its page ID from the JSON.

Before you use the `goToSlide` function, include this code at the top of the HTML or other JavaScript code. The first line of code references the entire JSON file, while the second row gets the page ID, which is stored in a zero-based array.

```
var configData;
document.addEventListener('PresentationDOMContentLoaded', (event) => {
  configData = event.data;
  var PageId =
    configData.presentations[configData.presentationIndex].Pages[1].id;
});
```

Or, you can use this code.

```
var configData = {{{.}}};

var PageId = configData.presentations[configData.presentationIndex].Pages[3].id;
```

Then, use the `goToSlide` function with that ID. For example, this code is attached to an HTML button on the presentation page.

```
<button onclick="PresentationPlayer.gotoSlide(PageId, '01_slide.html',null)" class="class" type="button">Next</button>
```

launchApprovedEmail Function

Opens the Send Email window with the email template that's linked to the presentation page, if the presentation page specifies a template. If there's no email template ID specified on the presentation page, the page isn't linked to a template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.launchApprovedEmail()
```

launchEmails Function

Opens the Send Email window with the email templates that are available to the user.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.launchEmails(templates)
```

Arguments

Argument	Description
<code>templates</code>	A comma-separated list of email template names to include in the Send Email window. If left blank, users see all of the templates that are available for the selected territory.

logError Function

Logs error messages within the presentation player.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

To log errors efficiently and prevent excess entries:

- Error messages are tracked and logged for each individual presentation page.
- Only 10 error messages are logged for each presentation page.

Syntax

```
PresentationPlayer.logError(errorMessage)
```

Arguments

Argument	Description
<code>errorMessage</code>	The specific error message to include in the log.

saveState Function

Saves data about the presentation's state to the state property in the JSON that's supplied to the presentation's Mustache template. Stores the state on the user's mobile device so that users can resume

a presentation and continue where they left off in the same session or a future session.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.saveState(state)
```

Arguments

Argument	Description
<code>state</code>	<p>Any string that represents the state of the presentation, typically in JSON format. For example, the presentation state, such as the current slide position, user preferences, or progress tracking. The state can be retrieved and used by the presentation.</p> <p>State values are stored and saved for each presentation and visit. When users resume a presentation from a visit, they return to their previous state.</p>

setSurveyFlowJson Function

Saves survey results to the database for the current presentation and visit when the related visit is saved or submitted.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

package.

This function is supported only in the Life Sciences Cloud mobile app.

When called, this function:

- Validates that the response object contains a `fullName` property, or returns an error for invalid response data.
- Processes the stored survey data, and saves it to the database when the related visit is saved or submitted.
- Creates related survey records.

The `surveyflowjsonpassedtovisit` event is triggered when the user selects the Visit button to return to the visit page, not when a user finishes the survey response.

Syntax

```
PresentationPlayer.setSurveyFlowJson(Object, state)
```

Parameters

Argument	Description
<code>Object</code>	Required. A survey response JSON object that includes the <code>fullName</code> , which is the full developer name of the survey, and additional survey response data and answers.
<code>state</code>	Optional. The submission state of the survey response. Supported values are: <ul style="list-style-type: none">• <code>save</code>• <code>submit</code> The default value is <code>save</code> .

Usage

Calling the function with the `save` state creates these survey records.

- A survey invitation record for the responded survey.
- A survey subject record.
 - The subject ID is set to the current context, such as the visit ID.

- The parent ID is set to the new survey invitation record's ID.
- A survey engagement context record.
 - The context type is set to Presentation.
 - The context value is set to the presentation ID.
 - The survey invitation ID is set to the new survey invitation record's ID.
- A survey response offline record.
 - The response is set to the survey response JSON data.
 - The survey invitation ID is set to the new survey invitation record's ID.

Calling the function with the `submit` state creates these survey records.

- All of the records that are created by the `save` state.
- Survey question response records for each question response.

startTrackingPage Function

Starts tracking presentation metrics in a new presentation click stream entry record for the specified presentation page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.startTrackingPage (pageid)
```

Arguments

Argument	Description
<code>pageid</code>	The ID of the page to start a new presentation click stream entry record for. Accepts any string as the ID for the current slide.

stopTrackingPage Function

Stops tracking presentation metrics for the current slide.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.stopTrackingPage()
```

updateFeedback Function

Sets the feedback from the healthcare professional (HCP) to the specified type during presentations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

This function is supported only in the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.updateFeedback(type)
```

Arguments

Argument	Description
<code>type</code>	The type of feedback. Supported values are: <ul style="list-style-type: none">PositiveNegativeNeutral

Argument	Description
	<ul style="list-style-type: none">• <code>null</code>

Example

This example sets the reaction type to Positive on the related provider visit detailing product message record.

```
<a href="javascript:PresentationPlayer.updateFeedback('Positive');">I like the presentation</a>
```

upsert Function

Creates and updates records for the specified objects and returns results to the specified callback method.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

-  **Note** To use this function, log a request with Salesforce Support to allowlist the objects that you plan to upsert from the presentation content. For example, to update an account profile within the content, allowlist the Account object.

This function is supported only in the Life Sciences Cloud mobile app.

You can create or update custom objects and supported Life Sciences Customer Engagement objects. To create or update records:

- The user must have Read permissions on the specified objects and fields.
- Active object metadata cache configurations must be created for each object and synced to the Life Sciences Cloud mobile app.

Syntax

```
PresentationPlayer.upsert(objects, callbackMethod)
```

Arguments

Argument	Description
objects	An array of objects to create or update records for. <ul style="list-style-type: none"> • To create records, specify the object name. • To update records, specify the ID field that contains the ID or the offline ID.
callbackMethod	The name of the JavaScript method that receives the result of the operation.

Returns

This function returns an array of IDs of the new or updated records.

Limitations

This function can't create or update User, Record Type, Territory, Territory2, and UserTerritory2Association records.

You can't use this function to create or update related records. To update related records, such as records in a parent-child relationship, use two function calls.

Example

This example creates records by using the object name.

```
<body>
    <input id="name" style="color: black;">
    <input id="customField" style="color: black;">
    <a href="javascript:save();">Save Record</a>
</body>
<script type="text/javascript">
    function save() {
        let name = document.getElementById("name").value;
        let customField= document.getElementById("customField").value;
        PresentationPlayer.upsert([
            {
                'sobject': 'Account',
                'name': name,
            }
        ]);
    }
</script>
```

```

        'customField__c': customField
    }], 'upsertCallbackMethod');
}

function upsertCallbackMethod(data) {
    console.log(data);
    PresentationPlayer.alert(JSON.stringify(data));
}
</script>

```

This example updates records by using record IDs.

```

<script type="text/javascript">
    function save() {
        let name = document.getElementById("name").value;
        let customField= document.getElementById("customField").value;
        let accountId = allData.customers[0].Id;
        PresentationPlayer.upsert([
            {
                'sobject': 'Account',
                'id': accountId,
                'name': name,
                'customField__c': customField
            }, 'upsertCallbackMethod');
        }
        function upsertCallbackMethod(data) {
            if (data.state === 'success') {
                console.log(data);
                PresentationPlayer.alert(JSON.stringify(data));
            } else {
                PresentationPlayer.alert(data.message + '\n' + data.code);
            }
        }
    }
</script>

```

Errors

This function processes up to 15 records at a time. If you submit more than 15 records, an error occurs.

This function can also return errors if there are failures when creating or updating records. For example, errors can occur when:

- Validation rules fail.
- The user doesn't have Read or Edit access to the object or field.

- The object or field isn't supported.
- SQLite database query errors occur.

Callback Event Function

When an event occurs in the Life Sciences Cloud mobile app, you can use a callback event function to notify the page's JavaScript, HTML, or template. For example, events can be triggered when users pause or resume tracking presentation metrics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Syntax

```
PresentationPlayer.registerEventListener(iOS_event, myCustomPlayerHandler)
```

Arguments

Argument	Description
<code>iOS_event</code>	<p>The event that occurs on iOS. These events are supported.</p> <ul style="list-style-type: none">• <code>'cancelbuttonpress'</code> : The event is triggered when users select the Cancel button.• <code>'pausebuttonpress'</code> : The event is triggered when users select the Pause button to stop tracking presentation metrics.• <code>'playbuttonpress'</code> : The event is triggered when users select the Play button to resume tracking presentation metrics.• <code>'returntovisitbuttonpress'</code> : The event is triggered when users select the Visit button.• <code>'viewappearing'</code> : The event is triggered when a page is opened.• <code>'viewdisappearing'</code> : The event is triggered when a page is closed.

Argument	Description
	<ul style="list-style-type: none"> • <code>'surveyflowjsonloaded'</code> : The event is triggered when the <code>PresentationPlayer.getSurveyFlowJson()</code> function is called. • <code>'surveyflowjsonpassedtovisit'</code> : The event is triggered just before a visit is opened.
<code>myCustomPlayerHandler</code>	Your custom JavaScript function.

Set Up Product Management Features

In the Life Sciences industry, delivering value to customers—healthcare professionals, organizations, and patients—depends on making sure that the right products are available, accessible, and aligned with regulatory requirements. In Life Sciences Cloud, Product Management supports this goal by making it easier to configure, classify, and manage the products that your organization discusses, markets, sells, and distributes. The product hierarchy view helps teams structure portfolios according to SKU-level organization, while product territory alignments make sure that users access only the products approved for their designated regions and purpose, supporting compliance and reducing risk. Product messages and objectives enable personalized and effective engagement by equipping users with targeted guidance tailored to the needs of the customer.

Get Your Org Ready for Product Management

Help product management admins and users quickly search for available products, check territory assignments, and view specific marketing tips to effectively sell the products. Configure all types of products that your company markets, sells, and discusses, including brands, therapeutic areas, and indications.

Product Hierarchy Settings

Product hierarchy provides a centralized view of all the products developed, marketed, and distributed by a life sciences company. It helps product management admins and users drill down into each product right from the hierarchy, and view the details of each record. Add, remove, or edit products, product types, and product guidances directly from the hierarchy without switching between multiple tabs.

Product Territory Alignments

Set up product-territory alignments to enable users to drive targeted product efforts, reduce errors, and comply with regulatory standards. These alignments control how products and product messages are assigned to territories, and make sure that the correct user has access to the correct product in the correct territory.

Organize Products Aligned to a Territory by Priority

Help users prepare for product detailing and discussions by sorting products according to relative importance of the products. Organize the different products assigned to the same territory by order of

priority.

Get Your Org Ready for Product Management

Help product management admins and users quickly search for available products, check territory assignments, and view specific marketing tips to effectively sell the products. Configure all types of products that your company markets, sells, and discusses, including brands, therapeutic areas, and indications.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Review the prerequisites for setting up Product Management in your org

- Make sure you [enable territory settings and create territory records](#).
- Verify that the following [trigger handlers are active](#).
 - LifeSciMarketableProductMetadataHandler
 - ProductGuidanceDeactivationHandler
 - ProductTerrDtlAvailabilityHandler
 - ProductTerritoryAvailabilityExclHandler
- To enable offline access to Product Management, [create object metadata cache configurations](#) of type Data for these objects.
 - Product2
 - Life Science Marketable Product
 - Product Guidance
 - Product Territory Availability
 - Product Territory Detailed Availability
 - Life Science Product Account Restriction

[Set Up Product Record Types](#)

Life Sciences companies develop a diverse range of products that include sellable and non-sellable products. Both sellable and non-sellable products can be further classified into markets, brands, products, therapeutic areas, brand indications, and indications. Sellable products can also be categorized into order items, promotional items, and samples. To keep track of all types of sellable products, classify and organize them with record types in the Product2 object.

[Map Product Record Types to Product Specification Types](#)

Create product specification record types to align each product record type with the related product specification type, and in turn with the related workflow in Life Sciences.

[Select the Product Hierarchy Display Type](#)

Depending on the size of your product hierarchy, choose to view the list of products in its entirety or in

parts. Choose to show all the products at one go or show 500 records at a time.

[Show Additional Product Information in the Hierarchy View](#)

Enable users to get more context about the products they're selling. Select standard or custom fields to display in the hierarchy view.

[Products and Product Types](#)

Before you set up products in your org, learn about the different types of products, their hierarchy and groupings, and how they all fit together.

[Configure Products and Product Types](#)

Enable users to seamlessly use the Product Hierarchy and the Product Territory Alignment settings by defining products and product types.

See Also

[Set Up Sales Territories for Life Sciences Cloud](#)

[Trigger Handler Administration](#)

[Create Object Metadata Cache Configuration](#)

Set Up Product Record Types

Life Sciences companies develop a diverse range of products that include sellable and non-sellable products. Both sellable and non-sellable products can be further classified into markets, brands, products, therapeutic areas, brand indications, and indications. Sellable products can also be categorized into order items, promotional items, and samples. To keep track of all types of sellable products, classify and organize them with record types in the Product2 object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a product record type:	Life Sciences Commercial Admin permission set
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You can create any kind of record type. However, to easily track product record types in the processes and workflows in Life Sciences Cloud, we recommend creating record types that correspond to these product specification types—order items, promotional items, and sample products.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Product Configuration**.
3. Click **New Product Record Type**.
4. Add a record type.
 - a. Confirm that Master is selected as the existing record type.

- b. Enter a label.
For example, *Orders*
The API name is automatically populated.
 - c. Add a description.
 - d. Select **Active**.
 - e. Select **Mark Available** for the profiles that you want to enable the record type for, and click **Next**.
 - f. Select **Product Layout** as the layout that you want to apply to all profiles.
 - g. Save your changes.
5. Similarly, add product record types for promotional items and sample products.

See Also

[Create Record Types](#)

Map Product Record Types to Product Specification Types

Create product specification record types to align each product record type with the related product specification type, and in turn with the related workflow in Life Sciences.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure settings in the admin console: Life Sciences Commercial Admin permission set

You can classify products on the basis of their utility. For example, some products are used for promotional purposes or even distributed as samples. To further organize product types into categories, map each product record type to a product specification type by using product specification record types.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Product Configuration**.
3. Click **New Product Specification Record Type**.
4. Add a product specification record type.
 - a. Enter a label.
For example, add *Order Item*.
The API name is automatically populated.
 - b. Select a product record type.
 - c. Select the product specification type that you want to map the product specification record type to.
 - d. Confirm that the product specification type is for the Life Sciences Commercial feature area.
 - e. Save your changes.

Select the Product Hierarchy Display Type

Depending on the size of your product hierarchy, choose to view the list of products in its entirety or in parts. Choose to show all the products at one go or show 500 records at a time.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure admin console settings:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Product Configuration**.
3. Select the product hierarchy display type.
4. Save your changes.



Note This setting applies to all users administering products, so all users see the hierarchy the same way.

Show Additional Product Information in the Hierarchy View

Enable users to get more context about the products they're selling. Select standard or custom fields to display in the hierarchy view.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create custom fields:	Life Sciences Commercial Admin permission set
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By default, the product hierarchy view shows only the name of the product. However, you can enhance the display by select standard or custom fields to display in the hierarchy.

 **Note** To configure a custom field that shows additional product details, add a text field or formula field on the Life Science Marketable Product object. Make sure that the API name of the field is `LSCAdditionalProductDetails`.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Product Configuration**.
3. In the Create a Field for Additional Product Details section, click **Go to Object Manager**.
Alternatively, from the Object Manager, go to the Life Science Marketable Product object.
4. To add a custom field, select **New**.
 - a. Select **Text** as the field type, and click **Next**.
 - b. In Field Name, enter `LSCAdditionalProductDetails` as the API name.
 - c. In Field Label, enter a label of your choice.
 - d. Confirm that Auto add to custom report type is selected.
 - e. Enter the maximum length of the value in the text field.
Alternatively, select a formula field. Select a formula return type and enter the formula.
 - f. Click **Next**.
 - g. Select the profiles for which you want the custom field to be visible.
Confirm that the checkboxes next to Add Field and Life Science Marketable Product are selected.
 - h. Save your changes.
5. Display additional fields in the product hierarchy.
 - a. On the Product Configuration page, in Life Science Marketable Product Field Name, select the field you want to display.
Select the custom field you created or any standard field on the Life Science Marketable Product object.
 - b. Save your changes.

Products and Product Types

Before you set up products in your org, learn about the different types of products, their hierarchy and groupings, and how they all fit together.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

In Life Sciences Cloud, use the Life Science Marketable Product object to create all product types. Physical and sellable products are created using the Product2 object and associated with the Life Science Marketable Product record of type Product.

Product Types are groupings that help organize the products that a company sells, markets, and distributes as samples. Life Sciences Cloud gives you the flexibility to create hierarchies among the

product types by using the Parent Product field in the Life Science Marketable Product object. However, there are certain limitations around implementing child product types for each parent type.

Here are the various groupings of products in Life Sciences Cloud and the parent-child hierarchies that you can set up for each product type.

Product Type	What it Means	Example	Child Product Types
Market	Represents a grouping of medical areas.	Diabetes	<ul style="list-style-type: none"> • Brand • Product • Indication • Therapeutic Area • Brand Indication
Therapeutic Area	Represents a category of medical conditions which share pathophysiological features.	Endocrinology	<ul style="list-style-type: none"> • Product • Indication • Therapeutic Area • Brand Indication
Brand	Represents the brand name of the medicine prescribed for treating a medical condition.	Glipizide	<ul style="list-style-type: none"> • Brand • Product • Indication • Therapeutic Area • Brand Indication
Product	Represents tangible, physical, sellable products. Each individual product, defined using a Product2 record, can be further categorized as an order item, a promotional item, or a sample.	Glipizide 1mg	<ul style="list-style-type: none"> • Product
Indication	Represents an individual medical condition that requires an intervention.	Polyurea	<ul style="list-style-type: none"> • Product • Indication • Therapeutic Area • Brand Indication
Brand Indication	Represents an instance of the brand discussed in the context of a specific indication.	Glipizide for Polyurea	<ul style="list-style-type: none"> • Product • Indication

Product Type	What it Means	Example	Child Product Types
			<ul style="list-style-type: none"> • Therapeutic Area • Brand Indication

 **Note** Therapeutic areas and indications are not sellable but they maintain the hierarchical structure for delivering product guidance during a visit.

See Also

[Create Products from the Product Hierarchy View](#)

Configure Products and Product Types

Enable users to seamlessly use the Product Hierarchy and the Product Territory Alignment settings by defining products and product types.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create products and product types:	Life Sciences Commercial Admin permission set
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As a prerequisite, set the distribution quantity for Sample Management. Add the Default Distribution Quantity field to the Life Science Marketable Product's page layout, and make sure that field-level security is enabled for your user.

1. From the App Launcher, find and select **Product**, and then click **New**.
 2. Select a record type.
For example, select **Order Item**.
 3. Click **Next**.
 4. Enter a name for the product, and select the product currency.
 5. Select **Active**.
 6. Save your changes.
 7. From the App Launcher, find and select **Life Science Marketable Product**, and then click **New**.
 8. Enter a name, and select a type for the product you're creating.
 9. Select **Active**.
 10. If the product is of type Product, select a Product2 record in the Product field.
 11. If the product is a child product, select the parent record.
- The Parent Product field indicates the hierarchy of the record.

12. Save your changes.

Product Hierarchy Settings

Product hierarchy provides a centralized view of all the products developed, marketed, and distributed by a life sciences company. It helps product management admins and users drill down into each product right from the hierarchy, and view the details of each record. Add, remove, or edit products, product types, and product guidances directly from the hierarchy without switching between multiple tabs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

If your Salesforce admin enables the Product Hierarchy business group filter, you see a custom view of the product tree that displays only the products in your business group.

[Create Products from the Product Hierarchy View](#)

The Product Hierarchy view emulates the SKU structure of pharmaceutical companies, providing complete visibility into the entire range of products of a company. This overview is useful for all the business functions that use products in various capacities, such as Visits and Sample Management. Search for products, create products, and edit or delete products directly from the Product Hierarchy view.

[Define Messages and Objectives for Product Detailing](#)

Drive effective product strategies and detailing efforts with product messages and objectives. Messages and objectives are implemented together as product guidance, and help drive key points of emphasis and product activities aligned with broader business goals.

See Also

[Get Your Org Ready for the Life Sciences Cloud for Customer Engagement Package](#)

Create Products from the Product Hierarchy View

The Product Hierarchy view emulates the SKU structure of pharmaceutical companies, providing complete visibility into the entire range of products of a company. This overview is useful for all the business functions that use products in various capacities, such as Visits and Sample Management. Search for products, create products, and edit or delete products directly from the Product Hierarchy view.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create, edit, and remove products from the hierarchy: Life Sciences Commercial Admin permission set

Life Science Marketable Product represents all sellable and non-sellable (marketable) products, while Product2 represents only sellable products. Life Science Marketable Product is categorized using various groupings, such as indications, therapeutic areas, brands, markets, and products.

In the Product Hierarchy view, you create products using the Life Science Marketable Product object. However, make sure that you associate the Life Science Marketable Product records of type Product with a Product2 record in the Product field.

1. From the App Launcher, find and select **Admin Console**.
2. Select the Product tile.
3. In the left navigation pane, select **Product Hierarchy**.
4. To create a parent Life Science Marketable Product record, select **New Product**.
 - a. Add a name and indicate the type.
If you select type as Product, you must add a record in the Product field.
 - b. Select **Active**.
 - c. Save your changes.
5. To create a child Life Science Marketable Product record, select the parent product in the hierarchy.
 - a. Click **Add Child Product**.
 - b. Add the details of the Life Science Marketable Product and activate it.
 - c. Save your changes.

See Also

[Products and Product Types](#)

Define Messages and Objectives for Product Detailing

Drive effective product strategies and detailing efforts with product messages and objectives. Messages and objectives are implemented together as product guidance, and help drive key points of emphasis and product activities aligned with broader business goals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create messages and objectives: Life Sciences Commercial Admin permission set

Users need quick access to product guidance, such as messages and objectives, to educate healthcare providers and share specific and accurate information about products they're discussing. In the pharma industry, messages include the information about the safety, efficacy, dosage limits, success rate, and side effects of a drug, shared with the provider so that they can make informed choices. Objectives are specific, product-related goals that a user aims to achieve during customer engagement. These objectives are aligned with broader business goals and tailored to the customer's current level of engagement, product adoption, and information needs.

-  **Note** Add messages and objectives for brands, therapeutic areas, indications, and brand-indications.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Product Hierarchy**.
3. Select a product.
4. Create a message.
 - a. In the Product Details window, under Messages, click **New Message**.
 - b. Enter a name for the message.
 - c. In Content Text, enter a description.
 - d. Enter the effective start and end dates for the message.
 - e. Specify the priority of the message.
 - f. To categorize messages by group, add a group name.
 - g. To sort groups by their order of priority, add a group sequence.
 - h. Enter the reaction of the healthcare professional.
 - i. To hide the provider's reaction to the product, select **Hide Reaction**.
 - j. Save your changes.
 - k. Select **Active**.

To deactivate a message, deselect Active, and then click Deactivate.

5. Create an objective.
 - a. In the Product Details window, under Objectives, click **New Objective**.
 - b. Enter a name for the objective.
 - c. In Content Text, enter a description.
 - d. Save your changes.
 - e. Select **Active**.

Product Territory Alignments

Set up product-territory alignments to enable users to drive targeted product efforts, reduce errors, and comply with regulatory standards. These alignments control how products and product messages are assigned to territories, and make sure that the correct user has access to the correct product in the correct territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

By default, product-territory alignments are inherited downstream in the product hierarchy. But Life Sciences Cloud also provides the Parent Territory Product Alignment admin setting that enables product territory alignments to be extended all the way up in the hierarchy to all parent territories.

Product-territory alignment in Life Sciences Cloud is determined through explicit (direct) alignment, parent-based inheritance, and explicit exclusion.

- **Explicit alignment (direct alignment):** A product is explicitly aligned to a specific territory. This means that the product is directly available in that territory, regardless of other hierarchy-based rules.
- **Inherited from parent (parent alignment):** A product is inherited from a parent territory. This means that it was aligned to a parent territory and is automatically made available to the child territory through inheritance.
- **Directly excluded (exclusion):** A product is explicitly excluded from a territory. This means that the product is unavailable for a child territory even when the parent territory is aligned to the product.

The final product alignment consisting of only non-excluded products—whether explicitly aligned to the territory or inherited from a parent—is available to users in that territory.

When you align products to territories, the system automatically creates Product Territory Availability records in the Queued status. An invocable action creates Product Territory Detailed Availability records for the queued Product Territory Availability records.

Here are the alignment types—Exclusion, Inclusion, and Territory and Subordinates Inclusion and the sharing rules.

Symbol	Meaning	Product Territory Availability Alignment Type
<input type="checkbox"/>	Indicates that a territory isn't aligned to a product.	No Product Territory Availability record created
<input checked="" type="checkbox"/>	Indicates that a territory is directly	Inclusion

Symbol	Meaning	Product Territory Availability Alignment Type
	aligned to a product. If this territory is a child territory, it means that even if the parent territory isn't aligned to the product, the child territory still has access to it.	
	Indicates that a territory is excluded from the alignment, even though its parent territory is aligned to the product.	Territory Exclusion
	Indicates that a territory is included, because one of its parent territories is aligned.	Inclusion
	Indicates that a territory, as well as its child territories, is aligned to a product.	Territory and Subordinates Inclusion

When you enable the Parent Territory Product Alignment admin settings, products assigned to a territory are automatically aligned with its parent territories as well, all the way up in the hierarchy. However, when you make changes to the admin setting, the new rules aren't applied retroactively to existing Product Territory Availability records.

Align Products with or Exclude Products from Territories

Configure precise and targeted product-territory alignments by using territory exclusions. When you exclude a child territory, it doesn't inherit the product alignment of its parent territory record.

Align Messages with or Exclude Messages from Territories

To help users quickly and efficiently deliver key messages to healthcare providers, assign product messages to the territories that are aligned with a product.

Align Products with or Exclude Products from Territories

Configure precise and targeted product-territory alignments by using territory exclusions. When you exclude a child territory, it doesn't inherit the product alignment of its parent territory record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create product alignments: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Product Alignment**.
3. Find a product by using the search field, or click the arrow next to Product Hierarchy, and then select the product.
4. Align a territory with the product according to your preference.
The changes you make are automatically saved.

Align Messages with or Exclude Messages from Territories

To help users quickly and efficiently deliver key messages to healthcare providers, assign product messages to the territories that are aligned with a product.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To align or remove messages: Life Sciences Commercial Admin permission set

 **Note** Message exclusion is available only for the lowest level of territories.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Product Alignment**.
3. Find a product by using the search field, or click the arrow next to Product Hierarchy, and then select the product.
The associated territory hierarchy appears.
4. Select a territory assigned to the product.
The list of product messages associated with the product appears.
5. Select a message to align it with a territory.
If the message is shared with a parent territory, its child territories also inherit the message.
If a message isn't activated, it appears in the product-territory alignment window but it remains unavailable.
6. Deselect a message to remove it from a territory.
You can remove a message from specific child territories, while keeping it assigned to the parent territory or to the other child territories of the parent.

Organize Products Aligned to a Territory by Priority

Help users prepare for product detailing and discussions by sorting products according to relative importance of the products. Organize the different products assigned to the same territory by order of priority.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit the product's priority: Life Sciences Commercial Admin permission set

The sort order is applicable specifically for the selected territory, and not for the territory's parent or child territories.

 **Note** If a priority level is not assigned to a product, the sorting is in descending order of the last modified date.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Territory Products**.
3. Select a territory.
This action shows all products in that territory according to their assigned priority levels.
4. To change the priority, in Territory-Specific Product Priority Order, select a product and click  or .
5. Save your changes.

[Restrict an Account's Access to a Product](#)

Account-level product restrictions help organizations enforce business and regulatory requirements by preventing the detailing, sampling, or ordering of specific products at restricted accounts. Use this functionality to make sure that product interactions are limited to the appropriate accounts, reducing compliance risks and supporting adherence to industry regulations.

[Create Product Territory Alignments in Bulk](#)

Import multiple product records from external systems, align them with territories, and create detailed availability records by using the Publish Draft Product Territory Alignments batch job.

Restrict an Account's Access to a Product

Account-level product restrictions help organizations enforce business and regulatory requirements by preventing the detailing, sampling, or ordering of specific products at restricted accounts. Use this functionality to make sure that product interactions are limited to the appropriate accounts, reducing

compliance risks and supporting adherence to industry regulations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create product account restrictions: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Life Science Product Account Restriction**, and click **New**.
2. Select the account that you want to restrict access for.
3. Choose the Life Science Marketable Product record or the product that you want to restrict access to.
4. If needed, select the territory that you want to control the access for.
When you select a territory, the product is restricted only for the account in that specific territory. If no territory is selected, the product is restricted for the account universally.
5. Save your changes.

Create Product Territory Alignments in Bulk

Import multiple product records from external systems, align them with territories, and create detailed availability records by using the Publish Draft Product Territory Alignments batch job.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To run batch jobs: Life Sciences Commercial Admin permission set

In a bulk import, product territory availability records are imported in the Draft state. If a status is not provided, Product Management automatically assigns the Draft status to the record.

When you run a batch job, the system changes the status of the records from Draft to Active, and creates Product Territory Detailed Availability records for all child territories.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Product**, and then select **Product Alignment Job**.

3. Click **Run Now**.



4. To check the status of the job, click **Monitor Runs**.

Set Up Sample Management Features

Enable pharmaceutical companies to efficiently handle and distribute drug samples to healthcare providers. Enhance drug sales and keep healthcare providers informed about the safe and effective use of products, leading to quicker treatments. Track and manage sales representative inventories of samples, ensuring compliance with regulations, and maintaining accurate records of distribution. Effective sample management is crucial for supporting healthcare providers and low-income patients, and ensuring ethical practices and regulatory compliance.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Sample Inventory Management](#)

Help users request and manage samples in one place. Define product batches and unique identifiers to simplify the tracking of the inventory operations. Configure inventory operations, counts, and other options in the sample inventory dashboard.

[Sample Limits](#)

Sample limits provide precise control over sample distribution to help ensure your organization's compliance with governmental regulations and organizational policies. Use sample limit templates and rules based on products and accounts to enforce limits. Streamline administrative tasks, optimize resource allocation, and reduce audit risks, especially for new product launches or controlled substances.

[Territory Product Quantity Allocations](#)

With territory product quantity allocations, you can control which products are available in each territory as part of your company's business strategy. Assign sample quantities to sales territories for a specified period. Sales reps can only distribute or request approved samples that are allocated to their assigned territories.

Sample Inventory Management

Help users request and manage samples in one place. Define product batches and unique identifiers to simplify the tracking of the inventory operations. Configure inventory operations, counts, and other

options in the sample inventory dashboard.

[Prerequisites for Sample Inventory Management](#)

Before setting up Sample Inventory Management, review and complete the prerequisite tasks.

[Enable the Sample Inventory Management Dashboard](#)

Give a user profile access to the Sample Inventory Management dashboard, where users can manage inventory operations and request samples.

[Configure Org-Wide Settings for Sample Inventory Management](#)

Configure the admin console settings that apply universally in your Salesforce org.

[Configure Profile Settings for Sample Inventory Management](#)

Configure the sample inventory settings. You can apply the settings to a specific profile or the entire org.

[Select the Fields to Use for Sample Inventory Management](#)

Choose the fields that you want to show for the inventory count assessment types, inventory operation types, and disbursement process.

[Add a Quick Action Button for Resolving Disbursements](#)

Add a button to make it easy to resolve disbursements. In Sample Inventory Management, you can get samples disbursements first, and address the unresolved disbursement records later. This scenario arises when a user hasn't acknowledged the samples they're received, and so they're in possession of the quantity required to make a disbursement, but the system count shows otherwise. Sample Inventory Management enables users to perform the disbursement, but the Product Disbursement record is created with a warning and the system temporarily pauses the update of the Product Batch Item's Remaining Quantity and Product Item's Quantity On Hand fields. The user must acknowledge the received inventory and resolve the disbursement.

[Customize Actions for Inventory Processes](#)

Create custom actions to override buttons in the Inventory Count Assessment records and in the Inventory Operations records.

[Set Up Data for Sample Inventory Management](#)

Configure location types that serve as the sales representative's inventory on hand, and define addresses for the inventory's storage locations. To easily track product samples in the sample inventory workflow, configure production batches that store external identifiers, such as unique identification numbers, and internal identifiers, such as the production batch name. View the sample product quantity in a sales rep's possession by configuring product batch items.

See Also

[Create Inventory Count Assessments](#)

[Transfer Sample Inventory Between Users and Locations](#)

[Return Sample Inventory to the Warehouse](#)

[Manually Adjust a Sample Inventory Count Discrepancy](#)

[Submit a Request to Replenish Sample Inventory](#)

[Acknowledge Received Samples from Transfers and Shipments](#)

Prerequisites for Sample Inventory Management

Before setting up Sample Inventory Management, review and complete the prerequisite tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Permission Sets

- To enable sample inventory admins to configure the necessary sample inventory data, assign the Life Sciences Commercial Admin permission set.
- To help users create inventory count assessments and inventory operations, and acknowledge received samples, assign the Field Sales Representative permission set and the Health Cloud Starter permission set.
- To request and perform inventory audits, clone the Life Sciences Commercial permission set. Assign the Perform audits of Inventory Count Assessment records user permission to the user who's the auditor. Assign the Request audits of multiple Inventory Count Assessment records user permission to the user who requests the audits.

Product Data Setup

- [Create a Product record and a Life Science Marketable Product record](#). Make sure you select Drop or Drop and Ship as the distribution method in the Life Science Marketable Product record. This action ensures that sample products are visible during visits.
- Add the Production Batch and Product Item related lists to the Product object.
- [Create product record types](#).
- [Associate the product record types with the product specification types](#).
- [Create picklist values](#) for these fields.
 - Location object's Location Type field
 - Inventory Operation's Status field
 - Product Transfer's Status field
 - Product Request's Status field
 - Production Batch's Quantity Unit Of Measure fieldYou must add "Each" as a unit of measure.

Object Metadata Cache Configurations

To provide offline access to Sample Inventory Management in the mobile app, [create object metadata cache configurations](#) of type Data for these objects. For the Location object, add the *primaryUserId* =

' {USER.ID} ' SOQL filter condition.

- ProductItem
- ProductBatchItem
- InventoryOperation
- ProductDisbursement
- ProductionBatch
- Location
- Product2
- LifeSciMarketableProduct

Trigger Handlers

 **Note** Make sure you activate these trigger handlers before you create records for Sample Management.

Sample Limits

- CalculateShippedQuantityHandler
- SampleLimitTransactionHandler
- NewAccountSampleLimitInitHandler
- NewAccountSampleLimitInitHandlerforHCO

Sample Inventory Management

- ProductTransferLockHandler
- ReceivedProductAllocationHandler
- ProductTransferValidationHandler
- TransferOutTriggerHandler
- ProductDisbursementSubmitLockHandler
- ProductDisbursementInventoryOpCreation
- LocationUserDupHandler
- LocationUserSharingHandler
- ProductBatchItemOwnershipHandler
- InventoryOperationLockHandler
- InventoryOperationSyncTxnHandler
- InventoryCountAssessmentLockHandler
- InventoryCountPBILOCKHandler
- ProductRequestLockHandler
- PrdReqLineItmUpdateAllocationHandler
- ProductRequestLineItemLockHandler
- ProductBatchItemUpdateByLotHandler
- InventoryCntPBIValidationHandler

Additional Configurations

On the Visit Administration tile's Visit Settings tab, select **Validate sample limits**.

See Also

- [Trigger Handler Administration](#)
- [Trigger Handlers for the ProductBatchItem - ProductTransfer Objects](#)
- [Set Up Product Management Features](#)
- [Create Object Metadata Cache Configuration](#)
- [Get Your Org Ready for Visit Management](#)

Enable the Sample Inventory Management Dashboard

Give a user profile access to the Sample Inventory Management dashboard, where users can manage inventory operations and request samples.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To enable the Sample Inventory Management tab: Life Sciences Commercial Admin permission set

1. From Setup, in the Quick Find box, find and select **Profiles**.
2. Select the profile, and click **Edit**.
3. In the Tab Settings, for Sample Inventory Management, select **Default On**.
4. Save your changes.

See Also

- [Manage Sample Inventory](#)

Configure Org-Wide Settings for Sample Inventory Management

Configure the admin console settings that apply universally in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure admin console settings:

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select the Sample Inventory Management tile.
3. In the left navigation pane, select **Org-Wide Settings**.
4. Configure the settings that apply across the org.
 - a. Select the location type that represents the user's inventory location.
 - b. Choose whether you want to show only active batch assignments.

If this setting is selected, only active batch assignments are considered for all sample inventory processes, such as in inventory counts, transfers, returns, and disbursements.
 - c. Select a validation type for restricting or allowing inventory operations and count assessments when records aren't synced.
5. Configure the inventory operation settings.
 - a. Select the status that indicates that an Inventory Operation record is final.
 - b. Select the status that represents that the product sample is returned to the sender.
 - c. Select the status that indicates that a Transfer In record is a duplicate record.
6. Select the inventory count assessment validation type for inventory disbursed during the visits that are still in Planned state and have signatures captured.
7. Configure the product request settings.
 - a. Select the final product request status.
 - b. To control the quantity requested, select **Require approval for product requests that exceed the territory's remaining quantity** and **Show a warning when a product request crosses maximum and minimum limits**.
 - c. Add statuses to indicate that a product request requires approval.

When you define a status in the Product Request Approval Required Status field, Sample Inventory Management applies the minimum and maximum limits that you've defined and checks the remaining territory allocation.
8. Save your changes.

Configure Profile Settings for Sample Inventory Management

Configure the sample inventory settings. You can apply the settings to a specific profile or the entire org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure admin console settings: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select the Sample Inventory Management tile.
3. In the left navigation pane, select **General Settings**.
4. Choose whether to apply the settings to the org or a specific profile.
5. Select the statuses that indicate that an inventory count assessment and its related records are locked.
6. Select the columns that you want to show in inventory count assessments.
 - a. To display the Quantity Received, Quantity Released, and Total System Count columns, select **Show system-calculated quantities in Inventory Count Assessments**.
 - b. To hide the history of Adjustments, Transfer In, Transfer Out, and Return type operations while performing count assessments, select **Hide inventory operations history**.
 - c. To display the system-calculated Opening Count column for all count assessments, select **Show opening count**.
 - d. To display only the inventory counts and operations assigned to the user in the inventory count assessment window, select **Show only assigned assessment and operation records**.
7. Configure the product request settings.
 - a. Select the statuses that indicate that a product request and the related product request line item are locked.
 - b. Choose whether to show the remaining allocation for a territory.
8. Select the statuses that indicate that Inventory Operations records and Product Transfer records are locked.
9. Save your changes.

Select the Fields to Use for Sample Inventory Management

Choose the fields that you want to show for the inventory count assessment types, inventory operation types, and disbursement process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit field sets: Customize Application

1. From the object management settings for Inventory Operation, go to Field Sets.
2. Next to Adjustment, click , and click **Edit**.
3. Move the fields that you want to show to the In the Field Set list.

4. Save your changes.
5. Repeat these steps for the Disbursement, Transfer in, Transfer out, Return, and Return to Sender field sets.
6. From the object management settings for Inventory Count Assessment, select the fields for the Ad Hoc, Audited, Initial, and Periodic objects.

See Also

[About Field Sets](#)

Add a Quick Action Button for Resolving Disbursements

Add a button to make it easy to resolve disbursements. In Sample Inventory Management, you can get samples disbursements first, and address the unresolved disbursement records later. This scenario arises when a user hasn't acknowledged the samples they're received, and so they're in possession of the quantity required to make a disbursement, but the system count shows otherwise. Sample Inventory Management enables users to perform the disbursement, but the Product Disbursement record is created with a warning and the system temporarily pauses the update of the Product Batch Item's Remaining Quantity and Product Item's Quantity On Hand fields. The user must acknowledge the received inventory and resolve the disbursement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add quick action buttons: Life Sciences Commercial Admin permission set

1. Create an action button.
 - a. From the object management settings for Product Disbursement, go to Buttons, Links, and Actions.
 - b. Click **New Action**.
 - c. For Action Type, select **Lightning Component**.
 - d. For Lightning Component, select **Isc4ce:ResolveProductDisbursementRecordAction**.
 - e. Enter a label, for example, *Resolve Disbursement*.
The name is automatically populated.
 - f. Save your changes.
2. Add the button to the page layout.
 - a. From the object management settings for Product Disbursement, go to Page Layout.
 - b. Click **Product Disbursement Layout**.
 - c. In the Page Layout editor, go to Mobile & Lightning Actions.
 - d. Move the button to the Salesforce Mobile and Lightning Experience Actions section.
 - e. Save your changes.

The button appears on the Product Disbursement page's highlights panel.

See Also

https://help.salesforce.com/s/articleView?id=platform.actions_overview.htm&type=5

[Quick Actions](#)

[Fix Unresolved Product Disbursements](#)

Customize Actions for Inventory Processes

Create custom actions to override buttons in the Inventory Count Assessment records and in the Inventory Operations records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To override buttons for inventory operations: Life Sciences Commercial Admin permission set

1. Override the New and View buttons for the Inventory Count Assessment object.
 - a. From the object management settings for Inventory Count Assessment, go to Buttons, Links, and Actions.
 - b. Next to the New button, click  and select **Edit**.
 - c. In the Override Properties pane, under Lightning Component Override, select **Lightning Component**.
 - d. In the dropdown next to Lightning Component, select **Isc4ce:InventoryCountAssessment**.
 - e. Save your changes.
 - f. Repeat these steps for the View button, but in the Lightning Component dropdown, select **Isc4ce:ViewSampleInventory**.
2. Override the Edit, New, and View buttons for the Inventory Operations object.
 - a. From the object management settings for Inventory Operations, go to Buttons, Links, and Actions.
 - b. Next to the Edit button, click  and select **Edit**.
 - c. In the Override Properties pane, under Lightning Component Override, select **Lightning Component**.
 - d. In the dropdown next to Lightning Component, select **Isc4ce:InventoryOperations**.
 - e. Save your changes.
 - f. Repeat these steps for the New and View buttons. For the New button, select **Isc4ce:InventoryOperations**. For the View button, select **Isc4ce:ViewSampleTransaction**.

See Also

https://help.salesforce.com/s/articleView?id=platform.actions_overview.htm&type=5

Quick Actions

Set Up Data for Sample Inventory Management

Configure location types that serve as the sales representative's inventory on hand, and define addresses for the inventory's storage locations. To easily track product samples in the sample inventory workflow, configure production batches that store external identifiers, such as unique identification numbers, and internal identifiers, such as the production batch name. View the sample product quantity in a sales rep's possession by configuring product batch items.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Before you start configuring data, make sure that you have the following records in place.

- To configure products, make sure you [create a Product \(Product2\) record](#).
- To designate it as a sample product, [create a corresponding Life Science Marketable Product \(LifeSciMarketableProducts\) record](#).
- [Create users](#) who represent sales reps.

Add an Inventory Location and Address for Sample Inventory Management

In Sample Inventory Management, the Location record represents the inventory that's currently in a sales rep's possession, rather than a physical location. Each sales rep is assigned a particular location to help you trace inventory. Create locations and add addresses for the storage of sample inventory.

Create Production Batches for Sample Inventory

Manage and track inventory transactions by organizing products into batches. Products are tracked by batches across all inventory operations, counts, acknowledgments, returns, and disbursements.

Create Product Items for Sample Inventory

Product items help establish a one-to-one relationship between a product and a location. When the location is designated as an inventory location, product items represent the total quantity of a product assigned to a user as inventory.

Create Product Batch Items for Sample Inventory

A product batch item establishes the relationship between the Product, Life Science Marketable Product, Production Batch, Product Batch Item, Location, and User records. It captures information about the product items allocated to a sales rep, organized by the batches that the products belong to. A product batch item record helps maintain compliance by keeping a sales rep within the defined disbursement limits. The allotted quantity is updated whenever the sales rep executes an inventory operation.

Add an Inventory Location and Address for Sample Inventory Management

In Sample Inventory Management, the Location record represents the inventory that's currently in a sales rep's possession, rather than a physical location. Each sales rep is assigned a particular location to help you trace inventory. Create locations and add addresses for the storage of sample inventory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create locations:	Life Sciences Commercial Admin permission set
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Before adding locations, make sure that the Location's page layout contains the Primary User field and the Inventory Location field.

1. From the App Launcher, find and select **Locations**.
2. Click **New**, and enter these details.
 - a. For the primary user, select the sales rep who is assigned the inventory for the location.
 - b. Select a location type.
Select the custom picklist value that indicates that the location type represents a sales rep's inventory.
 - c. Select **Inventory Location**.
If you set the location as an inventory-related location for a sales rep, you must set the location type as a User Inventory Location Type in the admin console settings. See [Configure Org-Wide Settings for Sample Inventory Management](#).
 - d. Save your changes.
3. On the Related tab, under Addresses, click **New**.
 - a. Select a location type.
 - b. Enter an address for the inventory and a postal code.
 - c. Save your changes.

See Also

[Manage Sample Inventory](#)

Create Production Batches for Sample Inventory

Manage and track inventory transactions by organizing products into batches. Products are tracked by batches across all inventory operations, counts, acknowledgments, returns, and disbursements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create batches:	Life Sciences Commercial Admin permission set
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 **Important** To track batches by using external identifiers, you must populate the Unique Identification Number. If the Unique Identification Number isn't populated, Sample Inventory Management tracks batches by using the system-generated Production Batch Name.

1. From the App Launcher, go to the Product record that you want to create a batch for.
2. On the Related tab, under Production Batch, click **New**.
3. Select **Active**, and add the unique identification number of the batch that the sample product belongs to.
4. For Quantity Unit of Measure, select **Each**.
5. Select the expiry date of the batch.
6. Save your changes.

Create Product Items for Sample Inventory

Product items help establish a one-to-one relationship between a product and a location. When the location is designated as an inventory location, product items represent the total quantity of a product assigned to a user as inventory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create product items:	Life Sciences Commercial Admin permission set
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 **Note** For Sample Inventory Management processes to work as intended, you must create only one Product Item record for a combination of a location and a product. To avoid inadvertently creating duplicate product items for a combination of a location and a product, we recommend not adding serial numbers to product items, especially when you import records from an external system.

1. From the App Launcher, go to the Product record that you want to add a production batch.
2. In the Product Item section, click **New**.
3. Select the location that's associated with the user.
4. For Quantity On Hand, enter *0*.

The quantity on hand is automatically updated based on the product batch items that the product item is related to. You can change the product quantity assigned to the user by updating the Quantity On Hand field.

5. For Quantity Unit of Measure, select **Each**.
6. Save your changes.

Create Product Batch Items for Sample Inventory

A product batch item establishes the relationship between the Product, Life Science Marketable Product, Production Batch, Product Batch Item, Location, and User records. It captures information about the product items allocated to a sales rep, organized by the batches that the products belong to. A product batch item record helps maintain compliance by keeping a sales rep within the defined disbursement limits. The allotted quantity is updated whenever the sales rep executes an inventory operation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create product batch items: Life Sciences Commercial Admin permission set

The Production Batch Item related list must be added to the Production Batch's related tab.

1. From the App Launcher, go to the Production Batch record that you want to add a production batch item to.
2. On the Related tab, under Product Batch Item, click **New**.
3. Select the product item assigned to a user.
4. Select **Active**.
5. In the Remaining Quantity field, enter the number of samples of the product batch to allocate to the user's inventory.
6. Save your changes.

Sample Limits

Sample limits provide precise control over sample distribution to help ensure your organization's compliance with governmental regulations and organizational policies. Use sample limit templates and

rules based on products and accounts to enforce limits. Streamline administrative tasks, optimize resource allocation, and reduce audit risks, especially for new product launches or controlled substances.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Create sample limit templates that contain the rules, operations, and limits to evaluate for each product and account. Assign sample limit templates to products or product groups, and update the sample limit rules for individual products as needed. Then, run a job to initialize individual accounts or account segments with the appropriate sample allocation amounts based on the sample limit template's rules. Or set up automatic initialization so sample limits are applied as soon as new HCP and HCO accounts are created.

Each time a sales rep disburses a sample, a Provider Visit Sample Limit Transaction record is created, and the related Provider Sample Limit records are updated automatically. When disbursing samples, errors or warnings make sure that sales reps stay within the defined limits.

To replace the sample limits for an account or product, run a batch job to delete the existing Provider Sample Limit records associated with the applied sample limit template. Then, apply a new template and run another job to create the new Provider Sample Limit records for that account and product.

[Sample Limit Templates](#)

Sample limit templates contain the rules, operations, and limits to evaluate for each assigned product and account. View the sample limit templates included with Life Sciences Customer Engagement. Create generic templates that use default rules and conditions, or configure advanced templates with complex sample limit rules.

[Manage Sample Limit Template Product Assignments](#)

To enforce rules and manage distribution based on the template's defined limits, assign sample limit templates to products or product groups.

[Update Sample Limit Rules for Products](#)

See the template and sample limit rules applied to each product. To help ensure your organization's compliance with governmental regulations and organizational policies, customize sample limit rules for individual products.

[Create Account Segments for Sample Limits](#)

Group accounts into segments by creating actionable lists so that you can customize sample limits and distribution strategies for different account groups.

[Initialize Sample Limits and Create Sample Limit Records](#)

Sample limits rely on dedicated batch jobs and trigger handlers to handle large-scale data processing. These sample limit batch jobs automate the creation of provider sample limit records for each combination of account, product, and assigned sample limit template.

Delete Sample Limit Rules for a Product

To clear all limits for an account and product, delete the product's sample limit rules. Then, you can reestablish new rules for that product.

Delete All Sample Limits for an Account

To remove outdated restrictions on sample distribution across all accounts, delete sample limits for a specific template. Then, you can apply new templates for those accounts.

Monitor and Run Batch Jobs for Sample Limit Triggers

Sample limit trigger handlers use batch jobs to automate the processing of large volumes of records. Track the status and health of sample limit batch jobs, and reprocess records if the batch jobs fail.

Sample Limit Templates

Sample limit templates contain the rules, operations, and limits to evaluate for each assigned product and account. View the sample limit templates included with Life Sciences Customer Engagement. Create generic templates that use default rules and conditions, or configure advanced templates with complex sample limit rules.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.



Note The Life Sciences Cloud Sample Limits features, functionality, and templates (the “Sample Limits Features”) are solely intended to help Customers provide quality services to healthcare provider (HCP) and similar end customers by giving such Customers capabilities to track and keep records of samples of medications offered, provided, or otherwise distributed by their own HCP end customers. Customers must comply with all applicable pharmaceutical, healthcare, and medicinal product-related laws in their use of the Sample Limits Features. In addition, it is Customer’s responsibility to: (i) determine which individuals within Customer’s organization can access the Sample Limits Features; and (ii) set the appropriate permissions consistent with Customer’s use case and related compliance obligations.

From the Sample Limit Templates page in the Admin Console, you can:

- See all templates.
- Add the default templates provided by Salesforce to your org.
- Create clones of the generic template or new advanced templates.
- Make custom generic templates and advanced templates active or inactive.

Types of Sample Limit Templates

Life Sciences Customer Engagement includes a generic sample limit template and several country-specific templates by default. You can also create custom generic templates by cloning the default

template. Or, you can create advanced templates that you can configure based on requirements for other countries.

Add Default Sample Limit Templates to Your Salesforce Org

Life Sciences Customer Engagement provides a generic sample limit template and several country-specific templates that you can add to your org. These templates contain predefined rules and operations for sample distribution, and they can't be edited or deleted.

Create Custom Generic Sample Limit Templates

To apply similar rules or configurations across different teams, geographies, or products with only small changes, create a custom generic template. When you create a custom generic sample limit template, you clone the generic sample limit template provided by Life Sciences Customer Engagement. Your custom generic template includes the default generic template's rules and conditions.

Create Advanced Sample Limit Templates

To define custom sample limit rules for more complex needs and for regions with stricter requirements, create an advanced sample limit template. For example, use an advanced template to configure sample limit rules for three years from the first drop date.

Types of Sample Limit Templates

Life Sciences Customer Engagement includes a generic sample limit template and several country-specific templates by default. You can also create custom generic templates by cloning the default template. Or, you can create advanced templates that you can configure based on requirements for other countries.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Template Type	Features	Limitations
Default Country-specific Templates	<ul style="list-style-type: none">Templates are predefined, and you can't customize, edit, or delete them.You can initialize sample limits automatically for new healthcare professional (HCP) and healthcare organization (HCO) accounts.	<ul style="list-style-type: none">After limits are created, you can't change them.You can assign only one template to a product.You can't use template priority to determine the limits to apply.The only rule enforcement type is Error, meaning that

Template Type	Features	Limitations
		additional distributions are blocked after limits are met.
Default Generic Template	<ul style="list-style-type: none"> Templates are predefined, and you can't customize, edit, or delete them. You can initialize sample limits automatically for HCP and HCO accounts. After the template is applied to a product, update the limits and period from the Sample Limit Rules page. 	<ul style="list-style-type: none"> You can't assign a priority to the default generic template. You can't assign multiple templates to one product. The only rule enforcement type is Error, meaning that additional distributions are blocked after limits are met.
Custom (Cloned) Generic Template	<ul style="list-style-type: none"> Create a custom generic template by cloning the default generic template. Choose between Error and Warning enforcement types to define what happens when sample limits are violated. Assign multiple templates to the same product. To determine which sample limit rules take precedence when multiple templates apply, assign each template a priority. Update limits for the sample product by creating another custom generic template and assigning it a higher priority. When a new account is created and multiple cloned generic templates apply to the product, sample limits are created based on the highest priority template. New sample limits aren't 	<ul style="list-style-type: none"> If you assign a custom generic template to a product, you can't assign a country-specific template. You can't use a custom generic template to initialize sample limits automatically for new HCP and HCO accounts.

Template Type	Features	Limitations
	<p>created when an account has existing sample limits with a higher priority.</p> <ul style="list-style-type: none"> You must create templates separately and assign them to accounts or account segments. 	
Advanced Template defined as Required by Law	<ul style="list-style-type: none"> The template is treated as a country-specific template. You can initialize sample limits automatically for HCP and HCO accounts. 	<ul style="list-style-type: none"> After limits are created, you can't change them. You can assign only one template to a product. You can't use template priority to determine the limits to apply. The only rule enforcement type is Error, meaning that additional distributions are blocked after limits are met.
Advanced Template not defined as Required by Law	<ul style="list-style-type: none"> To define what happens when sample limits are violated, choose between Error and Warning enforcement types. You can initialize sample limits automatically for HCP and HCO accounts. 	<ul style="list-style-type: none"> After limits are created, they can't be changed. You can assign only one template to a product. You can't use template priority to determine the limits to apply.

Add Default Sample Limit Templates to Your Salesforce Org

Life Sciences Customer Engagement provides a generic sample limit template and several country-specific templates that you can add to your org. These templates contain predefined rules and operations for sample distribution, and they can't be edited or deleted.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add default sample limit templates: Life Sciences Commercial Admin permission set

These templates are available for you to add to your org.

- Belgium
- Generic Template
- Germany AMG
- Germany AMG + EPFIA
- Italy Class A
- Italy Class C
- Netherlands
- Turkey

1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**, and then select **Sample Limit Templates**.
3. Select **Add Default Templates**.
If the templates are added already, you don't see this button.
4. Review the templates, and then add them to your org.

To see each template's rules and conditions, assign the template to a product from the Template Product Assignments page. Then, from the App Launcher, find the Provider Sample Limit Template Assignment record that was created. Open the template, or review the rules in the Rule Conditions field.

Create Custom Generic Sample Limit Templates

To apply similar rules or configurations across different teams, geographies, or products with only small changes, create a custom generic template. When you create a custom generic sample limit template, you clone the generic sample limit template provided by Life Sciences Customer Engagement. Your custom generic template includes the default generic template's rules and conditions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create custom generic sample limit templates: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**.
3. Select **Sample Limit Templates**, and then click **New**.
4. Enter a unique label and API name for the template.
5. Enter a priority number for the template.
The priority determines which template takes precedence when multiple templates apply to the same sample disbursement.
6. To determine what happens when sample limits are violated, select the limit enforcement type.
 - To block additional disbursements, select **Error**.
 - To let sales reps choose whether to continue with the disbursement or not, select **Warning**.
7. To make the template available for product assignments, select **Active**.
8. Save your changes.

After you create your template, you can assign the template to products and run jobs to apply sample limit rules to accounts and products.

Create Advanced Sample Limit Templates

To define custom sample limit rules for more complex needs and for regions with stricter requirements, create an advanced sample limit template. For example, use an advanced template to configure sample limit rules for three years from the first drop date.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create advanced sample limit templates: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**, and then select **Sample Limit Templates**.
3. Click **New**, and then click **Advanced**.
4. Enter a unique label and API name for the template.
5. To make the template available for product assignments, select **Active**.
6. To configure this template similar to the provided country-specific templates, select **Required by Law**.
7. If the template isn't required by law, select the enforcement type to determine what happens when sample limits are violated.
 - To block additional distributions, select **Error**.
 - To let sales reps choose whether to continue with the distribution or not, select **Warning**.
8. To determine how to apply the template's rules, select the rule operator.
9. Under Sample Limit Rules, enter a name for the first rule and how many samples can be distributed

per period and per visit.

10. Select the period type, and enter the other details for the rule.

- To enforce sample limits from the date of the first sample distribution, select **Rolling Start**. Set an interval to define how long to enforce limits after the first drop. Set an offset to add a delay or shift from the time of the first drop.
- To enforce sample limits from a fixed start date, such as the product's launch date, select **Fixed Start**. Set an interval to define how long to enforce limits after the start date. Set an offset to add a delay or shift from the start date.
- To set the maximum number of samples that can be distributed within a specified date range, select **Date Range**.
- To set the maximum number of samples that can be distributed within a calendar year, select **Calendar Year**.

11. Create more sample limit rules, or delete the ones that you no longer need.

You can create up to 3 rules.

12. Save your changes.

After you save your template, you can assign it to products and run jobs to apply its sample limit rules to accounts and products.

Manage Sample Limit Template Product Assignments

To enforce rules and manage distribution based on the template's defined limits, assign sample limit templates to products or product groups.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage sample limit templates product assignments: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.

2. Select **Sample Limits**, and then select **Template Product Assignments**.

3. Select the template that you want to assign to products.

If you select the default generic template or a custom generic template, you can modify the maximum quantity for each visit and period. You can also set the period start and end dates for the products that you select.

4. In the product hierarchy, search for products, or use the arrows to expand or collapse product groups.

5. Select the products to apply sample limit templates to.

6. Scroll to the bottom of the page and save your changes.

When you save your changes, provider sample limit template assignment records are created automatically for each product and template. If you make changes to the templates, these records aren't updated. Update provider sample limit template assignment records manually to reflect the updated template rules.

7. Go to the Sample Limits Jobs page and run the relevant job.

- If this is the first time you're assigning the template to a product, run the job to [initialize the template for accounts](#).
- If the template already had a product assigned and you changed the assigned template, run the [Assign Sample Limit Templates to Products](#) job instead.

After you assign sample limit templates to products, make sure that users can access provider sample limit template assignments. [Update the sharing settings](#) for the provider sample limit template assignment object and set the default internal access to **Public Read Only**. Alternatively, share these records with each user manually.

Update Sample Limit Rules for Products

See the template and sample limit rules applied to each product. To help ensure your organization's compliance with governmental regulations and organizational policies, customize sample limit rules for individual products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage sample limit rules: Life Sciences Commercial Admin permission set

You can update sample limit rules only for products assigned to the default generic template.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**, and then select **Sample Limit Rules**.
3. In the product hierarchy, search for products, or use the arrows to expand or collapse product groups.
4. To see a product's assigned template and sample limit rules, select a product in the hierarchy.
5. If the default generic template is assigned to the product, update its sample limit rules as needed. Enter or update the maximum limits for each visit and each period, and adjust the period start and end dates.
6. Save your changes.
7. Go to the Sample Limits Jobs page, and then run the [Assign Sample Limit Templates to Products](#) job. If accounts aren't initialized with the sample limits for this product yet, run the [Assign Sample Limit Templates to Accounts](#) job instead.

Create Account Segments for Sample Limits

Group accounts into segments by creating actionable lists so that you can customize sample limits and distribution strategies for different account groups.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To manage sample limits:	Life Sciences Commercial Admin permission set
To create actionable list definitions and actionable lists:	Health Cloud Starter permission set
	AND
	Actionable Segmentation permission set
	AND
	Data Pipelines Base User permission set
	AND
	Query for Datapipelines User permission set
	AND
	Use Data Processing Engine permission

Create an Actionable List Definition

Create an actionable list definition of type Healthcare Provider List by using the provided Create Dataset for Segmentation data processing engine template. The Create Dataset for Segmentation data processing engine creates a dataset by integrating data from the account, healthcare provider, provider account product information, and provider account territory information objects.

Before you create an actionable list definition, make sure that you set up [person accounts](#) and [territories](#). Then, grant Read access to these objects and their fields for the Analytics Cloud Integration User and Business Admin user profiles.

- Account

- Healthcare Provider
- Provider Account Product Information
- Provider Account Territory Information

1. From Setup, in the Quick Find box, find and select **Data Processing Engine** under Workflow Services.
2. Find the Create Dataset for Segmentation job in the list, click the action menu, and then select **Save As**.
3. Enter a unique name and API name for the definition, and then save your changes.
Copy and save the API name so that you can update the writeback object node.
4. If needed, edit the Data Processing Engine definition.
5. Update the writeback object for the Data Processing Engine definition.
 - a. Find the cloned Data Processing Engine definition in the list and select it.
 - b. Select the Create Dataset Writeback object node, and then select **Configure**.
 - c. In the Dataset Name field, enter the API name of the Data Processing Engine definition.
 - d. Save your changes.
6. [Activate the cloned Data Processing Engine definition](#).
7. [Run the activated Data Processing Engine definition](#) to create the initial dataset.

Create an Account Segment

Define an account segment by creating an actionable list of type Healthcare Provider List.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**, and then **Segmentation**.
3. Select **Manage Segmentation**.
The Actionable Lists page opens.
4. On the Actionable Lists page, define an account segment by creating an actionable list. Select a list definition of type Healthcare Provider List.

After you create an account segment, return to the Sample Limits tile in the Admin Console to initialize sample limits for those accounts.

See Also

- [Create an Actionable List Definition](#)
- [Create Actionable Lists From List Definitions](#)
- [Initialize Sample Limits for Accounts](#)

Initialize Sample Limits and Create Sample Limit Records

Sample limits rely on dedicated batch jobs and trigger handlers to handle large-scale data processing. These sample limit batch jobs automate the creation of provider sample limit records for each combination of account, product, and assigned sample limit template.

[Initialize Sample Limits for Accounts](#)

To initialize the sample limit templates that are assigned to healthcare professional (HCP) and healthcare organization (HCO) accounts for the first time, run the Assign Sample Limit Templates to

Accounts job. When you initialize the templates, provider sample limit records are created for each account and product based on the sample limit template and rules.

Assign Sample Limit Templates to Products

To apply sample limits when new products are assigned to an existing sample limit template or when a product's sample limit rules are updated, run the Assign Sample Limit Template to Products job. When you run this job, additional provider sample limit records are created for new products and existing provider sample limit records are updated based on updates to the template.

Automate Sample Limits for New Accounts

Define how sample limit templates are applied automatically to newly created healthcare professional (HCP) and healthcare organization (HCO) accounts.

Initialize Sample Limits for Accounts

To initialize the sample limit templates that are assigned to healthcare professional (HCP) and healthcare organization (HCO) accounts for the first time, run the Assign Sample Limit Templates to Accounts job. When you initialize the templates, provider sample limit records are created for each account and product based on the sample limit template and rules.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To run sample limit jobs:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**, and then select **Sample Limit Jobs**.
3. Under Assign Sample Limit Templates to Accounts, click **Run Now**.
4. In the Account Scope field, select whether to initialize sample limits for all accounts, a specific account, or a segment of accounts.
5. Select whether to initialize sample limits for only HCP accounts, only HCO accounts, or both HCP and HCO accounts.
6. If you're initializing sample limits for only a certain account, select an account.
7. If you're initializing sample limits for only a certain segment of accounts, select a segment.
8. Select a sample limit template to apply to the accounts.
9. To set how many accounts to initialize sample limits for in this job run, adjust the batch size.
10. Run the job.

The job runs asynchronously. To see the job's status, monitor the log on the Sample Limit Jobs page.

In the job log, this job's name is SampleLimitJobInit. Running this job for all accounts or for a segment

of accounts creates two entries in the log. One entry tracks the sample limit records created and one entry tracks updates to the created records. The number of records processed in each entry can be different if there aren't records to update.

Assign Sample Limit Templates to Products

To apply sample limits when new products are assigned to an existing sample limit template or when a product's sample limit rules are updated, run the Assign Sample Limit Template to Products job. When you run this job, additional provider sample limit records are created for new products and existing provider sample limit records are updated based on updates to the template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To run sample limit jobs:	Life Sciences Commercial Admin permission set
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Run this job only after you assign a sample limit template to a new product or after you update limits for an existing product.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**, and then select **Sample Limit Jobs**.
3. Under Assign Sample Limit Template to Products, click **Run Now**.
4. Select the template that you assigned to a product or that you updated sample limit rules for.
Only the products that are assigned to the template appear in the list of available products.
5. Move the products with newly assigned templates or updated rules to the Selected Products section.
6. To determine how many sample limits to update, adjust the batch size.
7. Run the job.

The job runs asynchronously. To see the job's status, monitor the list on the Sample Limit Jobs page.

In the Sample Limits Job log, this job's name is SampleLimitJobUpdate. Running the job creates two entries in the log, one to track the sample limit records created and one to track updates to the created records. The number of records processed in each job can be different if there aren't records to update.

See Also

[Manage Sample Limit Template Product Assignments](#)

[Update Sample Limit Rules for Products](#)

Automate Sample Limits for New Accounts

Define how sample limit templates are applied automatically to newly created healthcare professional (HCP) and healthcare organization (HCO) accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To enable trigger handlers:	Life Sciences Commercial Admin permission set
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You can initialize sample limits automatically with these template types.

- Default country-specific templates
- Default generic template
- Custom advanced templates

Turn on Trigger Handlers

To initialize sample limits automatically for all templates in your Salesforce org, first turn on trigger handlers.

1. From the App Launcher, find and select **LifeSciences Commercial**, and then select **Admin Console**.
2. Select **Trigger Handler Administration**.
3. Search for and turn on these trigger handlers.
 - NewAccountSampleLimitInitHandlerforHCO
 - NewAccountSampleLimitInitHandler

Initialize Sample Limits for Specific Templates

After you turn on trigger handlers, you can choose to initialize sample limits for accounts with specific templates.

1. From the object management settings for the Account object, create a custom text or picklist field to determine the sample limit templates that are applied automatically to new HCP or HCO accounts.
2. From the App Launcher, find and select **Admin Console**.
3. Select **Sample Limits**, and then select **Sample Limit Settings**.
4. Choose whether to apply the settings at the organization level, or select the user profile or the individual user to apply the settings for.
5. In the Account Sample Limits Source Field, select the field on the Account object that determines the

sample limit templates that are applied automatically to new healthcare professional or healthcare organization accounts.

6. Save your changes.

Each time that you create a new account, in the custom field that you created, enter the API name of the sample limit template to initialize for that account. After you save the record, sample limit templates are initialized automatically for the new account.

If you update the custom sample limit template field on an existing account, run the batch job manually to initialize the sample limits for that account. See [Monitor and Run Batch Jobs for Sample Limit Triggers](#).

Delete Sample Limit Rules for a Product

To clear all limits for an account and product, delete the product's sample limit rules. Then, you can reestablish new rules for that product.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To delete sample limit rules: Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**, and then select **Sample Limit Rules**.
3. In the product hierarchy, search for products, or use the arrows to expand or collapse product groups.
4. To see a product's assigned template and sample limit rules, select the product in the hierarchy.
5. To delete sample limit rules and remove the product from the template, click **Delete**.
6. Go to the Sample Limits Job page, and then run the Delete Sample Limits job.

After you delete sample limit rules, you can apply a new template to that product and update rules if needed. Then, initialize the new sample limits for that account and product.

Delete All Sample Limits for an Account

To remove outdated restrictions on sample distribution across all accounts, delete sample limits for a specific template. Then, you can apply new templates for those accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To run sample limit jobs:	Life Sciences Commercial Admin permission set
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Running this job doesn't delete provider sample limit records that are in use for sample limit transactions. To replace the template that's in use, assign and initialize a new template for that account or segment. Then, run this job to delete the sample limits associated with the old template.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Sample Limits**, and then select **Sample Limit Jobs**.
3. Under Delete Sample Limits, click **Run Now**.
4. Select the template that you want to delete sample limits for.
5. To determine how many sample limits to delete in this job, adjust the batch size.
6. Run the job.

The job runs asynchronously. To see the job's status, monitor the list on the Sample Limit Jobs page.

To verify that sample limits are deleted after the job runs, go to the App Launcher, and then find and select Provider Sample Limits. All sample limits created from the template are deleted and no longer appear in the list view.

Monitor and Run Batch Jobs for Sample Limit Triggers

Sample limit trigger handlers use batch jobs to automate the processing of large volumes of records. Track the status and health of sample limit batch jobs, and reprocess records if the batch jobs fail.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create, edit, and delete Life Sciences Cloud data:	Life Sciences Commercial Admin permission set
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To use the Developer Console:	API Enabled AND View All Data
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If a batch job fails for one of these trigger handlers, review the batch job and batch job part records to get details about the failures.

- CalculateShippedQuantityHandler
- NewAccountSampleLimitInitHandler
- NewAccountSampleLimitInitHandlerforHCO

Then, you can reprocess the failed records so the sample limits are created or updated.

1. From the Setup menu, open the Developer Console.
2. Select **Debug**, and then select **Open Execute Anonymous Window**.
3. To reprocess records created or updated via the CalculateShippedQuantityHandler trigger handler, enter this Apex code. In `sampleIds`, replace the example set of Provider Visit Requested Sample record IDs with your own.

```
Set<Id> sampleIds = new Set<Id> { '001XXXXXXXXXXXXAA4', '001XXXXXXXXXXXXAA4' };
```



```
Map<String, Object> paramMap = new Map<String, Object>();
```



```
paramMap.put('action', 'updateSampleLimitsWithShippedQuantity');
```



```
paramMap.put('providerVisitRqstSampleIds', sampleIds);
```



```
LifeScienceApi.getInstance(LifeScienceApi.Command.SampleLimitsJobService).execute(paramMap);
```

4. To reprocess records created or updated via the NewAccountSampleLimitInitHandler or NewAccountSampleLimitInitHandlerforHCO trigger handlers, enter this Apex code. In `accountIds`, enter the IDs of the accounts to process and initialize sample limits for.

```
Set<Id> accountIds = new Set<Id> { '001XXXXXXXXXXXXAA4', '001XXXXXXXXXXXXAA4' };
```



```
Map<String, Object> paramMap = new Map<String, Object>();
```



```
paramMap.put('action', 'initializeSampleLimitsForNewAccounts');
```



```
paramMap.put('accountIds', accountIds);
```



```
LifeScienceApi.getInstance(LifeScienceApi.Command.SampleLimitsJobService).execute(paramMap);
```

5. Click **Execute**.

Executing the Apex code invokes the trigger handlers to reprocess the records. If the batch job fails again, failures are logged in new batch job and batch job part records.

See Also

[Developer Console](#)

[Apex Developer Guide: Batch Apex](#)

Territory Product Quantity Allocations

With territory product quantity allocations, you can control which products are available in each territory as part of your company's business strategy. Assign sample quantities to sales territories for a specified period. Sales reps can only distribute or request approved samples that are allocated to their assigned territories.

[When to Use Territory Product Quantity Allocations and Sample Limits](#)

Both territory product quantity allocations and sample limits can help you manage sample product distribution to healthcare professionals (HCPs). Understand the difference between these options and when to use them.

[Set Up Territory Product Quantity Allocations](#)

Allocate sample products to a specific territory over a specified period. Use this feature to control the products that sales reps can access for sampling to healthcare professionals (HCPs).

When to Use Territory Product Quantity Allocations and Sample Limits

Both territory product quantity allocations and sample limits can help you manage sample product distribution to healthcare professionals (HCPs). Understand the difference between these options and when to use them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Territory product quantity allocations control inventory management and strategic distribution, while sample limits control regulatory compliance and responsible sampling per account. You can configure territory product quantity allocations and sample limits separately. Or, use them together to control the quantity of samples allocated to territories and how many samples sales reps can distribute per account and visit within that territory and period.

Feature	Overview	Purpose	Characteristics
Territory Product Quantity Allocations	Controls how much of a sample product is allocated to a territory for distribution to HCPs.	Helps with inventory management, budgeting, and strategic distribution planning.	<ul style="list-style-type: none">• Set at the territory level.

Feature	Overview	Purpose	Characteristics
			<ul style="list-style-type: none"> Determines the total quantity of a sample product available for that territory. Used for planning and managing sample stock. Managed via Territory Product Quantity Allocations records.
Sample Limits	Defines the maximum number of samples that can be distributed to a specific account within a given time frame or under certain conditions.	Prevents oversampling to ensure regulatory compliance and adhere to legal restrictions	<ul style="list-style-type: none"> Set at the account level. Determines the maximum quantity an account can receive. Managed via sample limit templates with defined rules, such as 2 samples per visit or 5 samples per period per account. Limits can reset periodically.

Set Up Territory Product Quantity Allocations

Allocate sample products to a specific territory over a specified period. Use this feature to control the products that sales reps can access for sampling to healthcare professionals (HCPs).

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create, edit, and delete Life Sciences Customer Engagement data: Life Sciences Commercial Admin permission set

Before you allocate quantities, create territories and products. Then, configure product territory alignments to control how products are assigned to territories and to make sure that the right users have access.

Create Territory Product Quantity Allocations

To allocate samples to territories, add or update territory product quantity allocation records. Or, use Data Loader to create allocations in bulk.

1. From the App Launcher, find and select **Territory Product Quantity Allocations**, and then click **New**.
2. Select the product and territory that you want to enforce this quantity allocation for.
We recommend defining allocations at the lowest relevant level in the hierarchy where samples are managed.
3. Select or create a period during which to enforce the quantity allocation for this product and territory.
4. To determine how sales reps can disburse the product, select the allocation type.
 - To distribute samples to HCPs during visits, select **Drop**.
 - To ship samples directly to HCPs, select **Ship**.
5. Define the quantities to enforce.
 - The Allocated Quantity is the amount of the sample product that is being allocated to the territory for the selected time period.
 - The Adjustment Quantity is the amount to adjust the allocated quantity.
 - The Ordered Quantity represents the total amount that is ordered and available for distribution in the territory.
 - The Max Disbursement Limit Quantity is that the maximum amount that a sales rep can disburse in a given visit.
6. Save your changes.

After a visit is submitted or signed, territory product quantity allocation records are updated. The debited quantity shows the amount disbursed or shipped to HCPs, and the remaining quantity is calculated to reflect the disbursement.

To monitor allocations, track usage, and identify any discrepancies, we recommend setting up reports and dashboards.

Enforce Validations for Sample Disbursements

To make sure that disbursements don't exceed the territory inventory, enforce validations when users submit a visit.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Visit Administration**, and then select **Visit Settings**.

3. Select **Validate territory quantity inventory**.
4. Choose whether to show an error and prevent the user from submitting the visit or to show a warning and let the user submit the visit anyway.

Set Up Common Customer Engagement Components

Notify users of critical updates with App Alerts. Prevent legal and regulatory violations by making informed decisions with License Validation Checks. Manage complex business processes and guide users through their tasks with clear steps with multi-step workflows and related lists. Maximize customer engagement efficiency with Multi-Object Components and Dynamic Tree Views. Create Quick and Custom Actions for smoother workflows. Visualize Sales Data for effective customer interactions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[App Alerts](#)

Deliver in-app notifications to sales reps in their flow of work by using App Alerts. Create alerts and assign them to specific territories to make sure that notifications reach the right sales reps. With App Alerts, enhance in-app communication, drive user engagement, and avoid missing opportunities.

[Dynamic Tree View Components for Life Sciences](#)

Configure a Dynamic Tree View component to show related Life Sciences Cloud for Customer Engagement data in an expandable hierarchy. Users can easily explore related records in one place without going to multiple pages, boosting visibility and saving time. For example, show the account hierarchy within a health system, or visualize how healthcare professionals (HCPs) and healthcare organizations (HCOs) are aligned under specific territories.

[License Management in Life Sciences](#)

Help your company comply to legal and regulatory standards, and adhere to audit-tracking measures with flexible license validity evaluations. License management in Life Sciences is a critical process that makes sure that healthcare providers (HCPs) have the required license and authorization to receive pharmaceutical samples.

[Multi-Object Components for Life Sciences](#)

The Life Sciences Cloud for Customer Engagement multi-object components consolidate fields from several related objects onto a single record page, making it easier for users to view and manage data. Showing fields from multiple objects together helps users avoid going to multiple pages and simplifies the workflows for accounts, inquiries, and visits.

[Provider Bulk Sync](#)

Provider Bulk Sync helps organizations to effectively and efficiently manage their relationships with Healthcare Organizations (HCOs) and Healthcare Providers (HCPs). It allows organizations to integrate

HCP and HCO data from IQVIA OneKey directly into the Life Sciences Cloud data model. This process helps organizations get verified HCP data, which helps users have the right information for their customer engagement plans and activities. The verified data can be used for territory planning and other processes.

Data 360 for Life Sciences Customer Engagement

Integrate Data 360 with Life Sciences Cloud by using the Life Sciences Data Kit. When you deploy the Life Sciences Data Kit, you get access to prebuilt data mappings, data streams, and other features that unify and harmonize your Account Management data.

Quick and Custom Action Management

To simplify user experiences in Salesforce and the Life Sciences for Customer Engagement mobile app, leverage quick actions and custom actions. These actions provide convenient access to essential information and common tasks, which streamlines user navigation and workflows.

Related Lists for Life Sciences

Records in Salesforce can include details and links to other related records. The Life Sciences Cloud for Customer Engagement related list offers more customization and filtering options than standard related lists. If you create a Life Sciences Cloud for Customer Engagement workflow, you can also control the actions that users can take on related records based on the parent record's status, user role, and other business rules. These related lists are supported both online and offline in the Life Sciences Cloud mobile app.

Reports and Dashboards Administration

Use reports and dashboards to deliver information to your Life Sciences Cloud mobile app users in the ways that work best for them.

Run Batch Jobs

Automate the processing of large record volumes by running Apex batch jobs from the Admin Console.

Trigger Handler Administration

View and activate trigger handlers in the Life Sciences Customer Engagement Admin Console.

Workflows for Life Sciences

Life Sciences Cloud for Customer Engagement workflows automate your business processes and guide users through their tasks with clear steps. Configure the permissions and actions for each step of the workflow based on the users' context and role. Implement custom validations to make sure that users follow business processes, and provide checklists to help users understand how to use the workflow. These workflows are supported both online and offline in the Life Sciences Cloud mobile app.

App Alerts

Deliver in-app notifications to sales reps in their flow of work by using App Alerts. Create alerts and assign them to specific territories to make sure that notifications reach the right sales reps. With App Alerts, enhance in-app communication, drive user engagement, and avoid missing opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

How App Alerts Work

Use App Alerts to create notifications, define how and when they appear, and deliver them to the correct sales reps. With App Alerts, sales reps can view all alerts in one place, take immediate action, and avoid missing opportunities.

Additional Message Field for App Alerts

Improve the standard look and presentation of alerts on the mobile app. Use the Additional Message field on the App Alert object for custom message bodies, categorized tags, and the actions that users can take directly from the alert.

Set Up App Alerts

Send relevant and targeted notifications, recommendations, and guided actions to sales reps on web and mobile apps. Configure the trigger handlers, assign access to the Apex classes, and activate the Life Sciences Cloud for Customer Engagement app for the standard user profile. Add the Lightning component to the record page to show Alerts to your sales reps.

Create an App Alert

App alerts are the broader, contextual notifications that appear in specific application areas. Choose a context type to control where the alert appears: All, Object, and Tab.

Record Alert Configuration for App Alerts

Target notifications associated with specific records, such as Accounts and Healthcare Providers, to your users. You can create a record alert manually or trigger it automatically using the Business Rules Engine.

Create App Alert Territories

App Alert Territories represents a junction between an Alert, either an App Alert or a Record Alert, and a Territory where the alert is sent. Use App Alert Territories to associate an alert with one or more territories so that only the users assigned to those territories see the message.

Mobile App Configuration for App Alerts

Configure the object schema for supported App Alerts objects and generate a metadata cache to make sure your sales reps receive timely alerts on the Life Sciences Cloud Mobile app.

Create a Metadata Cache

Package the object schema configuration into a downloadable metadata cache that the mobile app can use. Create a metadata cache to make sure that the app consistently uses the latest metadata definitions, even when a network connection is unavailable.

How App Alerts Work

Use App Alerts to create notifications, define how and when they appear, and deliver them to the correct

sales reps. With App Alerts, sales reps can view all alerts in one place, take immediate action, and avoid missing opportunities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You can create App Alerts for sales reps in three ways, depending on your business needs.

- Create Alerts Manually: Create records for the Record Alert, App Alert, and App Alert Territories objects. To control who sees an alert, map it to one or more territories by using the App Alert Territories object, which helps you target alerts geographically or organizationally. Only the users assigned to the mapped territories see the alerts during the specified time period.
- Create Alerts Automatically: Eliminate the need for manual intervention by automating alerts to trigger based on specific conditions or user actions. For example, create rules in the Business Rules Engine or use Flows to send alerts based on real-time context or business rules automatically. See [Create Record Alerts Using Business Rules Engine](#).
- Surface Alerts from External Systems: If you have critical information stored outside of Salesforce, use this method to bring it in as an alert. See [Show External System Record Alerts in Salesforce](#).

Where and How Users See Alerts

Show the alerts directly in the Life Sciences Commercial app, so sales reps can stay informed in their flow of work.

On mobile, sales reps open alerts from the bell icon in the app header. The message pane organizes alerts into tabs for notifications, recommendations, and guided actions. Depending on the alert type, here are some actions users can perform on the mobile app:

- View alerts grouped by type in the message pane
- Dismiss or resolve alerts and if needed, provide a reason
- Complete tasks or actions directly from alerts
- Go to external websites, apps, or internal records

Web: Alerts are shown in the Notifications List Lightning web component on the Notifications and Recommendations tab. Add this component to a specific record page, the app's homepage, or an app page. It adapts based on the context and visibility rules that you configure. Here are the actions users can perform on the web app.

- Guided actions are grouped in the Notifications section
- Users can view alerts and mark them as Read

How Alert Visibility and Behavior Are Controlled

Control alert content and interaction by using the **AdditionalMessage** field on the App Alert object. This field supports a JSON structure for defining deep links, external URLs, action buttons, and tags. See [Additional Message in App Alerts](#).

-  **Note** If the alert includes actions, use the `actionName` field with values such as Dismissed and Resolved. You can also define required and optional reasons that users select when they dismiss the alert. These responses are stored in the App Alert User Response object.

Alert visibility is controlled by the **AlertType** and the **ValidUntilDate** fields.

- For mobile: Alerts remain visible until the user marks them as Read. If no `ValidUntilDate` value is set, they stay visible indefinitely.
- For web: Notifications and recommendations are visible for up to 7 days from the effective date, unless dismissed or removed earlier. Guided Actions stay active until dismissed or resolved.

Here's how alert behavior and visibility work across platforms:

Feature	Web	Mobile
Sorting Logic	If multiple alerts appear on the same record, the most recent one, based on the effective date, appears at the top of the list.	Same as web: alerts are sorted by effective date, with the newest alert shown first.
Actions	Users can view and mark a message as Read.	Users can mark a message as Dismissed or Resolved. These actions are supported in the message pane. When you configure the alert to require a dismissal reason, users can provide one, as optional or required. The alert is then removed from the list, and the related alert status is updated via App Alert User Response.
Deep Links and Action Buttons	Not supported. Alerts can't include buttons or direct links to records or external systems.	Fully supported through the AdditionalMessage JSON field. You can include buttons, deep links, internal or external links, and tags in your alerts.

Additional Message Field for App Alerts

Improve the standard look and presentation of alerts on the mobile app. Use the Additional Message field on the App Alert object for custom message bodies, categorized tags, and the actions that users can take directly from the alert.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Additional Message configuration includes three main parts: Message, Tags, and Actions.

Message

Customize the alert message body by using plain text, hyperlinks, and deep links that direct users to specific records or tabs. Use deep links to guide users to targeted actions directly from the alert. The message supports:

- Basic HTML formatting, including `<a>` tags for hyperlinks
- Deep links to open tabs, records, and quick actions
- Web links to external content and documentation

Supported link formats for the Additional Message field.

The table outlines the link formats that you can use in the Additional Message field on the App Alerts object. These formats use HTML `<a>` tags to create deep links and external links. The table also explains the behavior and context of each link format.

Name	Examples	Description
Message Body	<pre>"message": "Agentforce just got smarter. Explore new features like guided visit prep, account insights, and action suggestions – all designed to help you plan faster and engage more effectively. Tap to see <a href=\"http</pre>	

Name	Examples	Description
	<pre>s://siliconangle.com/2025/05/12/salesforce-agentforce-data-cloud-path-software-hyperscaler\">what's new and boost your daily workflow ."</pre>	
External Web Page	<pre>what's new and boost your daily workflow</pre> <pre>Search Today weather in Browser</pre>	<ul style="list-style-type: none"> • Opens the link inside the in-app browser when no target attribute is specified. • Opens the link inside the device's default browser, like Safari instead of the in-app browser.
Tabs	<pre>Account Page</pre>	Opens a Salesforce tab directly, such as the Account tab.
Specific Record	<pre>YYYYYY</pre>	Opens a specific record, such as Account, using its record ID.
Quick Actions	<pre>Log Visit</pre>	Triggers a predefined quick action on a specific record, such as logging a visit.

Name	Examples	Description
	<pre>unt/record-id/001fic00 0000PG9AAM/quick-action/lsc4ce_LogAVisit\">Plan with Dr. Jones</pre>	
External App Deep Linking	<pre></pre>	Opens a screen or channel in a supported third-party app, such as Slack, using a valid deep link.

 **Note** Line breaks aren't supported in the message body. Double quotes ("") in link tags must be escaped using backslash (\").

Home Office Announcements

On App Alert records with the Announcement type, the Additional Message fields support these HTML tags so you can customize the app alerts that appear as notifications on the Life Sciences Commercial home page.

-
- <i>
- <u>
- <s>
- <p>
-

- <h1>, <h2>, <h3>, <h4>, <h5>, <h6>

Tags

Use tags to categorize additional messages and visually highlight their context and purpose. These tags appear as labels in the alert that helps users quickly recognize the message. Each tag requires a title, a short label identifying the tag, for example, What's New.

Assign one or more tags to each message. Tags can represent campaign names, feature highlights, or categories such as Territory, Engagement, and Product Update.

This example demonstrates how tags are defined in JSON format.

```
{
```

```
"tags": [ "Agentforce", "What's New", "Next Gen LSC"
]
}
```

Actions

Use actions to define what happens when a user interacts with a message. Configure actions to open a web URL, launch a deep link, or enable the user to dismiss or resolve the message. Use these options to direct users to relevant content or mark the notification as handled.

Supported Actions

For actions that involve opening a web URL or a deep link, each action must include at least a title and an action. For the dismiss or resolve action type, the required fields are title, actionable, and actionPerformed; the action field is not necessary. In addition, there are parameters available to guide user responses when they dismiss or resolve actions.

This table lists the required fields for the two action types.

Action Type	Required Fields	JSON Examples
Open a Web URL or Deep Link	<ul style="list-style-type: none"> Title: The label shown on the action button. Action: The URL or deep link that the action directs to. 	<pre>{ "notificationActions": [{ "title": "Agentforce 2.0", "action": "https://www.theskyplanner.com/what-is-salesforce-einstein/" }] }</pre>
Dismiss or Resolve Alerts	<ul style="list-style-type: none"> Title: The label shown on the action button. Actionable: Indicates whether the action is interactive or clickable for end users. When the actionable property is set to true, the action button 	<pre>{ "notificationActions": [{ "title": "Dismiss", "actionable": true, "actionName": "Dismiss" }] }</pre>

Action Type	Required Fields	JSON Examples
	<p>becomes clickable, and the system records the user's response when the action is triggered. Skip this field for actions that open a web URL or deep link.</p> <ul style="list-style-type: none"> • actionName: Specifies the outcome when users interact with the action. • (optional) dismissOptions: A list of predefined options for the user to choose from when they dismiss the message. • (optional) dismissOptionRequired: Indicates whether selecting a dismiss option is mandatory. 	<pre> "ed", "dismissOptions": ["Acknowledged", "Expired"], "dismissOptionRequired": true }]</pre>

See Also

[Create an App Alert](#)

Set Up App Alerts

Send relevant and targeted notifications, recommendations, and guided actions to sales reps on web and mobile apps. Configure the trigger handlers, assign access to the Apex classes, and activate the Life Sciences Cloud for Customer Engagement app for the standard user profile. Add the Lightning component to the record page to show Alerts to your sales reps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure App Alerts:

Life Sciences Commercial Admin

- Profiles are configured, and permission sets are assigned to users based on their roles. See [Assign Life Sciences Cloud for Customer Engagement Permission Sets](#).

- If you're using territory targeting, ensure your territory model includes territory types, active territory models, and user assignments to territories. For more information, see [Set Up Territory Types and Territories](#).
 - Required data is available for related objects, such as Accounts, App Alerts, Record Alerts, and App Alert Territories.
1. Make sure that your Salesforce org uses the default sharing settings because for App Alerts record sharing is based on territory assignments.
 - In the [sharing settings](#) for the App Alert and Record Alert objects, verify that default internal access is set to **Private**.
 - On each user profile, verify that the **View All Records** permission is disabled for the App Alert and Record Alert objects.
 2. Configure trigger handlers for App Alerts.
 - a. From the App Launcher, find and select **Admin Console**.
 - b. Click **Trigger Handler Administration**.
 - c. Turn on **NotificationTerritorySharingHandler**.
Check if a record on the `LifeScienceTriggerHandler` object with the developer name `NotificationTerritorySharingHandler` was created. If no record exists, create one.
 3. From Setup, assign access to the required Apex classes through the built-in Life Sciences Field Sales Representative or, optionally, through a custom profile created by you.
 - `LWCSoqlConnector`
 - `NotificationsComponentController`
 - `SystemController`
 - `TerritorySwitcherCmpController`

See [Set Apex Class Access from Permission Sets](#) and [Set Apex Class Access from Profiles](#).
 4. Add the built-in Notifications List Lightning component to the Life Sciences Cloud for Customer Engagement app.
Add the Lightning component on a record, home, or app page.
 - a. From the App Launcher, find and select **Life Sciences Commercial**.
 - b. Click the  icon, and then click **Edit Page**.
 - c. In the Components section, find and select **Notifications List** in the search box.
 - d. Drag the component to the canvas.
 - e. Save your changes.
 5. If you selected Announcement as the type of alert, add the LSC Home Announcement Lightning component to the Life Sciences Cloud for Customer Engagement app.
Add the Lightning component on a record, home, or app page.
 - a. From the App Launcher, find and select **Life Sciences Commercial**.
 - b. Click the  icon, and then click **Edit Page**.
 - c. In the Components section, find and select **LSC Home Announcements**.
 - d. Drag the component to the canvas.
 - e. Save your changes.

See Also

[Create an App Alert](#)

[Record Alert Configuration for App Alerts](#)

[Create App Alert Territories](#)

Create an App Alert

App alerts are the broader, contextual notifications that appear in specific application areas. Choose a context type to control where the alert appears: All, Object, and Tab.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure App Alerts:	Life Sciences Commercial Admin
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1. From the App Launcher, find and select **App Alerts**.
2. Click **New**.
3. Enter a subject as needed.
4. Select the type of alert.
 - Announcement: For broad internal communication, such as home office announcements.
 - **Note** Use Salesforce Files to upload images and create image URLs for home office announcements. Make sure to use HTTPS image URLs rather than HTTP, as HTTPS is more secure. See [Upload Images in your Salesforce Org](#). If images in home announcements don't appear, check whether the image URLs are from a domain added as a trusted URL. See [Manage Trusted URLs](#).
 - Notification: For short, contextual updates to inform users about relevant actions or statuses.
 - Recommendation: To guide users toward the next best action or suggestion.
 - Guided Action: To direct users through specific tasks by using predefined instructions.
5. Select the display context type, as needed.
 - Object: Shows the alert on the record pages of a specific object. On web and mobile, if the object type is populated, the alert appears on all records of that object. You must populate the `DisplayContextName` with the object name.
 - Tab: Shows alerts on a specific tab in the app. The tab must be identified by the `DisplayContextName` value.
 - Global: Shows the alert across all records. Global is the default value applied if you leave the `DisplayContextType` field blank. On the web and mobile, global alerts appear on the homepage.
6. Select the effective start date and time.
Indicates the date and time from when the alert becomes visible to users.
7. If needed, select the effective end date and time.
 - On mobile, notifications and recommendations are visible by default for up to 7 days from the effective start date, unless removed earlier.

- If no ValidUntilDate value is set for the web, alerts are visible indefinitely until the user marks them as Read.
8. If needed, in Additional Message, enter the JSON object.
This field supports a JSON structure that enables deep links, external website links, action buttons, and tags. If the alert is actionable, it must be marked as Dismissed or Resolved through the actionPerformed attribute in the JSON.
9. If you want to prevent the alert from popping up on mobile devices, select **Silent**.
Users can still view messages in the message pane on mobile.
10. Save your changes.

See Also

[Additional Message Field for App Alerts](#)

[Set Up App Alerts](#)

Record Alert Configuration for App Alerts

Target notifications associated with specific records, such as Accounts and Healthcare Providers, to your users. You can create a record alert manually or trigger it automatically using the Business Rules Engine.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

For more information on creating a record in the Record Alert object, see [Create a Record Alert](#).

To trigger alerts automatically, use Business Rules Engine to define the criteria to show a record alert when a record meets specified conditions. See [Create Record Alerts Using Business Rules Engine](#).

See Also

[Set Up App Alerts](#)

Create App Alert Territories

App Alert Territories represents a junction between an Alert, either an App Alert or a Record Alert, and a Territory where the alert is sent. Use App Alert Territories to associate an alert with one or more territories so that only the users assigned to those territories see the message.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure App Alerts: Life Sciences Commercial Admin

1. From the App Launcher, find and select **App Alert Territories**.
2. Click **New**.
3. In Alert Reference Record, select the app alert record.
4. Find and select the territory that you want to link to the selected record.
5. Save your changes.



Note Remove all associated App Alert Territories before you delete the App Alert record.

See Also

[Set Up App Alerts](#)

Mobile App Configuration for App Alerts

Configure the object schema for supported App Alerts objects and generate a metadata cache to make sure your sales reps receive timely alerts on the Life Sciences Cloud Mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure App Alerts: Life Sciences Commercial Admin

Here's the set of objects that require object schema configuration.

- AppAlert
 - AppAlertUserResponse
 - AppAlertTerritories
 - RecordAlert
1. From the App Launcher, find and select **Life Sciences Commercial**.
 2. Click **Admin Console**.
 3. On the Life Sciences Customer Engagement Setup page, click **Mobile**.
 4. On the navigation pane, click **Object Metadata Cache Configuration**.

5. Click **New**.
6. Enter the details.
 - a. Enter the name of the entity configuration.
 - b. If you want to activate the configuration, select **Is Active**.
 - c. Select the users that you want to assign the entity to, based on their profiles or permission sets.
 - d. If needed, select the attachment data for the object.
For example, select **Cache**.
 - e. If needed, in Delta Date field, select the applicable fields for the object.
 - f. To define a logic-based schema or data to store reference points, select the **Configuration** type.
 - g. To determine if the synchronization is unidirectional, select **One Way Sync**.
 - h. In Where Soql: select one of these.
 - Simple: To define conditions by using basic filters.
 - Advanced: To write a custom SOQL expression.
 - i. Select how you want the conditions to be evaluated.
 - All of the conditions are met: To apply the rule only when all conditions are true.
 - Any of the conditions are met: To apply the rule when at least one condition is true.
 - Customize the logic: To define manually how multiple conditions are evaluated.
7. Save your changes.

See Also

[Customize the Life Sciences Cloud Mobile App](#)

[Generate Metadata Cache](#)

Create a Metadata Cache

Package the object scheme configuration into a downloadable metadata cache that the mobile app can use. Create a metadata cache to make sure that the app consistently uses the latest metadata definitions, even when a network connection is unavailable.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

USER PERMISSIONS NEEDED

To configure App Alerts:	Life Sciences Commercial Admin
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! **Important** Run the metadata cache every time you configure the mobile app.

1. From the App Launcher, find and select **Admin Console**.
2. On the Modules Setup page, click the **Mobile** feature.
3. On the left navigation panel, click **Metadata Cache**.
4. On the Entities Setup page, click **New**.

5. Enter the details.

- a. Enter the name for the metadata cache.
- b. Select the type of mobile UI.
For example, select **Tab**.
- c. Enter a name of the tab.
- d. Enter a number to determine the sequence in which you want this tab to appear on the admin console.
- e. Select the user profiles that can view this tab.
- f. To activate the configuration, select **Is Active**.
- g. To save your changes, click **Create New Cache**.

Dynamic Tree View Components for Life Sciences

Configure a Dynamic Tree View component to show related Life Sciences Cloud for Customer Engagement data in an expandable hierarchy. Users can easily explore related records in one place without going to multiple pages, boosting visibility and saving time. For example, show the account hierarchy within a health system, or visualize how healthcare professionals (HCPs) and healthcare organizations (HCOs) are aligned under specific territories.

To create a Dynamic Tree View component, configure the objects that appear in the component. Then, create the component that references the object configurations that you defined. Finally, add the component to a Lightning record page.

[Create Object Configurations for a Dynamic Tree View Component](#)

Configure the data that you want to show for each object in a Life Sciences Cloud for Customer Engagement Dynamic Tree View component.

[Configure a Dynamic Tree View Component](#)

Create a dynamic tree view component configuration to show Life Sciences Cloud for Customer Engagement data for related objects in a hierarchical view.

[Add a Dynamic Tree View Component to a Record Page](#)

Use Lightning App Builder to add your Dynamic Tree View component to the parent object's Lightning record page in Life Sciences Cloud for Customer Engagement.

Create Object Configurations for a Dynamic Tree View Component

Configure the data that you want to show for each object in a Life Sciences Cloud for Customer Engagement Dynamic Tree View component.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed

package.

USER PERMISSIONS NEEDED

To create a dynamic tree view object configuration: Life Sciences Commercial Admin permission set

To create, edit, and delete field sets: Customize Application

Before you create a dynamic tree view object configuration, create field sets for each object that you want to show in the component. Field sets define the fields shown in the component itself and in an info icon on the component. Then, create the dynamic tree view object configurations.

1. From the App Launcher, find and select **Admin Console**, and then select **Component Library**.
2. Select **Dynamic Tree View Object Configurations**, and then create one.
3. Enter the basic details, such as the name for the dynamic tree view object configuration and whether it's active.
4. Enter the API name of the object that this configuration represents in the dynamic tree view component.
5. To filter the records shown in the dynamic tree view component, enter custom filter logic.
For example, enter *Status = 'Active'* to show only the records in the Active state.
6. Choose whether to show percentage fields as a progress bar instead of a numeric value.
7. In Parent Object Lookup Field, enter the API name of the lookup field on this object that references the parent object.
8. In the Object Column Field Set and Object Info Field Set fields, enter the API names of the field sets that you created for this object.
9. Choose whether to show column headers for this object's fields in the dynamic tree view component.
10. Enter the API names of the fields that you want to use for filtering or sorting records in the component, and define the sort order for the records shown.
11. Save your changes.
12. For each object that you want to show in the dynamic tree view component, create a similar configuration.

Next, create a dynamic tree view component configuration that references the object configurations that you created.

See Also

[Create and Edit Field Sets](#)

Configure a Dynamic Tree View Component

Create a dynamic tree view component configuration to show Life Sciences Cloud for Customer Engagement data for related objects in a hierarchical view.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a dynamic tree view component configuration:

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Component Library**.
3. Select **Dynamic Tree View Component Configurations**, and then click **New**.
4. Enter the basic details for the component, such as its name and whether it's active.
5. To filter the records shown for all objects in the component, enter a custom filter logic.
For example, enter `Name = 'AccountName'` to show the records related to a specific account.
6. In the Child Object Configuration, Parent Object Configuration, and Grandchild Object Configuration fields, enter the API names of the dynamic tree view object configurations that you created for each object you want to show in the component.
7. Choose whether to show a search bar and to let users filter records in the component.
8. Select whether the relationship between the parent and child objects uses a junction object. If it does, enter the details.
 - The API name of the junction object.
 - The API name of the lookup field on the junction object that references the grandparent object.
 - The API name of the lookup field on the junction object that references the related object.
9. Save your changes.

After you save your dynamic tree view component configuration, copy its API name. You need this information to add your component to the parent object's record page in Lightning App Builder.

Add a Dynamic Tree View Component to a Record Page

Use Lightning App Builder to add your Dynamic Tree View component to the parent object's Lightning record page in Life Sciences Cloud for Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create and save Lightning pages in Lightning App Builder:	Customize Application
To access the Dynamic Tree View component:	Life Sciences Commercial Admin permission set

1. From Setup, in the Quick Find box, search for and select **Lightning App Builder**.
2. Edit a record page for the parent object, or create one.
3. Search the list of components for Dynamic Tree View, and then drag the component to the page.
4. In the properties pane, enter the API name of the Dynamic Tree View Component Configuration that you created in the Admin Console.
5. To add visibility rules based on the record field, device type, or other filters, click **Add Filter**. An eye icon indicates that visibility rules are applied.
6. Save your changes to the record page, and then activate the page to share it with your users.

See Also

[Get Help for Lightning App Builder](#)

License Management in Life Sciences

Help your company comply to legal and regulatory standards, and adhere to audit-tracking measures with flexible license validity evaluations. License management in Life Sciences is a critical process that makes sure that healthcare providers (HCPs) have the required license and authorization to receive pharmaceutical samples.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

During sample disbursement, sales reps verify whether the healthcare provider (HCP) receiving the sample is licensed and eligible to practice in a given territory. For certain samples, users must also validate whether the HCP is licensed to prescribe, dispense, and administer controlled or dangerous drugs.

With License Management, you can configure custom formulas to evaluate the validity of an HCP's license. You can also configure the license validity icons on Lightning page, and in visits, searches, and lists.

[Configure Custom Formulas for License Validations](#)

Prepare your org for License Management by configuring custom validation rules for evaluating the status of HCP licenses.

Types of Licenses

License Management helps you configure license evaluations for these types of licenses: state license numbers (SLNs), state distributor licenses (SDLs), and drug enforcement administration (DEA) number. You can create custom validity formulas to control where these indicators are shown and meet your company's specific needs.

Configure Custom Formulas for License Validations

Prepare your org for License Management by configuring custom validation rules for evaluating the status of HCP licenses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create custom formulas:	Life Sciences Commercial Admin permission set
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Create a custom formula field by using a checkbox as the formula return type. This checkbox serves as an automated check to indicate whether the license validation is successful or not.

1. From the object management settings for Business License, go to Fields & Relationships.
2. Select **New**.
3. In Data Type, select **Formula**, and then click **Next**.
4. Add a field label.
The field name is automatically populated.
5. In Formula Return Type, select **Checkbox** and click **Next**.
6. Add a formula for the validation evaluation.
For example, to check if a license is active, select Advanced Formula and then insert isActive.
7. To make sure your formula is valid, select **Check Syntax**, and then click **Next**.
8. Select the profiles the formula is visible to, and click **Next**.
The page layout is automatically selected. Keep it as is.
9. Save your changes.

See Also

[Build a Formula Field](#)

Types of Licenses

License Management helps you configure license evaluations for these types of licenses: state license numbers (SLNs), state distributor licenses (SDLs), and drug enforcement administration (DEA) number.

You can create custom validity formulas to control where these indicators are shown and meet your company's specific needs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Life Sciences Cloud provides standard license validity formulas. With License Management, you can configure flexible custom formulas for validity checks. You can also select where the validity indicators are shown and which profiles can see it.

State License Numbers (SLNs)

SLNs are medical licenses for US healthcare providers (HCPs) and ensure that the HCPs are authorized to practice medicine and receive or prescribe samples within a specific state. SLNs are typically checked before sales reps disburse samples to them.

State Distributor Licenses (SDLs)

SDLs are issued to entities or facilities distributing dangerous drugs in certain states. In certain states, entities that distribute dangerous drugs need specific licenses, such as Terminal Distributor of Dangerous Drugs (TDDD) in Ohio.

Drug Enforcement Administration (DEA) Number

The DEA number is a license number issued by the Drug Enforcement Administration to providers who prescribe controlled substances. DEA numbers are important for compliance and audit purposes, and must be validated when samples include controlled substances.

[Define State License Number Validations](#)

Check the medical license issued to an HCP to practice within a US state by configuring state license number validations (SLNs). This configuration lets sales reps check a healthcare provider's license validity before sharing product samples.

[Define State Distributor License Validations](#)

To help sales reps comply with regulatory standards while distributing samples, create state distributor license (SDL) validations. This configuration ensures that the person or the facility that distributes high-risk products, such as those categorized as dangerous drugs, has the necessary license to do so.

[Define Drug Enforcement Administration License Validations](#)

Help your org comply with federal rules by configuring Drug Enforcement Administration (DEA)-issued identifiers for HCPs who prescribe, dispense, and administer controlled substances. Your sales reps

can confirm an HCP's license before providing samples. The DEA number ensures thorough regulation, tracking, and audit of controlled substances.

Define State License Number Validations

Check the medical license issued to an HCP to practice within a US state by configuring state license number validations (SLNs). This configuration lets sales reps check a healthcare provider's license validity before sharing product samples.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create license validations: Life Sciences Commercial Admin permission set

 **Note** Make sure you've created a custom formula field on the Business License object.

1. From the App Launcher, find and select **Admin Console**.
2. Select **License Management**.
3. In the left navigation pane, select **State License Number Setup**.
4. Make these changes.
 - a. Choose whether this setting applies to the org or to a specific profile.
 - b. In the License Validity Check section, specify the validation formula by selecting the custom formula that you configured in the Business License Object.
 - c. To change the formula configured in the Business License object, select **Modify Formula**.
 - d. Choose whether you want to evaluate the license validity and show the validity icon in visits, searches and lists, and Lightning pages.
 - e. Save your changes.

Define State Distributor License Validations

To help sales reps comply with regulatory standards while distributing samples, create state distributor license (SDL) validations. This configuration ensures that the person or the facility that distributes high-risk products, such as those categorized as dangerous drugs, has the necessary license to do so.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create license validations: Life Sciences Commercial Admin permission set

 **Note** Make sure you've created a custom formula field on the Business License object.

1. From the App Launcher, find and select **Admin Console**.
2. Select **License Management**.
3. In the left navigation pane, select **State Distributor License Setup**.
4. Make these changes.
 - a. Choose whether this setting applies to the org or to a specific profile.
 - b. In the License Validity Check section, specify the validation formula by selecting the custom formula that you configured in the Business License Object.
 - c. To change the formula configured on the Business License object, select **Modify Formula**.
 - d. Select **Evaluate license validity and show icon in visits**.
 - e. Move the states that require the license validation evaluation to the Selected Values list.
 - f. Save your changes.

Define Drug Enforcement Administration License Validations

Help your org comply with federal rules by configuring Drug Enforcement Administration (DEA)-issued identifiers for HCPs who prescribe, dispense, and administer controlled substances. Your sales reps can confirm an HCP's license before providing samples. The DEA number ensures thorough regulation, tracking, and audit of controlled substances.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create license validations: Life Sciences Commercial Admin permission set

 **Note** Make sure you've created a custom formula field on the Business License object.

1. From the App Launcher, find and select **Admin Console**.
2. Select **License Management**.

3. In the left navigation pane, select **DEA Number Setup**.
4. Make these changes.
 - a. Choose whether this setting applies to the org or to a specific profile.
 - b. In the License Validity Check section, specify the validation formula by selecting the custom formula that you configured in the Business License Object.
 - c. To change the formula configured on the Business License object, select **Modify Formula**.
 - d. Select **Evaluate license validity and show icon in visits**.
 - e. Save your changes.

Multi-Object Components for Life Sciences

The Life Sciences Cloud for Customer Engagement multi-object components consolidate fields from several related objects onto a single record page, making it easier for users to view and manage data. Showing fields from multiple objects together helps users avoid going to multiple pages and simplifies the workflows for accounts, inquiries, and visits.

How Multi-Object Components Work

With the multi-object Lightning components included with Life Sciences Customer Engagement, users can create, edit, and view records that include fields from multiple objects on a single page.

Set Up the Multi-Object Create and Edit Components

Assign overrides for standard Salesforce buttons to help users in Life Sciences Cloud for Customer Engagement create or edit records with fields from multiple objects.

Set Up the Multi-Object Record View Component

To help users in Life Sciences Cloud for Customer Engagement view fields from multiple objects on a single record page, add the Multi-Object Record View component to record pages.

How Multi-Object Components Work

With the multi-object Lightning components included with Life Sciences Customer Engagement, users can create, edit, and view records that include fields from multiple objects on a single page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Multi-Object Lightning Components

The Life Sciences Cloud for Customer Engagement managed package includes these Lightning components that support multi-object layouts.

- The MultiEntityCreateOverride component overrides the New action so users can populate fields and create multiple records at once.
- The MultiEntityEditOverride component overrides the Edit action so users can update fields from multiple records at once.
- The Multi-Object Record View component shows the details from related objects on a single Lightning record page.

Supported Objects

The account object supports these components to include fields from the healthcare provider object. To override the New button on the account object, use the Search Before Create component. See [Configure Search Before Account Creation](#).

- MultiEntityEditOverride
- Multi-Object Record View

The inquiry object supports these components to include fields from the case object.

- MultiEntityCreateOverride
- MultiEntityEditOverride
- Multi-Object Record View

The visit object supports these components to include fields from the provider visit object. These components are also supported on the provider visit object to show visit fields.

- MultiEntityEditOverride
- Multi-Object Record View

Considerations

When you set up multi-object components, keep these considerations in mind.

- Multi-object components are available only for supported objects.
- Multi-object components support objects with multiple object types, picklist assignments, and picklist field dependencies.
- Inline editing isn't supported on record detail pages that include a multi-object component.
- When users create records with a multi-object component, if one record has an error, no new records are created.
- When users create or edit records using a multi-object component, validation rules and errors appear at the top of the page rather than inline.
- The details that appear in each component depend on the existing parent records and related records.

Set Up the Multi-Object Create and Edit Components

Assign overrides for standard Salesforce buttons to help users in Life Sciences Cloud for Customer

Engagement create or edit records with fields from multiple objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access and work with Life Sciences Cloud for Customer Engagement multi-object components: Life Sciences Commercial Admin permission set

To override standard buttons: Customize Application

Multi-object Lightning components are supported only for these Life Sciences objects.

Lightning Component	Objects
Isc4ce:MultiEntityCreateOverride	Inquiry
Isc4ce:MultiEntityEditOverride	<ul style="list-style-type: none">• Account• Inquiry• Provider Visit• Visit

1. From the management settings for the object whose buttons you want to override, go to Button, Links, and Actions.
2. In the row for the New action, select **Edit** from the dropdown menu.
3. For the Lightning Experience Override, select **Lightning component**, and then select **Isc4ce:MultiEntityCreateOverride** from the dropdown.
4. Save your changes.
5. Similarly, assign the override for the Edit action. Select **Isc4ce:MultiEntityEditOverride** as the override for Lightning Experience.

The overrides that you apply to Lightning Experience also apply to the Life Sciences Cloud mobile app.

Set Up the Multi-Object Record View Component

To help users in Life Sciences Cloud for Customer Engagement view fields from multiple objects on a single record page, add the Multi-Object Record View component to record pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access and work with Life Sciences Cloud for Customer Engagement multi-object components: Life Sciences Commercial Admin permission set

To create and save Lightning pages in Lightning App Builder: Customize Application

When you install the Life Sciences Cloud for Customer Engagement managed package, the default Lightning record pages for these objects include the Multi-Object Record View component:

- Account
- Inquiry
- Provider Visit
- Visit

You can add the component to other Lightning record pages for the Account and Inquiry objects and object types.

1. From Setup, in the Quick Find box, search for and select **Lightning App Builder**.
2. Edit a record page, or create one.
3. Search the list of components for Multi-Object, and then drag the Multi-Object Record View component to the page's Details tab.
4. Remove any other detail components from the tab.
5. Save your changes to the record page, and then activate the page to share it with your users.

See Also

[Get Help for Lightning App Builder](#)

Provider Bulk Sync

Provider Bulk Sync helps organizations to effectively and efficiently manage their relationships with Healthcare Organizations (HCOs) and Healthcare Providers (HCPs). It allows organizations to integrate HCP and HCO data from IQVIA OneKey directly into the Life Sciences Cloud data model. This process helps organizations get verified HCP data, which helps users have the right information for their customer engagement plans and activities. The verified data can be used for territory planning and other processes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Set Up Provider Bulk Sync by Using Built-In MuleSoft Integration](#)

Integrate Life Sciences Cloud with IQVIA's OneKey to import healthcare provider and organization information from an external system into Salesforce Life Sciences Cloud for Customer Engagement. Life Sciences Cloud offers a prebuilt suite of integrations apps, such as the Provider Bulk Sync API and the Onekey System API. These apps are deployed by using MuleSoft Direct to seamlessly integrate with and import healthcare provider information from various external data sources.

[Create a Copy of Healthcare Provider Address Records by Using Flows and Batch Jobs](#)

Regulatory restrictions in certain countries prevent the retrieval of healthcare provider (HCP) addresses via IQVIA OneKey. To ensure data completeness, use Salesforce batch jobs and flows to trigger invocable actions that create copies of address records from the main affiliated healthcare organizations (HCOs) for all corresponding HCP records. The Process Affiliation Address Records invocable action is triggered when a healthcare professional's affiliation status changes, such as joining or leaving a healthcare organization. The Process Contact Point Address Records invocable action is triggered when a healthcare organization's address is added or updated.

Set Up Provider Bulk Sync by Using Built-In MuleSoft Integration

Integrate Life Sciences Cloud with IQVIA's OneKey to import healthcare provider and organization information from an external system into Salesforce Life Sciences Cloud for Customer Engagement. Life Sciences Cloud offers a prebuilt suite of integrations apps, such as the Provider Bulk Sync API and the Onekey System API. These apps are deployed by using MuleSoft Direct to seamlessly integrate with and import healthcare provider information from various external data sources.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Integrate MuleSoft Direct

To address end-to-end business needs, integrate Salesforce apps with external systems by using Integration Solutions with MuleSoft Direct. To set up MuleSoft Direct, see [Integrate Solutions with Mulesoft Direct](#). To set up integration for provider bulk sync, see [Explore MuleSoft Direct Integration](#).

Apps.

After the MuleSoft Direct integration is complete, you can sync healthcare provider and organization data. After a sync job is initiated, you can get the status of the sync job and abort the sync job. To ensure your provider data stays up to date, schedule a bulk data synchronization job from Salesforce to automatically pull information from external systems like OneKey regularly.

-  **Note** If healthcare provider (HCP) address details aren't synced, it's likely due to regulatory restrictions in that country. Alternatively, you can use Salesforce Flows and batch jobs that trigger invocable actions. This approach allows you to copy the missing address information directly from the affiliated healthcare organizations (HCOs). See [Create a Copy of Healthcare Provider Address Records by Using Flows and Batch Jobs](#)

See Also

[Explore MuleSoft Direct Integration Apps](#)

[Provider Bulk Sync Intergration App](#)

[Provider Bulk Sync API](#)

Create a Copy of Healthcare Provider Address Records by Using Flows and Batch Jobs

Regulatory restrictions in certain countries prevent the retrieval of healthcare provider (HCP) addresses via IQVIA OneKey. To ensure data completeness, use Salesforce batch jobs and flows to trigger invocable actions that create copies of address records from the main affiliated healthcare organizations (HCOs) for all corresponding HCP records. The Process Affiliation Address Records invocable action is triggered when a healthcare professional's affiliation status changes, such as joining or leaving a healthcare organization. The Process Contact Point Address Records invocable action is triggered when a healthcare organization's address is added or updated.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

- **Process Contact Point Address:** This invocable action synchronizes HCP address information with the affiliated HCOs. When an HCO address is created, the action creates a copy of the address for all affiliated HCPs. When an HCO address becomes inactive, the action deactivates the corresponding copied addresses for all affiliated HCPs.
- **Process Affiliation Address:** This invocable action ensures HCPs always have accurate address information based on their active affiliations with healthcare organizations (HCOs). When an HCP is affiliated with an HCO, the action copies the HCO addresses and links them to the HCP record. When the affiliation ends, the action deactivates the copied addresses to maintain up-to-date data.

To copy HCP address records from affiliated HCOs, create the required batch jobs and Salesforce Flows. The batch job triggers the flow, which in turn invokes the invocable action to create the address records.

[Create Flows to Trigger Invocable Actions to Copy Addresses](#)

Create Salesforce Flows that are used by batch jobs to trigger invocable actions that create a copy of healthcare provider (HCP) address records from the affiliated healthcare organization (HCOs).

[Create Batch Jobs to Copy Healthcare Provider Addresses](#)

Create Batch Management jobs that trigger the necessary flows, which in turn call the invocable actions to create a copy of the Contact Point Addresses and Process Provider Affiliation Addresses.

[Sequence Address Batch Jobs by Using a Flow](#)

To make sure that address synchronization batch jobs run in the correct order, create a flow that automatically initiates the Process Provider Affiliation Addresses batch job only after the Process HCP Contact Point Addresses batch job completes.

Create Flows to Trigger Invocable Actions to Copy Addresses

Create Salesforce Flows that are used by batch jobs to trigger invocable actions that create a copy of healthcare provider (HCP) address records from the affiliated healthcare organization (HCOs).

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a flow:	Manage Flow
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Create a Flow to Copy HCP Contact Point Addresses

Create the flow to trigger the Process Contact Point Address invocable action.

1. From Setup, enter *Flows* in the Quick Find box, select **Flows**, and then select **New Flow**.
2. In the New Flow window, select **Autolaunched Flow (No Trigger)**.
3. Create variables for input values.
 - a. From the toolbox, select **Manager** and then select **New Resource**.
 - b. For Resource Type, select **Variable**.
 - c. For API Name, enter *cpaRecordId*.
 - d. For Data Type, select **Text**.
 - e. For Description, enter *The ID of the contact point address that was passed into the flow.*
 - f. Select **Available for input**.

- g. Click **Done**.
4. Create an action element that calls the invocable action and uses the cpaRecordId variable.
 - a. For Category, select **Ls Commercial**.
 - b. Select the Process Contact Point Address Records invocable action.
 - c. For Label, enter *Process Contact Point Address Records*.
The API name is automatically populated.
 - d. Set cpaRecordId as an input value.
 - e. Click **Done**.
5. Save and activate the flow.

Create a Flow to Copy Provider Affiliation Addresses

Create the flow to trigger the Process Affiliation Address invocable action.

1. From Setup, enter *Flows* in the Quick Find box, select **Flows**, and then select **New Flow**.
2. In the New Flow window, select **Autolaunched Flow (No Trigger)**.
3. Create variables for input values.
 - a. From the toolbox, select **Manager** and then select **New Resource**.
 - b. For Resource Type, select **Variable**.
 - c. For API Name, enter *affiliationRecordId*.
 - d. For Data Type, select **Text**.
 - e. For Description, enter *the ID of the provider affiliation that was passed into the flow*.
 - f. Select **Available for input**.
 - g. Click **Done**.
4. Create an action element that calls the invocable action and uses the affiliationRecordId variable.
 - a. For Category, select **Ls Commercial**.
 - b. Select the Process Provider Affiliation Address Records invocable action.
 - c. For Label, enter *Process Affiliation Address Records*.
The API name is automatically populated.
 - d. Set affiliationRecordId as an input value.
 - e. Click **Done**.
5. Save and activate the flow.

Create Batch Jobs to Copy Healthcare Provider Addresses

Create Batch Management jobs that trigger the necessary flows, which in turn call the invocable actions to create a copy of the Contact Point Addresses and Process Provider Affiliation Addresses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for

Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a batch job: System Administrator profile

Create a Batch Job to Copy HCP Contact Point Addresses

Create the batch job to invoke the flow that triggers the Process Contact Point Address invocable action.

1. From Setup, in the Quick Find box, enter *Batch Management*, and select it.
2. Click **New**.
3. Complete the required fields.
 - a. For Name, enter *Process HCP Contact Point Addresses*.
 - b. For Process Type, select **Flow**.
 - c. For Execution Process, select the Process HCP Contact Point Addresses flow.
 - d. For Group, enter *Life Sciences*.
 - e. Enter the batch size, retry count, and retry interval.
 - f. Click **Next**.
4. Select the Flow Input Variable as **cpaRecordId** and Object as **Contact Point Address**.
5. Enter the conditions shown in the table.

Field	Operator	Type	Value
Last Modified Date	Greater Than Or Equal To	Input Variable	startTime
Last Modified Date	Less Than Or Equal To	Input Variable	endTime
Last Modified By ID	Equals	Value	Integration User
Created Date	Greater Than Or Equal To	Input Variable	startTime
Created Date	Less Than Or Equal To	Input Variable	endTime
Active	Equals	Value	False

6. Save and activate the batch job.

Create Batch Job to Copy Provider Affiliation Addresses

Create the batch job to invoke the flow that triggers the Process Affiliation Address Records invocable action.

1. From Setup, in the Quick Find box, enter *Batch Management*, and select it.
2. Click **New**.

3. Complete the required fields.
 - a. For Name, enter *Process Provider Affiliation Addresses*.
 - b. For Process Type, select **Flow**.
 - c. For Execution Process, select the Process Provider Affiliation Addresses flow.
 - d. For Group, enter *Life Sciences*.
 - e. Enter the batch size, retry count, and retry interval.
 - f. Click **Next**.
4. Select the Flow Input Variable as **affiliationRecordId** and Object as **Provider Affiliation**.
5. Enter the conditions shown in the table.

Field	Operator	Type	Value
Last Modified Date	Greater Than Or Equal To	Input Variable	startTime
Last Modified Date	Less Than Or Equal To	Input Variable	endTime
Last Modified By ID	Equals	Value	Integration User
Affiliation Type	Equals	Value	Hard
Account Person Account	Equals	Value	True
Related Account Person Account	Equals	Value	False
Created Date	Greater Than Or Equal To	Input Variable	startTime
Created Date	Less Than Or Equal To	Input Variable	endTime
Active	Equals	Value	False

6. Save and activate the batch job.

Sequence Address Batch Jobs by Using a Flow

To make sure that address synchronization batch jobs run in the correct order, create a flow that automatically initiates the Process Provider Affiliation Addresses batch job only after the Process HCP Contact Point Addresses batch job completes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a flow:

Manage Flow

1. From Setup, enter *Flows* in the Quick Find box, select **Flows**, and then select **New Flow**.
2. In the New Flow window, select **Platform Event - Triggered Flow**.
3. For Platform event, select **Batch Job Status Changed Event** and in Advanced settings, select **Run this flow as the user that triggered the event**.
4. Create a decision element that uses a record or answers from a screen input to determine a flow path.
 - a. On the flow canvas, add a Decision element.
 - b. Enter a label and API name for the element, for example *Is HCP Contact Point Addresses Batch Job Complete?*
 - c. Give labels for the outcomes and enter these conditions.

Resource	Operator	Value
Triggering BatchJobStatusChangedEvent -> Batch Job	Equals	Process_HCP_Contact_Point_Addresses's BatchJobDefinitionId Example batch job definition ID: 0maxx0000000001AAA
Triggering BatchJobStatusChangedEvent -> Batch Job	Does not Equal	Cancelled

- d. Click **Done**.
5. Create variables that store the batch job runtime parameters and make the value available for output.
 - a. From the toolbox, select **Manager** and then select **New Resource**.
 - b. For Resource Type, select **Variable**.
 - c. For API Name, enter *batchJobRuntimeParameters*.
 - d. For Data Type, select **Text**.
 - e. Select **Available for output**.
 - f. Click **Done**.
6. Create a Get Records element to retrieve the HCP Contact Point Addresses batch job details.
 - a. On the flow canvas, add a Get Records element.
 - b. Enter a label and API name for the element, for example *Get Batch Job Record*.
 - c. For Object, select **Batch Job**.
 - d. Under Filter Account Records Condition Requirements, select **All Conditions are Met (AND)**.
 - e. For Field, enter *Id*, then select **Run ID**.
 - f. For Operator, select **Equals**.
 - g. For Value, select **Resource Triggering BatchJobStatusChangedEvent -> Batch Job**.
 - h. For How Many Records to Store, select **Only the first record**.
 - i. For How to Store Record Data, select **Choose fields and assign variables (advanced)**.
 - j. For Where to Store Field Values, select **In separate variables**.

- k. For Field, select **Runtime Parameter**.
 - l. For Value, select **batchJobRuntimeParameters**.
 - m. Click **Done**.
7. Create these formulas to get the individual batch job runtime parameters.

API Name	Data Type	Formula
extractedStartTime	TEXT	<pre> LEFT(MID({!batchJobRuntimeParameters}, FIND('{"name":"startTime","value":"'', {!batchJobRuntimeParameters}) + LEN('{"name': e":"startTime","valu e":"''), 50), FIND('', MID({!batchJobRuntimeParameters}, FIND('{"name":"startT ime","value":"'', {!batchJobRuntimeParameters}) + LEN('{"nam e":"startT ime","valu e":"''), 50)) - 1) </pre>
extractedEndTime	TEXT	<pre> LEFT(MID({!batchJobRuntimeParameters}, FIND('{"name":"end Time","value":"'', {!ba </pre>

API Name	Data Type	Formula
		<pre>tchJobRuntimeParameter s}) + LEN('{"name":"en dTime","value":"'"), 50), FIND('', MID({!batchJobRuntim eParameters}, FIND('{"name":"e ndTime","value":"'", {!batchJobRuntimeParam eters}) + LEN('{"nam e":"endTime","valu e":"'"), 50)) - 1)</pre>
startTimeAsDateTime	Date/Time	<pre>DATETIMEVALUE(SUBSTITU TE(SUBSTITUTE({!extrac tedStartTime}, "T", " "), "Z", ""))</pre>
endTimeAsDateTime	Date/Time	<pre>DATETIMEVALUE(SUBSTITU TE(SUBSTITUTE({!extrac tedEndTime}, "T", " "), "Z", ""))</pre>

8. Create an Action element to trigger the Process Provider Affiliation Addresses Batch job. This element uses the startTimeAsDateTime and endTimeAsDateTime formulas.
- Select the Category as **Batch Job**, and then select the **Process Provider Affiliation Addresses** batch job.
 - For Label, enter *Trigger Process Provider Affiliation Address Batch Job*. The API name is automatically populated.
 - In the Set input values section, select startTime as **startTimeAsDateTime** and endTime as **endTimeAsDateTime**.
 - Click **Done**.

9. Save and activate the flow.

Data 360 for Life Sciences Customer Engagement

Integrate Data 360 with Life Sciences Cloud by using the Life Sciences Data Kit. When you deploy the Life Sciences Data Kit, you get access to prebuilt data mappings, data streams, and other features that unify and harmonize your Account Management data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, Data 360, and the Life Sciences Customer Engagement managed package.

[Set Up Data 360 for Life Sciences Cloud for Customer Engagement](#)

Before you use the Life Sciences data kit, complete the basic configurations required to work in Data 360. Set up Data 360, enable the required Life Sciences Cloud for Customer Engagement features, connect Data 360 to your Salesforce CRM org, and verify the SSOT version.

[Deploy Life Sciences Data Kit](#)

Deploy Life Sciences Data Kit to access data streams, data lake objects, and data transforms built specifically for Life Sciences use cases.

Set Up Data 360 for Life Sciences Cloud for Customer Engagement

Before you use the Life Sciences data kit, complete the basic configurations required to work in Data 360. Set up Data 360, enable the required Life Sciences Cloud for Customer Engagement features, connect Data 360 to your Salesforce CRM org, and verify the SSOT version.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, Data 360, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To use Data Cloud:	Data Cloud Architect permission set
To set up Life Sciences Cloud for Customer Engagement features:	Life Sciences Commercial Admin permission set

1. Review and complete all the steps mentioned in the Salesforce Data 360 documentation.
 - a. [Plan Your Data 360 Strategy](#).
 - b. [Manage Data 360 Users](#).
 - c. [About Data Spaces](#).
 - d. [Set Up a Salesforce Org CRM Connection](#).
2. Enable the Life Sciences Cloud for Customer Engagement features required to access the data kits and their components.
 - a. Go to Data Cloud Setup.
If you don't see this option, refresh your page, or log out and log back in with your admin user credentials.
 - b. To enable Data Cloud, click **Get Started**.
Setup can take a few minutes.
 - c. [Turn on Life Sciences Cloud for Customer Engagement features](#).
3. Connect Data 360 to your Salesforce CRM org.
 - a. In Data Cloud, click **Data Cloud Setup**.
 - b. In the Quick Find box, enter *Salesforce CRM*, then click **Salesforce CRM**.
 - c. Click **New**.
 - d. To connect to the Salesforce org that has Data Cloud provisioned, click **Connect**.
 - e. After you connect your Salesforce org, review the connection details.
Your Salesforce org is now connected as a data source and data action target.
4. Ensure that your users have Read, View All Fields, and View All Records access to all objects included in the data kit. See [Enable Object and Field Permissions for CRM Connections](#).
5. Enable the system permissions required to deploy data from the data kit.
 - a. From Setup, in the Quick Find box, enter *Permission*, and then select **Permission Sets**.
 - b. Select the **Data Cloud Salesforce Connector** permission set.
 - c. Click **System Permissions**.
 - d. Search for and enable all permissions related to these terms: activity plan, territory, next best, provider visit, and inventory.
6. Assign the Data Cloud Admin and Life Science Commercial licenses to the System Administrator profile. See [Enable a Permission Set License for the Admin](#).
7. Verify the SSOT package version.
 - a. From Setup, in the Quick Find box, enter *Installed Packages*, then select **Installed Packages**.
 - b. Verify that the Salesforce Standard Data Model SSOT version is current.

Deploy Life Sciences Data Kit

Deploy Life Sciences Data Kit to access data streams, data lake objects, and data transforms built specifically for Life Sciences use cases.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, Data 360, and the Life Sciences Customer Engagement

managed package.

USER PERMISSIONS NEEDED

To deploy data kits: Data Cloud Architect permission set

The data kit includes five ready-to-use bundles: Activity Plan, Marketable Product, Presentation, Provider Visit, and Sales Territory Account.

1. From Data Cloud Setup, in the Quick Find box, enter *Data Kits*, and then select **Data Kits**.
2. Find and select **Life Sciences Data Kit**.
3. Review the contents of the data kit, then select **Data Kit Deploy**.
4. Select a data space and enter your org ID.
5. Click **Deploy**.

Data Model Objects in Life Sciences Data Kit

The bundles in the Life Sciences Data Kit contain the data streams with mappings for these data model objects.

Data Model Objects in Life Sciences Data Kit

The bundles in the Life Sciences Data Kit contain the data streams with mappings for these data model objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, Data 360, and the Life Sciences Customer Engagement managed package.

Bundle	Object Name
Activity Plan	Activity Plan
	Activity Plan Sales Territory
	Provider Activity Goal
	Provider Activity Goal Measure
	Provider Activity Measure Type
Marketable Product	Product Guidance
	Life Science Marketable Product
	Inventory Product Disbursement

Bundle	Object Name
Presentation	Presentation Page
	Presentation Click Stream Entry
	Presentation Forum
	Presentation Linked Page
	Presentation Page Product
	Presentation Party Access
	Presentation
Provider Visit	Provider Visit Detailing Product Message
	Provider Visit Product Detailing
	Provider Visit
	Provider Visit Marketing Item
	Provider Visit Product Discussion
	Provider Visit Requested Sample
Sales Territory Account	Sales Territory Acct Prodt Message Score
	Sales Territory Acct Recommended Action
	Sales Territory Account Score

Quick and Custom Action Management

To simplify user experiences in Salesforce and the Life Sciences for Customer Engagement mobile app, leverage quick actions and custom actions. These actions provide convenient access to essential information and common tasks, which streamlines user navigation and workflows.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Quick actions provide direct access to core functionalities and help users initiate key processes without extensive searching. For example, from an account profile, users can schedule a visit, send an email, or start a remote visit from a visit record. This immediate accessibility reduces clicks and saves time.

Custom actions invoke Lightning components, flows, Visualforce pages, or canvas apps with the functionality that you define. Use custom actions to simplify commonly performed processes that are unique to your business needs.

Set Up and Manage Quick Actions

Define who can use specific Life Sciences Customer Engagement quick actions and where the actions appear. Make sure that the correct users see the correct options exactly when they need them.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To manage quick actions:

Life Sciences Commercial Admin permission set

AND

Customize Application

1. Create an action.
 - a. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
 - b. Select **Quick and Custom Action Administration**, and then select **Quick Actions**.
 - c. Select **New**.
 - d. Enter a label, name, action name, location, and sort order.
 - e. If needed, set optional values such as mobile only, sort order, icon, color, associated object, and record type.
 - f. Select the profiles and permission sets that can access the action.
 - g. Save your changes.
2. Manage existing actions.
 - a. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
 - b. Select **Quick and Custom Action Administration**, and then select **Quick Actions**.
 - c. From the dropdown, select the action.
 - Edit: Change the location, sort order, icon, color, associated object, and record type. Or, update the profiles and permission sets that have access to the action.
 - Activate/Deactivate: Turn the action on or off.
 - View Assignments: See a list of profiles and permission sets assigned to the action.
 - d. Save your changes.

Create Custom Actions

Invoke Lightning components, flows, Visualforce pages, or canvas apps with the functionality that you define for Life Sciences Customer Engagement users.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To create custom actions:

Life Sciences Commercial Admin permission set

AND

Customize Application

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Quick and Custom Action Administration**, and then select **Custom Actions**.
3. Select **New**.
4. Enter a label and name for the custom action.
5. To define where the action is available to users, select an entity type.

Home Page	The action is available on the mobile app Home page.
SObject	The action is available on the object defined in the Entity Name field.
Stage Path	The action is available for stage paths.
Visit	The action is available to support custom visit management tasks.

6. To define where the action takes place, select the action type.

App	The action takes place in the mobile app.
URL	The action opens a new URL.
Utterance	The action sends a predefined message to Agentforce.

7. Select the target type.
 - Internal
 - External
8. Enter values in the additional fields to meet your business needs.
9. Save your work.

See Also

[Quick Actions](#)

Related Lists for Life Sciences

Records in Salesforce can include details and links to other related records. The Life Sciences Cloud for Customer Engagement related list offers more customization and filtering options than standard related lists. If you create a Life Sciences Cloud for Customer Engagement workflow, you can also control the actions that users can take on related records based on the parent record's status, user role, and other business rules. These related lists are supported both online and offline in the Life Sciences Cloud mobile app.

When you add the Customer Engagement related list to a record page, you can:

- Customize the list's header, icon, and columns.
- Filter the records in the list.
- Populate fields on new records based on the parent record's data.
- Specify the record types that users can create.

[Get Your Org Ready for Life Sciences Related Lists](#)

Before you create a Life Sciences Customer Engagement related list, complete these steps.

[Create Related Lists for Life Sciences](#)

Add a Life Sciences Cloud for Customer Engagement related list to the page layout for Life Sciences objects, standard Salesforce objects, and custom objects. The related list appears in Life Sciences Cloud on desktop and in the mobile app.

Get Your Org Ready for Life Sciences Related Lists

Before you create a Life Sciences Customer Engagement related list, complete these steps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure the Life Sciences Customer Engagement related list:

Life Sciences Commercial Admin permission set

To create field sets and custom fields:

Customize Application

1. If needed, create a relationship between the parent and child object.
 - a. [Create a lookup field](#) from the child object to the parent object.
 - b. Add the field to the [child object's page layout](#).
2. To define the columns for the related list, [create a field set](#).

Add up to 10 fields, and arrange them in the order that you want the columns to appear in.

3. To grant users access to the related list child object and any fields used to filter the records in the list, [update permission sets](#).

These permissions make sure that users can create, read, edit, or delete records in the related list.

4. To further control when users can create, edit, and delete related records based on their role and the parent object record's status, [create a Life Sciences Customer Engagement workflow](#) for the parent object.
5. If needed, [create custom Lightning web components](#) for the New, Edit, and Delete actions, or other actions that you want to include in the related list.
You can also create a custom component for the View All link on related lists on iOS.
6. Set up the configurations for the related list to work in the Life Sciences Cloud mobile app.
 - a. [Set up object metadata cache configurations](#) for the related list objects.
 - b. [Generate a metadata cache](#) to package the object schema configuration that the Life Sciences Cloud mobile app uses for online and offline access.

Create Related Lists for Life Sciences

Add a Life Sciences Cloud for Customer Engagement related list to the page layout for Life Sciences objects, standard Salesforce objects, and custom objects. The related list appears in Life Sciences Cloud on desktop and in the mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure the Life Sciences Cloud for Customer Engagement related list: Life Sciences Commercial Admin permission set

Engagement related list:

To create and save Lightning pages in Lightning App Builder: Customize Application

When you install the Life Sciences Cloud for Customer Engagement managed package, these default Lightning record pages include some related lists automatically:

- Account
- Inquiry
- Visit

You can add a Customer Engagement related list to other standard and custom Lightning record pages.

1. From Setup, in the Quick Find box, search for and select **Lightning App Builder**.

2. Edit a record page, or create one.
3. Search the list of components for Related List, and then drag the Related List – Life Sciences component to the record page's Related tab.
4. In the properties pane, customize the list.
 - a. Enter the API name of the child object whose related records you want to show.
 - b. Enter the API name of the field set that you created on the child object.
The field set defines the fields that you want to use as the list's columns.
 - c. Enter the title of the related list.
 - d. Enter the name of the Salesforce Lightning Design System (SLDS) icon that you want to include in the list header. Use the format **group:name**.
 - e. Enter the API name of the action handler component that handles the edit and delete actions.
To use the standard Edit and Delete actions for each record in the related list, enter *StandardUpdateDeleteHandler*.
 - f. To filter the records in the list, enter a WHERE clause in SOQL format.
For example, enter *AccountId = 'recordId'*. You can also filter on a polymorphic field. For example, *ContactPointReferenceId IN (SELECT ID from ContactPointAddress WHERE ParentId = !recordId)*.
 - g. Enter the API name of the action handler component that handles the new action.
To show the standard New action so users can create related records from the list, enter *StandardNewAction*.
 - h. If the child object has record types, specify the record types that users can create from the list. Enter the record type API names in a semicolon separated list.
If you don't specify record types, users can create all types.
 - i. To simplify data entry, enter the API name of the relationship field to be populated automatically on new related records. The relationship field must be added to the child record's page layout.
 - j. To open the standard View All page, enter *StandardViewAll* in the View All Component field. To show users a custom View All page on iOS devices, enter the name of the Lightning web component that you created.
 - k. Choose whether to show the number of records in the list header.
5. To add visibility rules based on the record field, device type, or other filters, click **Add Filter**.
The eye icon on the component indicates that visibility rules are applied.
6. Save your changes to the record page, and then activate the page to share it with your users.

After you add the related list to the page layout, create a metadata cache for the required profiles so users can access the data in the mobile app when they're offline.

See Also

[Get Help for Lightning App Builder](#)

Reports and Dashboards Administration

Use reports and dashboards to deliver information to your Life Sciences Cloud mobile app users in the ways that work best for them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Manage Reports and Dashboards Settings

Define settings for the reports and dashboards shown to users on the Life Sciences Cloud mobile app.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To manage reports and dashboards settings:

Life Sciences Commercial Admin permission set

AND

Customize Application

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Reports and Dashboards**, and then select **Reports and Dashboards Settings**.
3. Select the mobile report settings based on your business needs.
 - Show Sales Data Chart
 - Show reports
4. Select the refresh frequency.
5. Save the settings.

Limitations for Charts and Dashboards in the Life Sciences Cloud Mobile App

Learn about the limitations for report charts and dashboards in the Life Sciences Cloud mobile app. Not all chart types render correctly or are supported.

After you set up reports and dashboards, you can add them to Lightning page components to help users visualize data from the Customer Engagement home page and record detail pages. In Lightning App Builder, you can add these standard components to Lightning pages.

- Dashboard: Supported on the home page
- Report Chart: Supported on the home page and Lightning record pages

You can also show reports or dashboards in separate tabs within the Life Sciences Cloud mobile app.

Limitations for Bar and Column Charts

Standard bar charts and column charts are replaced with stacked charts in the Life Sciences Cloud mobile app.

Unsupported Chart Types

These chart types aren't supported in the Life Sciences Cloud mobile app

- Funnel charts
- Scatter charts

See Also

[Customize Reports and Dashboards](#)

[Reports and Dashboards](#)

[Get Help for Lightning App Builder](#)

Run Batch Jobs

Automate the processing of large record volumes by running Apex batch jobs from the Admin Console.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To run batch jobs:	Life Sciences Commercial Admin permission set
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1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select a tile and find the batch job you want to run. For example, Products.
3. To run the batch job now, click **Run Now**.
 - a. Select a territory and its subordinates from the appropriate level in the territory hierarchy.
 - b. Select the batch size for the job, drag the slider handle. The default value is 200.
 - c. Click **Run**.
4. To schedule the job for a later time, click **Schedule**.
 - a. Select a frequency.
 - b. To select the batch size of the job, drag the slider handle. The default value is 200.
 - c. Save your changes.

Trigger Handler Administration

View and activate trigger handlers in the Life Sciences Customer Engagement Admin Console.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Manage Trigger Handlers](#)

View all Life Sciences Customer Engagement trigger handlers in one place, and turn them on or off.

[Trigger Handlers for the Account - AssessmentTask Objects](#)

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Account, AccountPlan, AccountPlanObjective, AccountPlanParticipant, ActionPlan, ActivityPlan, ActivityPlanTerritory, AppAlertTerritory, and AssessmentTask objects.

[Trigger Handlers for the Case - GoalAssignment Objects](#)

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Case, CommSubConsentCmplSsnsht, CommSubscription, CommSubscriptionConsent, ContactPointAddress, ContactPointEmail, ContactPointPhone, ContactPointSocial, ContentDocument, ContentDocumentLink, Expense, ExpenseParticipant, and GoalAssignment objects.

[Trigger Handlers for the HealthcareProvider - PresentationLinkedPage Objects](#)

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the HealthcareProvider, HealthcareProviderNpi, HealthcareProviderSpecialty, InventoryCntProdtBatchItem, InventoryCountAssessment, InventoryOperation, LifeScienceEmail, LifeSciMarketableProduct, Location, Presentation, PresentationForum, and PresentationLinkedPage objects.

[Trigger Handlers for the MedicalInsight - Subject Objects](#)

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the MedicalInsight, UserReaction, Subject and SubjectAssignment objects.

[Trigger Handlers for the ProductBatchItem - ProductTransfer Objects](#)

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductBatchItem, ProductDisbursement, ProductGuidance, ProductionBatch, ProductRequest, ProductRequestLineItem, ProductTerrDtlAvailability, ProductTerritoryAvailability, and ProductTransfer objects.

[Trigger Handlers for the ProviderAcctProductInfo - PrvdVstSmplLmtTransaction Objects](#)

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderAcctProductInfo, ProviderAcctTerritoryInfo, ProviderActivityGoal, ProviderAffiliation, ProviderVisit, ProviderVisitChangedEvent, ProviderVisitDtlProductMsg, ProviderVisitMarketingItem, ProviderVisitProdDetailing, ProviderVisitProdDiscussion, ProviderVisitRqstSample, and PrvdVstSmplLmtTransaction objects.

Trigger Handlers for the SurveySubject - Visitor Objects

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the SurveySubject, Territory2, TerritoryAcctRcmdAction, TerritoryBusinessPlan, TerritoryContentTmplAsgmt, TerritoryUserDowntime, Visit, and Visitor objects.

Manage Trigger Handlers

View all Life Sciences Customer Engagement trigger handlers in one place, and turn them on or off.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To manage trigger handlers:

Life Sciences Commercial Admin permission set

AND

Customize Application

Before you can use the Admin Console to manage trigger handlers, you must enable it.

1. From the App Launcher, find and select **Life Sciences Commercial**, and then select **Admin Console**.
2. Select **Trigger Handler Administration**.
3. Find specific trigger handlers by using the Object API Name dropdown or Search field.
4. Turn the trigger handler on or off.

Trigger Handlers for the Account - AssessmentTask Objects

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Account, AccountPlan, AccountPlanObjective, AccountPlanParticipant, ActionPlan, ActivityPlan, ActivityPlanTerritory, AppAlertTerritory, and AssessmentTask objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You can also review the trigger handlers that apply to all objects.

Account

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the

Account object.

Trigger Name	Description	Trigger condition
NewAccountSampleLimitInitHandlerforHCO	Initializes the HCO accounts for the Provider Sample Limit Template.	afterInsert
NewAccountSampleLimitInitHandler	Initializes the HCP accounts for the Provider Sample Limit Template.	afterInsert

AccountPlan

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the AccountPlan object.

Trigger Name	Description	Trigger condition
AccountPlanDeleteChildrenHandler	Handles the deletion of Account Plan Children records.	beforeDelete
AccountPlanChangeStatusHandler	Updates the completion percentage of the Account Plan records based on updates in the related Account Plan Objective records.	beforeInsert, beforeUpdate

AccountPlanObjective

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the AccountPlanObjective object.

Trigger Name	Description	Trigger condition
SetAccPlanPercentCompleteHandler	Updates the completion percentage of the Account Plan Objective records based on updates in the related Action Plan records.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, afterDelete

AccountPlanParticipant

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the AccountPlanParticipant object.

Trigger Name	Description	Trigger condition
AccountPlanToParticipantSharingHandler	Shares Account Plan and hierarchical records with participants.	afterInsert, afterUpdate, afterDelete

ActionPlan

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ActionPlan object.

Trigger Name	Description	Trigger condition
SetAccObjectPercentCompleteHandler	Updates the completion percentage of the Action Plan records to 100% when the parent Account Plan's status is changed to Completed.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, afterDelete
ActionPlanDeleteChildrenHandler	Deletes all the action plans related to a parent account plan when the account plan is deleted.	beforeDelete, afterDelete
SetSprintPercentCompleteHandler	Updates the completion percentage of the sprint based on the average completion percentages of the related action plans.	afterInsert, afterUpdate, afterDelete
SetGoalAsgmtPercentCompleteHandler	Updates the Completion Percentage of Goal Assignment records.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, afterDelete

ActivityPlan

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ActivityPlan object.

Trigger Name	Description	Trigger condition
ActivityPlanTerritoryValidationHandler	Validates the alignment of territories with activity plans and displays an error message if the conditions aren't met.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, beforeDelete, afterDelete, afterUndelete
ActivityPlanValidationHandler	Identifies and prevents duplicate activity plan records and displays an error message if the conditions aren't met.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, beforeDelete, afterDelete, afterUndelete
PAPATerritoryUpdateHandler	Adjusts the activity plan goals and creates the corresponding sharing record for the adjusted territory.	beforeInsert, beforeUpdate, afterInsert
PAPAAccrueProcessHandler	Prevents users from creating more than the allowed number of provider activity plan adjustment requests.	beforeInsert, beforeUpdate

ActivityPlanTerritory

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ActivityPlanTerritory object.

Trigger Name	Description	Trigger condition
ActivityPlanTerritoryModHandler	Validates and prevents an update of the Territory field in an Activity Plan Territory record or deletion of the Activity Plan Territory record if the associated activity plan is active or the status of the activity plan is not In Progress. If either condition is met, an error is displayed on the record page, preventing the update or deletion.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, beforeDelete, afterDelete, afterUndelete
ActivityPlanTerritorySharingHandler	Manages the creation of	beforeInsert, afterInsert,

Trigger Name	Description	Trigger condition
	sharing records upon territory alignment and supports the update and deletion of sharing records to reflect territory re-alignment or removal.	beforeUpdate, afterUpdate, beforeDelete, afterDelete, afterUndelete

ALL

Review the names, descriptions, and trigger conditions of the trigger handlers associated with all objects.

Trigger Name	Description	Trigger condition
StagePathPermissionsHandler	Enforces permissions defined in Life Sciences workflows. Validates whether users can create, edit, or delete records or work with related files at the current stage in the workflow path. Shows an error message if users don't have permission to perform actions at that workflow stage.	afterInsert, beforeUpdate, beforeDelete

AppAlertTerritory

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the AppAlertTerritory object.

Trigger Name	Description	Trigger condition
NotificationTerritorySharingHandler	Creates sharing records once a territory has been assigned to an alert.	afterInsert, afterUpdate

AssessmentTask

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the AssessmentTask object.

Trigger Name	Description	Trigger condition
SetActionPlanPercentCompleteHandler	Updates the completion percentage of Action Plan records.	afterInsert, afterUpdate
AssessmentTaskDeleteAPItemHandler	Deletes all the assessment tasks related to an action plan when the action plan is deleted.	beforeDelete
AssessmentTaskSharingHandler	Shares Assessment Task records with assignees.	afterInsert, afterUpdate

Trigger Handlers for the Case - GoalAssignment Objects

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Case, CommSubConsentCmplSnpsh, CommSubscription, CommSubscriptionConsent, ContactPointAddress, ContactPointEmail, ContactPointPhone, ContactPointSocial, ContentDocument, ContentDocumentLink, Expense, ExpenseParticipant, and GoalAssignment objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You can also review the trigger handlers that apply to all objects.

Case

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Case object.

Trigger Name	Description	Trigger condition
CaseMSLQueueHandler	Monitors and manages case status changes. Handles the medical inquiry queue of the medical science liaison users before a case record is updated. When an inquiry is submitted and the status changes to Submitted, the	beforeUpdate

Trigger Name	Description	Trigger condition
	trigger handler assigns the case to the appropriate MSL queue. When the status changes to Assigned, the trigger handler reassigns ownership to the current user for handling the inquiry.	
CaseChangeOwnershipHandler	Handles the sharing of the medical inquiry records with the sales representatives after a case record is updated. When a case transitions to Submitted or Responded status, the handler creates CaseShare records to give read access to the case creator or owner. This process maintains data transparency in inquiry management workflows by ensuring that the original creator or owner retains visibility into the case, even if ownership changes.	afterUpdate
CaseShareToCreatorHandler	Handles the change of ownership of the medical inquiries between the sales representative and the medical science liaison users after a case record is updated. When a case's OwnerId changes, the ownership change automatically cascades to all related inquiry objects, such as InquiryQuestions and SubjectAssignments. The handler queries for cases with updated ownership, retrieves the related records, and updates the Owner on these child objects, ensuring	afterUpdate

Trigger Name	Description	Trigger condition
	data consistency.	

CommSubConsentCmplSnpsh

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the CommSubConsentCmplSnpsh object.

Trigger Name	Description	Trigger condition
ConsentGiverSnapshotHandler	Validates if the consent giver is valid.	beforeInsert
ConsentSnapshotSharingHandler	Shares the consent snapshot with territories that are aligned with the account.	afterInsert

CommSubscription

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the CommSubscription object.

Trigger Name	Description	Trigger condition
ConsentNameCommSubHandler	Updates Communication Subscription Consent records when related Communication Subscription record names are changed.	beforeUpdate

CommSubscriptionConsent

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the CommSubscriptionConsent object.

Trigger Name	Description	Trigger condition
ConsentGiverConsentHandler	Validates if the consent-giver account exists and it's the same for the snapshot record.	beforeInsert, beforeUpdate
ConsentSharingHandler	Shares consent with	afterInsert

Trigger Name	Description	Trigger condition
	territories that are aligned with the account.	
ConsentUniqueRecordHandler	Handles changes to CommSubscriptionConsent and maintains unique records.	beforeInsert

ContactPointAddress

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ContactPointAddress object.

Trigger Name	Description	Trigger condition
AccountAddressPrimaryHandler	Ensures that each account maintains only one primary contact point address. It gets triggered whenever a contact point address record is created or updated, guaranteeing that the one primary rule is always enforced.	beforeInsert, afterInsert, beforeUpdate, afterUpdate
RelatedContactPointAddressHandler	Validates contact point address hierarchy rules to ensure child addresses are associated with person accounts and parent addresses are associated with business accounts.	beforeInsert, beforeUpdate

ContactPointEmail

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ContactPointEmail object.

Trigger Name	Description	Trigger condition
ContactPointEmailPopulateHandler	Updates healthcare provider records to maintain an accurate list of associated	afterInsert, afterUpdate, afterDelete, afterUndelete

Trigger Name	Description	Trigger condition
	email addresses whenever contact point email records are created, modified, removed, or restored. This ensures the EmailIds field on the healthcare provider record reflects the current related email addresses and avoids unnecessary processing.	

ContactPointPhone

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ContactPointPhone object.

Trigger Name	Description	Trigger condition
ContactPointPhoneHandler	Updates healthcare provider records to maintain an accurate list of associated phone numbers whenever contact point phone records are created, modified, removed, or restored. This ensures the PhoneNumbers field on the healthcare provider record reflects the current related telephone numbers and prevents redundant processing.	afterInsert, afterUpdate, afterDelete, afterUndelete

ContactPointSocial

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ContactPointSocial object.

Trigger Name	Description	Trigger condition
ContactPointSocialPopulateHandler	Updates healthcare provider records to maintain an accurate list of associated	afterInsert, afterUpdate, afterDelete, afterUndelete

Trigger Name	Description	Trigger condition
	social media handles whenever contact point social records are created, modified, removed, or restored. This ensures the SocialIdentifiers field on the healthcare provider record reflects the current related social handles and prevents unnecessary execution.	

ContentDocument

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ContentDocument object.

Trigger Name	Description	Trigger condition
ConsentContentDocumentHandler	Handles changes to ContentDocument.	afterInsert, afterUpdate, afterDelete, afterUndelete
ContentDocumentLockHandler	Prevents delete operation to Documents linked to Submitted Visits or related entities.	beforeUpdate, beforeDelete

ContentDocumentLink

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ContentDocumentLink object.

Trigger Name	Description	Trigger condition
ConsentContentDocumentLinkHandler	Handles changes to ContentDocumentLink.	beforeInsert, beforeDelete
ContentDocumentLinkLockHandler	Prevents insert/delete operation to Document Links for Submitted Visits or related entities.	beforeInsert, beforeDelete

Expense

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Expense object.

Trigger Name	Description	Trigger condition
ExpenseLockHandler	Prevents insert/update/delete operation on Expense if it is locked.	beforeInsert, beforeUpdate, beforeDelete

ExpenseParticipant

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ExpenseParticipant object.

Trigger Name	Description	Trigger condition
ExpenseParticipantNameHandler	Stores the Account/Contact Participant name as the Expense Participant Name.	beforeInsert
ExpenseParticipantLockHandler	Prevents insert/update/delete operation on ExpenseParticipant/Allocations if it is locked.	beforeInsert, beforeUpdate, beforeDelete

GoalAssignment

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the GoalAssignment object.

Trigger Name	Description	Trigger condition
GoalAssignmentDeleteHandler	Deletes Goal Assignment records.	beforeDelete
SetTerrBusPlanPrcntCompleteHandler	Updates the Completion Percentage of Territory Business Plan records.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, afterDelete

Trigger Handlers for the HealthcareProvider - PresentationLinkedPage Objects

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the

HealthcareProvider, HealthcareProviderNpi, HealthcareProviderSpecialty, InventoryCntProdtBatchItem, InventoryCountAssessment, InventoryOperation, LifeScienceEmail, LifeSciMarketableProduct, Location, Presentation, PresentationForum, and PresentationLinkedPage objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You can also review the trigger handlers that apply to all objects.

HealthcareProvider

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the HealthcareProvider object.

Trigger Name	Description	Trigger condition
HealthcareProviderHandler	Manages updates to healthcare provider records after creation, restoration, or modification. This trigger fetches and updates related email addresses, phone numbers, social identifiers, specialties, and NPI from their respective related records, while also preventing self-calling updates.	beforeInsert, beforeUpdate
HealthcareProviderAffiliationHandler	Creates a primary affiliation between a parent organization and an account on the Healthcare Provider object. If an existing affiliation is found, the handler will just set or unset the primary flag on that record. The role for the new affiliation defaults to the selected value from the active picklist on the	afterInsert, afterUpdate

Trigger Name	Description	Trigger condition
	provider affiliation; if no default role is selected, the handler throws a custom error.	

HealthcareProviderNpi

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the HealthcareProviderNpi object.

Trigger Name	Description	Trigger condition
HealthcareProviderNpiHandler	Updates healthcare provider records to maintain the correct National Provider Identifier (NPI) whenever healthcare provider NPI records are created, modified, removed, or restored. This ensures the NationalProviderIdentifier field on the healthcare provider record reflects the current associated NPI and avoids unnecessary execution.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, afterDelete, afterUndelete

HealthcareProviderSpecialty

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the HealthcareProviderSpecialty object.

Trigger Name	Description	Trigger condition
HealthcareProviderSpecialityHandler	Updates healthcare provider records to maintain an accurate list of associated specialty types whenever healthcare provider specialty records are created, modified, removed, or restored. This ensures the	beforeInsert, afterInsert, beforeUpdate, afterUpdate, afterDelete, afterUndelete

Trigger Name	Description	Trigger condition
	Specialties field on the healthcare provider record reflects the current related specialties and avoids redundant processing.	

InventoryCntProdtBatchItem

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the InventoryCntProdtBatchItem object.

Trigger Name	Description	Trigger condition
InventoryCountPBILOCKHandler	Prevents modifications to Inventory Count Product Batch Item records when the associated inventory count assessment is locked.	beforeUpdate, beforeDelete
InventoryCntPBIValidationHandler	Prevents update/delete operation on InventoryCntProdtBatchItem 's if unresolved Product disbursement records are present for the same product.	beforeInsert, beforeUpdate

InventoryCountAssessment

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the InventoryCountAssessment object.

Trigger Name	Description	Trigger condition
InventoryCountAssessmentLockHandler	Prevents modifications to Inventory Count Assessment records when they're in a locked state, and prevents the creation of duplicate "Initial" type inventory count assessments.	beforeInsert, afterInsert, beforeUpdate, beforeDelete

InventoryOperation

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the InventoryOperation object.

Trigger Name	Description	Trigger condition
InventoryOperationLockHandler	Prevents modifications to Inventory Operation records when they're in a locked state.	afterInsert, beforeUpdate, beforeDelete
InventoryOperationSyncTxnHandler	Prevents the creation of Return, Adjustment, Transfer In, and Transfer Out type operations when the inventory operation is in its final state, and checks for pending sync transactions before updating the Inventory Operation records.	beforeInsert, beforeUpdate

LifeScienceEmail

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the LifeScienceEmail object.

Trigger Name	Description	Trigger condition
EmailQueueImmediateHandler	Handles emails that are sent immediately instead of from a batch job.	afterInsert, afterUpdate
EmailQueueRecipientHandler	Populates additional information for email recipients.	beforeInsert, beforeUpdate
EmailQueueSenderHandler	Populates additional information for the email sender.	beforeInsert
EmailAttachmentHandler	Populates email attachments.	beforeInsert
SyncEmailResponseStatusToObjectHandler	Updates the invitation status on related records based on the email response status.	afterUpdate

LifeSciMarketableProduct

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the LifeSciMarketableProduct object.

Trigger Name	Description	Trigger condition
LifeSciMarketableProductMetadataHandler	Creates or updates the ProductMetadata field value in the Life Science Marketable Product object.	afterInsert, afterUpdate, beforeDelete, afterDelete

Location

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Location object.

Trigger Name	Description	Trigger condition
LocationUserDupHandler	Prevents duplicate primary user assignments to inventory locations.	beforeInsert, beforeUpdate
LocationUserSharingHandler	Shares records with the primary user assigned to an inventory location.	beforeInsert, beforeUpdate, afterUpdate

Presentation

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Presentation object.

Trigger Name	Description	Trigger condition
PresentationSharingHandler	Recalculates how Presentation Page records are shared after a presentation is deleted.	beforeDelete

PresentationForum

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the PresentationForum object.

Trigger Name	Description	Trigger condition
PresentationForumLockHandler	Prevents creating, editing, or deleting Presentation Forum records if the related presentation is locked.	beforeInsert, beforeUpdate, beforeDelete

PresentationLinkedPage

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the PresentationLinkedPage object.

Trigger Name	Description	Trigger condition
PresentationLinkedPageSharingHandler	Recalculates how Presentation Page records are shared after Presentation Linked Pages are added or removed.	beforeInsert, beforeDelete

Trigger Handlers for the MedicalInsight - Subject Objects

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the MedicalInsight, UserReaction, Subject and SubjectAssignment objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You can also review the trigger handlers that apply to all objects.

MedicalInsight

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the MedicalInsight object.

Trigger Name	Description	Trigger condition
PublishMedicalInsightEventHandler	Publishes MedicalInsightEvent	afterInsert, afterUpdate, afterDelete

Trigger Name	Description	Trigger condition
	platform events whenever a medical insight record is created, updated, or deleted. This facilitates real-time event streaming and integration with external systems.	
RecalculateParentLinkedInsightsHandler	Updates the rollup summary fields on parent medical insight records when child insights are modified. This includes updating the ChildMedicalInsightCount, UpvoteCount, and LastUpvotedDate fields to make sure roll-up summaries are accurate.	afterInsert, afterUpdate, afterDelete
MedicalInsightSharingHandler	Automatically shares medical insight records with peers having the same territory and profile as the creator upon creation. This handler creates sharing records with edit access to make sure that peers can collaborate on insights.	afterInsert
InsightCascadeDeleteTriggerHandler	Automatically deletes child medical insight records when a top-level parent record is deleted. This cascade deletion prevents orphan records and keeps the insight hierarchy clean.	beforeDelete

Subject

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Subject object.

Trigger Name	Description	Trigger condition
TopicValidationHandler	Prevents the creation of circular parent-child relationships when updating Subject records for medical insights. This makes sure a valid single-parent hierarchy structure.	beforeUpdate

SubjectAssignment

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the SubjectAssignment object.

Trigger Name	Description	Trigger condition
RecalculateInsightTopicNameHandler	Updates the TopicNames field on the related medical insight record whenever a Subject Assignment is created or deleted. This makes sure the processed insight accurately reflects the set of topics currently assigned to the record.	afterInsert, afterDelete

UserReaction

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the UserReaction object.

Trigger Name	Description	Trigger condition
UserReactionMedicalInsightHandler	Updates the UpvoteCount field on Medical Insight records when User Reaction records are created or deleted. It also deletes duplicate records to prevent multiple upvotes from the same user on the same insight.	afterInsert, afterDelete

Trigger Handlers for the ProductBatchItem - ProductTransfer Objects

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductBatchItem, ProductDisbursement, ProductGuidance, ProductionBatch, ProductRequest, ProductRequestLineItem, ProductTerrDtlAvailability, ProductTerritoryAvailability, and ProductTransfer objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

ProductBatchItem

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductBatchItem object.

Trigger Name	Description	Trigger condition
ProductBatchItemOwnershipHandler	Shares records in product batch item to sales rep in ProductBatchItem.AssigeeId .	afterInsert

ProductDisbursement

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductDisbursement object.

Trigger Name	Description	Trigger condition
ProductDisbursementInventoryOpCreation	Creates a corresponding Inventory Operation record when a disbursement is made.	afterInsert, afterUpdate
ProductDisbursementSubmitLockHandler	Prevents modifications to Product Disbursement records when the related Visit record is in a locked state, that is, when the visit is signed or submitted.	beforeInsert, beforeUpdate, beforeDelete

ProductGuidance

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductGuidance object.

Trigger Name	Description	Trigger condition
ProductGuidanceDeactivationHandler	Removes sharing if the Product Guidance record was deactivated.	afterUpdate

ProductionBatch

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductionBatch object.

Trigger Name	Description	Trigger condition
ProductBatchItemUpdateByLotHandler	Shares Product Batch Item records with the assignee or the current user if the Assignee ID is not specified.	afterUpdate

ProductRequest

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductRequest object.

Trigger Name	Description	Trigger condition
ProductRequestLockHandler	Prevents modifications to Product Request records when they're in a locked state.	beforeUpdate, beforeDelete

ProductRequestLineItem

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductRequestLineItem object.

Trigger Name	Description	Trigger condition
ProductRequestLineItemLockHandler	Updates the ordered quantity in the Territory	beforeInsert, beforeUpdate, beforeDelete

Trigger Name	Description	Trigger condition
	Product Quantity Allocation record when a product request line item is modified.	
PrdReqLineItmUpdateAllocationHandler	Prevents modifications to Product Request Line Item records when the associated product request is locked.	afterInsert, afterUpdate

ProductTerrDtlAvailability

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductTerrDtlAvailability object.

Trigger Name	Description	Trigger condition
ProductTerrDtlAvailabilityHandler	On trigger of these events the Product Guidance records shared with Territory are deleted.	afterUpdate, afterDelete

ProductTerritoryAvailability

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductTerritoryAvailability object.

Trigger Name	Description	Trigger condition
ProductTerritoryAvailabilityExclHandler	Deletes ProductGuidance share records when an Exclusion rule is created in ProductTerritoryAvailability.	afterInsert, afterUpdate

ProductTransfer

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProductTransfer object.

Trigger Name	Description	Trigger condition
ProductTransferLockHandler	Prevents modifications to Product Transfer records	beforeUpdate, beforeDelete

Trigger Name	Description	Trigger condition
	when the associated inventory operation is locked.	
ProductTransferValidationHandler	Prevents invalid Transfer In and Transfer Out operations by checking transfer directions, and source and destination locations.	beforeInsert, beforeUpdate
ReceivedProductAllocationHandler	Updates Territory Product Quantity Allocation records when a product transfer is received.	afterInsert, afterUpdate
TransferOutTriggerHandler	Creates a Transfer In record when a user receives a product transfer due to another user submitting a Transfer Out record.	afterInsert, afterUpdate

Trigger Handlers for the ProviderAcctProductInfo - PrvdVstSmplLmtTransaction Objects

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderAcctProductInfo, ProviderAcctTerritoryInfo, ProviderActivityGoal, ProviderAffiliation, ProviderVisit, ProviderVisitChangedEvent, ProviderVisitDtlProductMsg, ProviderVisitMarketingItem, ProviderVisitProdDetailing, ProviderVisitProdDiscussion, ProviderVisitRqstSample, and PrvdVstSmplLmtTransaction objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

ProviderAcctProductInfo

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderAcctProductInfo object.

Trigger Name	Description	Trigger condition
ProviderAcctProductInfoHandler	Sets the value of the Territory field on the provider account product information record to Null whenever a record is created or updated.	beforeInsert, beforeUpdate

ProviderAcctTerritoryInfo

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderAcctTerritoryInfo object.

Trigger Name	Description	Trigger condition
AccountTerritoryFieldsHandler	Handles a valid territory check for an account and manages Provider Account Territory Information Sharing.	beforeInsert, afterInsert, beforeUpdate
ATFPreferredAddressHandler	Updates the Preferred Address field on the Provider Account Territory Information object from the account's Primary address in the Contact Point Address Object. This preferred address then displays in the Account Territory Fields component on the Account Dashboard.	beforeInsert, beforeUpdate
NewAlignmentConsentSharingHandler	Creates sharing records for Consent and Snapshot records based on territory assignments.	afterInsert, afterUpdate
PATIRejectionHandler	Deletes provider account territory info sharing and object territory association records when the status of the associated provider account territory info records changes to Rejected.	beforeUpdate

ProviderActivityGoal

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderActivityGoal object.

Trigger Name	Description	Trigger condition
ProviderActivityGoalHandler	Validates and prevents the creation of duplicate Provider Activity Goals by ensuring the combination of Activity Plan and Account is unique. The trigger performs this validation when you create or update a Provider Activity Goal record. If a duplicate combination is found, an error is displayed, preventing the creation or update of the record.	beforeInsert, afterInsert, beforeUpdate, afterUpdate, beforeDelete, afterDelete, afterUndelete

ProviderAffiliation

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderAffiliation object.

Trigger Name	Description	Trigger condition
AffiliationUniquenessGenericHandler	Ensures a unique combination of fields configured in the field set of the Provider Affiliation object, preventing duplicates and maintaining accurate records.	beforeInsert, beforeUpdate
AffiliationUniquenessHandler	Ensures affiliation uniqueness by enforcing a unique combination of account, related account, and role values. This prevents duplicate affiliations and maintains data integrity.	beforeInsert, beforeUpdate

Trigger Name	Description	Trigger condition
HardAffiliationHandler	<p>Assigns the affiliation type of provider affiliation records as either hard or soft. Primary Affiliations are designated as Hard Affiliations. The HardAffiliationHandler trigger handler also ensures that duplicate Hard type affiliations between the same two accounts aren't created.</p> <p>Sets the affiliation type of workplace affiliations between an HCP and an HCO to Hard. It also sets the affiliation between an account and its related account to Hard when the related account is the preferred workspace of the account's provider account territory info (PATI) record. Lastly, it sets the affiliation type of reciprocal affiliations to None.</p>	beforeInsert, afterInsert, beforeUpdate
AffiliationReciprocalHandler	<p>Manages the creation, updating, and deletion of reciprocal affiliations. It ensures that the inverse affiliation is maintained whenever a ProviderAffiliation is created, updated, or deleted. Reverse Affiliations are only created if the Influence Type field on the Provider Affiliation object is selected as either Unidirectional, Bidirectional, or Neutral.</p>	afterInsert, afterUpdate, beforeDelete
AffiliationPrimaryChangeHandler	Ensures a single primary	afterInsert, afterUpdate

Trigger Name	Description	Trigger condition
	<p>affiliation between an account and a related healthcare organization account. When a new primary affiliation is created, the trigger deselects the primary flag on any prior affiliations with the same Account and Related Account. Additionally, it updates the associated Healthcare Provider's Primary Organization Account to the affiliation's Related Account, or creates a new Healthcare Provider record if one doesn't exist, populating it with the affiliation's Account and Related Account.</p>	
AffiliationAccountUpdateHandler	<p>Prevents the modification of the account and the related account after an affiliation is created.</p>	beforeUpdate

ProviderVisit

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderVisit object.

Trigger Name	Description	Trigger condition
PVUpdateChildFieldsHandler	<p>Maintains data consistency for group visits by syncing child provider visit records with the parent provider visit records. Automatically updates key fields (Planned Visit Start Time, Planned Visit End Time, and Channel) when the parent visit is modified.</p>	afterUpdate

Trigger Name	Description	Trigger condition
PVLockHandler	Prevents editing provider visit data based on the visit's status and signature state to maintain data integrity.	beforeUpdate, beforeDelete
RemoteSessionInvitationPVHandler	Manages remote session invitations by creating video calls, email notifications, and session keys for provider visit records.	afterInsert, afterUpdate, beforeDelete

ProviderVisitChangedEvent

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderVisitChangedEvent object.

Trigger Name	Description	Trigger condition
VisitChangedEventShareHandler	Creates Visit shares with the users shared with Accounts.	afterInsert
PVChangedEventUpdateAccountTerrInfo	Processes provider visit changed events and updates provider visit related fields on Provider Account Territory Information records.	afterInsert

ProviderVisitDtlProductMsg

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderVisitDtlProductMsg object.

Trigger Name	Description	Trigger condition
ProviderVisitDtlProductMsgLockHandler	Locks the ProviderVisitDtlProductMsg record when Visit is Submitted or Signed.	beforeInsert, beforeUpdate, beforeDelete

ProviderVisitMarketingItem

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the

ProviderVisitMarketingItem object.

Trigger Name	Description	Trigger condition
ProviderVisitMarketingItemLockHandler	Locks the ProviderVisitMarketingItem record when Visit is Submitted or Signed.	beforeInsert, beforeUpdate, beforeDelete

ProviderVisitProdDetailing

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderVisitProdDetailing object.

Trigger Name	Description	Trigger condition
ProviderVisitProdDtlNameHandler	Generates and populates the Product Hierarchy Name field for the Provider Visit Product Detailing record.	beforeInsert, beforeDelete
ProviderVisitProdDtlLockHandler	Locks the ProviderVisitProdDetailing record when Visit is Submitted or Signed.	beforeInsert, beforeUpdate, beforeDelete

ProviderVisitProdDiscussion

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderVisitProdDiscussion object.

Trigger Name	Description	Trigger condition
ProviderVisitProdDiscussionLockHandler	Locks the ProviderVisitProdDiscussion record when Visit is Submitted or Signed.	beforeInsert, beforeUpdate, beforeDelete

ProviderVisitRqstSample

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the ProviderVisitRqstSample object.

Trigger Name	Description	Trigger condition
ProviderVisitRqstSampleLockHandler	Locks the ProviderVisitRqstSample record when Visit is Submitted or Signed.	beforeInsert, beforeUpdate, beforeDelete
CalculateShippedQuantityHandler	Manages Provider Visit Request Sample shipped quantity on Visit.	afterUpdate

PrvdVstSmplLmtTransaction

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the PrvdVstSmplLmtTransaction object.

Trigger Name	Description	Trigger condition
SampleLimitTransactionHandler	Processes Sample Limit Records using Rule which comes from Web and Mobile as Provider Visit Sample Limit Transaction records.	afterInsert

Trigger Handlers for the SurveySubject - Visitor Objects

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the SurveySubject, Territory2, TerritoryAcctRcmdAction, TerritoryBusinessPlan, TerritoryContentTmplAsgmt, TerritoryUserDowntime, Visit, and Visitor objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

SurveySubject

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the SurveySubject object.

Trigger Name	Description	Trigger condition
SurveyInvitationSharingHandler	<p>Applies survey sharing logic on the Survey Subject object. When survey subject records are created or updated, this trigger handler automatically creates survey invitation share records based on one of three strategies:</p> <p>Account-Based Sharing: When a survey subject is linked to an account, the trigger handler automatically creates survey invitation share records for accounts listed in the related account's account share records. This sharing logic doesn't apply to records where the rowCause field is set to Owner.</p> <p>Life Sciences Marketable Product-Based Sharing: When you link a survey subject record to a Life Sciences marketable product, the corresponding survey invitation share records are created for either accounts or territories based on the product territory availability records. The availability of the product is determined by the product territory availability object, which includes an alignment type field with options such as territory subordinates, territory inclusion, or territory exclusion.</p>	beforeInsert, afterInsert, afterUpdate

Trigger Name	Description	Trigger condition
	<p>Territory-Based Sharing: When a survey subject record is linked to a territory, survey invitation share records are created for that territory and its subordinates.</p>	

Territory2

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Territory2 object.

Trigger Name	Description	Trigger condition
Territory2Handler	<p>Prevents the deletion of a Territory2 record when related records like ProviderAcctTerritoryInfo, Inquiry, ContactPointBestContactTime, TerritoryAcctRcmdAction, TerritoryAccountScore, TerritoryAcctProdMsgScore, TerritoryUserDowntime, or TerritoryBusinessPlan records reference it.</p>	beforeDelete

TerritoryAcctRcmdAction

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the TerritoryAcctRcmdAction object.

Trigger Name	Description	Trigger condition
TerrAcctRcmdActionSharingHandler	Shares the territory account recommended action records with the specified territory.	afterInsert, afterUpdate
TerrAccRcmActStatusUpdateHandler	Updates the status of the	afterInsert, afterUpdate

Trigger Name	Description	Trigger condition
	territory account recommended action when a visit is created.	

TerritoryBusinessPlan

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the TerritoryBusinessPlan object.

Trigger Name	Description	Trigger condition
TerritoryBusinessPlanDeleteHandler	Deletes Territory Business Plan records.	beforeDelete
TerritoryBusPlanChangeStatusHandler	Updates the statuses of Territory Business Plan records.	beforeInsert, beforeUpdate

TerritoryContentTmplAsgmt

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the TerritoryContentTmplAsgmt object.

Trigger Name	Description	Trigger condition
EmailTemplateTerritorySharingHandler	Updates territory sharing based on Territory Content Template Assignment records.	afterInsert, afterUpdate, afterDelete

TerritoryUserDowntime

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the TerritoryUserDowntime object.

Trigger Name	Description	Trigger condition
TUDUpdateHandler	Updates the start time and end time of time off territory records based on the time slot interval configuration.	beforeInsert, beforeUpdate
UDBHValidationHandler	Prevents the creation of time	beforeInsert, beforeUpdate

Trigger Name	Description	Trigger condition
	off territory records with start and end times outside of the org's business hours.	
TUDSharingHandler	Shares a user's time off territory records with other users in the same territory, giving them read-only access.	afterInsert
TUDVisitValidationHandler	Prevents the creation of time off territory during a visit.	beforeInsert, beforeUpdate
TUDHolidayValidationHandler	Prevents the creation of time off territory records on holidays.	beforeInsert, beforeUpdate
TUDOlapHandler	Prevents the creation of overlapping time off territory records.	beforeInsert, beforeUpdate
TUDEventValidationHandler	Prevents the creation of time off territory during a general event.	beforeInsert, beforeUpdate

Visit

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Visit object.

Trigger Name	Description	Trigger condition
VisitLockHandler	Prevents editing visit data based on the status and signature state to maintain data integrity.	beforeInsert, beforeUpdate
VisitTimeOffValidationHandler	Prevents scheduling a visit that conflicts with a time-off territory to support scheduling efficiency and accurate visit reporting.	beforeInsert, beforeUpdate
VisitLifeScienceAccountListLinkHandler	Clears the Life Science Account List field on the provider visit record if the	beforeUpdate

Trigger Name	Description	Trigger condition
	Planned Start Time is changed on a visit created by applying a routine.	
VisitHolidayValidationHandler	Prevents scheduling a visit on holidays or outside of business hours to maintain compliance with company policies.	beforeInsert, beforeUpdate
VisitPopulateEndTimeHandler	Calculates and sets the visit's Planned End Time by adding the default duration defined in the "Set blank date/time in Planned Start Time" Visit Administration setting in the Admin Console.	beforeInsert, beforeUpdate
FutureVisitLimitValidationHandler	Prevents scheduling visits beyond the limit specified in the "Future Visit Limit in Days" setting in Visit Administration in the Admin Console.	beforeInsert, beforeUpdate
VisitUpdateChildFieldsHandler	Maintains data consistency in group visits by synchronizing child visit records with their parent visits. Automatically updates key fields (Planned Visit Start Time, Planned Visit End Time, and Channel) when the parent visit is modified.	afterUpdate
VisitDelayReasonHandler	Clears the previously entered reason for delay if a user changes the visit date and time and the date no longer exceeds the submission delay threshold.	beforeUpdate
VisitCascadeDeleteHandler	Deletes attendee visits automatically when the parent group visit is deleted, maintaining data integrity.	beforeDelete

Trigger Name	Description	Trigger condition
VisitSurveyInviteCascadeDeleteHandler	Deletes survey invitations linked to a visit when a visit is deleted, and prevents deleting them if the visit is submitted to maintain data integrity.	beforeDelete
RemoteSessionInvitationVisitHandler	Manages remote session invitations by creating video calls, email notifications, and session keys for visit records.	afterUpdate, beforeDelete
VisitMyBestTimeValidationHandler	Prevents scheduling visits outside of best times defined for the account address and user's territory, improving scheduling efficiency and aligning with account availability.	beforeInsert, beforeUpdate
VisitChangePrimaryAccountHandler	Performs validations, updates related records, and prepopulates fields in the visit to maintain data consistency when the primary account is changed.	beforeInsert, beforeUpdate, afterUpdate

Visitor

Review the names, descriptions, and trigger conditions of the trigger handlers associated with the Visitor object.

Trigger Name	Description	Trigger condition
VisitorLockHandler	Prevents insert/update/delete operation on Visitor if it is locked.	beforeInsert, beforeUpdate, beforeDelete
VisitorShareHandler	Shares the Visit record with the Visitors (employees).	afterInsert, afterUpdate, afterDelete

Workflows for Life Sciences

Life Sciences Cloud for Customer Engagement workflows automate your business processes and guide

users through their tasks with clear steps. Configure the permissions and actions for each step of the workflow based on the users' context and role. Implement custom validations to make sure that users follow business processes, and provide checklists to help users understand how to use the workflow. These workflows are supported both online and offline in the Life Sciences Cloud mobile app.

Get Your Org Ready for Life Sciences Workflows

Before you create a Life Sciences workflow, complete these steps.

Understand Life Sciences Workflows

Life Sciences Cloud for Customer Engagement workflows outline the journey of an object through various stages and help you manage different statuses, actions, and record permissions. Get familiar with these terms, and understand how each part supports the overall workflow configuration.

Prepare to Configure a Life Sciences Workflow

Life Sciences Cloud for Customer Engagement workflows are a highly customizable way to streamline work for your field teams. To make sure your workflows function as expected, review these planning steps so you don't have to gather information or make decisions during setup.

Manage Life Sciences Workflows

To streamline your business processes, create tailored Life Sciences Cloud for Customer Engagement workflows.

Considerations for Life Sciences Workflows

When you configure a Life Sciences Cloud for Customer Engagement workflow, keep these considerations in mind.

Custom Scripts for Life Sciences

Custom scripts are programmatic tools for data validation across Life Sciences Cloud for Customer Engagement on desktop and both online and offline in the Life Sciences Cloud mobile app. Custom scripts are used in Life Sciences workflow management and visit management.

Get Your Org Ready for Life Sciences Workflows

Before you create a Life Sciences workflow, complete these steps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To access and work with Life Sciences Cloud for Customer Engagement data:

Life Sciences Commercial Admin permission set

To update permission sets:

View Setup and Configuration

1. Assign users a permission set that includes the Use Life Sciences Workflow Management permission.
 2. To make sure that users can see and work with workflow configurations, [enable permissions for these objects](#) in the correct permission sets.
 - Life Science Custom Scripts
 - Life Science Stage Actions
 - Life Science Stage Objects
 3. To make sure that users can access the workflow progress bar and data on the record detail page, [update the sharing settings](#) for these objects and set the default internal access to **Public Read Only**.
 - Life Science Custom Script
 - Life Science Stage Action
 - Life Science Stage Object
- Alternatively, share these records with each user manually.
4. Activate the StagePathPermissionsHandler trigger handler for Life Sciences Customer Engagement workflows. See [Trigger Handler Administration](#).
 5. Set up the configurations for the workflow to work in the Life Sciences Cloud mobile app.
 - a. [Set up object metadata cache configurations](#) for all workflow objects.
 - b. [Generate a metadata cache](#) to package the object schema configuration that the Life Sciences Cloud mobile app uses for online and offline access.

Understand Life Sciences Workflows

Life Sciences Cloud for Customer Engagement workflows outline the journey of an object through various stages and help you manage different statuses, actions, and record permissions. Get familiar with these terms, and understand how each part supports the overall workflow configuration.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

For an example workflow configuration, see [Set Up Workflow Actions for Medical Inquiry Management](#) and [Set Up the Workflow Stages to Manage Medical Inquiries](#).

Workflow Actions

Workflow actions are the actions that users can perform as part of the workflow.

Workflow Path

The workflow path is the object's overall workflow, and the path from one stage in the workflow to the

next.

Workflow Stage Value

Workflow stage values are the steps in the object's workflow path. A controlling picklist field determines the stages. For example, if the Status field is the controlling field on a workflow for the Inquiry object, the workflow path often includes stages such as New, Working, Escalated, and Closed.

Stage Object

The stage object is the object for which a workflow path is configured. When you create and save a workflow path, stage object records are created automatically. One stage object record is created for each object that has a workflow configured.

Stage Operation

Stage operations are a grouping of conditions that the record must meet in order to grant permissions and determine the actions that are available to users. You define stage operations for each stage in the workflow.

Stage Operation Conditions

Stage operation conditions are the specific conditions within the stage operation that a record must meet in order to grant permissions and make actions available to users. If the conditions aren't met, the permissions and actions aren't granted. You define stage operation conditions for each stage operation within each stage of the workflow.

Stage Operation Actions

Stage operation actions are the actions that are available to users when the stage operation is applied to a particular stage in the workflow path. You create workflow actions separately, and then you assign them as stage operation actions for each stage in the workflow's path.

Custom Scripts

Custom scripts are Lightning web components that validate user actions or provide checklists to help users understand the tasks to complete.

Prepare to Configure a Life Sciences Workflow

Life Sciences Cloud for Customer Engagement workflows are a highly customizable way to streamline work for your field teams. To make sure your workflows function as expected, review these planning steps so you don't have to gather information or make decisions during setup.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Step 1: Outline the Workflow

Identify the business process that you want to automate. Then, break down the workflow into logical steps or stages. For example, a common Inquiry process includes stages such as New, Working, Escalated, and Closed.

Step 2: Define Workflow Objects and Permissions

Identify the parent object that you want the workflow to run on, as well as any related objects. Determine the permissions users need to create, edit, or delete parent or child records at each stage in the object's workflow.

Step 3: Identify Fields for Workflow Conditions

Each workflow stage operation includes conditions that must be met so that users can work with records and take actions. Identify the fields on the parent object or related objects that are required to set up these conditions.

Step 4: Plan Actions for Each Workflow Stage

Workflow actions can update records, launch a platform event, invoke a Lightning web component, or open a custom URL. Outline the actions that you want to make available to users at each stage in the workflow. This way, you can identify the record fields or other components that the actions use or update.

Step 5: Consider Validation Rules and Checklists

Validation rules and checklists help you maintain data integrity and enforce business rules. For validation rules, consider what conditions must be met for a record to move to the next stage in the workflow. For checklists, identify any necessary steps that you want to outline for users so that they know how to move a record to the next stage.

Manage Life Sciences Workflows

To streamline your business processes, create tailored Life Sciences Cloud for Customer Engagement

workflows.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

You can manage Life Sciences workflows from the Workflow Configuration tile in the Admin Console. From the Workflow Paths page, you can:

- Search the list of workflow paths, and sort by column to find the workflow you need.
- Get details about each workflow path, such as the object and record type it applies to, its status, and its controlling field.
- Create a workflow path.
- Clone a workflow path.
- Open or edit a workflow path to modify its details, activate it, or deactivate it.

After you configure a Life Sciences workflow, you can use Data Loader to move the workflow configuration to another org.

[Configure Life Sciences Workflow Actions](#)

Before you configure a workflow path, create the actions that users can perform on an object. When you define the workflow path, you can assign these actions at each stage in the workflow.

[Configure Life Sciences Workflow Paths](#)

Create workflow paths for each object and record type to meet your business needs. At each stage of the record's lifecycle, define user permissions and the actions that users can take.

[Configure Custom Scripts for Life Sciences Workflows](#)

To make sure that records meet your business rules before the Life Sciences Customer Engagement workflow continues, create and manage custom scripts. Each time a user performs an action, validation scripts run to prevent incorrect actions or alert users about errors. Checklist scripts show an info icon on Update Record actions so that users can see the next steps to take.

[Assign Custom Scripts to Life Sciences Workflow Objects](#)

To enforce business rules throughout the workflow, update the validation scripts and checklists that apply to each stage object.

See Also

[Data Loader Guide](#)

Configure Life Sciences Workflow Actions

Before you configure a workflow path, create the actions that users can perform on an object. When you define the workflow path, you can assign these actions at each stage in the workflow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create workflow actions:

Life Sciences Commercial Admin permission set

You can create four types of workflow actions.

- Update Record actions edit records in some way, for example, by moving the record to a new status.
- Platform Event actions trigger real-time processes. For example, a platform event can launch a flow.
- Component actions invoke a Lightning web component. For example, you can open a component that shows a list of available document templates.
- Custom Actions support custom functionality, such as opening an external URL. You create custom actions from the Quick and Custom Action Administration page in the Admin Console. Actions must have the Stage Path entity type and the URL action type. See [Create Custom Actions](#).

1. From the App Launcher, find and select **Admin Console**.

2. Select **Workflow Configuration**, and then select **Workflow Actions**.

To see and search for available actions, select the tabs for each action type.

3. To create an action, click **New**, and select the action type that you want to create.

4. Enter the action's basic information, such as its name, the button label, and the object on which it's available.

5. For an Update Record action, enter these details.

a. Select the field on this object that the action updates, and enter the field's default value.

b. In the Target Object section, select an additional object, add the fields to update, and enter the default field values.

When this action is triggered, a window opens where users can review, update, and save changes to these fields.

c. In the Platform Event Parameters section, select a platform event to publish as part of this action, add the fields to include, and specify the default values.

The platform event details are sent as parameters to workflows, Apex processes, or other asynchronous processes that are subscribed to this platform event.

6. For a Platform Event action, enter these details.

a. In the Target Object section, select an additional object, add the fields to update, and enter the default field values.

When this action is triggered, a window opens where users can review, update, and save changes to these fields.

b. In the Platform Event Parameters section, select a platform event to publish as part of this action, add the fields to include, and specify the default values.

The platform event details are sent as parameters to workflows, Apex processes, or other

asynchronous processes that are subscribed to this platform event.

7. For a Component action, enter these details.

- a. In the Component Parameters section, enter the name of the Lightning web component to open from this action.
- b. To populate field values when the component loads, enter component parameters.

For example, for an action that opens a component to capture a signature, add these parameters to set these values when the component loads:

`"status": "Signed", "disclaimerText": "Disclaimer Text"`.

8. For a Custom Action, select a custom URL action to open an external link.

9. Save your changes.

After you create actions, you can see action details and parameters on the Workflow Actions page. You can also edit, clone, or delete actions.

See Also

[Define and Manage Platform Events](#)

[Lightning Web Components Developer Guide: Create Lightning Web Components](#)

Configure Life Sciences Workflow Paths

Create workflow paths for each object and record type to meet your business needs. At each stage of the record's lifecycle, define user permissions and the actions that users can take.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure workflow paths:

Life Sciences Commercial Admin permission set

1. From the App Launcher, find and select **Admin Console**.
2. Select **Workflow Configuration**, and then select **Workflow Paths**.
3. Click **New**, and give the workflow path a name.
4. Select the object and record type to create the workflow path for.
5. To determine the stages in the workflow path, select the controlling picklist field.
6. To open the workflow builder and define the workflow path, click **Continue**.
The workflow builder opens on the first stage of the workflow. To select a different stage, click its name in the progress bar at the top of the page.
7. Define a stage operation, which groups the conditions that control the permissions that users have, and the actions they can take when records are in this stage.
 - a. Under Stage Operations, click the plus icon.

- b. Name the operation.
 - c. Select whether users can create, edit, or delete records at this stage when conditions are met.
Standard Salesforce object and field-level permissions still apply.
 - d. Enter a priority for this operation.
When multiple stage operations apply to a record, the highest priority operation takes precedence, and users are granted those permissions.
 - e. Save your changes.
8. Define stage operation conditions that must be met in order to grant users permissions and show configured actions for this stage and operation.
- a. Select **Stage Operation Conditions**, and then click the plus icon.
 - b. Select the field to evaluate.
You can select fields on this object or a related object.
 - c. Set the operator for the condition, and enter the required field value.
 - d. Add more conditions as needed.
All conditions must be met to grant permissions and actions.
9. Define the stage operation actions, which determine the actions that users can perform when conditions are met for this stage.
- a. Select **Stage Operation Actions**.
 - b. Click **Add Actions**, and then select the type of action to add.
 - c. Select the actions to add to the page, and then save your changes.
 - d. Add more actions as needed. To reorder the actions, use the arrows.
10. In the Other Permissions tab, choose whether to grant users access to Salesforce Files.
With this permission, users can manage documents and attachments at this stage when conditions are met.
11. Add or edit additional stage operations for this stage, if needed.
- a. To add another parent stage operation, click the plus icon next to Stage Operations.
 - b. To add a child stage operation, click the plus icon next to a stage's name.
Child stage operations control access to child objects of the workflow path's object.
For example, in an Inquiry workflow path, create a child stage operation to control when users can create, edit, or delete Inquiry Question records.
 - c. To edit a stage operation, select it under Stage Operations, and then click the pencil icon.
 - d. To delete a stage operation, select it under Stage Operations, and then click the trash can icon.
 - e. To clone a stage operation and make minor changes, select it under Stage Operations, and then click the copy icon.
12. Similarly, configure at least one stage operation for each stage in the workflow.
When a stage is configured, a green checkmark appears in the progress bar.
13. After your workflow is completed, activate it to make it available to that object or object type, or save your changes and activate it later.
14. To create a copy of this workflow path, click **Clone**.

See Also

[Considerations for Life Sciences Workflows](#)

Configure Custom Scripts for Life Sciences Workflows

To make sure that records meet your business rules before the Life Sciences Customer Engagement workflow continues, create and manage custom scripts. Each time a user performs an action, validation scripts run to prevent incorrect actions or alert users about errors. Checklist scripts show an info icon on Update Record actions so that users can see the next steps to take.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To configure custom scripts:	Life Sciences Commercial Admin permission set
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First, configure custom scripts for the validations that you want to perform or for the checklists that you want to apply. See [Create Lightning Web Components](#) and [Custom Scripts for Life Sciences](#).

Then, you can apply the custom scripts from the Admin Console in Life Sciences Customer Engagement.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Workflow Configuration**, and then select **Custom Scripts**.
3. Click **New**, and give the script a name.
4. Enter the name of the Lightning web component that you created.
5. Select whether this is a script for a checklist or for validation.
6. Save your changes.
7. To sync changes to the customer script after you update the Lightning web component, select **Refresh**.

After you configure custom scripts, assign them to workflow objects.

Assign Custom Scripts to Life Sciences Workflow Objects

To enforce business rules throughout the workflow, update the validation scripts and checklists that apply to each stage object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To assign custom scripts to workflow objects: Life Sciences Commercial Admin permission set

Stage object records are created automatically after you create and save a Life Sciences Cloud for Customer Engagement workflow path. One stage object record is created for each object that has a workflow. Validations and checklists apply to all object types.

1. From the App Launcher, find and select **Admin Console**.
2. Select **Workflow Configuration**, and then select **Stage Objects**.
3. Find the object to apply custom scripts to, and then select **Edit** from the row-level actions.
4. In the Validation Script field, select the custom script that you created for validation.
5. In the Checklist Script field, select the custom script that you created for the checklist items.
6. Save your changes.

After you save your changes, custom scripts run automatically as long as the object has an active workflow.

See Also

[Configure Custom Scripts for Life Sciences Workflows](#)

[Custom Scripts for Life Sciences](#)

Considerations for Life Sciences Workflows

When you configure a Life Sciences Cloud for Customer Engagement workflow, keep these considerations in mind.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Conflicting Workflow Paths for Parent and Child Objects

Two workflow paths can control permissions to an object record at the same time. This happens if a parent object's workflow path applies a child stage operation for the child object, and the child object has its own workflow path and stage operation. When a record's permissions are controlled by two separate workflow paths, the most restrictive permissions apply.

For example, let's say you have separate workflow paths for the Inquiry object and the child Inquiry Question object. The Inquiry Question workflow path includes a stage operation that grants users only the Delete permission when the response status is Responded. The Inquiry workflow path includes a child stage operation that grants users Create, Edit, and Delete permissions on Inquiry Question records.

when the response status is Responded or Not Responded. Because the Inquiry Question workflow path is more restrictive, users can't create or edit Inquiry Question records with a Responded status.

Workflow Paths for Objects with Record Types

If an object has record types, you must configure a workflow path for every record type. If you create workflow paths only for some record types, users can't create, edit, or delete records of other types.

Workflow Path Stages

Each workflow stage requires at least one stage operation. If a stage doesn't have a stage operations:

- Users can't create, update, or delete records when the record is at that stage.
- The stage doesn't appear in the progress bar at the top of the record detail page.

Workflow Path Field Lengths

Text fields in the workflow path support a maximum length of up to 255 characters. With this length limit, you can reference parent objects in the workflow path, for example, in stage operation conditions.

Stage Operation Priority

When a workflow stage has multiple operations, a record in that stage can meet the conditions for more than one operation. To make sure the correct operation is applied and users are granted the correct permissions, assign each operation a priority.

For example, the New stage in the Inquiry workflow path has two operations:

- "Inquiry New Stage Operation 1" has condition "City==San Francisco AND State==CA"
- "Inquiry New Stage Operation 2" has condition "State==CA"

A new Inquiry record in San Francisco, California meets both conditions. Assign the higher priority to Operation 1 to grant users those permissions.

Workflow Record Update Actions

When a user runs a Record Update action, the action executes in this order.

1. The validation script runs.
2. The window opens where users can review, update, and save changes to additional object fields. For example, a window opens where a user can enter additional information about why they're canceling an inquiry.
3. The primary record is updated.
4. The platform event fires.

Custom Scripts for Life Sciences

Custom scripts are programmatic tools for data validation across Life Sciences Cloud for Customer Engagement on desktop and both online and offline in the Life Sciences Cloud mobile app. Custom scripts are used in Life Sciences workflow management and visit management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Custom scripts execute during Life Sciences workflow actions to support more complex business scenarios than standard Salesforce validation rules. Unlike Salesforce validation rules, custom scripts consolidate validation logic and can query any accessible database data, rather than just related records. Custom scripts also offer more dynamic user feedback, providing warnings and custom error messages when users execute actions.

You can create these types of custom scripts.

- **Checklist:** Checklist custom scripts are used in Life Sciences Cloud for Customer Engagement workflows. Checklist scripts help users understand all of the steps to take before they can move to the next stage in the workflow. These scripts are executed when a user clicks the info icon on Record Update actions.
- **Validation:** Validation custom scripts are used in Life Sciences Cloud for Customer Engagement workflows. Validation scripts make sure that business rules are met before users can move a record to the next stage in a workflow. These scripts are executed when a user runs any workflow action.
- **Visit Action Validation:** Visit action validation custom scripts validate business rules before a user can sign and submit a visit. These scripts are executed when a user runs an action to sign or submit visits.

[Understand the Format and Output for Life Sciences Custom Scripts](#)

Understand the format and output for custom scripts in Life Sciences Cloud for Customer Engagement.

[Best Practices for Life Sciences Custom Scripts](#)

Follow these best practices when you create custom scripts for Life Sciences Cloud for Customer Engagement.

[Test Custom Scripts for Life Sciences](#)

Because custom scripts aren't typical Lightning web components, you can't test them in the same way. Write custom Jest tests to test the Lightning web components that you create as custom scripts for workflows in Life Sciences Cloud for Customer Engagement.

[Troubleshoot Custom Scripts for Life Sciences](#)

To troubleshoot and debug custom scripts for Life Sciences Cloud for Customer Engagement workflow validation, use Chrome Developer Tools. The Console tab shows log information, while the Network

tab helps monitor network requests, responses, and performance.

Life Sciences Custom Scripts Reference

Understand the available JavaScript classes, functions, and variables that you can include in a Lightning web component for custom scripts in Life Sciences Cloud for Customer Engagement.

Understand the Format and Output for Life Sciences Custom Scripts

Understand the format and output for custom scripts in Life Sciences Cloud for Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Format

You create custom scripts as headless Lightning web components, meaning that the component includes only the JavaScript file and the metadata configuration file. See [Create Lightning Web Components](#).

In the LWC, contain custom script logic in a self-calling function.

```
( () => {
    // Add custom script logic here.
    ...
})();
```

Output

Custom scripts return an array of JavaScript objects with two defined properties.

Property	Type	Details
title	String	The message that users see. This can be a custom label name that can be translated to match the current user's language.
status	String	The type of message. Statuses

Property	Type	Details
		<p>are:</p> <ul style="list-style-type: none"> • success: Shows a success message for checklist scripts. Not displayed for validation scripts. • warning: Shows a warning message for checklist scripts. For validation scripts, if there are warnings but not errors, users see all warnings in one window, and they can choose to continue. • error: Shows an error message for checklist scripts. Shows an error window for validation scripts.

See this example output.

```
return [
  {
    title: "Success Message",
    status: "success",
  },
  {
    title: "Success_Message_Custom_Label",
    status: "success",
  },
  {
    title: "Warning Message",
    status: "warning",
  },
  {
    title: "Warning_Message_Custom_Label",
    status: "success",
  },
  {
    title: "Error Message",
    status: "error",
  },
]
```

```
{  
    title: "Error_Message_Custom_Label",  
    status: "success",  
}  
];
```

Best Practices for Life Sciences Custom Scripts

Follow these best practices when you create custom scripts for Life Sciences Cloud for Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Asynchronous Calls

Database queries are synchronous on the Life Sciences Cloud mobile app but asynchronous on desktop. To support asynchronous calls, enclose each validation in an `async` function.

```
(() => {  
    async function inquiryQuestionsValidation() {  
        try {  
            let inquiryQuestions = await db.query(  
                "InquiryQuestion",  
                await new ConditionBuilder(  
                    "InquiryQuestion",  
                    new FieldCondition("InquiryId", "=", getRecordId(record))  
                ).build(),  
                ["Id", "Name"]  
            );  
  
            if (  
                inquiryQuestions === null ||  
                inquiryQuestions === undefined ||  
                inquiryQuestions.length === 0  
            ) {  
                return {  
                    title: "No Inquiry Questions Found",  
                };  
            }  
        } catch (error) {  
            console.error(error);  
        }  
    }  
});
```

```
        status: "error",
    };
}

return {
    title: "Inquiry Questions Added",
    status: "success",
}

} catch(error) {
    return {
        title: "Caught Exception During Inquiry Questions Validation",
        status: "error"
    }
}
}

function getRecordId(record) {
    let recordId = record.stringValue("Id");
    return recordId ? recordId : record.stringValue("uid");
}

return [inquiryQuestionsValidation()];
})();
}
```

Database Queries

- To improve performance, always specify fields in database queries.
- Rather than making multiple WHERE clause queries to the database, filter queries in the JavaScript instead.

Error Handling

To make sure that you “catch” JavaScript errors, use a `Try-Catch` block in all validation functions in custom scripts. Otherwise, when JavaScript errors occur, validation rules don’t show in the UI.

If `enableAccessErrors()` is called before executing a function to retrieve field values, the function returns a JavaScript error for the inaccessible field. If an error occurs but isn’t caught by a `Try-Catch` block:

- On desktop, users see only a field access error for checklist and validation scripts.
- On the Life Sciences Cloud mobile app, users see a field access error for checklist scripts, but validation scripts fail.

Testing

Because errors can sometimes occur in only one environment, we recommend testing custom scripts on both desktop and in the Life Sciences Cloud mobile app.

Test Custom Scripts for Life Sciences

Because custom scripts aren't typical Lightning web components, you can't test them in the same way.

Write custom Jest tests to test the Lightning web components that you create as custom scripts for workflows in Life Sciences Cloud for Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

See [Test Lightning Web Components](#).

1. Load the script.

- Read the script's contents from the file system.
- Create a new function that accepts all necessary parameters for the script and includes the script's content as the final parameter.

The parameters that you pass into the function should be mocked versions of the classes and variables that are used in the script. The last parameter should be `return`, followed by the content of your script file.

```
// Load the script
const scriptContent = fs.readFileSync(path.resolve(__dirname, '../inquiryQuestionsValidation.js'));
const scriptFunction = new Function('env', 'record', 'db', 'ConditionBuilder', 'FieldCondition', `return ${scriptContent.toString()}`);
```

2. Mock custom script classes and variables.

To create custom script tests, you must create mocked versions of any out-of-the-box classes and variables and pass them in during testing. If you don't pass in mocked classes and variables, test failures occur.

```
// Mock the classes and variables that are used in the script
const mockEnv = {
    getOption: jest.fn(),
};

const mockDb = {
```

```
    query: jest.fn(),
};

const mockRecord = {
    stringValue: jest.fn(),
};

const mockConditionBuilder = jest.fn().mockImplementation(() => ({
    build: jest.fn().mockResolvedValue({}),
}));

const mockFieldCondition = jest.fn();
```

3. Set up a test using this structure.

- a. Mock the data that's necessary for your test scenario.
- b. Invoke your script's function, and provide mocked classes and variables.
- c. To make sure that the complete result is available, allow all validation functions to resolve.
- d. Verify the results.

```
// Mock the db.query method to return the desired value
mockDb.query.mockResolvedValue([{ Id: '1', Name: 'Question 1' }]);

// The scriptFunction returns an array containing a Promise
const promiseArray = scriptFunction(mockEnv, mockRecord, mockDb, mockConditionBuilder, mockFieldCondition);

// Wait for the Promise in the array to resolve
const result = await Promise.all(promiseArray);

// Assert the result is as expected
expect(result).toEqual([
    title: 'Inquiry Questions Added',
    status: 'success',
]);
```

Example Test Suite for Life Sciences Custom Scripts

This example provides a test suite for a custom script in Life Sciences Cloud for Customer Engagement.

Example Test Suite for Life Sciences Custom Scripts

This example provides a test suite for a custom script in Life Sciences Cloud for Customer Engagement.

This example Jest test suite is designed to test the example custom script in [Best Practices for Life Sciences Custom Scripts](#).

```
import fs from 'fs';
```

```
import path from 'path';

// Load the script
const scriptContent = fs.readFileSync(path.resolve(__dirname, '../inquiryQuestionsValidation.js'));
const scriptFunction = new Function('env', 'record', 'db', 'ConditionBuilder', 'FieldCondition', `return ${scriptContent.toString()}`);

// Mock the classes and variables that are used in the script
const mockEnv = {
    getOption: jest.fn(),
};

const mockDb = {
    query: jest.fn(),
};

const mockRecord = {
    stringValue: jest.fn(),
};

const mockConditionBuilder = jest.fn().mockImplementation(() => ({
    build: jest.fn().mockResolvedValue({}),
}));

const mockFieldCondition = jest.fn();

describe('inquiryQuestionsValidation', () => {

    beforeEach(() => {
        // Clear all mocks and reset modules to ensure a clean state
        jest.clearAllMocks();
    });

    test('should return Inquiry Questions Added when there are inquiry questions', async () => {
        // Mock the db.query method to return the desired value
        mockDb.query.mockResolvedValue([{ Id: '1', Name: 'Question 1' }]);

        // The scriptFunction returns an array containing a Promise
        const promiseArray = scriptFunction(mockEnv, mockRecord, mockDb, mockConditionBuilder, mockFieldCondition);

        // Wait for the Promise in the array to resolve
        const result = await Promise.all(promiseArray);

        // Assert that the result is as expected
    });
});
```

```
expect(result).toEqual([
    title: 'Inquiry Questions Added',
    status: 'success',
  ]]);
});

test('should return No Inquiry Questions Found when there are no inquiry questions', async () => {
  // Mock the db.query method to return the desired value
  mockDb.query.mockResolvedValue([]);

  // The scriptFunction returns an array containing a Promise
  const promiseArray = scriptFunction(mockEnv, mockRecord, mockDb, mockConditionBuilder, mockFieldCondition);

  // Wait for the Promise in the array to resolve
  const result = await Promise.all(promiseArray);

  // Assert that the result is as expected
  expect(result).toEqual([
    title: 'No Inquiry Questions Found',
    status: 'error',
  ]);
});

test('should return Caught Exception During Inquiry Questions Validation when there is an error', async () => {
  // Mock the db.query method to return the desired value
  mockDb.query.mockRejectedValue(new Error('Error'));

  // The scriptFunction returns an array containing a Promise
  const promiseArray = scriptFunction(mockEnv, mockRecord, mockDb, mockConditionBuilder, mockFieldCondition);

  // Wait for the Promise in the array to resolve
  const result = await Promise.all(promiseArray);

  // Assert that the result is as expected
  expect(result).toEqual([
    title: 'Caught Exception During Inquiry Questions Validation',
    status: 'error',
  ]);
});
```

```
});
```

Troubleshoot Custom Scripts for Life Sciences

To troubleshoot and debug custom scripts for Life Sciences Cloud for Customer Engagement workflow validation, use Chrome Developer Tools. The Console tab shows log information, while the Network tab helps monitor network requests, responses, and performance.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Troubleshoot in the Console Tab

Troubleshoot custom scripts from the Chrome Developer Tools Console tab.

1. Open Chrome Developer Tools.
2. Go to the Console tab.
3. Review the output for custom scripts.

Custom scripts can use these messages to provide insights into script execution, variable values, and debugging information.

- `console.log()`
- `console.warn()`
- `console.error()`

4. To investigate specific issues, filter the logs by type.

For example, filter by Error, Warning, or Info.

Troubleshoot Network Requests and Responses

Troubleshoot custom scripts from the Chrome Developer Tools Networks tab. When a custom script makes asynchronous calls, you can monitor these requests in the Network tab.

1. Open Chrome Developer Tools.
2. Go to the Network tab.
3. To monitor network activity, look for requests that are related to your custom script and how it queries or retrieves data.
4. To inspect requests and responses, click a specific network request and review its details, including the headers, payload, and response.
5. To show data that's returned by the server, select the Response tab from within a network request.
The data that's returned by the server can help you debug issues that are related to data retrieval.

Life Sciences Custom Scripts Reference

Understand the available JavaScript classes, functions, and variables that you can include in a Lightning web component for custom scripts in Life Sciences Cloud for Customer Engagement.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Classes for Life Sciences Custom Scripts](#)

Life Sciences Cloud for Customer Engagement supports various JavaScript classes in custom scripts. These classes enable you to create powerful and flexible logic within the script, particularly for constructing queries and managing data. Each class includes a description of its purpose, constructor details, parameters, methods, and examples.

[Variables for Life Sciences Custom Scripts](#)

Global variables in Life Sciences Cloud for Customer Engagement custom scripts provide access to contextual information such as environment details, database interactions, current record data, and user information. Use these variables to develop dynamic, data-driven custom scripts.

[Functions for Life Sciences Custom Scripts](#)

Use functions to enhance the robustness and adaptability of your custom scripts in Life Sciences Cloud for Customer Engagement. These functions provide specific utilities, from error handling and namespace management to retrieving metadata about available fields.

Classes for Life Sciences Custom Scripts

Life Sciences Cloud for Customer Engagement supports various JavaScript classes in custom scripts. These classes enable you to create powerful and flexible logic within the script, particularly for constructing queries and managing data. Each class includes a description of its purpose, constructor details, parameters, methods, and examples.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[AndCondition Class](#)

Builds a SOQL condition based on multiple nested conditions. Extends GroupCondition.

[Condition Class](#)

An abstract class that serves as the foundation for all conditions and lacks a concrete implementation.

ConditionBuilder Class

Builds a WHERE clause to use as part of a SOQL query. Validates if the current user has access to the fields that are used in conditions.

ConditionEnhancedBuilder Class

Serves the same purpose as the ConditionBuilder class. Only use the ConditionEnhancedBuilder class with the db.bulkQuery function. The ConditionEnhancedBuilder class doesn't validate whether the current user has access to the fields that are used in the query conditions.

DateFieldCondition Class

Builds a SOQL condition for a date field based on the specified operator. Extends FieldCondition.

DateTimeFieldCondition Class

Builds a SOQL condition for a datetime field based on the specified operator. Extends FieldCondition.

FieldCondition Class

Builds a SOQL condition for a field based on the specified operator. Extends OperatorCondition.

GroupCondition Class

Builds a SOQL condition based on multiple nested conditions. Extends Condition.

OperatorCondition Class

Extends the Condition class. Used as a super class for specific conditions.

OrCondition Class

Builds a SOQL condition based on multiple nested conditions. Extends GroupCondition.

Query Class

Creates a SOQL query based on an input. Only use the Query class as a subquery of SetCondition. To build a complex WHERE clause, pass SetCondition to ConditionBuilder.

SetCondition Class

Builds a SOQL condition for a field whose value is in a specified range. Extends OperatorCondition.

AndCondition Class

Builds a SOQL condition based on multiple nested conditions. Extends GroupCondition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor()

Builds a GroupCondition with **AND** as the nesting operator.

toSoql()

Returns the generated SOQL query as a string.

Example

```
await new ConditionBuilder(
    "HealthcareProvider",
    new AndCondition()
        .add(new FieldCondition("Status", "=", "Active"))
        .add(new FieldCondition("IsPrimaryProvider", "=", true))
).build()

// Returns: "(Status = \'Active\') AND (IsPrimaryProvider = true)"
```

Condition Class

An abstract class that serves as the foundation for all conditions and lacks a concrete implementation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

! **Important** Don't use the Condition class directly. Instead, use the predefined classes that extend the Condition class. Provide an instance of a Condition subclass as a parameter for the ConditionBuilder. The ConditionBuilder then uses the Condition subclass to construct the WHERE clause part of the query.

getRequiredFields()

Returns an empty object.

toSoql()

Returns an empty string.

ConditionBuilder Class

Builds a WHERE clause to use as part of a SOQL query. Validates if the current user has access to the

fields that are used in conditions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor(objectType, condition)

Creates an instance of ConditionBuilder.

This method accepts these parameters.

Parameter	Type	Description
objectType	String	The object for which the query is built.
condition	Condition	The condition to use for the query.

build()

Builds the condition based on the provided object and condition. Checks if the user has access to the fields that are used in conditions, and returns an exception if they don't have access.

Example

```
await new ConditionBuilder(
    "Account",
    new FieldCondition("Name", "=", "sForce")
).build()

// Returns: "Name = 'sForce'"
```

ConditionEnhancedBuilder Class

Serves the same purpose as the ConditionBuilder class. Only use the ConditionEnhancedBuilder class with the db.bulkQuery function. The ConditionEnhancedBuilder class doesn't validate whether the current user has access to the fields that are used in the query conditions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor(objectType, condition)

Creates an instance of ConditionEnhancedBuilder.

This method accepts these parameters.

Parameter	Type	Description
objectType	String	The object for which the query is built.
condition	Condition	The condition to use for the query.

build()

Returns a JavaScript object with a SOQL string and a map of fields that are listed in the condition for each JavaScript object.

Example

```
await new ConditionEnhancedBuilder(
    "Account",
    new FieldCondition("Name", "=", "sForce")
).build()

/**
 * Returns this JavaScript object:
 * {
 *     soqlString: "Name = 'sForce'",
 *     fieldNamesByObjectNames: {"Account": ["Name"]}
 * }
```

DateFieldCondition Class

Builds a SOQL condition for a date field based on the specified operator. Extends FieldCondition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor(dateField, operator, dateValue)

Creates an instance of DateFieldCondition.

This method accepts these parameters.

Parameter	Type	Description
dateField	String	The name of the field to use as part of a condition.
operator	String	The operator to use as part of a condition.
dateValue	Date	The date to use as part of a condition.

toSoql()

Returns the generated SOQL query as a string.

Example

```
await new ConditionBuilder(
    "HealthcareProvider",
    new DateFieldCondition("InitialStartDate", "=", new Date())
).build()

// Returns: "InitialStartDate = 2024-08-12"
```

DateTextFieldCondition Class

Builds a SOQL condition for a datetime field based on the specified operator. Extends FieldCondition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor(dateTextField, operator, dateTimeValue)

Creates an instance of DateTextFieldCondition.

This method accepts these parameters.

Parameter	Type	Description
dateTextField	String	The name of the field to use as part of a condition.
operator	String	The operator to use as part of a condition.
dateTimeValue	Date	The date to use as part of a condition.

toSoql()

Returns the generated SOQL query as a string.

Example

```
await new ConditionBuilder(
    "Inquiry",
    new DateTextFieldCondition("CreatedDate", "=", new Date())
).build()

// Returns: "CreatedDate = 2024-08-12T12:47:55.594Z"
```

FieldCondition Class

Builds a SOQL condition for a field based on the specified operator. Extends OperatorCondition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor(field, operator, value)

Creates an instance of FieldCondition.

This method accepts these parameters.

Parameter	Type	Description
field	String	The name of the field to use as part of a condition.
operator	String	The operator to use as part of a condition.
value	String	The value to use as part of a condition. A null value is supported for the = and != operators.

toSoql()

Returns the generated SOQL query as a string.

Example

```
await new ConditionBuilder(
    "Inquiry",
    new FieldCondition("Type", "=", "MedicalInquiry")
).build()

// Returns: "Type = 'MedicalInquiry'"
```

GroupCondition Class

Builds a SOQL condition based on multiple nested conditions. Extends Condition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor(nestingOperator)

Creates an instance of GroupCondition.

This method accepts these parameters.

Parameter	Type	Description
nestingOperator	String	The operator to use between nested conditions. Supported operators are AND and OR .

add(condition)

Adds a nested condition to the group condition.

This method accepts these parameters.

Parameter	Type	Description
condition	Condition	The condition to add to the group condition.

getRequiredFields(objectType)

Returns the required fields for a specified object type.

This method accepts these parameters.

Parameter	Type	Description
objectType	String	The name of the object to get the required fields for.

toSoql()

Returns the generated SOQL query as a string.

Example

```
await new ConditionBuilder(
    "HealthcareProvider",
    new GroupCondition("AND")
        .add(new FieldCondition("Status", "=", "Active"))
        .add(new FieldCondition("IsPrimaryProvider", "=", true))
).build()

// Returns: "(Status = \'Active\') AND (IsPrimaryProvider = true)"
```

OperatorCondition Class

Extends the Condition class. Used as a super class for specific conditions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor(field, operator)

Creates an instance of OperatorCondition.

This method accepts these parameters.

Parameter	Type	Description
field	String	The name of the field to use as part of a condition.
operator	String	The operator to use as part of a condition.
value	Array or Query	An array of values to use as part of a condition, or an instance of a Query object that specifies the

Parameter	Type	Description
		field values to query.

getRequiredFields(objectType)

Returns the required fields for a specified object type.

This method accepts these parameters.

Parameter	Type	Description
objectType	String	The name of the object to get the required fields for.

toSoql()

Returns the generated SOQL query as a string.

OrCondition Class

Builds a SOQL condition based on multiple nested conditions. Extends GroupCondition.

constructor()

Builds a GroupCondition with **OR** as the nesting operator.

toSoql()

Returns the generated SOQL query as a string.

Example

```

await new ConditionBuilder(
    "HealthcareProvider",
    new OrCondition()
        .add(new FieldCondition("Status", "=", "Active"))
        .add(new FieldCondition("IsPrimaryProvider", "=", true))
).build()

// Returns: "(Status = \'Active\') OR (IsPrimaryProvider = true)"

```

Query Class

Creates a SOQL query based on an input. Only use the Query class as a subquery of SetCondition. To build a complex WHERE clause, pass SetCondition to ConditionBuilder.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor()

Creates an empty instance of Query.

select(field)

Specifies the field name to select. Only one field name can be selected. Returns an instance of Query.

This method accepts these parameters.

Parameter	Type	Description
field	String	The name of the field to select.

from(sObjectType)

Specifies the object to query. Returns an instance of Query.

This method accepts these parameters.

Parameter	Type	Description
sObjectType	String	The name of the object to query.

where(condition)

Specifies the where condition for the query. Returns an instance of Query.

This method accepts these parameters.

Parameter	Type	Description
condition	Condition	The condition to use as part of the query.

getRequiredFields()

Returns the required fields for a specified object type.

This method is supported only on desktop and doesn't work on the Life Sciences Cloud mobile app.

toSoql()

Returns the generated SOQL query as a string.

Example

```
await new ConditionBuilder(
    "Account",
    new SetCondition(
        "Id",
        "IN",
        new Query()
            .select("AccountId")
            .from("Visit")
            .where(new FieldCondition("Status", "=", "Planned")))
    )
).build();

// Returns: "Id IN (SELECT AccountId FROM Visit WHERE Status = \\'Planned\\')"
```

SetCondition Class

Builds a SOQL condition for a field whose value is in a specified range. Extends OperatorCondition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

constructor(field, operator, values)

Creates an instance of SetCondition.

This method accepts these parameters.

Parameter	Type	Description
field	String	The name of the field to use as part of a condition.
operator	String	The operator to use as part of a condition.
value	Array or Query	An array of values to use as part of a condition, or an instance of a Query object that specifies the field values to query.

getRequiredFields(objectType)

Returns the required fields for a specified object type. This method accepts these parameters.

Parameter	Type	Description
objectType	String	The name of the object to get the required fields for.

toSoql()

Returns the generated SOQL query as a string.

Example

```

await new ConditionBuilder(
    "Inquiry",
    new SetCondition(
        "Type",
        "IN",
        ["MedicalInquiry", "ProductInformation"],
    )
).build()

// Returns: "Type IN (\\"MedicalInquiry\\",\\"ProductInformation\\")"

```

Variables for Life Sciences Custom Scripts

Global variables in Life Sciences Cloud for Customer Engagement custom scripts provide access to contextual information such as environment details, database interactions, current record data, and user information. Use these variables to develop dynamic, data-driven custom scripts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Environment Variable

The environment (env) variable manages environment settings. You can retrieve or create environment option values, get log information, and format labels for localization.

Database Variable

The db object provides access to the database to query records. All db functions are executed synchronously on the Life Sciences Cloud mobile app and asynchronously on desktop. In order to query correctly, use await syntax.

Record Variable

The record variable represents the current record in the context of the custom script. You can retrieve string, number, boolean, or date field values, and you can set values for fields on the current record.

User Variable

The user variable represents the current user and provides methods to access and modify field values on the user record. You can retrieve string, number, boolean, or date field values, and you can set values for user record fields.

Environment Variable

The environment (env) variable manages environment settings. You can retrieve or create environment option values, get log information, and format labels for localization.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

getOption(name)

Returns the value of the environment option. These options are set by default.

- **fromStatus:**
 - On desktop, fromStatus is set to the current value of a controlling field for the workflow path. This is set only when a Record Update action runs.
 - On the Life Sciences Cloud for Customer Engagement mobile app, fromStatus is set to the current value of the field to be updated by a Record Update action. This is set only when a Record Update action runs.
- **toStatus:** The new value of the field to be updated by a Record Update action. This is set only when a Record Update action runs.
- **fieldName:** The name of the field to be updated by a Record Update action. This is set only when a Record Update action runs.
- **actionName:** The name of the action on the action button.

Parameter	Type	Description
name	String	The name of the option to retrieve.

setOption(name, value)

Sets an environment option based on the name and value.

Parameter	Type	Description
name	String	The name of the option to set.
value	Object	The value of the option to set.

log(msg)

Logs a message to the browser console with the prefix "JS LOG: ".

Parameter	Type	Description
msg	String	The message to be logged to the browser console.

formatCustomLabel(key, defaultValue, argumentsList)

Translates a given custom label to match the current user's locale and replaces %@ symbols with given arguments. The resulting JavaScript object should be set to the title attribute in the returned message.

Parameter	Type	Description
key	String	The name of the custom label.
defaultValue	String	A default value to use when no custom label is found.
argumentsList	Array	An array of strings to use to replace placeholders in custom labels.

Database Variable

The db object provides access to the database to query records. All db functions are executed synchronously on the Life Sciences Cloud mobile app and asynchronously on desktop. In order to query correctly, use await syntax.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

rowById(entity, id, selectedFields)

Retrieves a record for a given object from the database by using the record ID.

Parameter	Type	Description
entity	String	The name of the object type to retrieve.
id	String	The ID of the record to retrieve.
selectedFields	Array	The array of fields to select. This parameter is supported only on desktop.

rowsByEntity(entity, selectedFields)

Retrieves records from the database for a given object.

Parameter	Type	Description
entity	String	The name of the object type to retrieve.
selectedFields	Array	<p>The array of fields to select.</p> <p>This parameter is supported only on desktop.</p>

query(entity, whereClause, selectedFields)

Retrieves records from the database for a given object based on a WHERE clause.

Parameter	Type	Description
entity	String	The name of the object type to retrieve.
whereClause	String	The SOQL WHERE clause to use in the query. You can use ConditionBuilder to build the WHERE clause.
selectedFields	Array	<p>The array of fields to select.</p> <p>This parameter is supported only on desktop.</p>

bulkQuery(queries)

Returns a key-value container `[String: [JsDbObject]]` where the key is uniqueRequestKey and the value is an array of queried records.

Parameter	Type	Description
uniqueRequestKey	String	The unique key to use to identify the specific query result.
sObjectName	String	The name of the object type to retrieve.
condition	ConditionEnhancedBuilder	The ConditionEnhancedBuilder object to use for the query.

Parameter	Type	Description
selectedFields	Array	<p>The array of fields to select.</p> <p>This parameter is supported only on desktop.</p>

Examples

This is a `query()` example.

```

await db.query(
  "Inquiry",
  await new ConditionBuilder(
    "Inquiry",
    new FieldCondition("Type", "=", "MedicalInquiry")
  ).build(),
  ["Id", "Name", "Status", "Type"]
)

/**
 * Returns arrays of Inquiry records of from the local database. The full query is:
 * "SELECT Id, Name, Status, Type FROM Inquiry WHERE Type = \'MedicalInquiry\'
 */

```

This is a `bulkQuery()` example.

```

let result = await db.bulkQuery([
  {
    uniqueRequestKey: "inquiryRequest",
    sObjectName: "Inquiry",
    selectedFields: ["Id", "Name", "Status", "Type"],
    condition: new ConditionEnhancedBuilder(
      "Inquiry",
      new FieldCondition("Type", "=", "MedicalInquiry")
    ).build(),
  },
  {
    uniqueRequestKey: "accountRequest",
    sObjectName: "Account",
    selectedFields: ["Id", "Name"],
  }
])

```

```

        condition: new ConditionEnhancedBuilder(
            "Account",
            new FieldCondition("Name", "=", "sForce")
        ).build(),
    },
]);
}

/**
 * These queries are executed:
 *
 * "SELECT Id, Name, Status, Type FROM Inquiry WHERE Type = \'MedicalInquiry\'"
 *
 * "SELECT Id, Name FROM Account WHERE Name = \'sForce\'"
 *
 * The results are combined into a single key-value container, where the key is
 * uniqueRequestKey and the value is an array of records. These can be treated
 * as JavaScript objects, and results can be accessed by properties.
 *
 * let inquiryRecords = result.inquiryRequest;
 * let accountRecords = result.accountRequest;
 */

```

Record Variable

The record variable represents the current record in the context of the custom script. You can retrieve string, number, boolean, or date field values, and you can set values for fields on the current record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

stringValue(key)

Returns the value of a string field on the record if the field exists and is readable.

Parameter	Type	Description
key	String	The name of the field on the record.

numValue(key)

Returns the value of a number field on the record if the field exists and is readable.

Parameter	Type	Description
key	String	The name of the field on the record.

boolValue(key)

Returns the value of a boolean field on the record if the field exists and is readable.

Parameter	Type	Description
key	String	The name of the field on the record.

dateValue(key)

Returns the value of a date field on the record if the field exists and is readable.

Parameter	Type	Description
key	String	The name of the field on the record.

setValue(key, value)

Sets a value for a given field on a record.

Parameter	Type	Description
key	String	The name of the field on the record.
value	Object	The field value to set.

recordTypeName()

Returns the name of the current record's record type, if it exists.

User Variable

The user variable represents the current user and provides methods to access and modify field values on the user record. You can retrieve string, number, boolean, or date field values, and you can set values for user record fields.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

stringValue(key)

Returns the value of a string field on the user record if the field exists and is readable.

Parameter	Type	Description
key	String	Name of the field on the user object.

numValue(key)

Returns the value of a number field on the user record if the field exists and is readable.

Parameter	Type	Description
key	String	Name of the field on the user object.

boolValue(key)

Returns the value of a boolean field on the user record if the field exists and is readable.

Parameter	Type	Description
key	String	Name of the field on the user object.

dateValue(key)

Returns the value of a date field on the user record if the field exists and is readable.

Parameter	Type	Description
key	String	The name of the field on the user object.

setValue(key, value)

Sets a value for a given field on a user record.

Parameter	Type	Description
key	String	The name of the field on the user object.
value	Object	The field value to set.

Functions for Life Sciences Custom Scripts

Use functions to enhance the robustness and adaptability of your custom scripts in Life Sciences Cloud for Customer Engagement. These functions provide specific utilities, from error handling and namespace management to retrieving metadata about available fields.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

enableAccessErrors()

Enables returning exceptions in the custom script.

Integrate Data 360 and Tableau Next with Customer Engagement

Integrate Data 360 and Tableau Next with Life Sciences to transform complex life sciences data into actionable insights and enhanced visualizations. Tableau Next requires Data 360 and the Data 360 semantic layer. Set up Sales Data reports to help your users better understand their customers and plan effective interactions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Set Up Tableau Next for Life Sciences Cloud](#)

Life Sciences Cloud integrates with Tableau Next to transform complex life sciences data into actionable insights and enhanced visualizations. Tableau Next is the composable, AI-analytics platform that turns any type of data into actionable insights. Tableau Next requires Data 360 and the Data 360 semantic layer.

[Set Up a Tableau View Lighting Web Component for Your Life Sciences Org and Mobile App](#)

View embedded Tableau reports in your Life Sciences org and the Life Sciences Cloud mobile app.

[Sales Data Setup](#)

Give users access to the drug distribution data and prescription data, and help them better understand their customers and plan effective interactions.

Set Up Tableau Next for Life Sciences Cloud

Life Sciences Cloud integrates with Tableau Next to transform complex life sciences data into actionable insights and enhanced visualizations. Tableau Next is the composable, AI-analytics platform that turns any type of data into actionable insights. Tableau Next requires Data 360 and the Data 360 semantic layer.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

To gain a comprehensive understanding of Tableau Next's capabilities, see [Tableau Next](#).

All users require a Data 360 permission set and a Tableau Next permission set.

- Data 360:
 - Data Cloud Architect adds and transforms data.
 - Data Cloud User views data.
- Tableau:
 - Tableau Next Admin administers users and permissions.
 - Tableau Next Creator creates content.
 - Tableau Next Consumer views content.

- Tableau Next Platform Analyst views and edits content.

To learn more about the permission sets and licenses you require for Tableau Next, see [Tableau Next Permission Sets and Licenses](#).

Get started by completing the tasks in [Admin: Set Up Tableau Next](#).

- Make sure to create the Tableau Next Admin. See [Create the Tableau Next Admin](#).
- Set up Data 360 for Tableau Next to enable real-time data access and insights in your visualizations. Tableau Next requires Data 360 for data ingestion and data queries. Before setting up Tableau Next, configure Data 360 and create a Data Model Object for your org. To learn more, see [Set Up Data 360 for Tableau Next](#).
- Tableau Semantics within Tableau Next gives you the power to create semantic models and then build metrics upon them. You can also use semantic models to create calculated fields in your visualizations. To learn more, see [Create Semantic Models and Define Metrics](#).

To set up Tableau Next for Mobile, see [Stay Informed With Tableau Next Mobile Overview](#).

Set Up a Tableau View Lighting Web Component for Your Life Sciences Org and Mobile App

View embedded Tableau reports in your Life Sciences org and the Life Sciences Cloud mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

1. Install the Tableau connected app in your Salesforce org.
 - a. Follow the installation steps provided in the Salesforce AppExchange. See [Tableau Connected App for Salesforce](#).
 - b. In your Salesforce org, to verify the connected app is correctly installed and configured in your org, go to the Installed Packages page or the App Manager page in Setup.
2. Configure authentication in Tableau.
 - a. Log into your Tableau Organization.
 - b. Go to Settings.
 - c. Select the Authentication tab, and then click **New Configuration** under Authentication types.
 - d. Select Salesforce as the new authentication type and give the authentication a unique name.
 - e. Save your changes.
3. Set the default authentication for embedded views.
 - a. From the Authentication tab in Settings, under **Default Authentication Type for Embedded Views**, set the Authentication to the Salesforce org you added in the previous step.

- b. Save your changes.
 4. Add users to Tableau with Salesforce Authentication.
 - a. In Tableau, go to **Users**.
 - b. Click **Add Users**.
 - c. Enter the Salesforce usernames (comma-separated) of the users who need access.
 - d. Select the users from the list of added users, and set their Authentication Type to the Salesforce org you added in a prior step.
 - e. Click **Update** to save your changes.
 5. Verify access to embedded Tableau Views in your Salesforce org.
 - a. Ensure the Tableau View Lightning Web Component is correctly configured in Salesforce by verifying the users you added in Tableau can see embedded Tableau reports without logging in separately.
 - b. Test the integration by logging in with a configured Salesforce user and verifying that Tableau reports load seamlessly.
 6. Configure the Tableau View Lightning Web Component in your org.
 - a. Open a flexi page and drag and drop the Tableau View component onto the page, and provide the url for any report on Tableau.
-  **Note** After setup, components in the org display the Tableau report without any extra authentication from the user. The mobile app renders the Tableau View component, but prompts you to authenticate directly with Tableau from within the embedded view.

Sales Data Setup

Give users access to the drug distribution data and prescription data, and help them better understand their customers and plan effective interactions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Get Your Org Ready for Sales Data](#)

Before you configure and use Sales Data reports, complete these required setup tasks.

[Create a Data Governance Policy](#)

Create a data governance policy to manage record-level access. This policy ensures that users access sales data only from their specific territory.

[Add Sales Data Component to a Record Page](#)

Gives your users quick access to their drug distribution data and prescription data by adding the Sales Data component to a record page.

[Add Territory Sales Data Tab to App Launcher](#)

Make the Sales Data component available to your users by adding it as a tab in your app.

Get Your Org Ready for Sales Data

Before you configure and use Sales Data reports, complete these required setup tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To complete the prerequisite setup tasks for Sales Life Sciences Commercial Admin permission set Data:

To create data streams	Data Cloud Architect
To use Data 360	Data Cloud User

1. Set up territories. See [Set Up Sales Territories for Life Sciences Cloud](#)
 2. Create Account records.
 3. Create Product2 records.
 4. Create LifeSciMarketableProduct records.
 5. Create LifeSciMarketableProduct records with the type Market.
 6. Create HealthcareProvider records.
 7. Create Life Science Drug Prescription Data records.
 8. Create Life Science Drug Distribution Data records.
 9. Set up Territory Geo Assignment rules.
 10. Set up Data 360 for drug distribution data and drug prescription data.
 - Create a data stream and ingest sales data.
 - Transform the data lake object.
 - Map the data to the data model object.

Create a Data Governance Policy

Create a data governance policy to manage record-level access. This policy ensures that users access sales data only from their specific territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed

package.

USER PERMISSIONS NEEDED

To create a data access policy:	Data Cloud Architect
To create custom permissions:	Manage Custom Permissions
To create permission sets:	Manage Profiles and Permission Sets
To assign permission sets:	Assign Permission Sets
To enable custom permissions in permission sets:	Manage Profiles and Permission Sets

The goal is to create tiered access for your sales data. Begin by defining an Allow All policy that grants general access, and then apply specific custom permissions and permission sets to restrict users to data from their assigned territories.

1. Create a custom permission for the territory to be governed.
2. Create a permission set.
3. Add the custom permission to the permission set.
4. Associate the permission set with the default data space.
5. Create an Allow All policy.
6. Apply the policy to the users who need access to the data.

Add Sales Data Component to a Record Page

Gives your users quick access to their drug distribution data and prescription data by adding the Sales Data component to a record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Make sure that the Data Model Object contains the necessary data, including the periods and measures used in the Sales Data reports and charts.

1. On the record page where you want to add the component, click the gear icon, and then select **Edit Page**.
2. From the Components pane, in the Search field, enter **Sales Data**.
3. Drag the Sales Data component from the left pane and place it on the page layout.
4. Edit the properties of the Sales Data component.
 - Select the component in the page layout.

- For Display Format, select whether you want to show the sales data in a chart, table, or both.
 - For Sales Data Type, select whether you want to show drug distribution data or prescription data on the component.
 - For Alignment Type, select the type of alignment that the sales data is based on.
 - For Time Period, select the time period for which you want to show the sales data.
 - For Time Period Units, select the number of time periods (months or weeks) to show on the chart.
 - For Data Space API Name, enter the name of the data space to get the sales data from.
 - Select the measures that can be applied to the sales data.
 - Select the filters that can be applied to the sales data.
5. Save your changes.
6. Activate the page.

Add Territory Sales Data Tab to App Launcher

Make the Sales Data component available to your users by adding it as a tab in your app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To view tab settings: View Setup and Configuration

To edit tab settings: Manage Profiles and Permission Sets

1. From Setup, in the Quick Find box, find and select **Profiles**.
2. Edit the profile that you want to add the custom tab to.
3. On the Profile Edit page, under Custom Tab Settings, enable the Sales Data tab.
 - To make the tab visible on the app's navigation bar and available in the App Launcher, select **Default On**.
 - To make the tab available in the App Launcher, select **Default Off**. The tab doesn't appear on the app's navigation bar.
4. Save your changes.

Use Life Sciences Cloud for Customer Engagement Features

Perform Life Sciences Cloud for Customer Engagement tasks such as managing HCO and HCP accounts, planning and executing engagements with your customers, managing key accounts, and managing samples.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Life Sciences Customer Engagement Home Page](#)

The Life Sciences Customer Engagement home page is the starting point for your day. Learn how to navigate the page and find the most important information to get you started.

[Life Sciences Workflow Features](#)

Life Sciences workflows guide you through your daily tasks, keeping you focused and on track. When configured, you get a step-by-step view of activities and stages directly on the record detail page. Checklists help you understand your next steps, and validations make sure changes are accurate.

[Synchronize Transactions Manually on a Mobile Device](#)

Connect to Salesforce from the Life Sciences Cloud mobile app by using Wi-Fi or cellular data to create, update, and delete records. Background synchronization is indicated by an animated App Settings icon.

[Stay Informed with App Alerts](#)

Stay on top of your work in the office or on the go by getting important updates, recommendations, and guided actions on your mobile and desktop apps.

[Manage Accounts](#)

Perform tasks such as viewing a smart summary and getting a quick snapshot of a HCP or HCO account, adding an account address, submitting data change requests, and updating a rating.

[Plan Engagements](#)

Optimize daily schedules by showing key events and applying predefined routines on the calendar. Log and manage time away from your territory. Increase your plan's success rate and personalize action plan templates for Key Account Management. Achieve business objectives with proven strategies for key accounts, and drive initiatives for key accounts in a territory. Perform tasks such as reviewing and submitting provider activity goals for manager approval and final administrator approval, and tracking the status of activity plans.

[Manage Key Accounts](#)

Nurture long-term partnerships with your key accounts and target territories. Anticipate customer concerns, identify growth opportunities, dedicate resources to offer tailored solutions, and ensure the long-term success of the partnership. Create Account Plans to build relationships with major customers, analyze customers' prescribing power, and gather input about the potential impact of pharma products. Use Territory Plans to monitor regional treatment patterns, gain medical insights, and disseminate scientific information to accounts.

[Engage With Your Customers](#)

Perform tasks related to visiting your customers in person or remotely, customizing and sending emails, creating and submitting medical inquiries, and presenting content to your customers.

[Manage Sample Inventory](#)

Sample Inventory Management provides a unified view of transactions, shipments, inventory counts, and assigned batches. Stay on top of items that require urgent attention, such as pending acknowledgments of transferred samples. Track inventory operations in a timeline, create product requests, and submit your inventory counts all on one screen.

Life Sciences Customer Engagement Home Page

The Life Sciences Customer Engagement home page is the starting point for your day. Learn how to navigate the page and find the most important information to get you started.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

What you see on your home page can vary based on your role, your environment, and your Salesforce admin's configuration. Your homepage can also include custom components built by your organization.

To see nearby accounts or the locations of your upcoming visits in the Life Sciences Cloud mobile app, turn on location services on your device.

Activity Plan

See activity plan goals across all accounts, and visualize your progress so that you can align your work with the overall company strategy. Filter goals by activity or product.

Agentforce Welcome

Use an Agentforce search bar and predefined utterances to get started with your daily tasks. Enter a prompt manually, or click an utterance to use it as a prompt.

Home Office Announcements

See important communications from the home office to make sure that you're up to date on the latest news. Scroll or use the arrows to see the date and overview of each announcement, or click an announcement to open it.

List Views

View, edit, and create records from a list of important records, such as accounts. List views are a great way to sort, prioritize, and analyze the records that are most important to you. See [Work with List Views](#)

[in Lightning Experience.](#)

Next Best Customers

See the top 5 next best customers to identify the prioritized accounts in your territory each day, sorted by rank and score. Depending on your admin's configuration, if you turn on location services on your device, you can also see the distance to each account from your location.

From the Next Best Customers list, you can:

- Click on an account to see details and intelligent insights about its score.
- Take actions for each account, depending on your admin's configuration. For example, you can create visits, see the last visit, open the content library, or raise inquiries directly from the list. These actions are available only in the Life Sciences Cloud mobile app.
- Refresh the page to see the latest data.

Notifications and Recommendations

On your desktop, you can see the latest alerts and unread messages directly on the home page. Click between the Notifications and Recommendations tabs to see the latest updates, and mark messages as read after you've seen them. See [Stay Informed with App Alerts](#).

In the Life Sciences Cloud mobile app, you can see alerts, recommendations, and guided actions in the Notifications pane by clicking the bell icon.

Quick Actions and Agentforce Chat

In the Life Sciences Cloud mobile app, the home page includes a floating actions menu and an Agentforce icon at the bottom of the page. Tap the actions menu to see the quick actions you can take, such as sending an email or logging an expense. Tap the Agent icon to start a conversation with Agentforce.

Salesforce Reports and Dashboards

Standard Salesforce report charts and dashboards help you visually understand changing business conditions so that you can make decisions based on real-time data. Use dashboards to identify trends, sort out quantities, and measure the impact of activities. You can also view source reports, expand charts to see them more clearly, and refresh each chart to get the latest data.

Up Next

See a list of your daily upcoming visits, times off territory, and general events. Swipe left and right to see previous or upcoming activities. To sync changes, click the refresh icon.

In the Life Sciences Cloud mobile app, you can also see where visits are on the map. Scrolling on the map shows you more information about upcoming visits based on your location.

The actions that you can take depend on the activity type.

- Open a visit, get details about a visit's related account, or get directions if the visit is in person. For group visits, you see only the primary account's location and details.
- See and update the details of times off territory.
- See the details for upcoming general events.

Depending on your admin's configuration, you can get reminders about upcoming visits or to turn on Do Not Disturb before a visit starts.

Visits to Submit

See a list of visits that remain in the Planned state after their planned start time has passed. Your oldest visits are at the top of the list so you can quickly identify the ones that you need to submit. Swipe or scroll to see newer open visits, or open a visit record to see its details and submit it. After you submit visits, the list is refreshed automatically so that you see the latest data.

See Also

[Set Up the Life Sciences Customer Engagement Home Page](#)

Life Sciences Workflow Features

Life Sciences workflows guide you through your daily tasks, keeping you focused and on track. When configured, you get a step-by-step view of activities and stages directly on the record detail page. Checklists help you understand your next steps, and validations make sure changes are accurate.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

If an object has a Life Sciences workflow configured, you can see some or all of these features. The workflow path and the available options depend on your Salesforce admin's workflow configuration, the record stage, and your current context.

Workflow Status and Progress

A color-coded progress bar at the top of the record detail page shows each stage of the workflow. The record's current stage is blue, and completed stages are green.

Workflow Actions

At each stage of the workflow, your permissions to create, edit, or delete records are determined by your admin's workflow configuration and your current role or context.

The action buttons on the record detail page also depend on the current workflow stage and your context. For example, when a visit is in a Draft state, you could see the Get Signature, Submit, and Email actions. In the Submitted state, you could see only the Email action.

Checklists

On the record detail page, some Update Record actions include a checklist of the steps that are required to move the record to the next stage. Actions that have a checklist include an infobubble icon.

To see the checklist, tap or click the infobubble icon. Completed tasks show a green checkmark, while incomplete tasks icons show a red X.

Validation Rules

When you perform an action, validation rules check that your changes follow business processes and policies. A notification shows you all issues and indicates whether you need to correct an error to proceed, or if you can continue with warnings.

See Also

[Workflows for Life Sciences](#)

Synchronize Transactions Manually on a Mobile Device

Connect to Salesforce from the Life Sciences Cloud mobile app by using Wi-Fi or cellular data to create, update, and delete records. Background synchronization is indicated by an animated App Settings icon.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

To initiate manual synchronization, go to App Settings and select Sync Database. If background sync is active, a message appears, and you can choose to **Run in Foreground** to prioritize the manual process.

When a foreground sync is running and the sync progress bar is enabled in the app settings, the app shows the current synchronization status.

Stay Informed with App Alerts

Stay on top of your work in the office or on the go by getting important updates, recommendations, and guided actions on your mobile and desktop apps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

In the mobile app, alerts appear in the message pane, which is organized into separate tabs for notifications, recommendations, and guided actions. Access the message pane from the notifications bell icon.

From the message pane, you can:

- Review notifications to stay informed about updates and events
- Complete guided actions that support your next steps
- Act on personalized recommendations
- Dismiss or resolve alerts to keep your list up to date
- View alert details by opening the full record view

In the web app, you can review notifications and mark them as read.

See Also

[App Alerts](#)

Manage Accounts

Perform tasks such as viewing a smart summary and getting a quick snapshot of a HCP or HCO account, adding an account address, submitting data change requests, and updating a rating.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Search for Accounts and Align Accounts with Your Territory](#)

Locate accounts in Salesforce outside your territory using account-related keywords. Expand the search outside Salesforce to include accounts from external sources such as an MDM or IQVIA OneKey

database.

Refine Account Search Results by Using Advanced Search Criteria

Enhance your search experience with advanced criteria such as account type and licenses when Search Outside Territory is insufficient to find specific accounts. Perform targeted, attribute-based searches to locate accounts in Salesforce and in external systems.

View a Smart Summary of an Account

Stay up to date and ready for provider visits with Einstein-generated summaries of an account's key details and the latest updates.

View Agent Generated Summary of an Account

Prepare for visits and boost customer engagement with Agentforce-powered account summaries. Use natural language utterances to interact with agents, and get real-time, data-driven insights that are tailored based on persona. Access the summaries faster without drilling into individual Account records, by viewing them in the Agent window from anywhere on the web and on the iPad.

Get a Quick Snapshot of an Account

Instead of navigating to multiple records to get information about a provider, view all the details in one place on your iPad. Go to the Provider Card to check whether a provider is a target account, a speaker, or a key opinion leader, and verify the provider's eligibility for receiving sample orders. View the provider's specialty areas, and check the preferred addresses and contact times. Stay on top of your communications by viewing information about your last interaction and upcoming visits.

Add an Address for an Account

Create and manage multiple addresses for an account, and mark one as the primary address to centralize communications. Keeping addresses organized makes your user engagement more effective.

Manage Best Times for an Account Address

View and modify preferred contact times, unavailable times, and required appointment times for an account's contact point address.

Create a Provider Affiliation

Define the affiliation between Healthcare Professionals (HCPs) and Healthcare Organizations (HCOs) by creating provider affiliation records. Use these records to track their roles, interests, and influence for comprehensive relationship management.

Link Provider Affiliations and Products

Create provider affiliation product records to link provider affiliations and products. The linking helps you track the influence of healthcare professionals on specific products.

Coordinating with Account Teams Across Territories

Sales reps, account managers, contact center agents, and medical team members are often assigned to different territories. To improve collaboration, users can share each other's roles, departments, and contact information, all from the Account Teams account record page. You can set up an account team using business accounts or person accounts.

Data Change Requests

As a sales rep working on the Life Sciences Cloud mobile app, when you update supported records or create records, your changes go through a validation process to make sure they meet your organization's data policies.

Focus on Targeted Accounts

Use lists and filters on the Accounts page to organize and focus on the right set of accounts. View and manage accounts more effectively by applying filters and organizing them into lists, making it easier for you to stay focused and take actions based on your business priorities.

Update a Rating Card

Keep your customer information accurate and current by updating the values in a rating card. Ratings show data organized into meaningful segments, such as general, product, territory, team, and address.

Align an Affiliated Account to Your Territory

To view details for an account outside your current territory, manually align an affiliated account to your territory.

Create Account Merge Requests

A merge request record represents a mapping of consolidated and merged accounts. You can create multiple mappings by creating merge request records. These records are further used in batch-job processing.

Search for Accounts and Align Accounts with Your Territory

Locate accounts in Salesforce outside your territory using account-related keywords. Expand the search outside Salesforce to include accounts from external sources such as an MDM or IQVIA OneKey database.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To search for accounts and align accounts with your territory:

Health Cloud Starter

AND

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From App Launcher, find and select **Accounts**.
2. Search for account outside your territory.
 - a. From App Launcher, find and select **Life Sciences Commercial** and then click the **Accounts** tab.
 - b. Click **Search Outside Territory**.

- c. Enter keywords related to the account you're searching for, like name and city, and click **Search**. All matching results within Salesforce, both within and outside your territory, are displayed.
3. To align an account from the matching accounts in Salesforce to your territory, click **Align to Territory**. You can align only active accounts to a territory.
4. To search for accounts not available in Salesforce, click **Search in External System**. The result shows all matching results from the external system.
5. To add an account from the external system, click **Add Account Information**. The account is added to Salesforce and aligned to your territory.

See Also

[Account Search](#)

Refine Account Search Results by Using Advanced Search Criteria

Enhance your search experience with advanced criteria such as account type and licenses when **Search Outside Territory** is insufficient to find specific accounts. Perform targeted, attribute-based searches to locate accounts in Salesforce and in external systems.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To refine account search results by using advanced search criteria:

Health Cloud Starter

AND

Life Sciences Core

AND

Life Sciences Field Sales Representative

Advanced Account Search helps improve performance by making relevant data easily accessible irrespective of the territory assignment.

1. From App Launcher, find and select **Life Sciences Commercial** and then click the **Accounts** tab.
2. Select **Advanced Search**.
3. Select your search criteria, such as HCP accounts, HCO accounts, and business licenses. Then, select **Next**.
4. Enter additional criteria related to account information and address, based on the available

information. The criteria can include details such as country, last name, first name, specialties, national provider identifier, city, and country code.

5. Click **Search**.

Matching results from Salesforce are shown.

6. To align an account from the matching accounts in Salesforce to your territory, click **Align to Territory**. You can align only active accounts to a territory.

7. To search for accounts not available in Salesforce, click **Search in External System**.

The result shows all matching results from the external system.

8. To add an account from the external system, click **Add Account Information**.

The account is added to Salesforce and aligned to your territory.

If you can't find the required account, proceed to [create an account](#).

 **Note** An advanced search is necessary before you create an account to prevent duplicate records.

[Create an Account](#)

Maintain an accurate and up-to-date collection of various accounts by creating an account for new customers. Add information related to the account that enables further communication with the account owner. You can also add affiliation and specialty records for the account.

See Also

[Account Search](#)

Create an Account

Maintain an accurate and up-to-date collection of various accounts by creating an account for new customers. Add information related to the account that enables further communication with the account owner. You can also add affiliation and specialty records for the account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create an account:

Health Cloud Starter

AND

Life Sciences Core

USER PERMISSIONS NEEDED

AND

Life Sciences Field Sales Representative

-  **Note** An advanced search is necessary before you create an account to prevent duplicate records.

1. From App Launcher, find and select **Life Sciences Commercial** and then click the **Accounts** tab.
2. Complete advanced search to check if there are any matching results.
If the required account isn't available, proceed to create an account.

 **Note** If you selected healthcare organization (HCO) in the account type selection of advanced search, select whether it's an HCO or a Sales record type. In the Life Sciences Cloud mobile app, you select the record type before adding the details.
3. Add account information.
 - a. For healthcare professional (HCP) record type, add details like Account Name, and Phonetic Name. For HCO/Sales record type, add details like First Name, Last Name, and Phonetic Name. For business licenses, add details like License Number, and Compliance Scope.
 - b. Select an appropriate provider type for the account.
 - c. For **Status**, select whether the account is active, pending, or inactive.
4. Add address information.
 - a. Add details like name, address, country code, city, state/province code, and zip/postal code, as needed.
 - b. Select **Is Primary** if the provided address is the primary address to contact the account owner.
5. Create an affiliation.
 - a. Click **New** and add details like related account and affiliation type.
 - b. Add the affiliation to the account.
6. To create a specialty,
 - a. Click **New** and add details like specialty name and specialty.
 - b. Add the specialty to the account.
7. Select **Create Account**.

The account is created. If your admin has enabled data change request validation, the account is created only after the request is approved.

See Also

[Affiliations](#)

[Data Change Request](#)

[Salesforce Help: Create Care Specialty Records](#)

View a Smart Summary of an Account

Stay up to date and ready for provider visits with Einstein-generated summaries of an account's key details and the latest updates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement, Agentforce for LifeSciences Cloud, Einstein GPT Prompt Builder, and Einstein GPT Platform Add-on licenses, and the Life Sciences Customer Engagement managed package.

Check recent interactions with an account on the go, on the web and on a mobile device. The smart summaries capture all the changes in the provider account since your last provider visit.

The screenshot shows the Salesforce Provider Summary page for the account "Grandview Medical Center". The page includes sections for Changes, Publications and Accreditations, Affiliations, Activity Goals, and HCP Cases. It also displays a summary generated on Monday, Aug 18, 4:22 PM, and a note about AI-generated responses. A "Territory 1" link is visible at the bottom.

See Also

[Account Summarization](#)

View Agent Generated Summary of an Account

Prepare for visits and boost customer engagement with Agentforce-powered account summaries. Use natural language utterances to interact with agents, and get real-time, data-driven insights that are tailored based on persona. Access the summaries faster without drilling into individual Account records, by viewing them in the Agent window from anywhere on the web and on the iPad.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud for Customer Engagement Add-on license, Agentforce for Life Sciences Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder. Also available with Einstein GPT Trust and Genie Data Platform Starter add-on licenses.

See Also

[Agentforce for Account Summarization](#)

Get a Quick Snapshot of an Account

Instead of navigating to multiple records to get information about a provider, view all the details in one place on your iPad. Go to the Provider Card to check whether a provider is a target account, a speaker, or a key opinion leader, and verify the provider's eligibility for receiving sample orders. View the provider's specialty areas, and check the preferred addresses and contact times. Stay on top of your communications by viewing information about your last interaction and upcoming visits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

See Also

[Provider Cards for Life Sciences](#)

Add an Address for an Account

Create and manage multiple addresses for an account, and mark one as the primary address to centralize communications. Keeping addresses organized makes your user engagement more effective.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create contact point address

Life Sciences Core

AND

USER PERMISSIONS NEEDED

Life Sciences Field Sales Representative

1. From the App Launcher, find and select **Accounts**.
2. Select the account record for which you want to add an address.
3. Click **Related**.
4. Under Contact Point Addresses, click **New**.
5. Enter the name, city, state, country, and postal code.
6. If this is the primary address for the selected account, select **Is Primary**.
7. Save your changes.

Manage Best Times for an Account Address

View and modify preferred contact times, unavailable times, and required appointment times for an account's contact point address.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To set up best time

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From the App Launcher, find and select **Accounts**.
2. Go to the account record of the Healthcare Professional (HCP) that you want to manage the best times for.
3. Click **Related**.
4. From the Contact Point Addresses related list, select a contact point address.
5. Click **Best Times**.
6. Click **Edit** and then select a relevant tab.

Unavailable Time	Set or edit the duration for which the provider is unavailable.
Provider's Best Time	Set or edit the provider's preferred contact time.

My Best Time	Set or edit the sales rep's preferred contact time.
Appointment Required	Set or edit the time for which the sales rep requires an appointment.

7. To set or edit a time slot value, click the time slot on the calendar.
To update multiple time slot values at a time, click and drag your cursor across the desired range.
8. Save your changes.

Create a Provider Affiliation

Define the affiliation between Healthcare Professionals (HCPs) and Healthcare Organizations (HCOs) by creating provider affiliation records. Use these records to track their roles, interests, and influence for comprehensive relationship management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a provider affiliation:

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From the App Launcher, find and select **Accounts**.
2. Select the account record that you want to create the affiliation for.
3. Select **Affiliations**, and then click **New**.
4. Select an account and a related account.
5. Select a role.
6. If it's a primary affiliation, select **Primary**.
7. For workplace affiliations, select **Hard** as the affiliation type; otherwise, select **Soft**.
8. Select an effective start date and an effective end date for the affiliation.
9. Save your changes.

Link Provider Affiliations and Products

Create provider affiliation product records to link provider affiliations and products. The linking helps you track the influence of healthcare professionals on specific products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a provider affiliation product:

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From the App Launcher, find and select **Provider Affiliation Products**.
2. Click **New**.
3. For Product, select either **Product** or **Life Sciences Marketable Product**, and then select a record.
4. Select a provider affiliation.
5. Save your changes.

Coordinating with Account Teams Across Territories

Sales reps, account managers, contact center agents, and medical team members are often assigned to different territories. To improve collaboration, users can share each other's roles, departments, and contact information, all from the Account Teams account record page. You can set up an account team using business accounts or person accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

View each user's assigned territory and other information (1), based on the fields configured. To view more fields, click the infobubble icon (2).

Santa Clarita Hospital

Type: Account
Phone: (979) 070-0343
Website:
Account Owner: Ray Holmes
Industry:
Billing Address: 1 Market St, San Francisco, California 94105, United States

Dashboard Details Related Additional Information Affiliations Activity History

Account Team (2)

Team Member	Territory Description	Active	Language
Evan Casto TM - SPC - San Francisco North 20D...	This territory covers the northern region of San Francisco and surrounding areas, ...	Active true	Language English
Luke Harrison RD - Midwest 20A	Territory Description	Active true	Language English

[View All](#)

See Also

[Create an Account Team](#)

Data Change Requests

As a sales rep working on the Life Sciences Cloud mobile app, when you update supported records or create records, your changes go through a validation process to make sure they meet your organization's data policies.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

These are the ways you update records of supported Data Change Request objects.

- Update records by using Bulk Updates on the mobile app
- Update records from the Account Details tab and the Account Related tab
- Create accounts from SBC
- Create new records for the objects listed on the Account Details tab

After you submit your changes, Life Sciences Cloud creates a data change request based on how your admin has configured it in your Salesforce org. The request is automatically routed to the admin, the manager, or other authorized approver, who then approves or rejects the changes.

Your changes appear on the mobile app only after approval and after the next sync. If the request is

rejected, the existing record remains unchanged.

If your admin configures Data Change Request to apply changes immediately, your updates appear on the mobile app immediately. If the request is later rejected, the changes are then reverted.

See Also

[Data Change Request](#)

Focus on Targeted Accounts

Use lists and filters on the Accounts page to organize and focus on the right set of accounts. View and manage accounts more effectively by applying filters and organizing them into lists, making it easier for you to stay focused and take actions based on your business priorities.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Organize Your View

Switch between different views on the Accounts page to move between broad account data and targeted subsets.

- Aligned Accounts: Shows only the accounts assigned to your territory. If no accounts appear, confirm that your admin has completed territory alignment
- All Accounts: Shows all the accounts that you have permission to access
- Filters: Shows accounts that match a saved filter
- Lists: Shows accounts grouped into the list you created
- Advanced Filters: Shows accounts that match specific criteria

Filter Accounts by Record Type

Apply record type filters to show only accounts that match a specific type. The record type filter is available in the Filter menu. By default, the Life Sciences Cloud for Customer Engagement app includes a few ready-to-use filters. Your admin can configure additional record type filters for your Salesforce org.

Use record type filters when:

- You want to see only specific categories of accounts, such as HCP and HCO. For example, selecting HCP displays all accounts with the Person record type, while selecting HCO displays all accounts with the NonPerson record type

- You're preparing for a targeted outreach plan
- You're working with a particular customer group

Manage Lists and Filters

Maintain Lists and Filters by taking necessary actions to make sure they stay accurate and aligned with your accounts strategy.

Here's the list of actions you can perform based on the view you select. For example, if you're checking all available accounts, you can quickly create a list, filter, or advanced filter.

- Create a list, filter, or advanced filters to refine accounts. Edit columns for lists and filters as needed.
 -  **Note** To make sure that you can see the accounts properly in the filter you created, make sure the account has the primary address associated with it.
- Add selected accounts to a new or existing list to group accounts for a specific objective, such as planning visits, tracking follow-ups, or managing accounts you're personally responsible for. You can also create a new list, filter, or advanced filters as needed.
- Manually search for accounts and add them to an existing list to organize and track specific groups of accounts based on your needs.
- Remove accounts from a list or filter to keep accounts relevant.
- Rename an existing list or filter to reflect a new purpose, align with updated account strategies, or correct naming inconsistencies.
- Delete a saved list or filter that's no longer needed. Deleting a shared list or filter also removes access for other users.
- Create a copy of an existing list to reuse its structure and criteria.
- Select fields from supported objects and show them as columns for dynamic filters.
- Select fields from supported objects and show them as columns in the datatable for lists.
- Define filter criteria to show values for each column.
- Download lists or filters as a CSV file to analyze account data outside the app or share it with others.
- Share filters to users with account list access level as needed.
- Sort accounts by available options, such as city, email, first name.
- View accounts as lists or view them on a map.

See Also

[Lists and Filters](#)

Update a Rating Card

Keep your customer information accurate and current by updating the values in a rating card. Ratings show data organized into meaningful segments, such as general, product, territory, team, and address.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To view and edit consents on the web and mobile app:

Life Sciences Field Sales Representative

OR

Life Sciences Field Medical

OR

Life Sciences Key Account Management

1. From the App Launcher, find and select **Life Sciences Commercial**.
2. Click **Accounts**.
3. In the Accounts list page, open the account record you want to update.
4. Click **Ratings**.
5. Click the tab that contains the rating card you want to update. For example, click **General**, **Product**, **Territory**, **Team**, or **Address**.
Each tab shows rating cards related to a specific object and appears based on how your admin has configured the layout.
6. To upload a file, click **Manage Attachments**, and then click **Upload Files** to select an attachment.
7. To edit a rating card, click **Edit**, and then add or update the values as needed.
For example, in the General tab (Account object), update fields such as Annual Revenue or determine whether the Account is a Person Account or not.
8. To clear the values you added, click **Clear**.
9. To view the change history, click the  icon on the rating card, and then click **Confirm**.

See Also

[Ratings](#)

Align an Affiliated Account to Your Territory

To view details for an account outside your current territory, manually align an affiliated account to your territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

package.

USER PERMISSIONS NEEDED

To align affiliated accounts to territories:

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From the mobile app home page, tap **Accounts**.
 2. Select an account, and tap **Affiliations**.
 3. Select the active account that's outside your territory and click **Align to Territory**.
- After the account is aligned to your current territory, you can see the account summary.

Create Account Merge Requests

A merge request record represents a mapping of consolidated and merged accounts. You can create multiple mappings by creating merge request records. These records are further used in batch-job processing.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To run merge account jobs:

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From App Launcher, find and select **Merge Requests**.
2. Click **New**.
3. Select **Account** as the object type.
4. Select **Requested** as the status.
5. Enter a value for Winning Record Identifier or Winning External Record Identifier.
6. Enter a value for Losing Record Identifier or Losing External Record Identifier.
7. Select **Override Blank Values** if you want to include fields from a merged account when consolidated account field values are blank.

8. Save your changes.

Plan Engagements

Optimize daily schedules by showing key events and applying predefined routines on the calendar. Log and manage time away from your territory. Increase your plan's success rate and personalize action plan templates for Key Account Management. Achieve business objectives with proven strategies for key accounts, and drive initiatives for key accounts in a territory. Perform tasks such as reviewing and submitting provider activity goals for manager approval and final administrator approval, and tracking the status of activity plans.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Use Calendar to Schedule Visits and Other Events](#)

Visualize and prioritize key activities, such as visits, assessment tasks, time off territory, and general events. Schedule events with best time recommendations, avoiding conflicts, to create optimized daily plans. You can switch between different views, create events, and filter the events.

[Manage Events in Calendar](#)

Create, view, edit, move, and delete events such as a visit, time off territory, general event, and assessment tasks from Planner. Manage your schedule efficiently by deleting multiple events from the calendar simultaneously. View the holiday mapped to your organization's business hours.

[Manage Visits in Calendar](#)

Learn how to manage your visits directly from the calendar, including how to create, reschedule, and delete them.

[Manage Routines](#)

Manage your recurring visits and streamline your scheduling using routines in Calendar.

[Review and Submit Activity Goals for Manager Approval](#)

As a sales representative, review the activity plans and provider activity goals that are assigned to you by your organization's activity plan administrator. You can view the account details for your assigned territory and propose adjustments to the goals.

[Review and Submit Activity Goals for Final Administrator Approval](#)

As a sales manager, review the provider activity goals and measures submitted by your sales representatives. Validate and accept the changes proposed by the sales representative, with or without further modifications, and then submit the goals and measures to the activity plan administrator for final approval.

[Adjust the Goals for Your Activity Plans](#)

Prepare for unexpected changes and real-world challenges in reaching your activity goals. Modify the

goal measures for existing activity types, set goal measures for additional activity types, and remove accounts from activity plans, based on your requirements.

[Approve and Activate Provider Activity Goals](#)

As an activity plan administrator, you have the final say on the provider activity goals defined for your sales representatives. Review the goals proposed by your representatives and managers, make modifications as required, and then approve and activate the plan. Make sure that you activate only one activity plan of type Account Goal for each territory at a time.

[Track Status of Activity Plans by Using List Views and Charts](#)

Stay informed about the activity plans for your territory and track progress toward your goals. Plan your day for effective operation by using a unified snapshot of targeted, actual, and scheduled activity goals. Execute various activities, such as calls and remote calls, on targeted accounts to meet your defined goals.

Use Calendar to Schedule Visits and Other Events

Visualize and prioritize key activities, such as visits, assessment tasks, time off territory, and general events. Schedule events with best time recommendations, avoiding conflicts, to create optimized daily plans. You can switch between different views, create events, and filter the events.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Views

- Previous and Next Period: Select < > to change the dates on the calendar.
- Calendar Period: Tap the calendar icon and select a date to view your schedule for a different period. After selecting a date, tap outside the calendar to close it.
- Calendar Views: Select **Day**, **Work Week**, **Week**, or **Month** to change the calendar view.
- Today: Click **Today** to view the current day's schedule.

Create and Filter Events

- Create Event: Tap + and select an event type such as visits, assessment tasks, time off territory, and general events. You can also touch and hold a time slot in the calendar grid to create an activity.
- Menu: Tap the menu icon and select an option to filter events, view event indicators, view shared calendar, or delete events.
- Filter Events: You can filter assessment tasks and visits by their statuses. Also, choose whether you want to see holiday and time off territory events.
- Event Indicators: View the colors assigned for different events to easily identify the events on your

- calendar.
- Shared Calendar: View events from the mirror territory.
 - Delete Events: Delete events in bulk by selecting the event type and the time period.

Other Calendar Elements and Features

- All Day Row: The All Day row shows these events.
 - Assessment tasks that you created or that are assigned to you.
 - General Events that you created or that are shared with you.
 - Time Off Territory events that you created using the Span method if the Span Type is All Day.
 - Holidays.
- Current Time Indicator: Indicates the current time on the calendar grid.
- Calendar Zoom: To zoom in and zoom out, stretch and pinch the grid.
- Preview Event: Tap an event to preview it.

Manage Events in Calendar

Create, view, edit, move, and delete events such as a visit, time off territory, general event, and assessment tasks from Planner. Manage your schedule efficiently by deleting multiple events from the calendar simultaneously. View the holiday mapped to your organization's business hours.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Manage Visits in Calendar

Learn how to manage your visits directly from the calendar, including how to create, reschedule, and delete them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Create a Visit

Create visits from the calendar using several intuitive methods. Simply drag an account from the account list to the calendar grid, tap + on the calendar grid, or long tap (tap and hold) an empty slot.

When you drag and drop an account to a time slot, the visit is automatically scheduled for the account's preferred address. If there isn't a preferred address, the primary address is used. You can also view all addresses for an account and drag a specific address to the calendar.

The Calendar helps you choose the optimal time for a visit by showing your best time, provider's best time, appointment time, and unavailable time, and colleague visits with the same account in the background.

-  **Note** You can't schedule a visit during your time off territory, unless it is allowed by your time off territory overlapping rules. If your Salesforce admin has configured rules to prevent visits from being scheduled to close to each other, you'll get a warning or error if you try to create a visit for an account that already has one scheduled within the period specified by the admin.

Reschedule a Visit

Move a visit on the calendar grid to reschedule it to a new time. To reschedule a visit, simply drag it to the new time slot on your calendar.

-  **Note** You'll get a warning or error message if the move isn't possible according to the validation rules set up by your Salesforce admin.

Preview and Delete a Visit

Preview a visit to confirm the details and delete it from the calendar. Tap the visit on the calendar grid to open the preview. From there, you can confirm or delete the visit.

-  **Note** You can't delete a submitted or signed visit, a visit with an attendee signature, or a shared visit where you were added as a visitor. If you delete a remote visit, cancellations are emailed to the account and attendees.

Manage Routines

Manage your recurring visits and streamline your scheduling using routines in Calendar.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Create a Routine

Create routines to quickly apply a predefined set of visits for recurring schedules. This eliminates the need to create individual visits, streamlining the process for single or multi-day routines across your calendar.

1. From the App Launcher, find and select **Planner**.
2. Tap  next to the date you want the routine to start on.
3. Select **Create or Update Routine**.
4. Enter a name for the routine.
5. Select an end date.
 - To create a routine that includes the schedule of a single day, select an end date that's the same as the start date.
 - To create a routine that includes the schedule spanning multiple days, select an end date that's after the start date.
6. Save your changes.

To update an existing routine:

Apply an Existing Routine

Leverage existing routines to apply predefined visit schedules.

1. From the App Launcher, find and select **Planner**.
2. Tap  next to the date you want the routine to start on.
3. Select **Apply Existing Routine**.
4. Select the routine you want to apply.

A routine indicator appears on the day that has the routine applied. To view all the routines for a specific day, click the routine icon.

You can share, delete, or rename existing routines.

Review and Submit Activity Goals for Manager Approval

As a sales representative, review the activity plans and provider activity goals that are assigned to you by your organization's activity plan administrator. You can view the account details for your assigned territory and propose adjustments to the goals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To review provider activity goals:

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From the App Launcher, go to **Life Sciences Commercial**.
The home page of the app appears.
2. Select the **Activity Plan Review** tab.
The Provider Activity Goal Overall Status page appears.
3. Review the current status, submission date, and the percentage of changes you can make for an account and activity plan.
Make sure the current status is In Progress indicating that the plan is ready for your review.
4. Review your assigned accounts, ratings, specialties, and the activity plan details, such as channel, products, and goal metrics.
5. (Optional) Add or remove an account from the activity plan.
6. To update the activity goals for an account, do the following.
 - a. Click  next to the account you want to update and review the details of the account such as name, activity types, address, specialty, and rating.
 - b. Under Employee, enter your proposed goal for each activity type.
You can update up to the maximum allowed limit of changes.
7. Click **Submit**.
The status of the activity plan changes to Manager Review.

See Also

[Salesforce Help: Activity Plans](#)

Review and Submit Activity Goals for Final Administrator Approval

As a sales manager, review the provider activity goals and measures submitted by your sales representatives. Validate and accept the changes proposed by the sales representative, with or without further modifications, and then submit the goals and measures to the activity plan administrator for final approval.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To review provider activity goals:

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From the App Launcher, go to **Life Sciences Commercial**.

The home page of the app appears.

2. Select the **Activity Plan Review** tab.

By default, you see the activity plan details for the first active territory in the Territory Switcher. To view details for a different territory, select it from the Territory Switcher.

The Provider Activity Goal Overall Status page appears.

3. Review the current status, submission date, percentage of changes you can make for an account and activity plan, and your sales representative's proposed changes.

Make sure the current status is Manager Review indicating that the sales representative has already reviewed and submitted the plan for your review.

4. Review the assigned accounts, ratings, specialties, and the activity plan details, such as channel, products, and goal metrics.

5. (Optional) Add or remove an account from the activity plan.

6. To update the activity goals for an account, do the following.

- a. Click  next to the account you want to update and review the account details and the goals proposed by your sales representative.
- b. If you want to update the details, under Manager, enter your proposed goal for each activity type. You can update up to the maximum allowed limit of changes.

7. Click **Submit**.

The status of the activity plan changes to Submitted.

See Also

[Salesforce Help: Activity Plans](#)

Adjust the Goals for Your Activity Plans

Prepare for unexpected changes and real-world challenges in reaching your activity goals. Modify the goal measures for existing activity types, set goal measures for additional activity types, and remove accounts from activity plans, based on your requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To adjust goals for an activity plans:

Life Sciences Core

AND

Life Sciences Field Sales Representative

 **Note** You can only adjust activity goals for non-product based measures.

1. From the App Launcher, find and select **Life Sciences Commercial**, and then go to the Accounts tab.
2. In the Activity Plans filter, click  next to the account you want to adjust the activity goals for, and then select **Activity Plan Adjustment Request**.
3. In the New Activity Plan Adjustment Request window, select an adjustment type.
Depending upon whether the account for which you're making an adjustment is already included in the activity plan, you can select one of the following.
 - Add New Account to Plan: This action lets you track activity types for an account that's not in the activity plan.
 - Set Goal Measure for Additional Activity Types: This action lets you track activity types that are already part of your activity plan.Alternatively, update the goals for an existing activity type or remove the account from the plan.
4. To add a new account to a plan or set goal measures for additional activity types, do the following.
 - a. Select the activity type you want to measure.
 - b. In Assignee Goal, enter your target measure for the activity type.
For example, enter the number of times you want to execute a visit activity type.
 - c. Select a reason for the adjustment.
 - d. Save your changes.
5. To update the goal measures for an activity type, modify the assignee goals.
6. To remove an account, do the following.
 - a. Turn on Remove Account from All Activity Plans.
 - b. Select a reason for the adjustment.
 - c. Save your changes.This step removes all the Provider Activity Goal Measure records associated with the activity plan for the selected account.

See Also

[Salesforce Help: Activity Plan Adjustments](#)

Approve and Activate Provider Activity Goals

As an activity plan administrator, you have the final say on the provider activity goals defined for your sales representatives. Review the goals proposed by your representatives and managers, make modifications as required, and then approve and activate the plan. Make sure that you activate only one activity plan of type Account Goal for each territory at a time.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To approve provider activity goals:

Life Sciences Core

AND

Life Sciences Commercial Admin

1. From the App Launcher, go to **Life Sciences Commercial**.

The home page of the app appears.

2. Select the **Activity Plan Review** tab.

By default, you see the activity plan details for the first active territory in the Territory Switcher. To view details for a different territory, select it from the Territory Switcher.

The Provider Activity Goal Overall Status page appears.

3. Review the current status and percentage of changes that your sales representatives and managers have proposed.

Make sure the current status is Submitted, indicating that the manager has already reviewed and submitted the plan for your final review.

4. Review the assigned accounts, ratings, specialties, and activity plan details, such as channel, products, and goal metrics.

5. (Optional) Add or remove an account from the activity plan.

6. To update the activity goals for an account, do the following.

- a. Click  next to the account you want to update.

- b. Review the account details and goals proposed by your representative and manager.

- c. Under Admin, enter the final measure for each activity type.

7. Click **Submit**.

The status of the activity plan changes to Admin Review.

Run the Validate Activity Plans batch job to activate the activity plan. The plan is activated only if the plan's start date is on or before the current date.

See Also

[Salesforce Help: Activity Plans](#)

Track Status of Activity Plans by Using List Views and Charts

Stay informed about the activity plans for your territory and track progress toward your goals. Plan your day for effective operation by using a unified snapshot of targeted, actual, and scheduled activity goals. Execute various activities, such as calls and remote calls, on targeted accounts to meet your defined goals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To track activity plan status:

Life Sciences Core

AND

Life Sciences Field Sales Representative

As you make progress on your activities, the Calculate Provider Activity Goal Measures batch job calculates the progress metrics. These metrics are not in real time but updated at regular intervals depending on when the job is run. Use dedicated list views and charts for activity plans and weighted activity plans, on the Account page, to identify targeted accounts and see the goal completion progress. Use charts on the home page to get a global overview.

1. From the App Launcher, go to **Life Sciences Commercial**.

By default, you see the details for the first active territory in the Territory Switcher. To view details for a different territory, select it from the Territory Switcher.

The home page of the app appears.

2. Review active activity plans by using list views.

a. Select the **Accounts** tab, and under Lists, select **Activity Plan** or **Weighted Activity Plan**.

The accounts that are associated with the active activity plan for the selected territory appear.

b. Review the account details, such as the last visit date, actual, scheduled, and total goals, and percentage of goal attainment. If an account has reached the target, the Targeted Activities check box is automatically selected.

c. To see activity metrics for an account in a weighted activity plan, under the Attainment column, click .

3. Review activity plan details by using charts.

- a. On the home page, find the Activity Plan component.
- b. Select an activity type and product.
- c. Review the goal completion data for the current date and for the entire time period of the activity plan.
- d. To see additional details on the tracked activities, related accounts, and goal attainment, click **View Details**.

The Activity Plan component is also available on the Account record page, and it shows data at the account level.

See Also

[Salesforce Help: Activity Plans](#)

Manage Key Accounts

Nurture long-term partnerships with your key accounts and target territories. Anticipate customer concerns, identify growth opportunities, dedicate resources to offer tailored solutions, and ensure the long-term success of the partnership. Create Account Plans to build relationships with major customers, analyze customers' prescribing power, and gather input about the potential impact of pharma products. Use Territory Plans to monitor regional treatment patterns, gain medical insights, and disseminate scientific information to accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Create a Life Sciences Cloud Account Plan](#)

Nurture long-term partnerships, anticipate customer concerns, and identify growth opportunities. Use an account plan to strategize effectively and stay on top of business targets and objectives. Expand an account plan by adding products, related plans, and strategic analysis.

[Manage Account Plan Participants](#)

You can add individual users to an account plan or as a group. To boost collaboration and improve networking outcomes, configure groups and users as participants, and assign stakeholders to participants.

[Manage Account Plan Stakeholders](#)

Influence your account's decision-making policies by adding stakeholders to an account plan. Enhance your account plans by assigning actions and participants to your stakeholders.

[Account Plan Stakeholder in the Mobile Interface](#)

Save time spent on searching for a stakeholder with additional sort and filter conditions in the mobile interface. You also get the added benefit of searching for stakeholders in all the key accounts aligned to your territory and adding stakeholders in bulk. Additionally, you create stakeholder records by

adding accounts and contacts who are already associated with your territory.

Create Account Plan Objectives

Define goals for your account and track their progress by creating actionable account plan objectives. Add objectives directly to a plan or import them.

Account Plan Hierarchy

Get a comprehensive view of the account plan objectives, from top-level objectives to the granular details of the associated tasks, all in one screen.

Manage Action Plans and Tasks in the Account Plan Hierarchy

Configure ad hoc tasks and actions directly in the account plan hierarchy. Monitor the progress of each element of the hierarchy, search for individual action plans, and filter records by status. To mark an action plan or assessment task as complete, update the status of the record.

Create a Life Sciences Cloud Territory Plan

Drive educational and scientific awareness campaigns, and collect information about the effectiveness of treatments in a region by creating a territory plan.

Create Goal Assignments for Territory Plans

Define a blueprint for achieving your territory's business targets. You can add goals directly in the plan or import them from a template.

Territory Plan Hierarchy

Visualize the progress of the assessment tasks, action plans, and goals, directly from the territory plan. Review details about each record without navigating away from the page.

Manage Action Plans and Tasks in the Territory Plan Hierarchy

Configure action plans, assessment tasks, and sprints in the territory plan hierarchy. Drill down to individual tasks with search and filter actions. Edit the records and update statuses to mark the tasks and action plans as complete. To mark an action plan or assessment task as complete, update the status of the record.

Create Tasks and Plans from the Goal Assignment Record

You can configure action plans and assessment tasks directly from the Goal Assignment record. The action plan template and the associated assessment tasks automatically appear on the Territory Business Plan record page.

Create a Life Sciences Cloud Account Plan

Nurture long-term partnerships, anticipate customer concerns, and identify growth opportunities. Use an account plan to strategize effectively and stay on top of business targets and objectives. Expand an account plan by adding products, related plans, and strategic analysis.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create an account plans:

Life Sciences Key Account Management permission set

See Also

[Key Account Management Plans and Objects](#)

Create an Account Plan

1. From the App Launcher, find and select **Account Plans**.
2. Click **New**, and enter a name for the plan.
3. Select the account that you want to create the account plan for.
4. Enter the plan's start and end date.
5. Save your changes.

Associate an Account Plan with a Product

Gain market insights for a specific product by associating it with an account plan.

1. From the App Launcher, find and select the Account Plan record that you want to add the product to.
2. On the Related tab, under Account Plan Product, click **New**.
3. Select a sellable product item or non-sellable Life Sciences marketable product.
4. Save your changes.

Associate an Account Plan with Another Plan

To manage a large account, you can create multiple account plans or use a primary account plan with several account plans related to it. To have all the account information in one place, associate the account plans with your primary account plan.

1. From the App Launcher, find and select the Account Plan record that you want to add a related plan to.
2. On the Related tab, under Account Plan Relationships, click **New**.
3. Select the account plan that you want to associate with the primary plan.
4. Save your changes.

Add an Analysis Component to an Account Plan

Create a more robust account plan by adding competitive and situational analysis of your account's position in the market. Identify your account's advantages, disadvantages, growth opportunities, and obstacles, and gather information about the socioeconomic, legal, and political factors that can affect your account's performance.

1. From the App Launcher, find and select the Account Plan record that you want to add the analysis to.

2. On the Related tab, under Account Plan Related Object Analysis, click **New**.
3. Select a sellable product item or non-sellable Life Sciences marketable product.
4. Add the details of the analysis.
5. Save your changes.

Manage Account Plan Participants

You can add individual users to an account plan or as a group. To boost collaboration and improve networking outcomes, configure groups and users as participants, and assign stakeholders to participants.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add account plan participants:	Life Sciences Key Account Management permission set
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See Also

[Configure a Participant Role for an Account Plan](#)

Create an Account Plan Participant

Streamline the execution of goals and objectives by incorporating participant users into your account plan.

1. From the App Launcher, go to the Account Plan record that you want to add the participant to.
2. On the Related tab, under Account Plan Participant, click **New**.
3. Select a group or individual as the participant.
4. Select the account plan.
5. Select the role of the participant user.
6. Save your changes.

Assign a Stakeholder to a Participant

Support cross-functional collaboration by enabling participants to liaise directly with stakeholders of an account plan.

Assigning a stakeholder to a participant creates an Account Plan Participant Stakeholder junction record.

1. From App Launcher, find and select the Account Plan Participant record to which you want to assign a stakeholder.
2. In the record's highlights panel, click **Assign or Unassign Stakeholder**.
3. Select an account plan stakeholder to assign to the participant.
4. Save your changes.

Manage Account Plan Stakeholders

Influence your account's decision-making policies by adding stakeholders to an account plan. Enhance your account plans by assigning actions and participants to your stakeholders.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add stakeholders to account plans:	Life Sciences Key Account Management permission set
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See Also

[Add a Key Account Management Quick Action Button to a Page Layout](#)

Add a Stakeholder to an Account Plan

A stakeholder can be another client or person whose influence helps a company grow, such as an intermediary from the buyer's group who influences the buyer's decision.

To add a stakeholder, the Account or Contact record page must include picklist values for Role Type, Influencer Level, and Strength.

1. From the App Launcher, find and select the Account Plan record that you want to add the stakeholder to.
2. On the Related tab, under Account Plan Stakeholder, click **New**.
On a mobile device, you can add stakeholders from other accounts aligned to your territory, from users set up as Account or Contact records aligned to your territory, or by importing from another account plan.
3. Select the stakeholder's Account or Contact record.
4. Select a role type.
5. Specify the influencer level and strength of the stakeholder.
6. Save your changes.

Add a Stakeholder-Related Action to a Plan

Help an account plan participant complete assignments that are associated with a stakeholder.

1. From the App Launcher, find and select the Account Plan Stakeholder record that you want to add the action to.
2. On the Related tab, under Account Plan Stakeholder, click **New**.
3. In Action Reference Record, choose an action plan, action plan item, or assessment task.
4. Select the stakeholder that you want to execute the action for.
5. Save your changes.

Associate a Product with a Stakeholder

Identify the product that you want to involve the stakeholder with.

1. From the App Launcher, find and select the Account Plan Stakeholder record that you want to add the action to.
2. On the Related tab, under Account Plan Stakeholder, click **New**.
3. Select a sellable product item or non-sellable Life Sciences marketable product.
4. Select the stakeholder that you want to associate the product with.
5. Save your changes.

Assign a Participant to a Stakeholder

Enable a plan participant to work directly with a stakeholder in an account plan.

Assigning a participant to a stakeholder creates an Account Plan Participant Stakeholder junction record.

1. From the App Launcher, find and select the Account Plan Stakeholder record that you want to assign a participant to.
2. In the record's highlights panel, click **Assign or Unassign Participant**.
3. Select the account plan participant to assign to the stakeholder.
4. Save your changes.

Import a Stakeholder from a Related Account Plan

Maximize the effectiveness of your account plan by importing stakeholders from related account plans.

To import stakeholders, the Import Stakeholder button must be added to the Account Plan page layout.

1. From the App Launcher, find and select the Account Plan record that you want to import a stakeholder to.
2. In the Account Plan record's highlights panel, click **Import Stakeholder**.
3. Select an account plan and the stakeholder.
4. Click **Import**.

Account Plan Stakeholder in the Mobile Interface

Save time spent on searching for a stakeholder with additional sort and filter conditions in the mobile interface. You also get the added benefit of searching for stakeholders in all the key accounts aligned to your territory and adding stakeholders in bulk. Additionally, you create stakeholder records by adding accounts and contacts who are already associated with your territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

- In the mobile interface, you can view and add stakeholders only from your current territory. Incorporate a stakeholder into your account plan in the following ways.
 - Add stakeholders in bulk by searching for stakeholders in all key accounts aligned to your territory.
 - Create an account plan stakeholder record. In the Reference Record field, select an account or a contact that's associated with your territory.
 - Import a stakeholder from another account plan.
- Sort the stakeholders by role type, account plan objective, or the stakeholder reference record.
- Filter the stakeholders by role type, account plan objective, or the stakeholder reference record.

Create Account Plan Objectives

Define goals for your account and track their progress by creating actionable account plan objectives. Add objectives directly to a plan or import them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To add account plan objectives:

Life Sciences Key Account Management permission set

See Also

[Create Goals, Tasks, and Measures for Plan Templates](#)

Create Account Plan Objectives From Scratch

Define goals for your account and track the goals' progress by creating actionable account plan objectives.

1. From the App Launcher, find and select Account Plan Objectives, and click **New**. Alternatively, navigate to the Account Plan record page and go to the Related tab.
2. Add the following details
 - a. Enter a name for the objective.
 - b. Select the account plan for which you want to create the objective.
 - c. Select a start date and end date for the objective.
 - d. Save your changes.

Create Account Plan Objectives by Importing Templates

Meet your account's targets by importing tried and tested strategies into your account plans. Add reusable goal definition templates and associated action plan templates to create run-time records of account plan objectives.

-  **Note** To filter goal definitions, action plans, and tasks by selecting the product associated with the goal definition, make sure that you have Goal Definition Product records. Also, when you import a goal definition associated with a product, Key Account Management creates Account Plan Product records.

1. From the App Launcher, find the Account Plan record into which you want to import a template.
2. Go to the Account Plan Objectives tab, and click **Import Template**.
3. In the Select Goal Definitions window, choose action plans and assessment tasks to add to your account plan objectives.
Search for records and filter your search by selecting the product associated with the goal definition.
4. Click **Next**, and review your selections.
5. Save your changes.

Account Plan Hierarchy

Get a comprehensive view of the account plan objectives, from top-level objectives to the granular details of the associated tasks, all in one screen.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

- Filter the account plan objectives, action plans, and assessment tasks by status.
- Search for records with keywords.
- View the completion percentages of each record. Trigger handles working behind the scenes automatically update each record in the hierarchy when tasks and plans are completed.
- Add assessment tasks, import existing assessment tasks, add sprints, and edit and delete tasks.
- Add, edit, and delete action plans from the action plan framework.

Manage Action Plans and Tasks in the Account Plan Hierarchy

Configure ad hoc tasks and actions directly in the account plan hierarchy. Monitor the progress of each element of the hierarchy, search for individual action plans, and filter records by status. To mark an action plan or assessment task as complete, update the status of the record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit records in the account plan hierarchy:	Life Sciences Key Account Management permission set
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See Also

[Create Goals, Tasks, and Measures for Plan Templates](#)

Create and Update Action Plans in an Account Plan

Add action plans to the Account Plan Objectives framework, update the status of your action plans, and edit the records as needed.

1. From the App Launcher, find the Account Plan record that you want to add an action plan to.
2. On the Account Plan Objective tab, next to the account plan objective that you want to update, click  and select **New Action Plan**.
3. Name the action plan and enter the start date.
4. Select an action plan template.
You can only add templates that have a target object of Account Plan Objective.
5. Click **Next**.
6. Review the assessment tasks, and save your changes.

Create and Update Assessment Tasks in an Account Plan

Execute assessment tasks and record your progress in the Account Plan Objective framework. When you accomplish a task, its progress is rolled up into the top of the account plan objective hierarchy. Trigger handlers working behind the scenes keep the completion percentages of all related records up-to-date at all times. You can also create new assessment tasks on the go.

1. From the App Launcher, find the Account Plan record whose objective you want to execute.
2. On the Account Plan Objective tab, next to the action plan you want to add the assessment task to, click .
3. Click **New Assessment Task**.
4. In New Assessment Task, make the following changes.
 - a. Enter a name for the assessment task.
 - b. Select a task type.
 - c. In Reference Record, select the action plan you added to your account plan objective.
 - d. Save your changes.
5. To assign the task, click , and in AssignedTo ID, select a user or group.

Import an Assessment Task into an Account Plan

Reuse tasks that have been successful in the past by importing them into the account plan.

1. From the App Launcher, find the Account Plan record that you want to update.
2. On the Account Plan Objective tab, next to the action plan you want to import the task to, click  and select **Import Assessment Task**.
3. In the Import Assessment Task window, search for and select an existing task.
4. Click **Import**.

Assign a Sprint to an Action Plan

Monitor the progress of an account plan by assigning a sprint to an action plan associated to the objective.

1. From the App Launcher, find the Account Plan record.
2. On the Account Plan Objective tab, next to the action plan that you want to track, click  and select **Assign or Unassign Sprints**.
3. Select the sprint to assign.
4. Save your changes.

Create a Life Sciences Cloud Territory Plan

Drive educational and scientific awareness campaigns, and collect information about the effectiveness of treatments in a region by creating a territory plan.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create territory plans:

Life Sciences Key Account Management permission set

1. From the App Launcher, find and select Territory Business Plans.
2. Click **New** and enter a name for the plan.
3. Select the territory.
4. Select a status, and select **Active**.
5. Enter the plan's start and end dates.
6. Save your changes.

See Also

[Key Account Management Plans and Objects](#)

Create Goal Assignments for Territory Plans

Define a blueprint for achieving your territory's business targets. You can add goals directly in the plan or import them from a template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create goal assignments:

Life Sciences Key Account Management permission set

Create Goal Assignments

Define a goal assignment by using global, territory, and affiliate goal definitions of any type.

1. From the App Launcher, find and select Territory Business Plans and select a record.

2. Go to the Goal Assignment tab.
3. To create a goal assignment, click **New**, and add the following details.
 - a. Select a goal assignee.
 - b. Make sure that the record selected in the Parent Record field is the territory plan that you're adding the goal.
 - c. Add a goal definition.
 - d. Save your changes.

Import Goal Definition Templates into a Goal Assignment

Incorporate proven strategies from predefined templates to enhance your territory business plans. You can add only active goal definitions that are of type Top Goal

For a selected territory business plan, you can import goal definitions into a goal assignment only once. However, you can add goal definitions to a territory business plan multiple times by using the New button.

 **Note** To filter goal definitions, action plans, and tasks by selecting the product associated with the goal definition, make sure your admin creates Goal Definition Product records.

1. From the App Launcher, find the Territory Business Plan record into which you want to import a template.
2. Go to the Goal Assignment tab, and click **Import Template**.
3. In the Select Goal Definitions window, choose action plans and assessment tasks to add to your goal assignments.
Search for records and filter your search by selecting the product associated with the goal definition.
4. To review your selection, click **Next**.
5. Save your changes.

Territory Plan Hierarchy

Visualize the progress of the assessment tasks, action plans, and goals, directly from the territory plan. Review details about each record without navigating away from the page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

- When you complete the assessment tasks, the completion percentage is updated and rolled up to the parent goal assignment in the hierarchy.
- Filter by status of your goal assignment, action plan, or assessment task.

- Search across goal assignments, action plans, and assessment tasks.

See Also

[Create Goals, Tasks, and Measures for Plan Templates](#)

Manage Action Plans and Tasks in the Territory Plan Hierarchy

Configure action plans, assessment tasks, and sprints in the territory plan hierarchy. Drill down to individual tasks with search and filter actions. Edit the records and update statuses to mark the tasks and action plans as complete. To mark an action plan or assessment task as complete, update the status of the record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To edit records in the territory plan hierarchy: Life Sciences Key Account Management

See Also

[Create Goals, Tasks, and Measures for Plan Templates](#)

Create and Update Action Plans in a Territory Plan

Territory business plans give you the flexibility to add action plans on the go, without having to switch screens. You can also update the status of the action plans and remove the ones that aren't needed.

1. From the App Launcher, find and select Territory Business Plans and select a record.
2. Go to the Goal Assignment tab.
3. To create an action plan, do the following.
 - a. To add an action plan, click  next to the goal assignment, and click **New Action Plan**.
 - b. Make sure the goal assignment selected in the Target Record field is the goal assignment you're creating the action plan for.
 - c. Add a name for your action plan and enter a start date.
 - d. Select an action plan template with which you associate the action plan.
 - e. Save your changes.

Create and Update Assessment Tasks in a Territory Plan

Update the statuses of the assessment tasks directly from the territory business plan hierarchy. The trigger handlers working behind the scenes dynamically update the progress bars of all the related action

plans and goal assignments, so that you can check the status of the entire territory plan at a glance. You can also create ad hoc assessment tasks when needed, and remove the assessment tasks you don't need.

-  **Note** To configure ad hoc tasks, make sure your admin enables the Let users add items to action plans checkbox in the Action Plan Template record.

1. From the App Launcher, find and select **Territory Business Plans**, and then select a record.
2. Select the Goal Assignment tab.
3. To add assessment tasks on the go, do the following.
 - a. Click  next to the action plan the assessment task is a part of.
 - b. Click **New Assessment Task**, and add the following details.
 - c. Add a name for your assessment task and select a status.
 - d. Make sure the action plan selected in the Reference Record field is the action plan you're adding a new assessment task to.
 - e. Save your changes.
4. To assign the task, click , and in AssignedTo ID, select a user or group.

Assign a Sprint to an Action Plan in a Territory Plan

Stay informed about the accomplishment of your target goals in a territory plan. Track the progress of action plans assigned to each goal with the help of sprints.

1. From the App Launcher, find the Territory Business Plan record whose action plans you want to track.
2. On the Goal Assignments tab, next to the action plan you want to track, click , and then click **Assign or Unassign Sprints**.
3. Select a sprint to assign to the action plan.
4. Save your changes.

Create Tasks and Plans from the Goal Assignment Record

You can configure action plans and assessment tasks directly from the Goal Assignment record. The action plan template and the associated assessment tasks automatically appear on the Territory Business Plan record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create tasks and plans from the goal assignment record:

Life Sciences Key Account Management permission set

1. From the App Launcher, find and select **Goal Assignments**, and select a record.
2. On the Assessment Tasks tab, to create an ad hoc assessment task, click **New**.
3. Click  next to an assessment task to clone it.
4. To create an action plan, click **New Action Plan**.

Engage With Your Customers

Perform tasks related to visiting your customers in person or remotely, customizing and sending emails, creating and submitting medical inquiries, and presenting content to your customers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Visit Your Customers](#)

Plan and schedule visits by using the planner tool, which includes a calendar-based view of activities, various event types, and account targeting based on best contact times. Create visits, plan routes, and manage events efficiently, taking advantage of shared calendars. During visits, use the visit engagement screen for recommendations, presentations, product discussions, samples, attendee management, and inquiry input, ensuring compliance and capturing visit information.

[Capture a Customer's Consent and Communication Preferences](#)

Update communication subscriptions and channel preferences of healthcare professionals (HCPs) directly from an account's record page. Plan and execute your outreach strategies better by seeing a HCP's consent status and communication preferences, all in one place.

[Host Virtual Meetings with Your Customers](#)

Run professional and efficient remote engagement sessions by managing participants and sharing your screen for interactive presentations. Schedule remote visits from Planner with unique room IDs and passcodes, and send invitation emails to support secure and easy access for all participants.

[Create and Submit a Medical Inquiry](#)

As a sales representative, use the straightforward and easy-to-navigate Medical Inquiries feature to create and submit accurate and comprehensive concerns and questions from healthcare professionals. Use the web or mobile interface to log initial inquiries, add relevant files and images for context, and monitor case progress while on the move. Maintain compliance and adhere to your organization's policies, regulations, and custom checks by adding mandatory signatures and attachments during inquiry submission.

Review and Respond to a Medical Inquiry

As a medical science liaison, enhance healthcare professional satisfaction and minimize delays by providing quick, accurate, and compliant responses to medical inquiries. Review the inquiry queue, self-assign appropriate inquiries, consult the answer library to formulate your responses, and vet your responses by the medical, legal, and regulatory teams. Add necessary attachments and provide multiple responses with supporting documentation. After you submit your response, the details are shared with the healthcare professional through their preferred communication channel.

Capture Medical Insights

Capture and structure your observations from field interactions with HCPs and HCOs in the Life Sciences Cloud mobile app to identify opportunities and risks promptly. Organize your field observations within Medical Insights by linking them to accounts, products, and structured tags. Use this structured feed to effectively identify trends, competitive signals, and sentiment shifts that can guide your strategy.

Collect Feedback from Your Customers

Capture insights from your interactions with healthcare professionals (HCPs) to support business decisions. Review the summary questions before your visit so you can prepare and focus on the topics most relevant to the HCP, helping you collect accurate and meaningful responses.

Customize and Send Emails

Send emails to healthcare professionals (HCPs) and healthcare organizations (HCOs) from any point in your workflow in Life Sciences Customer Engagement. Easily select an email template from a preapproved list, add relevant attachments, and use fragments to personalize the email content for your audience. Track key performance metrics such as opens and clicks so you can monitor and optimize email campaigns.

Track Email History

Track communications and get insights about the emails you sent from an account's Activity Timeline. By accessing previous communications, you can easily follow up or resend important information without needing to create the message again from scratch.

Navigate the Content Library

Use the content library to find and organize your most important presentations, or create your own. The presentations that you see are aligned to your territory, so you know that the content is relevant to you.

Custom Presentations

Create presentations tailored to specific customer needs from the content library. You create a custom presentation by combining pages from existing presentations.

Start Presentations

Start a presentation for healthcare professionals (HCPs) directly from the content library, from an account, or from a visit. Presentation metrics are saved in presentation click stream entry records. Or, preview content and practice giving presentations without tracking metrics.

Present Content to Your Customers

Present slides, PDFs, embedded videos, and dynamic content to enhance your interactions with healthcare professionals (HCPs). In the presentation player, leverage engagement tools, capture feedback and survey responses, add participants, and share presentations for more effective HCP interactions. Content tracking offers detailed insights into the content presented and the feedback

from HCPs.

Visit Your Customers

Plan and schedule visits by using the planner tool, which includes a calendar-based view of activities, various event types, and account targeting based on best contact times. Create visits, plan routes, and manage events efficiently, taking advantage of shared calendars. During visits, use the visit engagement screen for recommendations, presentations, product discussions, samples, attendee management, and inquiry input, ensuring compliance and capturing visit information.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Plan

Use the calendar and routines to help create efficient visit schedules. Visualize and prioritize key events, such as visits, meetings, and time off territory. Schedule events with the best time recommendations, avoiding conflicts and creating optimized daily plans. Sales reps can save sets of visits as routines and access colleagues' schedules for seamless collaboration.

Engage

The Visit Engagement page acts as a central hub during a visit. From here, you can view recommendations, which include presentations and messages, and select and personalize presentations from a content library. If configured by your admin, you can select See Why on a recommended message to view the rationale for the message being recommended for this visit.

Add presentations to your visit, preview content, or open the content library to find the presentation that you need. Information and warnings about product restrictions and targeted presentations for your territories help you select the right content and add the right accounts to your visit. During presentations, navigate between the presentation player and the Visit Engagement page to review and update visit details. Metrics about the slides presented and the linked products and messages are captured automatically during presentations and saved on the Visit Engagement page.

Choose specific products for discussion, and manage, disperse, and track samples that are either on-hand, delivered directly to the physician post-visit (DTP), or marketing items. In addition, you can log medical inquiries, link them to a product and topic, and upload attachments. Capture key visit information and acknowledge any mandatory compliance statements from the Visit Engagement page. For remote visits, you can send invitation emails and control the meeting, and view the room ID and passcode. Use device authentication to capture a signature at the end of a visit for compliance.

Report

After completing a visit, update and save the visit record. You can save a visit as either planned (draft) or submitted (completed). The system tracks your unsubmitted (planned) visits, and monitors your pace of activity, showing your current progress against a target. You can view visit goals, and the system measures provider activity using metrics like Activity Weight, Total Actual Activity, Total Scheduled, Weighted Actual, and Weighted Schedule.

The Activity Timeline on an account profile provides a chronological record of your interactions, such as visits, surveys, and emails. You can filter this timeline by interaction type, address, affiliation, and whether you view your interactions or all interactions. Account profiles also include a Smart Summary that highlights key changes and recent interactions to provide context for future engagements.

You can log visit-related expenses, including details such as the expense type, attendee allocation, and amount. View and edit rating data from the Ratings tab or open and complete surveys to gather feedback on topics like patient treatment, drug preferences, meeting value, and service satisfaction. Finally, you can view recordings of remote sessions in the Recordings related list on the visit record.

Capture a Customer's Consent and Communication Preferences

Update communication subscriptions and channel preferences of healthcare professionals (HCPs) directly from an account's record page. Plan and execute your outreach strategies better by seeing a HCP's consent status and communication preferences, all in one place.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To view and edit consents on the web and mobile app:

Life Sciences Field Sales Representative

OR

Life Sciences Field Medical

OR

Life Sciences Key Account Management

1. From the App Launcher, find and select **Life Sciences Commercial**.
2. Click **Accounts**.

3. From the list of accounts, select the one you want to update consent for.
4. In the Account Record page, click the **Consent** tab, and then click **Edit**.
5. Select the radio buttons to update channels and subscriptions as needed.
6. To upload any files, click **Manage Attachments**, and then click **Upload Files** to select an attachment.
7. To create a new channel value, click **Manage Channels**, and then click **+New**.
8. In the New Channel window, select the Channel Type and Direct Mail 2 options, and save your changes.
9. To update channel values, such as mailing address or email, click the  icon.
10. In the Edit Channel window, edit the channel by selecting a value from the dropdown, and save your changes.
If no channel is available, go to the Related tab and click **New** on the Contact Point object that requires the channel value. After the Contact Point record is added, refresh the page so that the new channel shows up on the Manage Channel page.
11. Acknowledge the terms and conditions and select **I Agree**.
12. If you want to send a confirmation email to your users, select **Send email consent confirmation**.
13. Save your changes.

See Also

[Consent Management](#)

Host Virtual Meetings with Your Customers

Run professional and efficient remote engagement sessions by managing participants and sharing your screen for interactive presentations. Schedule remote visits from Planner with unique room IDs and passcodes, and send invitation emails to support secure and easy access for all participants.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Just like an in-person visit, you can schedule remote visits from Planner. Specify important details such as the account, the planned start and end times, and the channel. For secure access, each remote visit gets a unique room ID and passcode. When you schedule a remote engagement session, an invitation email is sent to each attendee. These emails contain the meeting date, time, and a direct Join Meeting link, simplifying the process for the recipient.

To start a planned session, tap **Start Remote Engagement** on the visit engagement page. Or, quickly start an ad hoc session directly from an account page by using the **Start Remote Session** quick action. During the remote session, you can monitor participants, observing states such as Waiting for attendees to join or Online. You can also manage audio for all participants with options to mute or unmute all participants. The platform also supports interactive presentations, so you can show presentation pages

and use screen-sharing capabilities.

After the visit is complete, tap **End Meeting** to conclude the remote session. You can view the recording of the remote session in the Video Call Recordings related list on the visit record.

Create and Submit a Medical Inquiry

As a sales representative, use the straightforward and easy-to-navigate Medical Inquiries feature to create and submit accurate and comprehensive concerns and questions from healthcare professionals. Use the web or mobile interface to log initial inquiries, add relevant files and images for context, and monitor case progress while on the move. Maintain compliance and adhere to your organization's policies, regulations, and custom checks by adding mandatory signatures and attachments during inquiry submission.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create and submit a medical inquiry:

Life Sciences Core

AND

Life Sciences Field Sales Representative

1. From the App Launcher, go to **Inquiries**.
2. Click **New**.
The New Inquiry window appears.
3. From the Case list, click **New Case**.
4. On the New Case window, enter the case details, such as the account of the healthcare professional, origin, and description.
5. Save your changes.
The Case list shows the ID of the new case.
6. On the New Inquiry window, specify the inquiry details. Make sure that the inquiry type is set to **Medical Inquiry**.
7. Save your changes.
Medical Inquiries creates the inquiry record, and the Inquiry record page appears. The status and the account of the inquiry are set to the values in the associated case.
8. Add a question to the inquiry.
 - a. On the Questions tab, click **New**.
The New Inquiry Question window appears. The case and inquiry are auto-populated.

- b. Enter the inquiry question and additional comments.
 - c. Save your changes.
9. Add your signature to the inquiry question.
 - a. On the Inquiry record page, click **Add Signature**.
 - b. On the Review & Sign window, enter your signature and click **Accept**.
The status of the inquiry changes to Signed.
10. Add the healthcare professional's preferred response mode.
 - a. On the Inquiry record page, click **Add Response Preference**.
 - b. On the Select Response Preference window, select a contact point address, contact point email, or contact point phone.
 - c. Save your changes.
The Response Contact Point Record ID field shows the selected mode of response.
11. Add attachments and topics, if required.
12. Click **Submit**.
The status of the inquiry changes to Submitted. The inquiry is moved to the medical science liaison's queue, who then reviews and responds to the questions.

See Also

[Salesforce Help: Medical Inquiries](#)

Review and Respond to a Medical Inquiry

As a medical science liaison, enhance healthcare professional satisfaction and minimize delays by providing quick, accurate, and compliant responses to medical inquiries. Review the inquiry queue, self-assign appropriate inquiries, consult the answer library to formulate your responses, and vet your responses by the medical, legal, and regulatory teams. Add necessary attachments and provide multiple responses with supporting documentation. After you submit your response, the details are shared with the healthcare professional through their preferred communication channel.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To review and respond to a medical inquiry:

Life Sciences Core

AND

Life Sciences Field Medical

1. From the App Launcher, go to **Inquiries**.

2. Select the inquiry that you want to review.
The Inquiry record page appears.
3. On the Questions tab, review the inquiry question.
4. To assign the inquiry to yourself, click **Assign Inquiry**.
The status of the inquiry changes to Assigned.
5. Click **Respond**.
The New Answer window appears.
6. Enter your response to the inquiry and specify the response date and time.
7. Save your changes.
8. On the Inquiry record page, click **Move Status to Responded**.
The status of the inquiry changes to Responded. The sales representative can pass on the response from the medical science liaison to the healthcare professional.

See Also

[Salesforce Help: Medical Inquiries](#)

Capture Medical Insights

Capture and structure your observations from field interactions with HCPs and HCOs in the Life Sciences Cloud mobile app to identify opportunities and risks promptly. Organize your field observations within Medical Insights by linking them to accounts, products, and structured tags. Use this structured feed to effectively identify trends, competitive signals, and sentiment shifts that can guide your strategy.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud and the Life Sciences Cloud for Customer Engagement Add-On license

View Insights

View and interact with existing insights shared by other colleagues in the same role to stay informed. Find relevant insights quickly using the search bar by name or keyword. Filter and sort insights using tags to focus on what's most relevant to your context. Identify opportunities and potential risks within recent observations using Insights.



Note : When you select child tags while filtering insights, the parent tags are automatically selected. However, selecting a parent tag doesn't automatically select its child tags.

Maximize the strategic value of captured insights by keeping them up to date, validating their importance, and making them accessible across related records for engagement planning:

- Upvote an insight using the icon to indicate that it's important and relevant.
- Link insights to account and visit records to make the consolidated intelligence available on the

- relevant records where engagement planning occurs.
- Open an insight to view details, such as source type, related accounts, related products, and upvote activity.
 - Edit or delete insights that you created if details change or are no longer relevant.

Capture Insights

Create a new insight from key touch points during HCP and HCO interactions including the dedicated Insights tab, app's Home page, Accounts or Visits record page. Enrich your insights by associating it with specific products, accounts, and hierarchical tags, while supplementing details such as name, source type, and visit aids deeper analysis.

-  **Note** : To create insights from the visit page, make sure you add the account in the visit information.
-  **Note** If you capture insights from an account, the account in the insight record is auto populated. If you capture insights from a visit page, the visit in the insight record is auto populated.

See Also

[Salesforce Help: Account Search](#)

Collect Feedback from Your Customers

Capture insights from your interactions with healthcare professionals (HCPs) to support business decisions. Review the summary questions before your visit so you can prepare and focus on the topics most relevant to the HCP, helping you collect accurate and meaningful responses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To view and edit consents on the web and mobile app:

Life Sciences Field Sales Representative

OR

Life Sciences Field Medical

OR

Life Sciences Key Account Management

1. From the App Launcher, find and select **Accounts**.
2. From the list of Accounts, select the account that you want to take the survey for.
3. Click **Surveys**.
4. Review the list of assigned surveys, and select a survey and answer the questions on behalf of the healthcare professional.
5. Review your responses and submit the survey.
6. To retake the survey, click **Retake**, update your responses, and submit them again.

See Also

[Surveys](#)

Customize and Send Emails

Send emails to healthcare professionals (HCPs) and healthcare organizations (HCOs) from any point in your workflow in Life Sciences Customer Engagement. Easily select an email template from a preapproved list, add relevant attachments, and use fragments to personalize the email content for your audience. Track key performance metrics such as opens and clicks so you can monitor and optimize email campaigns.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Depending on where you start an email from, the Send Email window is filtered automatically based on your context. For example, start an email directly from the content library to share a specific presentation for HCPs to review at their convenience.

Send Emails

In the Life Sciences Cloud mobile app, you can send emails from:

- The home page
- Visit and account records
- The content library
- The presentation player
- The Next Best Action component
- The Next Best Customer component
- The Accounts lists and filters page
- Remote engagements

On desktop, you can send emails from accounts and visits, and from the Accounts lists and filters page.

Customize Emails

The Email button opens the Send Email window. The options in the Send Email window depend on your Salesforce admin's configuration. You can:

- View and filter templates: See a list of available templates, and filter them by brand, category, and language. Depending on where you are in the app, the list of templates is filtered to your context automatically.
- Select a template: Search through the list of available templates, or filter by product, topic, or language. Before you select a template, you can preview it to make sure it's the one you need.
- Add attachments: Preview PDFs and JPG attachments, and select up to 12 attachments associated with the template to include in your email. Attachments with the **required** prefix are added to the email by default, you can't remove them.
- Send presentations as links: If you share presentations as links in email content from the content library or the presentation player, you can see the presentation names and links, reorder them, and delete them in the Send Email window.
- Customize email content: Select the email subject. Add fragments to customize the text from the email template. The fragments available to you depend on your Salesforce admin's configuration.
- Preview the email: See how the email looks to recipients. To make changes, you can return to the previous pages.
- Add email recipients: Select whom to send the email to, including individual HCPs and HCOs. Add your colleagues as CC recipients. Depending on your Salesforce admin's configuration, you can enter other email addresses manually.
- Verify consent: Verify and capture consent from recipients before sending emails.
- Schedule or send the email: Send the email automatically, or schedule it to send later.

After you send the email, Salesforce validates that recipients have consented to receive emails about this topic. Emails to recipients who opt out are canceled automatically. To see sent emails and their details, go to the App Launcher, and then find and select **Life Sciences Emails**.

See Also

[Emails and Templates](#)

Track Email History

Track communications and get insights about the emails you sent from an account's Activity Timeline. By accessing previous communications, you can easily follow up or resend important information without needing to create the message again from scratch.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed

package.

After you send emails, open the account record and go to the Activity Timeline to see detailed insights, including:

- Send status
- Email attachments
- Open rates
- Click-through rates
- Response times

You can also work with sent emails, including editing email content and resending emails that failed.

See Also

[Emails and Templates](#)

Navigate the Content Library

Use the content library to find and organize your most important presentations, or create your own. The presentations that you see are aligned to your territory, so you know that the content is relevant to you.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.



Note The desktop site doesn't support some options in the content library.

In Life Sciences Customer Engagement, open the Intelligent Content tab to see the content library. From that tab, you can:

- Change your view to see all presentations, presentations you created, or your favorites.
- Search for a presentation by using keywords.
- Search for presentations by using conceptual terms and phrases while you're online in orgs with Data 360 and smart content search. The search results show you why each presentation matches your search terms.
- Filter to show recommended presentations, presentations you viewed recently, or presentations related to certain topics.
- Expand or collapse all topics to see related presentations.
- Use the arrows to expand or collapse individual topics to see those presentations.
- Use the heart icon to mark presentations as favorites for easy access or to remove presentations from your favorites.
- Create custom presentations by combining pages from other presentations.

- Preview a presentation to see its content without tracking presentation metrics.
- Use the email icon to share presentations as email attachments or as unique links in the email body. Or, use the + icon to select one or more presentations to share with accounts as email links. On the desktop site, you can send presentations as links but not as email attachments.
- Open a presentation in the presentation player and start presenting to healthcare professionals (HCPs).

See Also

[Presentations](#)

Custom Presentations

Create presentations tailored to specific customer needs from the content library. You create a custom presentation by combining pages from existing presentations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

 **Note** You can't create custom presentations on desktop.

In Life Sciences Customer Engagement, open the Intelligent Content tab. If you see the New button, you can create custom presentations.

Create a Custom Presentation

The New button opens the New Presentation window. You can:

- See available presentations and search presentations to find the ones you need.
- See your other custom presentations.
- Select individual pages to add to your presentation.
- Add all pages from a presentation to your custom presentation.
- Remove pages from your presentation.
- Reorder pages in your presentation.
- Apply the topics to filter the presentation under in the content library.

After you create a custom presentation, it's automatically distributed to your assigned territory and available for you to present. The presentations that you create appear under My Presentations in the content library. From there, you can edit or delete your presentations.

Considerations for Custom Presentations

When you create a custom presentation, keep these considerations in mind.

- The first page of the custom presentation is used as the thumbnail.
- Products or messages that are linked to the original page are also linked to the page in the custom presentation.
- If an admin updates the original page, your custom presentation reflects the updates or the new page version automatically.
- If the original page expires or becomes inactive, it's removed from the custom presentation. Your custom presentation remains active.
- Required pages are denoted with a red asterisk. If you add another page from a presentation that has a required page, the required page is also added.
- To remove a required page, you must remove all other pages from the same presentation.

See Also

[Presentations](#)

Start Presentations

Start a presentation for healthcare professionals (HCPs) directly from the content library, from an account, or from a visit. Presentation metrics are saved in presentation click stream entry records. Or, preview content and practice giving presentations without tracking metrics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

 **Note** The presentation player is fully supported only in the Life Sciences Cloud mobile app.

Start Presentations from the Content Library

In the Intelligent Content tab, search or filter to find the content that you want to present. Tap a presentation to open it and start presenting the content immediately, or preview the content without tracking engagement metrics. During the presentation, add accounts as attendees, and then tap the Visit button to create a visit directly from the presentation player.

Start Presentations from an Account

In the Accounts tab, you can open the content library from each account record to preview or start a

presentation for that account. The presentations in the content library can vary based on the account. During the presentation, add accounts as attendees, and then tap the Visit button to create a visit directly from the presentation player.

- If the account has any product restrictions, you don't see presentations associated with that product.
- The Recommended filter shows any presentations recommended for that account and territory. Changing the account or territory context updates the list of recommended presentations accordingly.
- The Next Best Message tag indicates the presentations that are most appropriate for the account.

Start Presentations from a Visit

Deliver relevant content efficiently during visits with HCPs. On the Visit Engagement page, add presentations to the visit and tap presentation thumbnails to start presentations. From the Presentations section, you can also preview recent presentations without tracking presentation metrics or open the content library to find the presentation you need. Information and warnings about product restrictions and targeted presentations for your territories help you select the right content and add the right accounts to your visit.

During or after the presentation, you can return to the Visit Engagement page to see an overview of the presented content, including the page thumbnails and the time spent on each page. You can also see the product messages presented and the HCP's reaction.

See Also

[Presentations](#)

Present Content to Your Customers

Present slides, PDFs, embedded videos, and dynamic content to enhance your interactions with healthcare professionals (HCPs). In the presentation player, leverage engagement tools, capture feedback and survey responses, add participants, and share presentations for more effective HCP interactions. Content tracking offers detailed insights into the content presented and the feedback from HCPs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

 **Note** The presentation player is fully supported only in the Life Sciences Cloud mobile app. The presentation player requires a modern internet browser with access to IndexedDB. IndexedDB is enabled by default on modern browsers but can be limited or disabled by corporate network settings.

The options that are available in the presentation player depend on your platform, your admin's configuration, and your permissions.

When you start a presentation, the player opens to the presentation's first page. In the presentation player window, you can interact with some content on the page depending on your admin's configuration. For example, play an embedded video, or use links within the slide to go to other pages.

Open the Presentation Player Menu

You access the presentation tools from the player menu. To open the presentation player menu, use the arrow icon on the top-left or bottom-left corner of the page.

If you don't see an icon, use one of these gestures to open the menu in the Life Sciences Cloud mobile app.

- Swipe down
- Swipe up
- Tap the bottom of the page
- Tap the top of the page

Navigate and Add Presentations

When you open the player menu, the Pages tab shows the thumbnails and page names for each page. Required slides are denoted with an asterisk, and you must present them to continue the presentation or to create a visit.

In the Presentations and Favorites tabs, or by using the Presentations icon, you can also select and add other presentations from the content library. Apply filters to quickly find the presentation you want. If a product is restricted for an account that's added to the presentation session, you can't see or select presentations associated with the restricted product.

Turn On and Capture Feedback

To record positive or negative HCP feedback at the page or presentation level, turn on Rate Content. Capturing reactions helps you customize content for future engagements. Depending on your admin's configuration, you can rate content in these ways.

- Use the thumbs up and thumbs down icons for each page or presentation in the player menu. You can use these icons to capture feedback without opening the page or the presentation.
- In the presentation player window, tap or click each page to capture feedback without opening the player menu. To capture positive feedback, tap or click the top of the page. To capture negative feedback, tap or click the bottom of the page. A flash on the page indicates that your feedback was captured.

Use Drawing Tools

To open the drawing tools menu to highlight or annotate content on the slides, use the paintbrush icon. From the drawing tools menu:

- Drag the drawing tools menu to another location on the screen.
- Select the laser pointer to highlight content.
- Select the pen and choose the pen color to annotate on the page.
- Undo or clear what you've drawn on the page.
- Close or open the drawing tools menu.

Drawing tools aren't available when a presentation is locked. When you use drawing tools, you can't interact with the slide content in other ways, such as clicking links or playing embedded videos.

Lock Presentations

To lock a presentation when you hand your iPad over to HCPs during a face-to-face visit and prevent them from accessing other parts of the app, use the lock icon. To unlock the presentation, select the Lock button again, and enter your PIN code or use Face ID.

Some presentations are locked by default when the presentation starts. When presentations are locked, other options in the player menu aren't available.

Pause Tracking

The pause icon stops tracking metrics for a presentation session during a training session or when you want to preview content without recording an interaction. When tracking is paused, you see a reminder each time you go to a new page or presentation.

For some presentations, session tracking is paused by default when the presentation starts. To start or resume tracking metrics, use the play icon.

For information about the captured metrics, see [Understand Presentation Metrics](#).

Add Attendees

To add HCPs as attendees so that you can capture interactions with multiple stakeholders in real time, use the account icon. The first account that you select is captured as the main account, and others are captured as participants. If a product that's associated with the presentation is restricted for an account, you can't add the account as a attendee.

Add and Update Visits

To create a visit or to return to the Visit Engagement page during a presentation, use the Visit button. On the Visit Engagement page, you can:

- Update the visit information
- View presentation metrics, including the presentations and pages viewed, and the time spent on each page
- View and update the shared products and messages and capture the HCP's sentiment
- Add discussions or next visit objectives
- Return to the presentation player by using the Return to Presentation link at the top of the page
- Save changes to the visit
- Submit the visit

You can't open visits when you preview a presentation.

Share Presentations

To send the presentation to the HCP during or after a visit, use the email icon. The presentation is added to the email as an attachment or as a link in the email content, and the accounts that are added to the presentation become email recipients. See [Customize and Send Emails](#).

Respond to Surveys

Capture responses to account-specific surveys on behalf of the HCP. Use the account icon to see attendees, and then from the account's quick actions, select Survey. If needed, close a survey and resume it later. Responses are saved automatically and associated with the relevant account.

Create Medical Inquiries

Create medical inquiries directly from the presentation player. Use the account icon to see attendees, and then from the account's quick actions, select **Inquiry**.

Capture Reactions to Product

Depending on the presentation HTML file's configuration, capture the HCP's sentiment and reaction to products messages directly on each presentation page.

Cancel Presentations

To end the presentation without capturing metrics or saving presentation data to associated visits or accounts, use the Cancel button.

End Presentations

To end a presentation, return to the visit and save it or submit it. Ending the presentation saves presentation metrics and data to associated visits or accounts.

See Also

Presentations

Manage Sample Inventory

Sample Inventory Management provides a unified view of transactions, shipments, inventory counts, and assigned batches. Stay on top of items that require urgent attention, such as pending acknowledgments of transferred samples. Track inventory operations in a timeline, create product requests, and submit your inventory counts all on one screen.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Product Disbursements Graph

Get an overview of all the different products you disbursed over a selected period of time with the Product Disbursement graph. Use predefined, time-based filters to analyze your disbursement data, and view a summary of the quantities disbursed.

You can track multiple products in the graph, and add a filter to show disbursements made over 3 months, 6 months, and 12 months.

Batch Assignments

Stay organized and up-to-date with the Batch Assignments component that helps you view the batches assigned to you, and navigate to the batch records from the dashboard.

You can do the following in the Batch Assignments component.

- View the product's expiry date.
- Check the production batch number.
- Check whether the batch assignment is active or not.
- Select Manage Assignments to see the entire list of product batch items.

Inventory Storage Addresses

Define where your sample inventory is stored with the Inventory Storage Addresses component. You can create multiple addresses for your inventory, and navigate to the record list to view details and edit and add new addresses. On the dashboard, you see only the latest inventory address.

Inventory Count Assessments

Use Inventory Count Assessments to prepare for your visits and maintaining accurate and up-to-date inventory levels.

Inventory count assessments are of the following types.

- Initial: To declare the initial quantity of inventory you receive from the sample inventory admin. When you're declaring your inventory count for the first time, you can only create an Initial type assessment. Without a record for an initial assessment, you can't submit other types of assessments.
- Ad hoc: An unplanned inventory count to prepare for an upcoming visit.
- Periodic: To comply with organizational guidelines, such as when a company mandates inventory counts at regular intervals.
- Audited: A self audit or a declaration of inventory count, or a peer audit of an inventory count assessment. To request for a peer audit, you must be assigned the Request Multiple Inventory Count Assessment Audits user perm that lets you submit a count for approval. The peer auditor is assigned the Audit Inventory Count Assessment user perm that lets the auditor verify the submission.

The inventory count data is stored in two objects. Inventory Count Assessment captures the overview of the count, such as where the assessment takes place and the assessment type. The details of the assessment, such as the product selected and the quantity recorded, are captured in Inventory Count Assessment Product Batch Item.

Inventory Operations Timeline

The Inventory Operations Timeline offers a comprehensive overview of all your transactions and product requests, arranged in descending chronological order. View details of each transaction, including the relevant sample product, quantity, date, and status, and filter the view by selecting inventory operations or product requests. Create records, and view and edit existing records from the timeline itself.

The inventory operation timeline shows the details of two types of transactions—inventory operations and product requests.

- Inventory operations represent the latest transactions that are relevant to you, including transfer in, transfer out, return, and adjustments of sample products.
- Product requests represent the product samples you request to be transferred from a warehouse.

When you submit an inventory operation, the system creates an Inventory Operation record and a related Product Transfer record. The Inventory Operation record captures the source and destination locations and the operation type, while the Product Transfer record captures the details of the quantity, product batch, and status. An Inventory Operation record can have multiple Product Transfers records associated with it.

Received Inventory Acknowledgment

Track all the products transfers that need your acknowledgment in the Received Inventory

Acknowledgments component. The component consists of two tabs for inbound samples—Shipments and Transfers.

- When another sales rep creates a Transfer Out operation to send you samples, the system creates a corresponding Transfer In record that appears in the Transfers tab in your dashboard.
- The Shipments tab represents sample products transferred from manufacturing warehouses in response to product requests that you raise.

The key difference between shipments and transfer scenarios is in the use of the source location. For shipments, the source location is either blank or set to a location with a location type that doesn't represent the user's inventory. For transfer scenarios, both the source location and the destination locations have location types that represent the user's inventory.

[Create Inventory Count Assessments](#)

Maintain inventory levels, and verify inventory availability before every sample drop from the Sample Inventory Management dashboard. Configure periodic inventory counts, and conduct self-audits.

[Discrepancy Adjustments for Inventory Counts](#)

When you record a discrepancy in the inventory count, Sample Inventory Management adjusts the system count positively or negatively to match the actual count.

[Transfer Sample Inventory Between Users and Locations](#)

Transfer samples from one user to another user, between locations, or from the central warehouse from the Sample Inventory Management dashboard.

[Return Sample Inventory to the Warehouse](#)

Send damaged, obsolete, or unwanted inventory back to the warehouse from the Sample Inventory Management dashboard.

[Manually Adjust a Sample Inventory Count Discrepancy](#)

To rectify an inventory count error, you can manually adjust the count in the Sample Inventory Management dashboard.

[Submit a Request to Replenish Sample Inventory](#)

When inventory runs low and you require replenishment, you can request samples in the Sample Inventory Management dashboard.

[Acknowledge Received Samples from Transfers and Shipments](#)

In the Sample Inventory Management dashboard, confirm the receipt of samples transferred to you from a sales rep or when your inventory is replenished. After you acknowledge receipt, your sample inventory count is updated.

[Return Samples or Mark Transfers As Duplicate](#)

Keep your sample inventory levels up-to-date by returning transfers that you don't need or by marking transfers as duplicate. The Return to Sender option creates a corresponding Transfer In inventory operation record in the sender's dashboard.

[Fix Unresolved Product Disbursements](#)

Sample Inventory Management helps you to go forward with sample drops even when you have insufficient inventory on record, but sufficient inventory at hand.

See Also

Sample Inventory Management

Create Inventory Count Assessments

Maintain inventory levels, and verify inventory availability before every sample drop from the Sample Inventory Management dashboard. Configure periodic inventory counts, and conduct self-audits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create inventory count assessments:

Life Sciences Field Sales Representative permission set

AND

Health Cloud Starter permission set

To request an inventory audit:

Request audits of multiple Inventory Count Assessment records user permission

To audit an inventory count:

Perform audits of Inventory Count Assessment records user permission

1. From the App Launcher, find and select **Sample Inventory Management**.
2. Under Inventory Count Assessment, click  and select the type of inventory count assessment.
 - Initial—When you create a count assessment for the first time, the Initial assessment type is selected by default. In an Initial assessment type, the opening balance is always zero.
 - Ad hoc—An unplanned inventory count to prepare for an upcoming visit.
 - Periodic—Conducts inventory counts at regular intervals.
 - Audited—Performs a self-audit of the inventory count.
3. Under New Assessment, enter these details.
 - a. Select the product that you want to submit your assessment for. You can create an assessment for multiple products at the same time.
 - b. Enter the stock count.
If there's a discrepancy between the system count and the actual count, select a reason for the discrepancy.
For an Ad Hoc assessment, select the purpose for performing the assessment.
For an Audited assessment, specify the auditor's ID.
 - c. Click **Submit**.

See Also

- [Customize Actions for Inventory Processes](#)
- [Select the Fields to Use for Sample Inventory Management](#)

Discrepancy Adjustments for Inventory Counts

When you record a discrepancy in the inventory count, Sample Inventory Management adjusts the system count positively or negatively to match the actual count.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

For example, the admin has allocated 100 units of samples to you—the Total System Count—but when you count the actual disbursement, you have 105 units. To adjust for this discrepancy, Sample Inventory Management automatically records a product transfer of 5 units to the destination location to increase the total system count value.

In the opposite scenario, the admin has allocated 105 units of samples, but you have only 103 units. In this case, Sample Inventory Management transfers 2 units from the source location to reduce the value of the system count.

In the Sample Inventory Management Dashboard, the adjustment creates two updates: an assessment count added to the Inventory Count Assessment and an adjustment operation record added to the Inventory Timeline.

Transfer Sample Inventory Between Users and Locations

Transfer samples from one user to another user, between locations, or from the central warehouse from the Sample Inventory Management dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To transfer inventory:

Life Sciences Field Sales Representative permission set

AND

Health Cloud Starter permission set

1. From the App Launcher, find and select **Sample Inventory Management**.
2. Under Inventory Timeline, click  and select **New Operation**.
3. Select whether you want to transfer inventory in or out, and then click **Next**.
4. If you're transferring inventory in, enter these details.
 - a. Enter the inventory's source location and the destination address.
 - b. Enter when you want to receive the transfer.
 - c. Enter the product and quantity.
 - d. Optionally, add the reason for the transfer.
 - e. Save your changes.
5. If you're transferring inventory out, enter these details.
 - a. Select the inventory location of the user who you want to transfer the samples to.
 - b. For Ship to Name, enter the recipient's name.
 - c. Enter the product and quantity.
 - d. Optionally, add the reason for the transfer.
 - e. Save your changes.

When you receive the requested samples, confirm the receipt. After you acknowledge receipt, your inventory count is automatically updated. See [Acknowledge Received Samples from Transfers and Shipments..](#)

See Also

[Customize Actions for Inventory Processes](#)

[Select the Fields to Use for Sample Inventory Management](#)

Return Sample Inventory to the Warehouse

Send damaged, obsolete, or unwanted inventory back to the warehouse from the Sample Inventory Management dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To return sample inventory:

Life Sciences Field Sales Representative permission set

AND

Health Cloud Starter permission set

1. From the App Launcher, find and select **Sample Inventory Management**.
2. Under Inventory Timeline, click  and select **New Operation**.
3. Select **Return**, and click **Next**.
4. For Destination Location, select the warehouse that you want to return the samples to.
5. Select a shipping provider, and enter the name of the recipient.
6. Select the product, and enter the quantity to return.
7. Optionally, add the reason for the return.
8. Save your changes.

See Also

[Customize Actions for Inventory Processes](#)

[Select the Fields to Use for Sample Inventory Management](#)

Manually Adjust a Sample Inventory Count Discrepancy

To rectify an inventory count error, you can manually adjust the count in the Sample Inventory Management dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To adjust the inventory count:

Life Sciences Field Sales Representative permission set

AND

Health Cloud Starter permission set

There are two scenarios where you submit adjustments. The first scenario is an automatic adjustment

made by the system in response to an inventory count assessment discrepancy. When there's a difference between the system count and the actual count, the system adjusts the shortfall or surplus and ensures that your inventory count remains up-to-date and accurate at all times. The second type of adjustment is a manual adjustment that sales reps must do to rectify disbursement errors made during visits.

To manually adjust for an error during disbursement, create an Adjustment type inventory operation.

1. From the App Launcher, find and select **Sample Inventory Management**.
2. Under Inventory Timeline, click  and select **New Operation**.
3. Select **Adjustment**, and click **Next**.
4. Select the product, and enter the quantity.
5. Optionally, add the reason for the adjustment.
6. Save your changes.

See Also

[Customize Actions for Inventory Processes](#)

[Select the Fields to Use for Sample Inventory Management](#)

Submit a Request to Replenish Sample Inventory

When inventory runs low and you require replenishment, you can request samples in the Sample Inventory Management dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To create a product request:

Life Sciences Field Sales Representative permission set

AND

Health Cloud Starter permission set

1. From the App Launcher, find and select **Sample Inventory Management**.
2. Under Inventory Operations Timeline, click  and select **New Request**.
3. For the product type, select **Sample**, and click **Next**.
4. Select the status of the product request.
5. Select the product that you want to replenish, and enter the quantity.

6. Save your changes.

When you receive the requested samples, confirm the receipt. After you acknowledge receipt, your inventory count is automatically updated. See [Acknowledge Received Samples from Transfers and Shipments](#).

See Also

[Customize Actions for Inventory Processes](#)

[Select the Fields to Use for Sample Inventory Management](#)

Acknowledge Received Samples from Transfers and Shipments

In the Sample Inventory Management dashboard, confirm the receipt of samples transferred to you from a sales rep or when your inventory is replenished. After you acknowledge receipt, your sample inventory count is updated.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To acknowledge received samples:

Life Sciences Field Sales Representative permission set

AND

Health Cloud Starter permission set

1. From the App Launcher, find and select **Sample Inventory Management**.
2. Under Received Inventory Acknowledgments, click to receive the inventory.
3. Check the details of the transfer.
4. Optionally, add a comment.
5. Save your changes.

Return Samples or Mark Transfers As Duplicate

Keep your sample inventory levels up-to-date by returning transfers that you don't need or by marking transfers as duplicate. The Return to Sender option creates a corresponding Transfer In inventory operation record in the sender's dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To return samples or mark transfers as Duplicate:

Life Sciences Field Sales Representative permission set

AND

Health Cloud Starter permission set

1. From the App Launcher, find and select **Sample Inventory Management**.
2. In the Inventory Operations Timeline, next to the transfer that you want to return or mark as duplicate, click .
3. To return a transfer, click **Return to Sender**, and enter these details.
 - a. Select a shipping provider.
 - b. Enter the shipment's tracking number.
 - c. Enter the reason for the return.
 - d. Enter the destination address.
 - e. Click **Return**.
4. To remove a duplicate transfer, click **Mark as Duplicate**.

Fix Unresolved Product Disbursements

Sample Inventory Management helps you to go forward with sample drops even when you have insufficient inventory on record, but sufficient inventory at hand.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

USER PERMISSIONS NEEDED

To resolve disbursements:

Life Sciences Field Sales Representative permission

USER PERMISSIONS NEEDED

set

AND

Health Cloud Starter permission set

-  **Note** Make sure your admin configures the custom action button to resolve disbursements.

1. From the App Launcher, find and select **Product Disbursement**, and select the record that requires resolution.
2. Select the custom action button your admin configured to resolve disbursements.

See Also

[Add a Quick Action Button for Resolving Disbursements](#)

Leverage Customer Engagement Best Practices

Leveraging extensive past experience in CRM, Medtech, and Life Sciences implementations, Salesforce has compiled best practices from partners, clients, and professional services. These insights, gathered over eight years from common mistakes and configuration issues, aim to guide future implementations for clients, partners, and professional services.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

[Project Execution Best Practices for Life Sciences Cloud](#)

Review project implementation best practices gathered by Salesforce from partners, clients, and professional services. Adopt these insights for your own implementation.

[Salesforce Platform Best Practices for Life Sciences Cloud](#)

Review Salesforce Platform best practices gathered by Salesforce from partners, clients, and professional services. Adopt these insights for your own implementation.

[Schema Management Best Practices for Life Sciences Cloud](#)

Review schema management best practices gathered by Salesforce from partners, clients, and professional services. Adopt these insights for your own implementation.

[Profile and Page Layout Best Practices for Life Sciences Cloud](#)

Life Sciences Cloud provides standard security profiles such as the System Administrator and the

Standard User profiles as a template to customize security profiles for your organization.

Trigger Handler Best Practices during Data Migration

Trigger handlers are important to maintain data sanity. However, keeping all trigger handlers enabled during data migration can lead to slow performance or hit governor limits. Make sure to review the trigger handler documentation and understand the purpose of each trigger handler.

Project Execution Best Practices for Life Sciences Cloud

Review project implementation best practices gathered by Salesforce from partners, clients, and professional services. Adopt these insights for your own implementation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Planning

- Agree project roles and responsibilities at the beginning. Determine the following:
 - How to conduct the implementation.
 - Identify procedures for escalating project risks/problems.
 - Decide on communication methods and frequency.
- Establish the function of the Architect: Governs changes to the data model and coordinates various logic pieces such as triggers, scheduled jobs, and technical design.
- Discuss documentation processes and requirements upfront.
 - Request compliance documentation at the launch of a project to ensure you meet local industry regulations and standards. Some companies require heavy amounts of documentation to meet compliance regulations.
 - Decide on your object naming and documentation standards before you start to implement any features.
- Consider the Life Sciences Cloud release schedule and holidays when you plan the timeline for an implementation project.
- Avoid development customizations as much as possible. This adds risks, extends timelines, and adds maintenance costs to the project.
 - Design changes can impact requirements, and requirement changes can impact the time required for technical resources.

Testing

- To avoid surprises when you go live, consider validating all tests upon every push of code to a dev branch.

- Plan ahead to conduct integration tests well before the client UAT. Performing integration testing too close to UAT doesn't allow sufficient time to resolve any challenges that you encounter. Integration tests involve the Life Sciences Cloud mobile app and the Life Sciences Cloud org on the web. Increase the API limits during Regression and UAT to avoid governor limit issues during testing.
- Conduct performance tests from within the customer network on a user's device from the start. This provides the best real experience for the customer to test from.
- Consider device consistency during the unit, regression, and UAT testing phases of an implementation. For example, the team cannot test with a Mac and Chrome during regression testing, and then test with Windows and Chrome for UAT. Similarly, the team cannot do regression testing with one version of iPad and then UAT with a different version of iPad. The behavior and test criteria differs in these scenarios. Therefore, the best practice is to keep device testing consistent.

Support

- Bandwidth, outdated browser versions, and network latency can degrade user experience.
- Raise a case with the Salesforce support team as needed.

Salesforce Platform Best Practices for Life Sciences Cloud

Review Salesforce Platform best practices gathered by Salesforce from partners, clients, and professional services. Adopt these insights for your own implementation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

API Best Practices

- No apex triggers or workflows on firing of APEX REST Reads/Inserts.
- Operation choice (Insert (fastest) -> Update -> Upsert).
- Record sizes matter (3 MB limit).
- Optimize sharing (Use less sharing models).

To learn more, see [API Best Practices and Use Cases](#).

Indexes

To make queries faster, ensure there are proper indexes and external IDs for fields that are in the 'where' clause.

Indexes must be below these thresholds to be useful:

- Custom Indexes: Lower of (10% of 1M + 5% over 1M) or 333,333.
- Standard Indexes: Lower of (30% of 1M + 15% over 1M) or 1M.

Indexes modified by “AND” and “OR”:

- AND – Below 20% of total records or 666K for custom index.
- OR – Below 10% of total records or 333K in summation of all indexes.

Predicates that won’t use indexes:

- Not equal to (i.e. “!=“).
- NOT (i.e. NOT IN).

To learn more, see [Indexes](#).

Page Layout Section Header Translations

You cannot custom translate standard section headers. The Salesforce Platform automatically translates them based on the user’s language settings. They are not configurable via the Translation Workbench. If you want custom translation, hide the standard section header and create a new custom section header. You can translate this custom section header using Translation Workbench.

Avoid using standard sections in the layouts. Always use custom sections.

Reports

- Use report filters
- Pre-aggregate data
- De-normalize data
- Use a data warehouse

To learn more, see [Reporting](#).

Sharing Best Practices

Avoid over protection. Follow a pattern of least-privilege. Don’t nest groups deeply.

To learn more, see [Best Practices for Optimizing Sharing Performance](#).

Skinny Tables

Salesforce can create skinny tables to contain frequently used fields and to avoid joins. This can improve the performance of certain read-only operations. Skinny tables are kept in sync with their source tables when the source tables are modified. If you want to use skinny tables, contact Salesforce Customer

Support.

Advantages of skinny tables include:

- Better Cache Utilization
- Reduced Joins
- Invisible to End users
- Supported in reports, list views and SOQL queries

To learn more, see [Skinny Tables](#).

Web Browser Considerations

Use separate browser contexts when you access different Salesforce environments such as sandboxes or multiple production instances. Otherwise, cookies and session info can get mixed up and cause problems such as corruption issues with the organization and Life Sciences Cloud functionality. Examples of separate browser contexts include using different Chrome users/people, Firefox profiles, or browser extensions that create separate contexts.

All incognito/private browser windows share a common set of cookies. You can use an incognito/private window to separate from an org logged into a non-incognito/private window. However, it may cross cookies when using multiple incognito/private windows for multiple org logins.

Schema Management Best Practices for Life Sciences Cloud

Review schema management best practices gathered by Salesforce from partners, clients, and professional services. Adopt these insights for your own implementation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Field Types

There are two types of fields on an object:

- Salesforce standard fields are delivered by Salesforce.com
- Customer custom fields are created for the customer implementation.

API Naming Convention

Always implement the API naming convention agreed upon at the start of the project. The convention depends on the strategy chosen by the system architect. Keep it universal by adding the organization's prefix or suffix to differentiate between Salesforce custom fields and customer-built custom fields.

Examples:

- OneEducation_<client name>__c
- License_<client name>__c

In the description section, identify the:

- Group that requested the field
- ISO codes of the countries
- Business Units
- Integrations using the field

Organize Fields

Organize your fields by prefixing any unused custom field labels with "dep_[fieldname]" (Dep for 'Deprecated')

Examples:

- dep_fax
- dep_website

Salesforce sorts the fields by label name. Prefixing them moves them to the bottom of the list and out of your way. This makes it easier for you to manage the environment.

Field Limitations

Understand the field limitations per object:

- The number of custom fields allowed per object varies according to your Salesforce edition. The Unlimited edition allows a maximum of 800 custom fields. To learn more, see [Custom Fields Allowed Per Object](#).
- You can designate up to 25 External ID fields per object. To learn more, see [Maximum number of External Ids per object or entity](#).
- 25 roll-up summary fields are allowed. To learn more, see [Increase the maximum limit of a roll-up summary field](#).
- Two master-detail and 40 relationship fields (master-detail plus lookup) are allowed per object. To learn more, see [Increase the maximum relationships allowed per object](#).

Profile and Page Layout Best Practices for Life Sciences Cloud

Life Sciences Cloud provides standard security profiles such as the System Administrator and the Standard User profiles as a template to customize security profiles for your organization.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Here are the recommended security best practices for profiles and page layouts.

- Use Field Level Security rather than page layouts to hide fields from users. Field Level Security is a safer method for restricting accessibility to data due to compliance regulations. This also helps minimize the number of page layouts. Page layouts prevent a user from seeing fields but does not prevent them from seeing fields in Salesforce reports. Only field level security completely prevents access to fields.
- Always use the least possible number of profiles. Minimizing the number of profiles reduces the amount of security profile field level security settings you must update when you add a new field to an object. Rename unused profiles to include ‘dep_’ to move them out of your way.
- Always use the least possible number of page layouts. This decreases the likelihood of inconsistencies for different record types. Consider using Dynamic Forms instead for ease of maintenance.
- If you consider adding Security Exclusion to bypass enforcement of user access permissions in triggers, you must evaluate this decision very carefully before implementation. While the Salesforce Platform allows you to bypass user permissions, Salesforce doesn’t recommend it because CRM is a point in time system, and audits of the system can sometimes lead to inaccurate assessments.

Trigger Handler Best Practices during Data Migration

Trigger handlers are important to maintain data sanity. However, keeping all trigger handlers enabled during data migration can lead to slow performance or hit governor limits. Make sure to review the trigger handler documentation and understand the purpose of each trigger handler.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud, Life Sciences Cloud for Customer Engagement Add-on license, and the Life Sciences Customer Engagement managed package.

Bypass Life Sciences Cloud Trigger Handlers

There are two ways to bypass Life Sciences Cloud trigger handlers during data migration.

- Create a user with the Salesforce Integration license type. In the Permission Set License Assignments for the user, click Edit Assignments, and then grant the Salesforce API Integration permission set license, which includes the Skip Life Sciences Trigger Handlers permission to bypass all trigger handlers. This only bypasses the trigger handlers for integration users. For all other users, these handlers continue to run. This can significantly increase the data load performance. However, this places the responsibility on customers to ensure data sanity during data migration. This approach is most suitable for environments that are live with active users.
- Disable handlers selectively from the Admin Console in the Life Sciences Commercial app. This disables the trigger handler for all users in the system. This approach is most suitable for environments that aren't yet live with active users.

Here are the trigger handlers that have equivalent jobs that you can run after data loads. You can disable these handlers from the Admin Console during data loads.

Object	Handler Name	Description	Job
Account	NewAccountSampleLimitInitHandlerfor HCO	Disable this trigger handler during data loads. Run the job post data loads and Sample Limits setup is completed.	Admin Console -> Sample Limits Tile -> Sample Limit Jobs -> Assign Sample Limit Templates to Accounts
Account	NewAccountSampleLimitInitHandler	Disable this trigger handler during data loads. Run the job post data loads and Sample Limits setup is completed.	Admin Console -> Sample Limits Tile -> Sample Limit Jobs -> Assign Sample Limit Templates to Accounts
ContactPointEmail	ContactPointEmailPopulateHandler	Updates healthcare	Admin Console -->

Object	Handler Name	Description	Job
		<p>provider records to maintain an accurate list of associated email addresses whenever contact point email records are created, modified, removed, or restored. This ensures the EmailIds field on the healthcare provider record reflects the current related email addresses and avoids unnecessary processing.</p>	Search Before Create --> General Settings --> Search Before Create Jobs
ContactPointPhone	ContactPointPhoneHandler	Updates healthcare provider records to maintain an accurate list of associated phone numbers whenever contact point phone records are created, modified, removed, or restored. This ensures the PhoneNumbers field on the healthcare provider record reflects the current related telephone numbers and	Admin Console --> Search Before Create --> General Settings --> Search Before Create Jobs

Object	Handler Name	Description	Job
		prevents redundant processing.	
ContactPointSocial	ContactPointSocialPopulateHandler	Updates healthcare provider records to maintain an accurate list of associated social media handles whenever contact point social records are created, modified, removed, or restored. This ensures the SocialIdentifiers field on the healthcare provider record reflects the current related social handles and prevents unnecessary execution.	Admin Console --> Search Before Create --> General Settings --> Search Before Create Jobs
HealthcareProvider	HealthcareProviderHandler	Manages updates to healthcare provider records after creation, restoration, or modification. This trigger fetches and updates related email addresses, phone numbers, social identifiers, specialties, and NPI from their respective related records, while also	Admin Console --> Search Before Create --> General Settings --> Search Before Create Jobs

Object	Handler Name	Description	Job
		preventing self-calling updates.	
HealthcareProviderNpi	HealthcareProviderNpiHandler	Updates healthcare provider records to maintain the correct National Provider Identifier (NPI) whenever healthcare provider NPI records are created, modified, removed, or restored. This ensures the NationalProviderId entifier field on the healthcare provider record reflects the current associated NPI and avoids unnecessary execution.	Admin Console --> Search Before Create --> General Settings --> Search Before Create Jobs
HealthcareProviderSpecialty	HealthcareProviderSpecialtyHandler	Updates healthcare provider records to maintain an accurate list of associated specialty types whenever healthcare provider specialty records are created, modified, removed, or restored. This ensures the Specialities field on the healthcare	Admin Console --> Search Before Create --> General Settings --> Search Before Create Jobs

Object	Handler Name	Description	Job
		provider record reflects the current related specialties and avoids redundant processing.	
ProviderVisitChangedEvent	VisitChangedEventShareHandler	Creates Visit shares with the users shared with Accounts.	Admin Console -> Territories -> Visit Share Management Jobs
ProviderVisitChangedEvent	PVChangedEventUpdateAccountTerrInfo	Processes provider visit changed events and updates provider visit related fields on Provider Account Territory Information records.	Admin Console -> Visit Administration-> Visit Jobs -> Provider Account Territory Information Job

Consider disabling these trigger handlers for historical data load purpose.

Object	Handler Name	Description
ALL	StagePathPermissionsHandler	Enforces permissions defined in Life Sciences workflows. Validates whether users can create, edit, or delete records or work with related files at the current stage in the workflow path. Shows an error message if users don't have permission to perform actions at that workflow stage.
ContentDocument	ContentDocumentLockHandler	Prevents delete operation to Documents linked to Submitted Visits or related

Object	Handler Name	Description
		entities.
ContentDocumentLink	ContentDocumentLinkLockHandler	Prevents insert/delete operation to Document Links for Submitted Visits or related entities.
Expense	ExpenseLockHandler	Prevents insert/update/delete operation on Expense if it is locked.
ExpenseParticipant	ExpenseParticipantLockHandler	Prevents insert/update/delete operation on ExpenseParticipant/Allocations if it is locked.
LifeScienceEmail	EmailQueueImmediateHandler	Handles emails that are sent immediately instead of from a batch job.
ProductDisbursement	ProductDisbursement2d0Handler	Creates a corresponding Inventory Operation record when a disbursement is made.
ProductDisbursement	ProductDisbursementSubmitLockHandler	Prevents modifications to Product Disbursement records when the related Visit record is in a locked state, that is, when the visit is signed or submitted.
ProviderVisit	PVUpdateChildFieldsHandler	Maintains data consistency for group visits by syncing child provider visit records with the parent provider visit records. Automatically updates key fields (Planned Visit Start Time, Planned Visit End Time, and Channel) when the parent visit is modified.
ProviderVisit	RemoteSessionInvitationPVHandler	Manages remote session invitations by creating video calls, email notifications, and session keys for provider visit records.
ProviderVisit	PVLockHandler	Prevents editing provider visit

Object	Handler Name	Description
		data based on the visit's status and signature state to maintain data integrity.
ProviderVisitDtlProductMsg	ProviderVisitDtlProductMsgLockHandler	Locks the ProviderVisitDtlProductMsg record when Visit is Submitted or Signed.
ProviderVisitMarketingItem	ProviderVisitMarketingItemLockHandler	Locks the ProviderVisitMarketingItem record when Visit is Submitted or Signed.
ProviderVisitProdDetailing	ProviderVisitProdDtlLockHandler	Locks the ProviderVisitProdDetailing record when Visit is Submitted or Signed.
ProviderVisitProdDiscussion	ProviderVisitProdDiscussionLockHandler	Locks the ProviderVisitProdDiscussion record when Visit is Submitted or Signed.
ProviderVisitRqstSample	ProviderVisitRqstSampleLockHandler	Locks the ProviderVisitRqstSample record when Visit is Submitted or Signed.
TerritoryUserDowntime	TUDBHValidationHandler	Prevents the creation of time off territory records with start and end times outside of the org's business hours.
TerritoryUserDowntime	TUDVisitValidationHandler	Prevents the creation of time off territory during a visit.
TerritoryUserDowntime	TUDHolidayValidationHandler	Prevents the creation of time off territory records on holidays.
TerritoryUserDowntime	TUDOOverlapHandler	Prevents the creation of overlapping time off territory records.
TerritoryUserDowntime	TUDEventValidationHandler	Prevents the creation of time off territory during a general event.

Object	Handler Name	Description
Visit	VisitLockHandler	Prevents editing visit data based on the status and signature state to maintain data integrity.
Visit	VisitTimeOffValidationHandler	Prevents scheduling a visit that conflicts with a time-off territory to support scheduling efficiency and accurate visit reporting.
Visit	VisitLifeScienceAccountListLinkHandler	Clears the Life Science Account List field on the provider visit record if the Planned Start Time is changed on a visit created by applying a routine.
Visit	VisitHolidayValidationHandler	Prevents scheduling a visit on holidays or outside of business hours to maintain compliance with company policies.
Visit	VisitPopulateEndTimeHandler	Calculates and sets the visit's Planned End Time by adding the default duration defined in the "Set blank date/time in Planned Start Time" Visit Administration setting in the Admin Console.
Visit	FutureVisitLimitValidationHandler	Prevents scheduling visits beyond the limit specified in the "Future Visit Limit in Days" setting in Visit Administration in the Admin Console.
Visit	VisitUpdateChildFieldsHandler	Maintains data consistency in group visits by synchronizing child visit records with their parent visits. Automatically updates key fields (Planned Visit Start Time, Planned Visit End Time, and Channel) when the parent visit is modified.
Visit	VisitConflictValidationHandler	Prevents scheduling another

Object	Handler Name	Description
		visit for the same account on the same day and by the same user to avoid double-booking.
Visit	VisitDelayReasonHandler	Clears the previously entered reason for delay if a user changes the visit date and time and the date no longer exceeds the submission delay threshold.
Visit	VisitCascadeDeleteHandler	Deletes attendee visits automatically when the parent group visit is deleted, maintaining data integrity.
Visit	VisitSurveyInviteCascadeDeleteHandler	Deletes survey invitations linked to a visit when a visit is deleted, and prevents deleting them if the visit is submitted to maintain data integrity.
Visit	RemoteSessionInvitationVisitHandler	Manages remote session invitations by creating video calls, email notifications, and session keys for visit records.
Visit	VisitMyBestTimeValidationHandler	Prevents scheduling visits outside of best times defined for the account address and user's territory, improving scheduling efficiency and aligning with account availability.
Visitor	VisitorLockHandler	Prevents insert/update/delete operation on Visitor if it is locked.

Life Sciences Cloud for Customer Engagement Patch Releases

We release patches periodically. The patch updates in this section provide information on each patch release for the Life Sciences Cloud for Customer Engagement package and Life Sciences Cloud mobile app.

Life Sciences Cloud for Customer Engagement Package Patch Releases

The patch updates in this section provide information on patch releases for the Life Sciences Cloud for Customer Engagement package.

Life Sciences Cloud Mobile App Patch Releases

The patch updates in this section provide information on patch releases for the Life Sciences Cloud mobile app.

Life Sciences Cloud for Customer Engagement Package Patch Releases

The patch updates in this section provide information on patch releases for the Life Sciences Cloud for Customer Engagement package.

Patch Releases Spring '26

We release patches periodically. Check back here for information on each Spring '26 patch release for the Life Sciences Cloud for Customer Engagement package.

Patch Releases Winter '26

We release patches periodically. Check back here for information on each Winter '26 patch release for the Life Sciences Cloud for Customer Engagement package.

Patch Releases Spring '26

We release patches periodically. Check back here for information on each Spring '26 patch release for the Life Sciences Cloud for Customer Engagement package.

Patch 260.5.0.0

This patch contains fixes to ensure that the Life Sciences Cloud for Customer Engagement features work correctly.

Feature	Issue	Description
Inventory Management	While editing an Inventory Operation record of type Transfer In and Transfer Out, the destination address is not visible.	The issue has been fixed and the destination address appears as expected.
Affiliations	The Create Account button was incorrectly disabled after a validation error, forcing users to restart the account creation process. In the account creation screen,	The Create Account button now remains active after a failed attempt. This allows users to correct their information and retry without starting over. Updated the dropdowns to

Feature	Issue	Description
	the Role and Department dropdowns were incorrectly displaying internal API names instead of labels.	ensure the correct display labels are shown for all affiliations.
Account Search	Advanced search wasn't working when dependent picklists with a multi-level dependency were configured in the Advanced Search field set.	Advanced search now works as intended after adding dependent picklists to the Advanced Search field set.
Sales Data	Sales charts would not display all products when their measure values were identical. When a user hovered over the grid, only one product was visible.	All product names are now visible in the sales data grid, even when their values are the same.
Territory Management	A NullPointerException occurred when searching for accounts outside the user's territory. This was triggered when a FieldSetMapping configuration record did not have a corresponding LifeSciConfigAssignment record.	Updated the underlying logic to include a null check, preventing the exception.
Visit Management	The list of values in a lookup field on the Visit Engagement page doesn't scroll, preventing users from selecting the intended values.	The issue is resolved and long lists of values in lookup fields now scroll.
	Detailing products with Parent Brand Product with "Market" type were not displayed on the Visit Engagement page sidebar menu.	Parent Brand Product's Type filtering is removed so that detailing products are displayed regardless of the Parent Brand Product's Type.
Remote Engagement	The Remote Engagement with Microsoft Teams pilot feature disclaimer is missing from the Remote Engagement pages for Microsoft Teams in the Admin Console.	Added a disclaimer for the Remote Engagement with Microsoft Teams pilot feature to the correct pages in the Admin Console.
Intelligent Content	Emailed links to large	Fixed the issue that caused large

Feature	Issue	Description
	presentations don't open presentations correctly.	presentations not to load correctly.

Patch 260.3.0

This patch contains fixes to ensure that the Life Sciences Cloud for Customer Engagement features work correctly.

Feature	Issue	Description
Surveys	Users encounter an error when running the SurveyInvitationShareBatchJob.	The issue is resolved, and SurveyInvitationShareBatchJob is now running successfully.
Visit Management	The remaining quantities for Territory Product Quantity Allocation and Product Batch Item records were not updated for samples that do not require a signature from attendee visits when a group visit is submitted.	The issue is fixed, and the remaining quantity of Territory Product Quantity Allocation and Product Batch Item records updates correctly.
MS Teams	Remote visits with multiple attendees create duplicate Microsoft Teams calendar events and outbound emails for every participant.	Remote visits with Microsoft Teams now generate a single calendar event and email.
Inventory Management	When the user tries to edit an Inventory Operation record of type Return, the system throws an error.	The issue has been fixed, and users can edit Inventory Operation records of type Return.
Intelligent Content	Some emails fail to send when users send presentations as links to multiple accounts.	Emails are now sent as expected.
Remote Engagement	When Twilio is the service provider for remote sessions, an error occurs when users change an in-person visit to a remote visit.	Fixed the issue that caused users to see an error.
	When Twilio is the service provider for remote sessions,	Now, only the cancellation email is sent.

Feature	Issue	Description
	updating the visit date and changing the visit channel from remote to in-person sends two separate emails.	

Patch 260.2.0

This patch contains fixes to ensure that the Life Sciences Cloud for Customer Engagement features work correctly.

Feature	Issue	Description
Account Search	Users encountered a Page Not Found error when using Advanced Search to search accounts.	Resolved an error in Advanced Search to ensure account search results load correctly.
Affiliations	The Customer Search functionality incorrectly determines the affiliated HCPs.	Fixed the query logic to determine the affiliated HCPs correctly.
Email	When sending emails from the desktop site, users can't select email templates in the Send Email window.	Users can now select email templates to send emails from the desktop site.
Home Page	Some users see duplicates of general events in the Up Next agenda.	Users no longer see duplicates of general events in the Up Next agenda.
Intelligent Content	Users can add accounts as attendees for presentations even when the presentation's targeting context is set to Restrict.	When a presentation's targeting context is set to Restrict, users can add only the accounts that the presentation is targeted for as attendees.
Medical Insights	Users are unable to save new Subject Assignment records due to a system "permission" error that blocks the save workflow despite the user having expected access.	Users can now create new subject assignment records without any errors.
Surveys	The SurveyInvitationShareBatchJob	Updated the batch job logic to correctly fetch and populate the

Feature	Issue	Description
	is failing with a "Territory name cannot be null" error, which prevents the survey batch from running successfully.	territory name from the source record before processing. Users can now run the batch job successfully.
Visit Management	No confirmation dialog was shown when deleting a product from Visit Information.	Deleting a product from Visit Information now displays a confirmation dialog.
	After signing or submitting a Visit with a sample, the Disbursed Date field on the Product Disbursement record was empty.	The Disbursed Date is now updated correctly on the Product Disbursement record.
	When trying to submit a visit with samples, users encounter an error if there is an attendee visit in the USA794 org.	Fixed the issue, and users can now submit visits without an error.

Patch Releases Winter `26

We release patches periodically. Check back here for information on each Winter `26 patch release for the Life Sciences Cloud for Customer Engagement package.

Patch 258.15.0.0

This patch contains fixes to ensure that the Life Sciences Cloud for Customer Engagement features work correctly.

Feature	Issue	Description
Visit Management	When a Direct to Practitioner sample quantity exceeds the Max per Visit quantity, the validation was not triggered when Document ID is captured.	A validation error or warning message is correctly displayed whenever the Direct to Practitioner sample quantity exceeds the defined Max per Visit limit.
	Picklists were showing values that are not available for the selected Record Type.	Picklists now correctly display only the values assigned to the Record Type.
	Provider Visit Product Discussion records weren't created when saving or submitting a visit if	Provider Visit Product Discussion records are now created as expected.

Feature	Issue	Description
	different discussions are configured by record type.	
Account Search	In the SBC Create Account flow, newly created Provider Affiliation records didn't have the IsActive flag set to true.	The IsActive flag is now automatically set to true for Provider Affiliation records created during the flow.
	In the Account Picker component, a query limit error occurred when attempting to fetch only accounts associated with an HCP.	The query logic has been optimized to prevent limit errors when fetching associated accounts.
	An error occurred when a boolean field was configured as a Provider Account Territory Info searchable field in the Account Search Preference settings.	Account search preferences now correctly handle all data types, allowing boolean fields to be used as searchable fields without error.
Object Metadata Cache Configuration	The validation status of the Object Metadata Cache Configuration records isn't accurately shown.	The validation status is now correctly reflecting.
Calendar	Available visits weren't shown in Calendar even when filters are set to show all visits.	The display logic is corrected to ensure that all available visits are now properly shown according to the applied filter settings.
	An unknown error occurs when previewing a newly created visit in Calendar.	Visit previews now load as expected after creation.
Ratings	PrvdAccountUserGroupInfo entity were not visible in the Ratings layout.	The Ratings layout now correctly shows all the PrvdAccountUserGroupInfo fields.
Sample Limits	Users encountered an error (gack) when trying to view or save sample limit templates in the Admin Console.	Fixed the issue that caused users to see an error (gack).
	The NewAccountSampleLimitInitHandler and	To avoid hitting Apex limits, the NewAccountSampleLimitInitHandler and

Feature	Issue	Description
	NewAccountSampleLimitInitHandlerforHCO trigger handlers created Apex jobs of type Batch, exceeding the limit for the maximum number of batch Apex jobs in the Apex flex queue.	NewAccountSampleLimitInitHandlerforHCO trigger handlers now create Apex jobs of type Queueable.
My Team	All Day events were incorrectly displayed on the previous day's calendar due to a time zone or date conversion error during the creation process.	All Day events are correctly shown for the intended date.
Affiliations	An error occurred when inserting a provider affiliation record from MuleSoft because the system found multiple Provider Affiliation records with the same Source System Identifier. This was caused by a trigger handler incorrectly cloning the identifier onto the automatically generated reverse affiliation record.	Updated the trigger handler logic to stop cloning the Source System Identifier to the reverse affiliation record, ensuring uniqueness for the external ID field.
Inventory Management	Users couldn't submit inventory count assessments for samples that were disbursed for visits which were still in planned state, but for which signatures were already captured.	Users can now submit inventory count assessments for samples disbursed for planned visits, but with warnings or error messages that indicate the specific record or records that need an update.
Time Off Territory	The Admin Console displayed a "cannot dereference a null object" error on the Time Off Territory settings page when any default time slot interval is saved with blank values.	Resolved the error by adding validations to handle empty or missing time slot interval values.

Patch 258.13.0.0

This patch contains fixes to ensure that the Life Sciences Cloud for Customer Engagement features work correctly.

Feature	Issue	Description
Visit Management	When a default channel was set, the Channel field could be empty causing an error that the visit is already signed and locked when trying to submit the visit.	If a default channel is set, the Channel field now retains that setting.
	Even if a sample limit template wasn't assigned to a product, limit validation would still be performed, resulting in an error.	Sample limits are no longer checked if a sample limit template isn't assigned to a product.
	It was possible to submit a Visit with a child visit that contained a restricted product.	Attempting to submit a Visit that has a child visit with a restricted product displays an error.
	In certain circumstances it was possible for a Reaction Type Value to be changed from blank to Positive automatically, preventing the visit from being saved.	A blank Reaction Type Value is no longer changed by the app automatically.
	A rep could delete an attendee using a quick action after the visit was signed. Also, there was no warning this happened.	Deleting an attendee after a visit is signed now displays a message that the record is signed and locked.
	Searching for accounts was too slow.	Searching for accounts is now significantly faster. However, as a result of a logic change to improve performance, account search now returns accounts that match the Account name and not the Written and Phonetic name.
Home Page	In the Up Next agenda on the home page, the event date didn't match the event's start and end times when the user's timezone changed, and the same date sometimes appeared in multiple sections. On desktop, multi-day events weren't split into multiple events in the agenda.	Event dates now match the corresponding start and end times, duplicate date sections are removed, and multi-day events are split into multiple entries. Additionally, the event time format no longer includes seconds.

Feature	Issue	Description
	In the Up Next agenda, Time Off Territory events show the record name instead of the type of event.	Time Off Territory events now show the type of event, for example, Personal Absence or Training.
	In the Up Next component on the home page, all day general events didn't appear on the correct date.	All day general events now show up on the correct date in the Up Next agenda on the home page.
Calendar	The Visit preview fails to load and returns an unexpected error even when attendee records are correctly associated with the visit.	Fixed the underlying logic to show the preview for valid visit records.
Medical Inquiry	When the MultiEntityCreateOverride component was configured for the New button on the Inquiry object and users tried to create a new inquiry, an error occurred.	Users can now create a new inquiry when the MultiEntityCreateOverride component is configured.
	Searching for response delivery preferences took longer than expected and required multiple clicks. On clicking the Contact Point Address, Contact Point Email, and Contact Point Phone column headers, the results couldn't be sorted.	After the fix, the search and the sort functionalities are working as expected.
Email	Email consent checks didn't check the EffectiveFromDate and EffectiveToDate fields on Communication Subscription Consent records, meaning that emails could be sent to people whose consent had expired or hadn't yet started.	Now emails are sent only when valid consent is present, respecting the Effective From Date and Effective To Date on Communication Subscription Consent records.
Inventory Management	The creation of inventory operation records would fail if the related User Additional Info record didn't have a product return address.	Now inventory operation records can be created irrespective of whether the product return address field is populated or not.

Patch 258.12.0.0

This patch contains fixes to ensure that the Life Sciences Cloud for Customer Engagement features work correctly.

Feature	Issue	Description
Visit Management	The Visit page didn't load for Life Sciences Field Medical users.	The Visit page now loads correctly for Life Sciences Field Medical users.
	A Product Item without a Production Batch ID wouldn't display in Samples.	Product Items with Production Batch IDs are now displayed correctly in Samples.
	Setting a Document ID on a Visit would cause the Place ID and Shipping Address to display incorrectly and submitting the Visit would fail with the message "We couldn't perform the action because this visit is signed and locked."	You can now submit a Visit with a Document ID and the Place ID and Shipping Address display correctly.
	When the "Show recent details and product selector" setting is enabled, some products that were displayed in the Product Details sidebar for mobile wouldn't be displayed in the web app. Also, recent products that were displayed in the sidebar weren't displayed in the Product Selector in Visit.	Products are correctly displayed in the Product Details sidebar and in Product Selector for Visit in the web app.
	The Place ID on the Visit would change to a different ID after submission.	The Place ID displays correctly after the Visit is submitted.
	A Visit could be saved without a shipping address if the account was changed.	A Visit can no longer be saved without a shipping address.
	On the Sample Inventory Management dashboard, users	The issue has been fixed and users can now submit inventory

Feature	Issue	Description
	were unable to submit inventory count assessments due to high volume of Inventory Operation records.	count assessments even when the volume of Inventory Operation records is high.
	On the Sample Inventory Management dashboard, in the Inventory Operations section, when users would try to create product requests, the product types displayed would be the API names of the product specification types, instead of the labels.	After the fix, when users try to create product requests, the product types displayed are the labels of the product specification types.
General	The Life Sciences Commercial Lightning App didn't have an icon in the App Launcher.	The Life Sciences Commercial Lightning App now has the same icon as the Life Sciences Cloud Mobile app.
Email	Users saw an unhelpful error when the RSVP email address isn't enabled on the Life Sciences for Customer Engagement Setup page.	Users now see a helpful error informing them that the email RSVP email address isn't set up yet.
	Issues occurred when sending emails via the LifeScienceApi global Apex class. For example, attachments weren't included in emails, and some emails that were marked as canceled were still sent.	Emails that are sent via the LifeScienceApi global Apex class are now sent correctly.
Activity Timeline	Clicking Resend Email on the activity timeline incorrectly displayed an error and an incorrect label is shown for the associated action.	Fixed the logic to correctly process attachment IDs during the resend action, allowing the email to be resent without an error. The timeline entry now displays the correct label.
Mobile App Setup	The object metadata cache configuration validation incorrectly requires a profile	Fixed the validation logic to show relevant errors.

Feature	Issue	Description
	<p>when the Type field is set to Data or Configuration.</p> <p>Additionally, an incorrect validation error is shown requiring an Sobject even when it is selected.</p>	
	<p>The View Assignments action didn't show the assigned profiles for records on the UI Settings page in the mobile app setup. Additionally, the label of the custom UI component wasn't populated when a user edits the record.</p>	<p>The profile assignments are now shown when a user clicks the View Assignments action. The custom UI component label is populated in the edit view.</p>
	<p>When a profile was assigned to an Object Metadata Cache configuration record in the list view, the record was incorrectly being deactivated.</p>	<p>Fixed the underlying issue to ensure that the object metadata cache configurations remain active when profiles are assigned from the list view.</p>
	<p>When metadata cache is generated after the Community User profile is assigned to all object metadata cache configuration records, the LifeSciMobileMetadataRecord persists indefinitely in the Validating status.</p>	<p>The status of the LifeSciMobileMetadataRecord is now correctly updated to Inactive, resolving the indefinite Validating status issue.</p>
Product Management	<p>The LSCAdditionalProductDetails custom field on the Life Science Marketable Product object was not visible in the complete Product Hierarchy view.</p>	<p>The issue has been fixed and the LSCAdditionalProductDetails custom field on the Life Science Marketable Product object is now visible in both the complete and partial Product Hierarchy views.</p>
Activity Plan	<p>The Calculate Provider Activity Goal Measures batch job couldn't be run more than once.</p>	<p>Users can now run the Calculate Provider Activity Goal Measures batch job multiple times.</p>
Inventory Management	On the Sample Inventory	The issue has been fixed and

Feature	Issue	Description
	<p>Management dashboard, users were unable to submit inventory count assessments due to high volume of Inventory Operation records.</p> <p>On the Sample Inventory Management dashboard, in the Inventory Operations section, when users would try to create product requests, the product types displayed would be the API names of the product specification types, instead of the labels.</p>	<p>users can now submit inventory count assessments even when the volume of Inventory Operation records is high.</p> <p>After the fix, when users try to create product requests, the product types displayed are the labels of the product specification types.</p>
	<p>The Accounts list view fails to load when the Contact Point Address formula in Address Setup contains special characters.</p>	<p>The Accounts list view now loads correctly, displaying accounts and their addresses, even when the Contact Point Address formula in setup contains special characters.</p>
Medical Inquiry	<p>After a user submits an inquiry record in the mobile and the app syncs, the status of the record incorrectly changes to “Signed”.</p>	<p>The issue is fixed and now the status of a submitted inquiry record doesn't change after a sync.</p>
Calendar	<p>An unexpected error is shown when the user clicks Cancel on the Delete Events window.</p>	<p>Removed the incorrect validation check that was preventing the window from closing. The Delete Events dialog now closes correctly without an error.</p>
	<p>The Delete Events window prevents users from selecting and deleting multiple event types simultaneously, restricting the selection to only one type at a time.</p>	<p>Modified the underlying logic to correctly support multi-selection of event types. Users can now select and delete multiple event types in a single operation.</p>

Patch 258.11.0.0

This patch contains fixes to ensure that the Life Sciences Cloud for Customer Engagement features work

correctly.

Feature	Issue	Description
Visit Management	From an Attendee Visit, Account Card quick actions (such as Inquiry, Last Visit, Survey , Attendee Visit, and Send Email) didn't work.	Account Card quick actions now work.
	The Visits to Submit page would sometimes display visits that had already been submitted.	The Visits to Submit page now displays only visits that have not yet been submitted.
	The Provider Account Territory information job would fail to process some records.	The Provider Account Territory information job now correctly processes all records.
	Users who didn't manage sample inventory in Life Sciences Cloud would see a warning when signing and submitting a Visit with Samples.	Inventory validation is now performed only for users who manage inventory in Life Sciences Cloud.
	Use of custom objects and fields would prevent the Visits page from loading.	The Visits page now works correctly with custom objects and fields.
	The list of products shown in the Samples and Direct to Practitioner sections of Visit Management pages would be different between the web and mobile interfaces.	The list of products shown on web and mobile Visit Management pages is now identical.
	Users were unable to allocate expenses.	Expenses can now be allocated.
	The Edit Visitors window would throw a null-pointer exception when no profiles were selected in Visitor Settings.	The Edit Visitors window now works correctly regardless of whether any profiles have been selected in Visitor Settings.
Inventory Management	The audit-related user perms, Request audits of multiple Inventory Count Assessment records and Perform audits of Inventory Count Assessment records, were not accessible to	The issue has been resolved and the Request audits of multiple Inventory Count Assessment records and Perform audits of Inventory Count Assessment records user perms

Feature	Issue	Description
	<p>the user.</p> <p>While acknowledging a product transfer, the Quantity on Hand field in the Product Item record and the Remaining Quantity field in the Product Batch Item record were being updated when users clicked on the Save button.</p>	<p>accessible to the user.</p> <p>The issue has been fixed, and the Quantity on Hand field in the Product Item record and the Remaining Quantity field in the Product Batch Item record are updated when users click Submit during the acknowledgment of a product transfer.</p>
	<p>Users weren't able to add comments in Inventory Operation records.</p>	<p>The issue has been resolved and users can now add comments in Inventory Operation records.</p>
	<p>The page layout for Product Disbursement wasn't visible in the Object Manager.</p>	<p>The page layout for Product Disbursement is now visible in the Object Manager.</p>
	<p>After a visit is submitted, users couldn't update the Inventory Count Reference field in the related Product Disbursement record.</p>	<p>The issue is now resolved and users can update the Inventory Count Reference field in the related Product Disbursement record after a visit is submitted.</p>
Consent Management	<p>Opening the Consent wizard and attempting to add a new email on the recipient page throws a component execution error when the Communication Subscription record isn't in the expected status.</p>	<p>The Consent wizard now handles Communication Subscription status changes correctly, and adding a new email no longer triggers the component execution error.</p>
Time Off Territory	<p>A visit could be created during a Time Off Territory (TOT) event, bypassing the overlapping rule which should have prevented the creation.</p>	<p>Visit creation is now correctly blocked during a Time Off Territory event.</p>
Data change request	<p>A DCR record was not getting created when creating an HCP account or an HCO account using this combination: Update Type = Don't apply changes immediately and Record</p>	<p>The DCR record is now created when using this combination.</p>

Feature	Issue	Description
	<p>Creation Approval = Yes.</p> <p>When users approve or reject data change requests from the internal DCR tab, the status for Healthcare Provider records and Provider Affiliations doesn't change to active or inactive.</p> <p>The HealthcareProviderRefetchingBatch job fails with Too many SOQL queries:201 error because the getRecordTypeNameFromSObject method is being called inside a loop in the DCR service handler.</p>	<p>The status of the rejected Healthcare Provider records now update to inactive, and approved Provider Affiliation records now update to active when processed from the internal DCR tab.</p> <p>The SOQL query was moved outside the loop to prevent multiple executions, making sure the HealthcareProviderReferencingBatch job runs without exceeding the query limit.</p>
Lists and Filters	<p>When users select an account from the Accounts tab and click Select and Add, the selected account isn't shown on the resulting window.</p> <p>Some quick actions are missing in the More Actions menu for individual accounts.</p>	<p>Users can now select and add an account to a new list or an existing list.</p> <p>The issue was resolved by making sure the quick actions are properly configured and displayed in the More Actions menu for all accounts.</p>
Activity Plan	<p>The deprecated Account Activity Goal and Activity Plan Lightning App Builder components were appearing in the Home Page and Account record pages, without being flagged as "Deprecated".</p>	<p>The deprecated components, Account Activity Goal and Activity Plan, are now flagged as "Deprecated" in the Lightning App Builder.</p>
Account Search	<p>The HealthcareProviderFlatteningBatchJob failed due to Salesforce governor limits, specifically the "Too many SOQL rows: 50001" error.</p>	<p>The job was optimized by refining the database queries to fetch only necessary records. Unnecessary queries were further eliminated by skipping the DCR logic, as DCR processing was not required for this job.</p>

Feature	Issue	Description
Account Merge	Merging of accounts was failing because CommSubConsentCmplSnpsh fields were not accessible.	Made the CommSubConsentCmplSnpsh fields accessible and now accounts can be merged.
Activity Timeline	Incorrect labels were shown for the values in the Type dropdown on the Activity Timeline tab.	Correct labels are now shown for the values in the Type dropdown.
Territory Management Jobs	Duplicate entries of the Territory Management job unexpectedly appeared when a job is run or scheduled.	The child records of the job were filtered out. This ensures that duplicate entries are not shown and only one entry per parent batch job appears.
Provider Account Territory Info	The Provider Account Territory Info component's title showed an inaccurate name.	The component's title is updated to the correct name, Provider Account Territory Information, to ensure accuracy across the user interface.
	When a visit is created by dragging an account or address to the calendar grid, the territory name isn't populated.	The territory name is now populated when a visit is created by dragging an account or address to the calendar.
Calendar	When creating a visit from the Calendar, the visit duration incorrectly defaults to 30 minutes even though a specific default duration has been defined.	<p>The visit now correctly uses the defined default visit durations when creating a visit from the Calendar.</p> <ul style="list-style-type: none"> • If a default duration is defined, the defined duration is used. • If no default duration is defined, the visit duration defaults to 30 minutes.

Patch 258.9.0.0

This patch contains fixes to ensure that the Life Sciences Cloud for Customer Engagement features work correctly.

Feature	Issue	Description
Inventory Management	A random inventory storage address is shown for sales reps without an address in the Inventory Management screen.	Corrected the address mapping logic to ensure accurate user association.
Account Summarization	Scratch org definitions included unnecessary summarization and agent preferences.	Removed these components to streamline the configuration.
Object Metadata Cache Configuration	Users are unable to save records containing SOQL filter conditions with the variable {STI.OBJ.IDS} in the Object Metadata Cache Configuration window.	Added support for the {STI.OBJ.IDS} SOQL variable. Users can now save records with SOQL filter conditions containing this variable.
	The Web-to-Mobile Sync checkbox in the Object Metadata Cache Configuration window incorrectly shows its status even when it was selected.	The display error has been fixed and the checkbox now accurately reflects the status when it's selected.
	Permission set assignments were incorrectly shown when viewing assignments for an object metadata cache configuration.	The display error has been fixed to show only profile assignments.
External Search	Searching externally for business license records using the isActive field resulted in the invalid conversion of data type from Boolean to String.	The underlying issue is resolved. In case of a failure due to unsupported fields in the external search criteria, an error message specifying the field appears.
Surveys	Users encountered an error when attempting to view Surveys during a visit due to missing Apex class access in the LifeSciencesCore permission set.	Added the VisitInvitationFetchStrategy class to the LifeSciencesCore permission set and included the Survey quick action to the Account page layout to make sure users have error-free access.
Visit	A validation error is occurring on the visit creation screen requiring a production batch even when the settings were	Fixed the validation logic to align with the configured settings.

Feature	Issue	Description
	configured to not require it.	
	The mobile app's Visit Engagement screens incorrectly show a sample limits error for sample products, even though a sample limit template isn't assigned to a sample product.	Fixed the validation to show the sample limits error only for sample products that are assigned to a sample template.
Error Log Management	Clicking an error log hyperlink in the Error Log Management tile is causing a gack.	Removed the hyperlink for error log numbers.
Affiliations	The Affiliation List View isn't displayed due to field-level security for the Phone and ParentId fields on the account object.	Removed these two fields from the underlying query as they were unused.

Life Sciences Cloud Mobile App Patch Releases

The patch updates in this section provide information on patch releases for the Life Sciences Cloud mobile app.

Patch Releases Spring `26

We release patches periodically. Check back here for information on each Winter `26 patch release for the Life Sciences Cloud mobile app.

Patch Releases Winter `26

We release patches periodically. Check back here for information on each Winter `26 patch release for the Life Sciences Cloud mobile app.

Patch Releases Spring `26

We release patches periodically. Check back here for information on each Winter `26 patch release for the Life Sciences Cloud mobile app.

Patch 260.4.0

This patch contains fixes to ensure that the Life Sciences Cloud mobile app features work correctly.

Feature	Issue	Description
Visit Management	When saving a visit with a	The SDL validation logic is

Feature	Issue	Description
	product that has no State Distributor License (SDL) category, the visit fails to save if the selected address doesn't have a valid SDL license.	changed so that it no longer triggers for products without a State Distributor License (SDL) category, and the visit is now successfully saved.
	Because newer versions of the mobile app required expenses to be linked to a valid expense report, expenses couldn't be created or edited until they were linked to expense reports.	Expense Report is no longer a required field for expenses so you can create and edit expense entries without having to select an expense report.
Lists and Filters	In the mobile app, certain list view filter conditions return no records even though matching records appear on web.	Fixed the list view filter conditions in the mobile app to ensure results are consistent with the web.
Inquiry	The Inquiry action wasn't rendering on the Home page due to a naming discrepancy between the web and the mobile app configuration.	Resolved the naming conflict and the Inquiry action is now visible on the Home page as expected.
Presentations	When adding new pages to a custom presentation in the mobile app, tapping the + icon didn't add the selected page as expected. Instead, users had to tap the page thumbnail directly to add it, resulting in an inconsistent user experience.	Users can now tap the + icon to add a page to a custom presentation, ensuring the behavior aligns with user expectations and provides a more intuitive, consistent experience.
Intelligent Content	When reordering pages in a presentation, the page numbering did not update correctly. This could result in incorrect or duplicate page numbers being displayed.	Page numbers update automatically and accurately when pages are reordered. Users see the correct sequence reflected immediately, ensuring a smooth and reliable presentation experience.
General	The Account Name field isn't populated correctly in the Life Sciences Cloud mobile app when the Account Field to Display setting in Admin Console	The Account Name field now reflects the correct value from the custom formula.

Feature	Issue	Description
	uses a custom formula field.	

Patch 260.2.1

This patch contains fixes to ensure that the Life Sciences Cloud mobile app features work correctly.

Feature	Issue	Description
Visit Management	A deeplink with lightning/o/OBJECT_NAME/list format was not redirecting to the object list view.	A deeplink with lightning/o/OBJECT_NAME/list format now redirects to the object list view.
	The field for entering the Document ID in the pop-up isn't visible on the Visit Engagement page.	The issue has been corrected, and the field for entering the Document ID is visible.
	No records are displayed when using special date strings like TODAY and THIS_WEEK in the list view filters.	The issue is corrected, and special date strings now return the correct results.
	The Visit Information section of the Attendee Visit Engagement page was editable.	The Visit Information section is now editable only on the parent Visit Engagement page and read-only in the Attendee Visit Engagement page.
	The text field for entering the Submit Delay Reason on a pop-up screen isn't visible on the Visit Engagement page on mobile.	The issue is corrected, and the Submit Delay Reason field is now visible.
	Multi-select picklists for Product Discussions on the Visit Engagement page weren't supported in the mobile app.	The multi-select picklist field type is now displayed correctly in the Product Discussions section of the Visit Engagement page.
	While capturing a signature, the mobile app appeared unresponsive, even though it was still processing the capture.	A spinner now displays when the app is capturing a signature.
	Product messages weren't displayed by message groups	The issue has been fixed, and product messages are now

Feature	Issue	Description
	even when message groups were set for the messages.	displayed by message groups when those are set for messages.
General	Mobile sync fails when users enable the Related Record Retrieve checkbox because the mobile client queries the Name field for related records, but some related objects don't have a Name field, causing a sync failure.	To enable sync to complete successfully, deselect the Related Record Retrieve checkbox to prevent the mobile client from adding Name fields for related objects.
Planner	The Calendar was taking too long to load when the accounts had too many visit events.	Optimized the main database query to include child visit counts, eliminating the need for additional queries and significantly improving calendar load times.
Calendar	The Calendar crashes frequently, especially while loading, scrolling, and during drag-and-drop scheduling.	Fixed the underlying issues to prevent Calendar from crashing.
Inquiry	The Recently Viewed related list on the Activity Plan and Inquiry objects displayed inconsistently between the web and iPad interfaces. On the web, it showed only a few records, while on the iPad, it correctly displayed all recently viewed records for the same user.	The Recently Viewed related list now displays items consistently across both web and iPad interfaces for Activity Plan and Inquiry objects.

Patch Releases Winter `26

We release patches periodically. Check back here for information on each Winter `26 patch release for the Life Sciences Cloud mobile app.

Patch 258.15.0

This patch contains fixes to ensure that the Life Sciences Cloud mobile app features work correctly.

Feature	Issue	Description
Visit Management	In the Visit Information section on the Visit Engagement page (Mobile), a custom picklist filters correctly by the controlling field, but doesn't filter by the selected Record Type. As a result, users see values that should not be available for that Record Type.	A custom picklist in the Visit Information section on the Visit Engagement page (Mobile) now respects record type restrictions and displays only applicable values.
	The Visit Information section on the Attendee Visit Engagement page (Mobile) should be read-only, but it's currently editable for users.	The Visit Information section on the Attendee Visit Engagement screen (Mobile) is now read-only.
	The multi-select picklist field type wasn't supported for Product Discussions.	The multi-select picklist field type now displays correctly in the Product Discussions section of the Visit Engagement page.

Patch 258.14.0

This patch contains fixes to ensure that the Life Sciences Cloud mobile app features work correctly.

Feature	Issue	Description
Visit Management	In the Advanced Account Search from the Switch Account link on a Visit Engagement page, the Type, Lists, and Filters weren't displayed.	The issue is fixed so that the appropriate lists and filters selectors are displayed in Advanced Account Search.
	Creating a visit with over 20 attendees resulted in this error: "common.exception.ApiException: We couldn't perform the action because this visit is signed and locked."	Visits with more than 20 attendees now save correctly.
	After capturing a signature, the Floating Action Button (FAB) incorrectly disappears from the bottom-right corner of the page.	The floating action button remains at the bottom of the page after a signature is captured.
General	The mobile app was crashing at	Delayed the initialization of the

Feature	Issue	Description
	startup because Intelligent Content was attempting to access database and background services before they had finished initializing.	Intelligent Content until the user manually opens the tab to ensure all required services are ready for use.
Key Account Management	The Account Plan Participant records on the mobile weren't syncing with the web.	The issue has been fixed and Account Plan Participant records on the mobile are now syncing with the web as expected.

Patch 258.13.0

This patch contains fixes to ensure that the Life Sciences Cloud mobile app features work correctly.

Feature	Issue	Description
Home Page	In the Up Next component on the home page, all day general events didn't appear on the correct date.	All day general events now show up on the correct date in the Up Next agenda on the home page.
Visit Management	When creating a visit, validation was skipped when the Time Off Territory Rules setting was turned off, causing all appointments that overlapped with scheduled downtime to be blocked.	The Time Off Territory Rules setting is now checked when creating a visit.
	Trying to start a visit a few minutes early failed with the error "Visit Date and Time cannot be in the future."	Visits can now be started in advance.
	Creating a visit with many activities could take 40-50 seconds.	The time to create a visit is significantly shorter.
	Updating visit attendees and deleting visits on mobile would cause Device Sync Transaction (DST) errors even though the operations were successful.	Errors are no longer shown when a visit is successfully updated.

Feature	Issue	Description
	A Device Sync Transaction (DST) error would occur when a user had only read access to custom fields on a record, or if the Private API was enabled in a client org.	Field level access is now checked correctly for custom fields. Also, client orgs should not have the Private API enabled in order to prevent this issue from happening with fields such as MayEdit and IsLocked which are added to pages automatically.
	Reps could delete an attendee visit that's already signed from the Attendee section of the Visit.	The option to delete an attendee is no longer available after the visit is signed.
	Custom objects weren't being displayed on mobile.	The mobile app now correctly displays custom objects.
Medical Inquiry	Even after an Inquiry record was submitted, the record stayed in draft status. "Contact Info" was erroneously displayed as "Response Contact Point Record ID". Users were also unable to scroll through Contact Point Email and Contact Point Phone records and select the last two records.	These issues have been fixed. The label has been corrected, the Inquiry record displays the correct status, and users can scroll through and select Contact Point Email and Contact Point Phone records as expected.
Lists and Filters	When users sorted accounts by next visit or last visit date, the list showed no results.	The sort criteria for Next Visit or Last Visit date was fixed, and the correct accounts now display when these options are selected.
General	When users changed the user language and device language, translations didn't load in the Life Sciences Cloud mobile app on iPads.	Now translations load in the Life Sciences Cloud mobile app on iPads.

Patch 258.12.0

This patch contains fixes to ensure that the Life Sciences Cloud mobile app features work correctly.

Feature	Issue	Description
Agentforce	The Agentforce window is	The Agentforce window is now

Feature	Issue	Description
	missing in the Tableau Next metrics view.	available in the Tableau Next metrics view.
Visit Management	For General Events, if the event was set to All Day the wrong date and time would be displayed.	The correct date and time is now displayed for All Day General Events.
	It was possible to schedule a visit during the Visit Conflict Validation Period even when the validation mode is set to error.	Visits can no longer be scheduled during a Visit Conflict Validation Period if the Visit Conflict Validation Mode is set to Error.
	Even if a Sample Limit Template wasn't assigned to a sample product, you could still see a sample limit error on the Visit Engagement.	An error is no longer shown for products if the Sample Limit Template isn't assigned.
	Links shown by Agentforce in the Agentforce conversational window didn't work.	Links shown in the Agentforce conversational window are now clickable.
	An SDL License Validation error would occur for Life Science Marketable Products that didn't have a State Distributor License Category populated.	An SDL License Validation no longer occurs for sample products that don't have SDL categories.
	The View Online quick action on the Visit record page would fail with the message "This Action is only meant for Mobile App".	The View Online quick action now works correctly on mobile.
	The Inquiry quick action from the Visit record page didn't display the Case ID, or allow users to modify the Case field manually.	The Inquiry quick action now works correctly, displaying the Case ID and allowing users to modify the Case field manually.
General	Users didn't always know when new versions of the Life Sciences Cloud Mobile app were available.	Users now get alerts when there's a new version of the Life Sciences Cloud Mobile app available in the app store, and they have 7 days to upgrade to the latest version.

Feature	Issue	Description
Home Page	On the home page in the Life Sciences Cloud Mobile app, the incorrect date shows for general events.	Now, general events show the correct date on the home page in the Life Sciences Cloud Mobile app.

Patch 258.11.0

This patch contains fixes to ensure that the Life Sciences Cloud mobile app features work correctly.

Feature	Issue	Description
Synchronization Management	Text in the DeviceSyncSummary payload was mislabeled as OCEDBSize.	In the DeviceSyncSummary payload, text is now correctly labeled DBSize.
Account Plan	Users couldn't import goal definitions onto account plans or create account plan objectives.	Users can now import goal definitions onto account plans and create account plan objectives.
Activity Timeline	When the Address filter was applied on the Activity Timeline tab, no records were displayed.	The Address filter on the Activity Timeline tab has been fixed and now correctly returns all relevant activity records that match the selected address criteria.
Activity Plans	The Activity Plans widget wasn't appearing in the mobile app.	The Activity Plans widget now appears in the mobile app.
	In the Activity Plans widget, the Non-Product Cumulative value wasn't appearing in the dropdown.	The Non-Product Cumulative value now appears in the dropdown for Activity.
Affiliations	The Affiliation tab was taking too long to load.	Fixed the underlying issue. Now the Affiliations tab loads immediately.
Planner	When creating a visit from the Calendar, the visit duration incorrectly defaults to 30 minutes even though a specific default duration has been defined.	<p>The visit now correctly uses the defined default visit durations when creating a visit from the Calendar.</p> <ul style="list-style-type: none"> If a default duration is

Feature	Issue	Description
		<p>defined, the defined duration is used.</p> <ul style="list-style-type: none"> If no default duration is defined, the visit duration defaults to 30 minutes.
Visit Management	<p>Labels for "Content & Samples" weren't shown in the sidebars of visit screens for Medical Science Liaison (MSL) users.</p>	<p>Labels for "Content & Samples" are now shown correctly on visit screens for MSL users.</p>
	<p>Custom fields weren't displayed on the edit page and on Visit records.</p>	<p>Custom fields are now shown correctly on the edit page and on Visit records.</p>
	<p>When a Child Visit contained a sample or DTP with a Mandatory Signature requirement and user selected Submit on the Parent Visit, an error was shown indicating the signature or DocumentId wasn't captured for the attendee.</p>	<p>Selecting Submit on a Parent Visit works correctly when a Child Visit contains a sample or DTP with a Mandatory Signature requirement.</p>
	<p>When a remote visit was created with a child attendee, after the remote session ended the child attendee visit and any added products were deleted.</p>	<p>The child attendee visit record is now retained along with the added products.</p>
	<p>The signature screen wasn't displayed as a full window, allowing HCPs to see part of the application when they sign.</p>	<p>The signature screen now displays as a full window.</p>
	<p>Mobile Visits with large transactions such as more than twenty attendees, would fail with these messages.</p> <ul style="list-style-type: none"> SYNC_SAVE_FAILED Something went wrong while saving the target record. We 	<p>Mobile Visits with large transactions are now processed correctly.</p>

Feature	Issue	Description
	couldn't perform the action because this visit is signed and locked.	
	When a user submitted an ad hoc, remote visit, a second, duplicate visit record for the same time and channel would be created in completed status but containing no information, despite the original planned visit being correctly updated to completed status.	A single Visit record is now created following a remote engagement.
	The New Inquiry window would become unresponsive when launched from Inquiry action on a Visit Engagement page.	The New Inquiry window now functions correctly.
	After an Attendee Visit Engagement was signed, the Direct to Practitioner sample details were still editable.	After signing an Attendee Visit Engagement, sample details can't be changed.
	When the Contact Point Address Formula Field was set to None, the Place ID would display an ID instead of a complete address.	The Place ID displays a complete address when the Contact Point Address Formula Field is set to None.
	For remote engagements, digital signatures weren't being saved correctly.	Digital signatures are now saved correctly for remote engagements.
	Surveys completed from Mobile for Visits would appear under the Completed section of the corresponding records on the web, but not on mobile.	Completed surveys now appear correctly on mobile.
	Samples and Direct to Practitioner related lists were displayed to Key Account Manager (KAM) users even when they shouldn't have been able to	KAM users no longer see the Samples and Direct to Practitioner related lists.

Feature	Issue	Description
	see them.	
General	When samples were added to the visit, license information related to the visit's place and shipping address were displayed on the signature page. When Direct to Practitioners (DTPs) were added to the visit, license information related to the visit's place and shipping address were displayed.	The signature page now displays the correct license information when samples and Direct to Practitioners are added to a visit.
	The Life Sciences Cloud Mobile app wasn't available for distribution in France.	The Life Sciences Cloud Mobile app is now available in France.
	Logging out of the Life Sciences Cloud Mobile app takes 2 minutes or longer.	Users can now log out of the Life Sciences Cloud Mobile app without delay.
Home Page	In some cases, the home page crashes when trying to refresh data for maps.	The home page no longer crashes when refreshing map data.

Patch 258.9.0

This patch contains fixes to ensure that the Life Sciences Cloud mobile app features work correctly.

Feature	Issue	Description
Search Before Create	When users click the Search Online button from the Accounts page, a blank screen appears instead of the search interface.	Updated the configuration to permanently enable the advanced search layout, ensuring that the search page loads properly and consistently.
Data Change Request	When records are updated from the mobile app, Data Change Request (DCR) are created. Admins encountered an error while approving these DCRs.	Fixed the DCR approval logic to correctly process requests created from record updates made through the mobile app, enabling admins to approve them successfully.
Home Page	In the Up Next component on	The Edit Visit action now opens

Feature	Issue	Description
	the home page, the Edit Visit action opened the visit details in view mode instead of edit mode.	the page to edit visit details.
Remote Engagement	Ending a remote engagement session resulted in the loss of the selected presentation and a failure to capture presentation metrics.	The selected presentation and associated metrics are saved and recorded properly.
Account Address	The State License Number shield icon appears on the Account List only if a contact point address is set on the Business License record, which was incorrect.	Fixed the logic so the icon now correctly appears when a Business License record exists.
External Search	Search for Business License records in Salesforce failed due to an outdated API endpoint.	The code is updated to use the correct search API, resolving the endpoint failure and restoring a smooth search experience.
Visit Management	Validations were missing for sample limits when signing child visits.	Added sample limits validations for child visits.
	Manual sync is failing after users created a visit or inquiry.	Fixed the underlying database error that prevented syncs. Manual syncs for visits and inquiries are now succeeding.
	Visit creation is failing with an incorrect validation error. The user is prompted to select a batch, even though the Batch field is not required.	Users can now create visits without a batch.
Mobile-to-Web Sync	Transactions on the mobile app were failing to sync automatically to the web, requiring manual intervention.	Fixed the sync issue.
Time Off Territory	An incorrect validation error is shown when a user tries to create an overlapping event.	Fixed the validation logic to show relevant errors.
Activity Timeline	Field sets were not visible in the activity timeline.	Fixed the visibility of field sets in the activity timeline.

Feature	Issue	Description
Planner	The Day View field set values aren't shown in the Visit tile on the calendar.	Ensured that the Day View field set now picks fields from the Visit object.
	Incorrect warnings or errors are shown when a user tries to create a visit for an account that already has one scheduled within the period specified by the admin.	Fixed the validation logic to show relevant warnings and errors.
	Incorrect best time values are shown when a user drags an account or account address to the calendar grid.	Fixed the incorrect time values and resolved display errors in the calendar.
Consent Management	When selecting consent for the first time, no channels were displayed until values were selected, leading to a confusing user experience.	Reverted the feature to its previous state, displaying all configured channels from each subscription regardless of channel values being selected.
Email	Consent subscriptions were opted out incorrectly after users sent an email.	Fixed the issue to ensure that consent subscriptions remain intact, preventing unintended opt-outs after users send an email.
Provider Card	In the Account tab, the provider card shows "Account Snapshot" instead of the graph name, and shows the NextProviderVisitDate field name instead of the visit details. It doesn't show the preferred address, the sample eligibility details, and hides the best time to contact the provider when the corresponding record details aren't available. Also, the card shows the KOL text item even if the conditions aren't met.	The provider card now displays the name of the ARC graph, upcoming visit details, preferred address, and the sample eligibility details. It no longer hides the Best Time to Contact element name when the corresponding record details aren't available. Also, the card no longer shows the KOL text item when the specified conditions aren't met.
General	The mobile app is crashing when a user attempts to log out after entering the PIN.	Fixed the issue to prevent the app from crashing when users log out after entering the PIN.

Feature	Issue	Description
Agentforce Home	Tapping the primary chat box in the iOS Agentforce Home Welcome component resulted in an error on the Agentforce chat window.	Now the chat box works as expected.

Administer Life Sciences Cloud

Set up Clinical Engagement for Life Sciences by implementing features such as Participant Management and Site Management.

Get Started with Clinical Engagement

Accelerate clinical trials across patients, sponsors, sites, and more on a flexible and compliant platform. Clinical engagement in Life Sciences Cloud helps clinical research organizations raise trial awareness with candidates, speed up their onboarding, and mitigate attrition. Empower candidates to discover trials, evaluate eligibility, and sign up for eligible trials with robust self-service portals. Streamline participant enrollment with optimized auto-matching and consent management features.

Sign Up for a Life Sciences Trial Org

Sign up for a trial to get hands on with Clinical and Patient Engagement features in a Life Sciences Cloud org. The trial org doesn't include Life Sciences for Customer Engagement features.

Plan and Prepare for Clinical Engagement

Let's walk you through some key concepts before you begin your implementation. Learning about how Life Sciences Cloud models data and its users will help you optimize your implementation to the needs of your organization.

Set Up Clinical Engagement Basics

Before you set up specific clinical engagement features in Agentforce Life Sciences, perform basic setup tasks such as enabling person accounts and installing OmniStudio.

Set Up Participant Management

Participant Management streamlines the process of recruiting and enrolling participants in clinical trials by orchestrating each stage, from initial recruitment to enrollment. With this feature, you can provide a unified clinical trial portal experience for potential participants and clinical trial coordinators.

Set Up Site Management

Life sciences organizations can identify suitable sites and investigators for conducting research studies. Identification of the right site, the initial step in the research study process, is crucial to the successful completion of a study.

Get Started with Clinical Engagement

Accelerate clinical trials across patients, sponsors, sites, and more on a flexible and compliant platform. Clinical engagement in Life Sciences Cloud helps clinical research organizations raise trial awareness with candidates, speed up their onboarding, and mitigate attrition. Empower candidates to discover trials, evaluate eligibility, and sign up for eligible trials with robust self-service portals. Streamline participant enrollment with optimized auto-matching and consent management features.

Explore a trial org and then learn what's included, what setup we recommend, and how to prepare for your implementation.

		
Get Oriented What is Life Sciences Cloud? Create a Life Sciences Cloud Trial Org	Dive In: Learn About Recommended Core Features Enable Clinical Trial Discovery with Criteria-Based Search and Filter Empower Candidate Self-Service with Experience Cloud Obtain Informed Consent with Digital Verification Randomize Group Allocations for Participants Manage Complex Therapies with Advanced Therapy Management	Go Deeper: Learn About Features for Specific Business Needs Automate Processes with Omnistudio Automate Complex Decision-Making Solutions Using Business Rules Engine Manage Electronic Signatures using Digital Verifications Assessments and Surveys
		
Extend Further: Learn About Additional Capabilities & Add-Ons Manage Electronic Signatures with Digital Verification Criteria-Based Search and Filter Assessments and Discovery	Get Ready for Your Implementation Orchestrate Participant Enrollment Set Up Clinical Engagement Basics Add Data for Participant	Know Your Resources & Get Help Life Sciences Cloud Developer Guide Trailblazer Community: Life Sciences Trailblazer Group

Framework	Recruitment and Enrollment	
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Sign Up for a Life Sciences Trial Org

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Trial orgs are intended for proof of concept and guided self-exploration. Trial orgs expire in 30 days.

1. Go to one of the trial org signup pages:

- [Learning Org](#)

This org includes rich sample data and lets you see all the Life Sciences Cloud Clinical and Patient Engagement features in action. Use these orgs to see what a comprehensive enablement looks like for Life Sciences Clinical and Patient Engagement.

- [Base Org](#)

This unconfigured org is a blank slate with only the necessary licenses and permissions. Use these orgs for quick proof of concept projects or general testing.

2. Enter your contact information.
3. Read and accept the service agreement.
4. Click **Start My Free Trial**.

Look for an email with your login credentials.

Plan and Prepare for Clinical Engagement

Let's walk you through some key concepts before you begin your implementation. Learning about how Life Sciences Cloud models data and its users will help you optimize your implementation to the needs of your organization.

[The Clinical Data Model and FHIR](#)

The Clinical data model is built to align with the Fast Healthcare Interoperability Resources (FHIR) specification, which is an open API standard for the exchange of healthcare information. The FHIR standard is defined by Health Level 7 (HL7), the organization that also defined the HL7 messaging standard.

[Supporting Clinical Data in Life Sciences Cloud](#)

Clinical data that comes from EHR or other clinical systems is critical to the planning, execution, and management of coordinated care plans for patients. Clinical data can be integrated with Salesforce using several standard APIs to map messages from EHR systems into Life Sciences Cloud objects and fields.

[Code Sets and Code Set Bundles](#)

Having accurate information and standardized definitions is vital for the life sciences industry. Serious

consequences can occur if organizations differ in their interpretation of a patient's data. To avoid this scenario, the life sciences industry uses terminology systems that standardize the definitions of various situations and clinical data. These systems consist of subunits that the industry terms Coding, Codeable Concept, and Value Set.

The Clinical Data Model and FHIR

The Clinical data model is built to align with the Fast Healthcare Interoperability Resources (FHIR) specification, which is an open API standard for the exchange of healthcare information. The FHIR standard is defined by Health Level 7 (HL7), the organization that also defined the HL7 messaging standard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

The standard objects in the Clinical data model store all sorts of clinical data, including conditions, medications, encounters, immunizations, procedures, and so on. The Life Sciences Cloud implementation of FHIR aligns with FHIR v4.0.1.

To verify the FHIR (Fast Healthcare Interoperability Resources) R4-aligned clinical data model for Life Sciences Cloud is enabled in your org, search for and then select **FHIR R4 Support Settings** under Life Sciences Cloud in Setup. If the **FHIR-Aligned Data Model** setting is not enabled for your org, enable it now.

The FHIR-Aligned Clinical Data Model

Life Sciences Cloud's clinical data model maps closely to FHIR R4 specification, but with a few minor differences.

- The new clinical data model supports most of the FHIR R4 attributes, except certain instances that aren't relevant for the typical Life Sciences Cloud user.
- Entities like Identifier and Code Set have more attributes than their FHIR R4 counterparts. These extra fields increase data usability across the Salesforce platform and support specific needs of certain features in Life Sciences Cloud.
- FHIR R4 typically defines zero-to-one, zero-to-many, one-to-one, or one-to-many values for each attribute. However, the Salesforce platform doesn't support one-to-many and zero-to-many values for a field, except in multi-select picklists. Instead, Salesforce uses child objects that can create multiple records that all reference the same parent record to achieve this type of logical zero/one-to-many values. For instance, an encounter can have multiple providers participating in it. To support this scenario, Salesforce has the Clinical Encounter Provider child object. This child object has records representing each provider in an encounter, and each of these records reference the record of the

encounter that these providers were a part of.

Supporting Clinical Data in Life Sciences Cloud

Clinical data that comes from EHR or other clinical systems is critical to the planning, execution, and management of coordinated care plans for patients. Clinical data can be integrated with Salesforce using several standard APIs to map messages from EHR systems into Life Sciences Cloud objects and fields.

The Clinical data model is built to align with the Fast Healthcare Interoperability Resources (FHIR) specification. This data model supports easier and more straightforward clinical data integration from other source systems. When devising an implementation strategy, you or your integration partner maps messages from the electronic health records system to the correct Life Sciences Cloud object.

Life Sciences Cloud uses the following standard objects to manage patient data.

Account

In Life Sciences Cloud, the account record for a patient is a person account, not an account representing a business or an organization. Contacts and accounts that represent caregivers or external healthcare providers are associated with the account through the patient care plan (case record).

Contact

In the Salesforce data model, contacts are the people associated with the patient, such as family members and specialists who are outside of your organization. A contact must be related to an account. When you set up and use Salesforce Experience Cloud, the Contact object supports communication within the private patient site. Care team members are added as either external contacts without site access or as Salesforce users *and* contacts, which give them access to the patient site.

User

Life Sciences Cloud includes internal Salesforce users and Experience Cloud users. Each user type has different access to records and functions. Internal users have access to patient data, when granted. Experience Cloud users don't have access to patient data.

Case

In Life Sciences Cloud, the care plan is a record type of Case. The case permission controls access to the elements of the care plan, to the care team (Case Team), and to the communication within the patient's Experience site. All care team members are associated with the patient's contact record through the Case object.

Problem Definition

Represents clinical or non-clinical health issues that a care plan must address.

Goal Assignment

Represents the intended objectives of carrying out a care plan.

Task

Represents an activity, such as making a phone call, completing a survey, attending a medical appointment, or other to-do items. Tasks can be directly related to a goal or problem on the care plan, or even directly to the care plan itself.

Standard objects in the Clinical data model

These standard objects hold patient data that comes from external EHR source systems. For example, `HealthCondition` represents detailed information about conditions, problems, and diagnoses recognized by a clinician. Objects in this data model are built to align with FHIR R4, specifically FHIR v4.0.1.

Code Sets and Code Set Bundles

Having accurate information and standardized definitions is vital for the life sciences industry. Serious consequences can occur if organizations differ in their interpretation of a patient's data. To avoid this scenario, the life sciences industry uses terminology systems that standardize the definitions of various situations and clinical data. These systems consist of subunits that the industry terms Coding, Codeable Concept, and Value Set.

In the Life Sciences Cloud implementation of the Clinical data model, coding is termed code set and codeable concept is termed code set bundle. Code Set and Code Set Bundle are generic objects designed to store a wider variety of standardized codes required by the industry. They are aligned with FHIR R4.

Codings, Codeable Concepts, and Value Sets

To work effectively with these entities, it's important to know what they are first. These entities are related to each other by way of hierarchies, concepts, or contexts.

Recommendations for Using Code Sets and Code Set Bundles

The type and range of codes required vary across organizations. The code requirements also depend on the type of care and services organizations provide and on the terminology systems they prefer. As such, Life Sciences Cloud doesn't pre-populate these objects with any codes from terminology systems.

Codings, Codeable Concepts, and Value Sets

To work effectively with these entities, it's important to know what they are first. These entities are related to each other by way of hierarchies, concepts, or contexts.

Codings relate to codeable concepts as a hierarchy. Basically, a codeable concept is a set of codings that represent the same concept. However, a value set groups codings more loosely based on their context. Let's take a closer look at what these entities are and how they're structured.

Coding

A coding, or code set in Life Sciences Cloud, represents a specific concept in the context of the terminology system that defines that concept. Multiple codings can represent the same real-world concept. However, their form depends on the terminology systems that define them and the versions of those systems. Codings consist of five components: Code, Display, System, Version, and User Selected.

Code: The symbol that represents the concept. This code can be a string of numbers or characters, and not necessarily a word. If this attribute is absent in a coding, the terminology system has no defined code to represent that coding's concept. Consider a code as the form of a coding.

Display: The text that represents the meaning of the code and its concept.

System: The URI of the terminology system that defines the concept of a coding. There are many terminology systems that the industry uses, like LOINC, SNOMED, RxNorm, ICD, and so on.

Version: The version of the terminology system that defines the coding. As mentioned earlier, the form a coding takes can change across versions of the terminology system.

User Selected: The boolean value that specifies whether the code is explicitly chosen by a user, as opposed to being selected by an automated algorithm. The expectation is that codings marked true for this attribute are more likely to be more accurate. If there are multiple codings that represent the same concept, codings marked true for this attribute tend to be more accurate. The Life Sciences Cloud implementation calls this attribute Primary.

Here's what a JSON sample for a coding looks like:

```
<coding>
  <system value="http://snomed.info/id"/>
  <version value="International Release - 20130731"/>
  <code value="389145006"/>
  <display value="Allergic Asthma"/>
  <primary value="true"/>
</coding>
```

The Life Sciences Cloud implementation of coding doesn't support hierarchies because the FHIR definition of a coding doesn't specify hierarchies. However, if your organization requires recording hierarchies, you can do that by adding a self-reference field to the Code Set object.

Codeable Concept

A codeable concept represents a unique real-world concept that's represented by codings. Codeable concepts bind together codings from across systems and versions, with the binding factor being the shared concept that those codings represent. For instance, let's say that system 1 represents COVID-19 as C19 in version 2.31 and as CVD2019 in version 1.13, and system 2 represents COVID-19 as C204. The

codeable concept that represents the real-world concept of COVID-19 binds all three codings together.

The Life Sciences Cloud implementation of codeable concepts, called code set bundles, allow only 15 codings to be bound together while FHIR places no such constraint on codeable concepts.

Here's a JSON sample for a codeable concept:

```
<codeableConcept>
  <!-- SNOMED code -->
  <coding>
    <system value="http://snomed.info/id"/>
    <version value="International Release - 20130731"/>
    <code value="389145006"/>
    <display value="Allergic Asthma"/>
    <primary value="true"/>
  </coding>
  <!-- ICD code -->
  <coding>
    <system value="urn:oid:2.16.840.1.113883.6.42"/>
    <version value="9"/>
    <code value="493.00"/>
    <display value="Extrinsic asthma - unspecified"/>
    <primary value="false"/>
  </coding>
  <text value="Atopic Asthma"/>
</codeableConcept>
```

Value Set

A value set, like a codeable concept, binds together different codings. However, a value set is grouped by the context of the codings that are bound together and isn't a shared concept that aligns across terminology systems. For instance, while a codeable concept binds together codes representing a specific illness, a value set binds together code sets representing multiple illnesses.

Life Sciences Cloud hasn't explicitly implemented value sets using any object or component. However, to achieve a basic degree of grouping, you can group together code set records that have the same values for the Code Set Type field.

Recommendations for Using Code Sets and Code Set Bundles

The type and range of codes required vary across organizations. The code requirements also depend on the type of care and services organizations provide and on the terminology systems they prefer. As such, Life Sciences Cloud doesn't pre-populate these objects with any codes from terminology systems.

As an admin, it's up to you to populate these objects with the codes your organization needs. As the

volume of required codes can be immense, we recommend that you use the Salesforce Data Loader to import code data into your orgs.

Data Loader is a client application for the bulk import or export of data. Use it to insert, update, delete, or export Salesforce records. When importing data, Data Loader reads, extracts, and loads data from comma-separated values (CSV) files or from a database connection. When exporting data, it outputs CSV files.

Check [Considerations for Installing Data Loader](#) for system requirements and other prerequisites to using Data Loader.

Data integrity in your code database is vital to the smooth functioning of your organization. It's likely that you don't want your users to modify codes or add new ones. Such code changes can interfere with the automated approval processes you've set up and result in unintended authorizations. Therefore, we recommend modifying the access permissions on these objects after you populate these objects with the data your organization needs. You can give your users Read-Only access to these objects, or even prevent new record creation in them after your initial data loading.

Set Up Clinical Engagement Basics

Before you set up specific clinical engagement features in Agentforce Life Sciences, perform basic setup tasks such as enabling person accounts and installing OmniStudio.

[Set Up Security and Permissions for Life Sciences Cloud](#)

Create users and profiles for your org and give them the permission sets and permission set licenses that they need for Life Sciences Cloud.

[Verify Data Protection Details Are Available in Records](#)

To help maintain the privacy of your users' data, verify that data protection details are available for lead, contact, and person account records.

[Set Up Person Accounts to Represent People in Life Sciences Cloud](#)

Person accounts store information about specific people by combining certain account and contact fields into a single record. In Life Sciences Cloud, always model your patients or members as person accounts. You can't fully use Life Sciences Cloud functionality if you don't model your patients and members as person accounts.

[Omnistudio for Life Sciences Cloud](#)

Use Omnistudio to create guided interactions and other rich user experiences without code. You can even create applications and workflows using data from Life Sciences Cloud and from external sources.

[Set Up Healthcare Providers](#)

Set up records for healthcare providers such as the practitioners (people) who take care of patients and the facilities (organizations) where patients are cared for. Practitioners include doctors, nurses, physical therapists, and other clinical staff. Facilities include hospitals, clinics, labs, and other organizations.

Set Up Security and Permissions for Life Sciences Cloud

Create users and profiles for your org and give them the permission sets and permission set licenses that they need for Life Sciences Cloud.

Add Life Sciences Cloud Users

You can add internal Salesforce users one at a time or in batches of up to 10 users.

Configure Profiles for Life Sciences Cloud

Your org includes several standard profiles where you can edit a limited number of settings. You can assign these standard Salesforce profiles to your Life Sciences Cloud users. If you need a custom profile to extend visibility and provide access to certain objects, clone a standard profile and edit it to meet your organization's needs. You can also adjust users' profiles to determine their access to fields.

Assign Permission Sets for Life Sciences Cloud

To work in Life Sciences Cloud, users need the appropriate permission sets and permission set licenses. The Permission Sets page in Setup describes each permission set and shows the permission set license related to each permission set. Sort the License column to gain a clear picture of which permission sets match which permission set licenses.

Add Life Sciences Cloud Users

You can add internal Salesforce users one at a time or in batches of up to 10 users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. Click **New User** to add a single user.
3. Enter a first name, last name, email, and a unique username in the form of a email address.
Your username must be unique across all Salesforce orgs, including trial and Sandbox orgs.
4. Select a user license and a profile. For example, select Salesforce as the user license and Standard User as the profile.
The user license determines the available profiles. A profile specifies the user's minimum permissions and access settings.
5. To email a login name and temporary password to each new user, ensure **Generate new password and notify user immediately** is selected.
6. Specify more details for the user as needed.
7. Save your changes.

Configure Profiles for Life Sciences Cloud

Your org includes several standard profiles where you can edit a limited number of settings. You can

assign these standard Salesforce profiles to your Life Sciences Cloud users. If you need a custom profile to extend visibility and provide access to certain objects, clone a standard profile and edit it to meet your organization's needs. You can also adjust users' profiles to determine their access to fields.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

 **Note** When you set up certain features such as Advanced Therapy Management, you will encounter tasks to create specific profiles for users of those features.

1. In Setup, in the Quick Find box, search for and select **Profiles**.
2. Select a profile and then click **Clone**.
3. Enter a name for the new profile and then click **Save**.
4. Configure the new profile per your organization's requirements and save your changes.

Assign Permission Sets for Life Sciences Cloud

To work in Life Sciences Cloud, users need the appropriate permission sets and permission set licenses. The Permission Sets page in Setup describes each permission set and shows the permission set license related to each permission set. Sort the License column to gain a clear picture of which permission sets match which permission set licenses.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To assign permission set licenses or permission sets:
Manage Users

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud for Life Sciences

Permission sets give users access to objects and fields, custom metadata, and other app and system settings. Permission set licenses grant users access to features that aren't included in their user license. Users can be assigned any number of permission set licenses.

In Setup, you can assign permission set licenses and permission sets to users in a few ways. When you assign a permission set to a user, the permission set license is automatically assigned to the user.

- From the Company Information page, you can select a permission set license to view its details and assign it to multiple users.
- From the Permission Sets page, you can select a permission set to view its details and assign it to

multiple users.

- From the Users page, you can select a user to view his or her details and assign multiple permission set licenses and permission sets to the user.

- Familiarize yourself with your list of available licenses and permissions and know what each does.

To see the available permission set licenses, go to **Company Information** in Setup. To see available permission sets, go to **Permission Sets** in Setup.

 **Note** The permission sets available to you depend in part on which features are included in your Salesforce contract.

- Assign the appropriate permission sets to your users via the Permission Sets or Users pages.

- Make sure to add the Health Cloud Starter permission set for all users.
- Add additional permission sets depending on the features you want to make available to each user. For example, assign the Manage Pharmacy Benefits Verification permission set to give users access to the Pharmacy Benefits Verification program and its features.
- Save your changes.

Verify Data Protection Details Are Available in Records

To help maintain the privacy of your users' data, verify that data protection details are available for lead, contact, and person account records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

- From Setup, in the Quick Find box, enter *Data Protection and Privacy*, and then select **Data Protection and Privacy**.
- You don't need to take any further action if **Make data protection details available in records** is selected. If this option is not selected, select **Edit**, select **Make data protection details available in records**, and then save your changes.

Set Up Person Accounts to Represent People in Life Sciences Cloud

Person accounts store information about specific people by combining certain account and contact fields into a single record. In Life Sciences Cloud, always model your patients or members as person accounts. You can't fully use Life Sciences Cloud functionality if you don't model your patients and members as person accounts.

[Enable Contacts to Relate to Multiple Accounts](#)

Relate a single contact to multiple accounts so you can easily track the relationships between people and organizations.

Enable Person Accounts for Use in Life Sciences Cloud

Enable person accounts so that you can use them to represent patients and members in your Life Sciences Cloud org.

Create Page Layouts and Record Types for People and Organizations

Create page layouts and assign them to different record types to hold data for the different types of organizations and people that your organization interacts with. For example, create separate business account record types with different page layouts for pharmacies, payers, and healthcare provider organizations.

Enable Contacts to Relate to Multiple Accounts

Relate a single contact to multiple accounts so you can easily track the relationships between people and organizations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

 **Important** Enabling Contacts to Multiple Accounts is required to use person accounts in Life Sciences Cloud.

Because Life Sciences Cloud uses person accounts to represent patients, you must enable the setting that allows a contact to be related to multiple accounts. By enabling the contacts to be shared with multiple accounts, you ensure that person accounts are available to use in your org.

1. From Setup, in the Quick Find box, enter *Account Settings*, and then select **Account Settings**.
2. Click **Edit**.
3. In the Contacts to Multiple Accounts Setting section of the page, select the checkbox for Allow users to relate a contact to multiple accounts.
4. Save your changes.

Enable Person Accounts for Use in Life Sciences Cloud

Enable person accounts so that you can use them to represent patients and members in your Life Sciences Cloud org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

-  **Note** After Person Accounts is enabled, it cannot be disabled. We recommend that you create a sandbox to preview how person accounts affect your Salesforce org.

1. From Setup, use the Quick Find box to search for and select **Person Accounts**.
2. Go through the steps listed on the Person Accounts page.
 - a. Acknowledge the impact of enabling person accounts in the org.
 - b. Verify the Account object has at least one record type such as a Business record type. If it doesn't, you can open another tab to set up a record type.
 - c. Verify user profiles that have read permission on accounts have read permission on contacts.
 - d. Verify the organization-wide default sharing is set so that either Contact is **Controlled by Parent** or both Account and Contact are **Private**.
3. Click **Check Readiness** to ensure you've completed all the prerequisites to enable person accounts in your org.
4. Click **Enable Person Accounts**. Click **Enable** when you see the warning message.

After Person Accounts is enabled, the Person Account and the Account Contact Relationship objects become visible in Setup > Object Manager in your org. In the Person Account object, a person account record type and person account page layout are created automatically.
5. From Setup, find and select **Profiles**, and then assign the Person Account record type to each user profile.
 - a. In the Record Type Settings for each profile, find and edit the Accounts object.
 - b. Move the Person Account record type from Available Record Types to Selected Record Types.
 - c. Select Person Account or Business as the default record type for the user profile.
 - d. In the Business Account and Person Account Default Record Types section, verify the Person Account Default Record Type dropdown has Person Account selected, and then verify the Business Account Default Record Type dropdown has Business or a value other than --Master-- selected.
 - e. Save your changes.

Create Page Layouts and Record Types for People and Organizations

Create page layouts and assign them to different record types to hold data for the different types of organizations and people that your organization interacts with. For example, create separate business account record types with different page layouts for pharmacies, payers, and healthcare provider organizations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

You can also differentiate your patient records from your practitioner records by creating a record type for patient accounts and a record type for practitioners.

 **Note** When you enable person accounts, a person account layout and a person account record type are created automatically. You can rename the page layout and record type and configure them as needed.

1. Create a page layout for a person:
 - a. From Setup, go to Object Manager.
 - b. In the Quick Find box, enter *Person Account*, select **Person Account**, and then select **Page Layouts**.
 - c. Click **New**.
 - d. Select an existing page layout from the dropdown.
 - e. Enter a name for the new layout, and then click **Save**. For example, enter Patient.
 - f. Configure the layout to show the fields that your organization uses for patients.
 - g. Save your work.
 - h. Repeat these steps to create more page layouts for people as needed; for example, create a page layout for healthcare providers who are solo practitioners.
2. Create a record type for a person:
 - a. From Setup, go to Object Manager.
 - b. In the Person Account object, select **Record Types**.
 - c. Click **New**.
 - d. Select the existing Person Account record type from the dropdown.
 - e. Enter a label for the new record type. For example, enter Patient.
 - f. Select **Active**.
 - g. Select the profiles for which you want to make this record type available, and then make this the default record type for profiles as needed.
 - h. Click **Next**.
 - i. Select a page layout to assign to all the profiles you selected or assign a different page layout for each profile.
 - j. Click **Save**.
 - k. Repeat these steps to create more record types as needed; for example, create a record type for healthcare providers who are solo practitioners.
3. Create a page layout for an organization:
 - a. From Setup, go to Object Manager.
 - b. In the Quick Find box, enter *Account*, select **Account**, and then select **Page Layouts**.
 - c. Click **New**.
 - d. Select an existing page layout from the dropdown.
 - e. Enter a name for the new layout, and then click **Save**. For example, enter Pharmacy.
 - f. Configure the layout to show the fields that your organization uses for pharmacies.
 - g. Save your work.
 - h. Repeat these steps to create more page layouts for organizations as needed; for example, create page layouts for payer and healthcare provider organizations.
4. Create a record type for an organization:
 - a. From Setup, go to Object Manager.
 - b. In the Account object, select **Record Types**.
 - c. Click **New**.
 - d. Select the existing Business record type from the dropdown.

- e. Enter a label for the new record type. For example, enter Pharmacy.
- f. Select **Active**.
- g. Select the profiles for which you want to make this record type available, and then make this the default record type for profiles as needed.
- h. Click **Next**.
- i. Select a page layout to assign to all the profiles you selected or assign a different page layout for each profile.
- j. Click **Save**.
- k. Repeat these steps to create more record types as needed; for example, create record types for payer and healthcare provider organizations.

See Also

[Salesforce Help: Configure Profiles for Life Sciences Cloud](#)

[Salesforce Help: Assign Record Types and Page Layouts in Profiles](#)

Omnistudio for Life Sciences Cloud

Use Omnistudio to create guided interactions and other rich user experiences without code. You can even create applications and workflows using data from Life Sciences Cloud and from external sources.

Omnistudio is built on the Salesforce platform and provides a suite of services, components, and data model objects. Omnistudio includes components for different purposes:

- Omniscripts define and contain user-interaction components and give you the flexibility to create logic for guided flows.
- Flexcards display data and launch actions.
- Integration Procedures bundle server-side data integration operations for efficiency and reuse.
- Omnistudio Data Mappers transfer and transform data between Salesforce and the Omniscripts, Flexcards, and Integration Procedures components.

When we update Omnistudio, the upgrades are pushed automatically to you. Omnistudio is required for Business Rules Engine and Decision Explainer.

Set Up Omnistudio for Life Sciences Cloud

To use Omnistudio in Life Sciences Cloud, set up permissions, change optional Omnistudio settings, and learn more about Omnistudio.

Before using Omnistudio, [set up and assign Omnistudio permission sets](#).

If needed, deploy Omnistudio components from one org to another. For more information, see [Deploy Omnistudio Components Between Orgs](#).

Additional Omnistudio Settings

Omnistudio has other settings that you might want to change. By default, these are disabled.

- Use the Omnistudio SLDS 2 Theme
- Enable Autogenerated Numbers
- Enable Enhanced Runtime Performance of Components

Omnistudio Basics

We also recommend that you use these resources to learn the basics of Omnistudio.

- Trailhead: Get Started with Omnistudio on the Salesforce Platform
- Omnistudio Documentation
- Learn about Omnistudio Standard Designer

Set Up Healthcare Providers

Set up records for healthcare providers such as the practitioners (people) who take care of patients and the facilities (organizations) where patients are cared for. Practitioners include doctors, nurses, physical therapists, and other clinical staff. Facilities include hospitals, clinics, labs, and other organizations.

When you set up healthcare provider data, create a record to represent the provider as a person or an organization, and then create a record to represent what the provider does.

For organizations, create accounts with a Business record type.

For people, create person accounts or contacts, but we strongly recommend person accounts. A person account combines an account and a contact. Person accounts are a better fit for healthcare providers who are their own independent entity with practicing rights at a number of locations. These individuals have their own unique identification number, such as a National Provider Identifier (NPI), which follows them regardless of where they work. If you map individual providers as contacts, there are limited capabilities for these records.

To represent providers in terms of what they do, create healthcare provider records. These records store business-level details about the healthcare organization or person, such as the provider type.

A person account record and a healthcare provider record combine to represent the FHIR Practitioner resource in Salesforce. The healthcare provider record is the base, and it references the person account record using the AccountId field.

-  **Note** Model providers using both the Healthcare Provider object and person accounts to ensure they're aligned to the FHIR Practitioner resource and they can appear in features such as provider search. If you model providers only as person accounts, you may not be able to use features such as provider search.

To define the relationship between a practitioner and a facility, create a healthcare practitioner facility record that specifies the facility's account record and the practitioner's person account or contact record. Healthcare practitioner facility records represent the set of services that a practitioner provides at a specific location.

Create additional records to store provider care specialties, certifications, education, and licenses, and for the payer network that a healthcare provider is affiliated with.

[Create Records for Healthcare Practitioners](#)

Create a person account record to represent a healthcare practitioner as a person and create a healthcare provider record to represent what the practitioner does.

[Create Records for Healthcare Organizations](#)

Create a business account record to represent a healthcare facility as an organization and create a healthcare provider record to represent what the organization does.

[Create Healthcare Facilities](#)

Create a healthcare facility record to represent the facility's physical, geographic, or functional details. A healthcare organization's local branches or facilities need healthcare facility records that reference a business account and a healthcare provider record for that specific branch or facility.

[Connect Healthcare Practitioners with Facilities](#)

Define the relationship between a practitioner and a facility or organization by creating a healthcare practitioner facility record to represent the set of services that a practitioner provides at that facility or for that organization.

[Create Healthcare Facility and Payer Networks](#)

Create healthcare payer network records for insurance network groups, and then create healthcare facility network records to identify the payer network that a facility or organization is a part of.

[Create Care Specialty Records](#)

Healthcare providers can have multiple specialties and subspecialties. Create care specialty and healthcare provider specialty records to represent them. You can also classify specialties and subspecialties using taxonomy records.

[Create Care Provider Facility Specialty Records](#)

Create care provider facility specialty records to represent all the specialties that the practitioner provides at a specific facility or for a specific organization. These records help patients find a provider by the specialties they offer at a facility.

[Add Healthcare Provider Credentials](#)

Create records to store healthcare provider credentials such as accreditations, awards, board certifications, business licenses, and education.

See Also

[Salesforce Help: Practitioner](#)

Create Records for Healthcare Practitioners

Create a person account record to represent a healthcare practitioner as a person and create a healthcare provider record to represent what the practitioner does.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To use Provider Relationship Management: Health Cloud Provider Relationship Management

Healthcare provider records store business-level details about the healthcare organization or person, such as the provider type.

1. From the App Launcher, find and select **Accounts**.
2. Click **New**.
3. Select the appropriate person account record type for practitioners.
4. Enter the practitioner's first name and last name, and salutation if appropriate.
5. Enter optional data such as the practitioner's address and contact information, and then save your changes
6. Add a business identifier for the account such as the National Provider Identification (NPI) number.
 - a. From the account's related list, go to Identifiers and click **New**.
 - b. For Parent Record, verify the account is selected.
 - c. For ID Value, enter the identifier value specific to your country or region.
 - d. Save your changes.
7. From the App Launcher, find and select **Healthcare Providers**.
8. Click **New**.
9. For Healthcare Provider Name, enter the practitioner's full name.
10. For Account, select the person account you created for the practitioner earlier.
11. Enter optional data such as the provider type and provider class. For example, select Medical Doctor for the provider type and select Solo Practitioner for the provider class.
12. For Status, select **Active** to show the provider's current status is active.
13. Save your changes.

Create Records for Healthcare Organizations

Create a business account record to represent a healthcare facility as an organization and create a healthcare provider record to represent what the organization does.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To use Provider Relationship Management: Health Cloud Provider Relationship Management

Healthcare provider records store business-level details about the healthcare organization or person, such as the provider type.

1. From the App Launcher, find and select **Accounts**.
2. Click **New**.
3. Select the appropriate business account record type for the provider organization.
4. Enter the name of the organization.
5. Enter the organization's address and contact information.
6. Save your changes.
7. Add a business identifier for the account such as the National Provider Identification (NPI) number.
 - a. From the account's related list, go to Identifiers and click **New**.
 - b. For Parent Record, verify the account is selected.
 - c. For ID Value, enter the identifier value specific to your country or region.
 - d. Save your changes.
8. From the App Launcher, find and select **Healthcare Providers**.
9. Click **New**.
10. For Healthcare Provider Name, enter the organization's name.
11. For Account, select the business account you created for the organization earlier.
12. Enter optional data such as the provider type. For example, select Hospital for the provider type.
13. For Status, select **Active** to show the provider's current status is active.
14. Save your changes.

Create Healthcare Facilities

Create a healthcare facility record to represent the facility's physical, geographic, or functional details. A healthcare organization's local branches or facilities need healthcare facility records that reference a business account and a healthcare provider record for that specific branch or facility.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To use Provider Relationship Management: Health Cloud Provider Relationship Management

1. From the App Launcher, find and select **Healthcare Facilities**.
2. Click **New**.
3. Enter a name for the facility.
4. For Account, select the business account you created for the organization earlier.
5. Add other relevant information, and then save your changes.

Connect Healthcare Practitioners with Facilities

Define the relationship between a practitioner and a facility or organization by creating a healthcare practitioner facility record to represent the set of services that a practitioner provides at that facility or for that organization.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To use Provider Relationship Management:	Health Cloud Provider Relationship Management
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A healthcare practitioner facility record specifies the facility's account record and the practitioner's contact record. Create multiple records if a practitioner works for more than one facility or organization.

If the healthcare practitioner provides primary care to the patient, make sure you select the Primary Care Physician checkbox.

1. From the App Launcher, find and select **Healthcare Practitioner Facilities**.
2. Click **New**.
3. For Practitioner Facility Name, enter a name such as *Dr Meera Kaling at StayHealthy Hospital*. We recommend you establish this naming convention or a similar naming convention for these records.
4. Select **Active**.
5. For Account, specify the account associated with the practitioner facility.
6. For Practitioner, specify the practitioner that works at the facility. If you created a person account for the practitioner, select it in this field. Otherwise select the practitioner's contact record.
7. If the facility is the practitioner's primary facility, select **Primary Facility**.
8. If the practitioner provides primary care, select **Primary Care Physician**.
9. Add other relevant information, and then save your changes.

Create Healthcare Facility and Payer Networks

Create healthcare payer network records for insurance network groups, and then create healthcare facility network records to identify the payer network that a facility or organization is a part of.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein

GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To use Provider Relationship Management: Health Cloud Provider Relationship Management

Before you begin, create business account records to represent payer organizations as needed.

1. From the App Launcher, find and select **Healthcare Payer Networks**.
2. Click **New**.
3. Enter a name for the payer network.
4. For Payer, select the payer organization associated with this facility network.
5. Select a network type such as HMO, PPO, or EPO.
6. Select **Active**.
7. Add other relevant information such as effective date or line of business, and then save your changes.
8. From the App Launcher, find and select **Healthcare Facility Networks**.
9. Click **New**.
10. Enter a name for the facility network.
11. For Account, select the business account associated with this facility network.
12. For Payer Network, select the payer network you created earlier.
13. For Practitioner Facility, select a healthcare practitioner facility related to the account you selected.
14. For Practitioner, select the practitioner related to the healthcare practitioner facility.
15. Add other relevant information, and then save your changes.

Create Care Specialty Records

Healthcare providers can have multiple specialties and subspecialties. Create care specialty and healthcare provider specialty records to represent them. You can also classify specialties and subspecialties using taxonomy records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To use Provider Relationship Management: Health Cloud Provider Relationship Management

1. From the App Launcher, find and select **Care Specialties** to create care specialty records that store general provider specialty codes and descriptions. For example, 02 - Physician/General Surgery.
2. From the App Launcher, find and select **Care Taxonomies** to create care taxonomy records that store a static list of taxonomy codes..
3. From the App Launcher, find and select **Care Specialty Taxonomies** to create records that define the

relationship between a care specialty and a care taxonomy.

- From the App Launcher, find and select **Healthcare Provider Specialties** to create healthcare provider specialty records to store the specialties for a practitioner or a provider organization.

Create Care Provider Facility Specialty Records

Create care provider facility specialty records to represent all the specialties that the practitioner provides at a specific facility or for a specific organization. These records help patients find a provider by the specialties they offer at a facility.

REQUIRED EDITIONS

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

USER PERMISSIONS NEEDED

To use Provider Relationship Management: Health Cloud Provider Relationship Management

- From the App Launcher, select **Care Provider Facility Specialties**.
- Click **New**.
- Enter a name for the record.
- For **Specialty**, select the practitioner's specialty or create a new one.
- For **Practitioner Facility**, select the facility where the practitioner practices the specialty.
- Select **Primary Specialty** if this specialty is the practitioner's primary specialty at this facility.
- Select **Active**.
- Add other relevant information, and then save your changes.

Add Healthcare Provider Credentials

Create records to store healthcare provider credentials such as accreditations, awards, board certifications, business licenses, and education.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To use Provider Relationship Management: Health Cloud Provider Relationship Management

- From the App Launcher, find and select **Accreditations** to create records for the professional accreditations of a facility. For example, a joint commission accredits a facility as a general acute care

hospital.

2. From the App Launcher, find and select **Awards** to create records for a practitioner or a provider organization's professional awards.
3. From the App Launcher, find and select **Board Certifications** to create records for a practitioner's board certifications, which demonstrate the practitioner has undergone extra training to become a specialist or learn the latest advancements in their speciality.
4. From the App Launcher, find and select **Business Licenses** to create records for a practitioner or a provider organization's professional licenses.
5. From the App Launcher, find and select **Person Educations** to create records for a person's professional education in a provider role.

Set Up Participant Management

Participant Management streamlines the process of recruiting and enrolling participants in clinical trials by orchestrating each stage, from initial recruitment to enrollment. With this feature, you can provide a unified clinical trial portal experience for potential participants and clinical trial coordinators.

Using Participant Management, users can gather critical participant information and support the evaluation of the effectiveness and safety of new medical treatments. Participant Management enables you to:

- Reduce the cost per eligible participant
- Reduce the cost per conversion of consenting participants
- Reduce the average time between registration and enrollment
- Improve participant registration and enrollment experience
- Lower your participant attrition rate

The key components of Participant Management include:

For Recruitment

During the recruitment phase, potential participants are referred to as Candidates. The following features support trial discovery, candidate matching, prescreening, and the application process.

- Criteria-Based Search and Filter feature to help users search for and find suitable clinical trials on an experience cloud site
- Omnistudio components to digitize initial prescreening and candidate registration processes
- Einstein Candidate Matching feature to automatically match candidates to clinical trials

For Enrollment

After enrollment, Candidates become Participants and proceed to the next phase of the clinical trial.

- Build enrollment journey using Salesforce orchestration capabilities

- Flows to digitize the consent management process
- Invocable actions and flows to digitize the basic randomization process

Participant Management Data Model and Permissions

Participant Management uses a data model that's FHIR R4 and USCDI-aligned to store its data and make it interoperable.

Enable Participant Management

Give users access to participant management features by enabling org preferences in your Salesforce org. By enabling Participant Management, you can streamline the recruitment and enrollment processes in clinical trials.

Assign Permission Sets for Participant Management Users

Participant Management offers five permission sets: Clinical Trial Manager, Clinical Trial Coordinator, Clinical Trial Participant, Clinical Trial Guest, and Clinical Trial Site Coordinator in Experience Cloud. Assign the necessary permission sets to users according to their roles.

Add Data for Participant Recruitment and Enrollment

Quickly create a record from an object's home page. Clinical trial managers can create records that are necessary to use the features within Participant Management. Clinical trials are represented using care programs and research studies.

Participant Recruitment

Participant Management digitizes and optimizes candidate recruitment in clinical trials. With Participant Management, you can help users overcome recruitment challenges, save time, and improve trial efficiency.

Participant Enrollment

Participant Enrollment features help your clinical trial managers, coordinators, and participants to prepare, send, and view consent forms. It includes consent management and randomization features that can be combined to create a participant enrollment journey using Salesforce orchestration capabilities.

Use Participant Management

Participant Management helps organizations that conduct clinical research studies to make their recruitment and enrollment processes more efficient. Clinical trial coordinators or recruiters can use the Clinical Excellence Console app to track and monitor participant recruitment and enrollment progress. Clinical trial coordinators can use the Research Study Candidate page to add new Medication Requests, Health Conditions, Allergies, and Immunization records directly from the patient card.

Participant Management Data Model and Permissions

Participant Management uses a data model that's FHIR R4 and USCDI-aligned to store its data and make it interoperable.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

Participant Management

Here's the summary of objects used in Participant Management. Use these objects to set up features that assist users in the recruitment and enrollment processes.

Object	Purpose
Research Study	Represents the details of a research study that include its design, execution, and oversight.
Care Program	Represents the extended or additional details of a research study.
Care Program Eligibility Rule	Represents a rule defining the inclusion and exclusion criteria for a research study or care program. This entity creates an association between Care Program and an Enrollment Eligibility Criteria.
Care Program Enrollee	Represents a participant enrolled in a care program.
Enrollment Eligibility Criteria	Represents criteria that define patient enrollment eligibility for one or more care programs.
Care Program Status Period	Represents the historical changes to the status of a care program.
Care Program Site	Represents the location details of the care program site.
Research Study Candidate	Represents the details of the associated account and the status of the research participant or candidate.
Care Program Detail	Represents the detail records related to the care program.
Research Study Candidate Status Period	Represents the duration of time that a research participant or candidate is assigned a particular status.
Research Study Relation	Represents the different related research studies. For example, a cardiac drug research study can be a part of a larger study encompassing cardiac diseases and diabetic diseases.

Object	Purpose
Research Study Searchable Field	Represents a common dataset that includes multiple fields and values from multiple objects, and is used as the basis for searches related to research studies.
Research Study Protocol Information	Represents details of the research study protocol document.
Data Use Purpose	Represents the reason for contacting a prospect or customer, such as for consent verification.
Authorization Form Data Use	Represents the data use consented to in an authorization form.
Authorization Form	Represents the specific version and effective dates of a form that is associated with consent, such as consent forms.
Authorization Form Text	Represents an authorization form's text and language settings.
Content Document	Represents a document that has been uploaded to a library in Salesforce CRM Content or Salesforce Files.
Content Document Version	Represents a specific version of a document in Salesforce CRM Content or Salesforce Files.
Info Authorization Request	Tracks a request for authorization on a Data Use Purpose.
Info Authorization Request Form	Tracks the individual Authorization Form Texts that belong to an Authorization Request.
Authorization Form Consent	Represents the date and way in which a user consented to an authorization form.
Digital Verification	Stores information about the verification of a related record.
Care Program Team Member Role Period	Represents the historical changes to the role of a care program team member.
Care Program Enrollee Status Period	Represents the historical changes to the status or the stage of a care program enrollee.
Care Program Enrollment Evaluation Result	Represents the result of an evaluation done to assess the eligibility of a participant enrolling for a research study or care program.

Object	Purpose
Diagnostic Summary	Represents the findings, interpretations, and summaries of tests performed on participants.

In addition to these objects, Participant Management also uses the objects in the Discovery Framework data model to support Assessments and recommendations.

Randomization

Here's the set of objects to use to define randomization.

Object	Purpose
Research Study Randomization	Represents the randomization algorithm configuration defined for a research study.
Research Study Randomization Block	Represents the details of a block that's generated through the parameters specified in the research study randomization.
Research Study Randomization Block Slot	Represents the individual randomization block items that correspond to a research study randomization block.
Research Study Randomization Criteria	Represents the criteria definition for grouping the participants or candidates that participate in the research study.
Research Study Comparison Group	Represents the details of a research study comparison group.
Research Study Comparison Group Candidate	Represents the junction between a research study control group and a research study participant or candidate.

Permissions

Users need these permissions and permission sets to use Participant Management.

Permission	Type	Purpose
Clinical Trial Manager	Permission Set License	Users can design and run clinical trials.
Clinical Trial Coordinator	Permission Set License	Users can involve in daily activities to coordinate tasks of

Permission	Type	Purpose
		clinical trials.
Clinical Trial Participant	Permission Set License	Users can view and register for research studies as external users on the Experience Cloud site.
Clinical Trial Guest	Permission Set License	Users can view and register for research studies as guest users on the Experience Cloud site.
Clinical Trial Site Coordinator in Experience Cloud	Permission Set License	Users, such as doctors or nurses, who are Experience Cloud site external users can coordinate tasks on clinical trial sites.
Clinical Trial Manager	Permission Set	Users can design, manage, and run clinical trials.
Clinical Trial Coordinator	Permission Set	Users can coordinate tasks of clinical trials.
Clinical Trial Participant	Permission Set	Users can view and register for research studies on the Experience Cloud site as external users.
Clinical Trial Guest	Permission Set	Users can view and register for research studies on the Experience Cloud site as guest users.
Clinical Trial Site Coordinator in Experience Cloud	Permission Set	Users can coordinate tasks on clinical trials as Experience Cloud site external users.

See Also

- [Assign Permission Sets for Participant Management Users](#)
- [Salesforce Help: Participant Management Objects and Fields](#)

Enable Participant Management

Give users access to participant management features by enabling org preferences in your Salesforce org. By enabling Participant Management, you can streamline the recruitment and enrollment processes in clinical trials.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

1. From Setup, in the Quick Find box, find *Participant Management Settings*, and select it.
2. To access the participant enrollment features and the data model, turn on **Participant Recruitment and Enrollment**.
After you enable this feature setting, you'll see the guided setup for Participant Recruitment and Enrollment.
3. To use Randomized Clinical Trials feature, turn on **Research Study Randomization**.
4. To match candidates with clinical trials using Einstein Candidate Matching, turn on **Candidate Matching**.

Your Salesforce org now has access to the Participant Management features and the data model.

Assign Permission Sets for Participant Management Users

Participant Management offers five permission sets: Clinical Trial Manager, Clinical Trial Coordinator, Clinical Trial Participant, Clinical Trial Guest, and Clinical Trial Site Coordinator in Experience Cloud. Assign the necessary permission sets to users according to their roles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To assign permission sets and permission set licenses:
Modify All Data and Privacy Center

Here's the list of permission sets required to access various features of Participant Management.

Permissions

User	Permission Sets Required
Administrator	Actionable Segmentation Clinical Trial Manager

User	Permission Sets Required
	Criteria-Based Search and Filter Data Pipelines Base User Health Cloud Starter Omnistudio Admin Omnistudio User (OmniStudioExecution) Omnistudio User (OmniStudioUser) Prompt Template Manager Prompt Template User Query for Datapipelines User Use Data Processing Engine
Trial Manager	Actionable Segmentation Clinical Trial Manager Data Pipelines Base User Health Cloud Starter Omnistudio Admin Omnistudio User Prompt Template Manager Prompt Template User Query for Datapipelines User Criteria-Based Search and Filter
Trial Coordinator	Omnistudio User Prompt Template User Health Cloud Starter Clinical Trial Coordinator

User	Permission Sets Required
Trial Participant	Clinical Trial Participant
Trial Coordinator Experience Cloud	Clinical Trial Site Coordinator in Experience Cloud
Trial Guest	Clinical Trial Guest

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
2. Click the user who you want to assign the permission set license to.
3. In the Permission Set License Assignments related list, click **Edit Assignments**.
4. Select the required permission sets to assign depending on the user role.
5. Save your changes.

See Also

[Participant Management Data Model and Permissions](#)

Add Data for Participant Recruitment and Enrollment

Quickly create a record from an object's home page. Clinical trial managers can create records that are necessary to use the features within Participant Management. Clinical trials are represented using care programs and research studies.

1. [Create a Care Program](#)

You can define a care program and associate it with the research study. To create a care program, define the program and the relationships and activities within it.

2. [Create a Care Program Detail](#)

Stores the keywords, focus, and condition, including other details of the care program of the study. You can use these details to manage and track specific details of the care programs within clinical trials.

3. [Create Care Program Sites](#)

Stores the name, related care program, and healthcare facility of the care program site. Use this information to manage and track specific details of the care program site within clinical trials.

4. [Create a Research Study](#)

Stores the name, title, and all the necessary essential details of the research study. You can use these details to manage and track specific details of the research studies within clinical trials.

5. [Create a Research Study Candidate](#)

Capture and organize essential details about the participants enrolled for the research study. This record is created automatically as part of the registration flow. However, trial managers or coordinators can also manually create these records as necessary.

6. [Create a Research Study Comparison Group](#)

Capture and organize essential details about the participants allocated to the comparison groups by creating a research study comparison group record.

7. [Create Assessment Questions](#)

Capture and organize essential details about the assessment questions in your prescreening eligibility

checklist.

8. [Add Consent Documents for Clinical Trials](#)

You can add consent documents to clinical trials by associating those documents with the related care program and defining their data use purpose.

9. [Add Clinical Data to View Patient Details](#)

Use the object's homepage to create records for adding clinical data. This data helps site coordinators track a candidate's medical information at a glance in the research study candidate's lightening page. You can also use these objects in the Candidate Matching context definition to retrieve candidate's health data for the Research Study Candidate Evaluation prompt template.

Create a Care Program

You can define a care program and associate it with the research study. To create a care program, define the program and the relationships and activities within it.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To add and manage data for clinical trials:

Clinical Trial Manager

1. From the App Launcher, find and select **Care Programs**.

2. Click **New**.

3. Enter the name of the care program.

4. Select the parent program associated with the care program, if needed.

5. Select a category for the care program.

For example, to use a care program in the research study record, select **Trial Management** as the category.

6. Enter the start date of the care program.

7. If necessary, enter the program's end date.

8. Add a description for the care program.

9. Select the status of the care program.

10. Find and select a program sponsor, if any.

11. Save your changes.

Create a Care Program Detail

Stores the keywords, focus, and condition, including other details of the care program of the study. You can use these details to manage and track specific details of the care programs within clinical trials.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To add and manage data for clinical trials:

Clinical Trial Manager

1. From the App Launcher, find and select **Care Program Details**.
2. Click **New**.
3. In CareProgram, select the related care program for this care program detail.
4. In Detail Type, select the detail type for the program.
5. In Detail Record, select the corresponding detail record for the program.
6. Save your changes.

Create Care Program Sites

Stores the name, related care program, and healthcare facility of the care program site. Use this information to manage and track specific details of the care program site within clinical trials.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To add and manage data for clinical trials:

Clinical Trial Manager

To learn more about fields and values, refer to [CareProgramSite](#).

1. From the App Launcher, find and select **Care Program Sites**.
2. Click **New**, and enter the name of the care program site.
3. Select the related care program for this care program site.
4. Select the healthcare facility associated with the care program site, if necessary.
5. Select the location associated with the care program site.



Note Make sure that the latitude and longitude fields on the location object associated with the care program site object are populated. If these fields aren't populated, searches for care program sites don't return any results.

6. Select the status of the care program site, if necessary.
7. Save your changes.

See Also

- [Set Up Experience Cloud Site for Participant Management](#)
[Create Guest Users Sharing Rules in Participant Management](#)

Create a Research Study

Stores the name, title, and all the necessary essential details of the research study. You can use these details to manage and track specific details of the research studies within clinical trials.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To add and manage data for clinical trials:

Clinical Trial Manager

Add or edit values in a custom picklist from the fields area of an object. For more information, see [Add or Edit Picklist Values](#). To learn more about Research Study fields and values, refer [ResearchStudy](#).

1. From the App Launcher, find and select **Research Studies**.
2. Enter **New**, and enter the name of the research study. For example, *A Study to Assess the Effect of Dexpramipexole in Adolescents and Adults With Eosinophilic Asthma (EXHALE-4)*.
3. If necessary, enter the title for the research study.
4. Enter the summary for the research study, and a description, if needed.
5. Select the care program that you want to add as part of this research study.
6. Select the blinding type for the research study, if any.
For example, you can select Double Blinding. It's a type of clinical trial in which participants and researchers don't know which treatment or intervention participants receive until the trial ends.
7. Select the publication status. For example, select **Active**.
8. Select the intent type, if needed.
9. Select the phase applicable to the research study, if any.
10. Select the discontinuation reason, if any.
11. Select the start date and end date, along with time for the research study, if needed.
12. If necessary, select the uniform resource identifier, source system, and source system identifier for the research study.
13. If necessary, select the source system modified dates.
14. If necessary, select the type for the research study.

15. If necessary, select the primary contact information of the research study.
16. If necessary, enter an eligible maximum and minimum age.
17. If necessary, select an eligible gender.
18. Save your changes.

Create a Research Study Candidate

Capture and organize essential details about the participants enrolled for the research study. This record is created automatically as part of the registration flow. However, trial managers or coordinators can also manually create these records as necessary.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To add and manage data for clinical trials:

Clinical Trial Manager

OR

Clinical Trial Coordinator

1. From the App Launcher, find and select **Research Study Candidates**, and then click **New**.
2. Search and select the name of the research study candidate.
3. Select the research study that the candidate is associated with.
4. If necessary, select the care program site associated with the research study. For example, select the site-based matching care program that the candidate is interested in.
5. Select the Status of the candidate of the research study, if necessary.
6. Enter a description for the research study candidate.
7. Save your changes.

Create a Research Study Comparison Group

Capture and organize essential details about the participants allocated to the comparison groups by creating a research study comparison group record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the

Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To add and manage data for clinical trials:

Clinical Trial Manager

1. From the App Launcher, find and select **Research Study Comparison Groups**, and then click **New**.
2. Enter a name for the research study comparison group.
3. Select the research study that you want to add to the comparison group.
4. Enter the allocation ratio.

The distribution of participants across groups can be controlled using the allocation ratio field. If you leave this field blank, it defaults to 1. For example, consider a study with three comparison groups and allocation ratio values of 1:1:2. If the study has 100 participants, the distribution will be as: 25 participants in the first group, 25 participants in the second group, and 50 participants in the third group.

5. If necessary, enter a description for the research study comparison group.
6. Select the type code that represents the main intent of the research study for the comparison group.
7. Save your changes.

Create Assessment Questions

Capture and organize essential details about the assessment questions in your prescreening eligibility checklist.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To add and manage data for clinical trials:

Clinical Trial Manager

1. From the App Launcher, find and select **Assessment Questions**.
2. Click **New**.
3. Specify these details.
 - a. Enter the name of the assessment question.
 - b. Select the data type of the assessment question.
 - c. Select the category of the assessment question.
 - d. Enter the question text. For example, enter *Are you on any medication?*
 - e. Enter Response Values. For example, enter *Yes* and *No* on separate lines.

Response Values are required for the data types Radio, Radio Group, Select, and Multi-select.

- f. To make the question available to OmniScript, select **Active**.
 - g. If necessary, complete the other fields on the New Assessment Question page.
4. Save your changes.

Add Consent Documents for Clinical Trials

You can add consent documents to clinical trials by associating those documents with the related care program and defining their data use purpose.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To add and manage data for clinical trials: Clinical Trial Manager

To initiate consent and manage related tasks: Clinical Trial Coordinator

To access and view consent forms: Clinical Trial Participant

To learn more, see [Add Consent Documents to a Care Program](#).

Add Clinical Data to View Patient Details

Use the object's homepage to create records for adding clinical data. This data helps site coordinators track a candidate's medical information at a glance in the research study candidate's lightening page. You can also use these objects in the Candidate Matching context definition to retrieve candidate's health data for the Research Study Candidate Evaluation prompt template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data for clinical trials: Clinical Trial Manager

To view and add new requests to the patient card: Clinical Trial Coordinator

This clinical data is also used in the built-in Prepare Candidate Details for Participant Enrollment data

processing engine definition. Create records for these clinical data model objects.

- Account (Patient)
- Allergy Intolerance
- Care Observation
- Care Observation Component
- Clinical Encounter
- Clinical Service Request
- Diagnostic Summary
- Health Condition
- Patient Health Reaction
- Patient Immunization
- Patient Medical Procedure
- Patient Medication Dosage
- Medication
- Medication Request

1. From the App Launcher, find and select the object from the preceding list for the kind of record you want to create. For example, to create a record for Allegery Intolerance, find and select **Allergy Intolerances**.
2. Click **New**.
3. Enter values in the fields, as applicable.
Complete all the required fields marked with an asterisk (*).
4. Save your changes.

See Also

[Add Clinical Information to the Patient Card](#)

Participant Recruitment

Participant Management digitizes and optimizes candidate recruitment in clinical trials. With Participant Management, you can help users overcome recruitment challenges, save time, and improve trial efficiency.

Life Sciences organizations often encounter significant delays in clinical research studies due to the complexities of identifying and recruiting suitable candidates efficiently. These delays directly impact trial timelines and overall success. Participant Management addresses these challenges by digitizing and streamlining the entire recruitment experience. The platform empowers users to:

- Effortlessly locate suitable trials
- Quickly assess candidate eligibility
- Streamline the registration process
- Automatically match candidates to clinical trials

You can integrate built-in Omnistudio components into your Experience Cloud site to help your organization establish robust prescreening and registration processes. These features enhance the

recruitment workflow and offer candidates a unified clinical trial portal experience, which results in improved enrollment rates. The Einstein Candidate Matching feature automates the process of matching candidates with the inclusion and exclusion criterial of clinical trials. This automation saves time in identifying potential candidates and reduces the costs associated with converting candidates for enrollment.

Configure Data Processing Engine for Trial Search

Use the Data Processing Engine definition in the Clinical Trial Search feature to populate data from multiple objects into a single Research Study Searchable Field. Before you enable this feature, configure the necessary licenses and permissions in your Salesforce org.

Create Searchable Object Configuration for Trial Search

Use a searchable object to convert disparate pieces of data into a single searchable format. You can select a Data Processing Engine definition to transform the pieces of information across multiple objects and fields, and populate the searchable object with the consolidated data.

Create Search Configuration for Trial Search

Configure the trial search settings to tailor result relevance and display options.

Set Up Experience Cloud Site for Participant Management

Provide a seamless experience for candidates who wish to participate in clinical trials using Experience Cloud. You can help your users build an engaging site that features the Criteria-Based Search and Filter widget, which enables candidates to easily find trials that match their criteria and start the prescreening and registration process. You can create multiple sites within your organization for different purposes and transition between them effortlessly.

Clone and Assign Permission Set Licenses for Participant Management Guest User

Participant Management provides built-in permission set licenses that you can clone and customize to give access to your guest users. You must also clone and modify Omnistudio user permission set license to assign them to the guest users.

Create Guest Users Sharing Rules in Participant Management

A guest user sharing rule is a special type of criteria-based sharing rule that you use to grant record access to unauthenticated guest users. Guest user sharing rules can grant only Read-Only access.

Create Authenticated Users Sharing Rules in Participant Management

Experience Cloud site sharing rules are a special type of criteria-based sharing rules that you use to grant record access to authenticated portal users.

Set Up Eligibility Assessment and Candidate Registration

With Omnistudio components, you can help users check their eligibility and register for clinical trials.

Einstein Generative AI for Participant Management

Participant Management's Einstein Candidate Matching is an AI-enabled feature designed to automatically match candidates to the inclusion and exclusion criteria of research studies. Clinical trial coordinators or recruiters can use this information to build different candidate cohorts.

Clinical Excellence Console App for Participant Management

Clinical trial recruiters at investigative sites are often burdened with disparate solutions to track and monitor candidates' recruitment and enrollment progress as well as manage daily tasks and activities. With the Clinical Excellence Console App, you can help streamline the essential jobs for a trial recruiter by organizing important metrics and tasks.

Configure Data Processing Engine for Trial Search

Use the Data Processing Engine definition in the Clinical Trial Search feature to populate data from multiple objects into a single Research Study Searchable Field. Before you enable this feature, configure the necessary licenses and permissions in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To enable Criteria-Based Search and Filter and
Data Pipelines:

Data Pipelines Base User

AND

Criteria-Based Search and Filter permission set

To run a Data Processing Engine definition:

Customize Application

Modify All Data

Data Pipelines Base User

Before you execute the Data Processing Engine definition, set up all the necessary data: Care Programs, Care Program Details, Care Program Sites, and Locations.

1. Enable **Data Pipelines**. For more information, see [Enable Data Pipelines](#).
2. Enable **Criteria Based Search & Filter**.
For more information, see [Set Up Criteria-Based Search and Filter](#).
3. To open the Data Processing Engine definitions page, in Setup, find and select **Data Processing Engine**.
4. To open the built-in Data Processing Engine definition, click **Populate Research Study Searchable Field**.
To configure or add new nodes, see [Configure a Data Processing Engine Node](#).
5. To save the Data Processing Engine in your org with a custom name, click **Save As**.
6. Click **Activate** on the builder header.
Before you execute the Data Processing Engine definition, set up all the necessary data (Care Programs, Care Program Details, Care Program Sites, Locations).
7. To execute the Data Processing Engine definition, click **Run Definition** on the builder header.
Whenever you update the data in any records, you must run the data processing engine definition. Use

a scheduled flow or directly run the definition from the builder to regularly synchronize the data in the Research Study Searchable Field.

Create Searchable Object Configuration for Trial Search

Use a searchable object to convert disparate pieces of data into a single searchable format. You can select a Data Processing Engine definition to transform the pieces of information across multiple objects and fields, and populate the searchable object with the consolidated data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To configure the searchable object:	Use Criteria-Based Search and Filter system permission
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1. From Setup, in the Quick Find box, enter *Criteria-Based Search and Filter*, and select it.
2. On the Searchable Object Configuration tab, click **New**, and then enter the name of the searchable object.
The API name is automatically populated.
3. Find and select **Research Study Searchable Field**.
4. (Optional) Enter a description for the searchable object.
5. Save your changes.
6. If you want to specify an alternative display format for fields used as filter criteria.
 - a. Open the search configuration that you created.
 - b. Under Filter Field Display Format, click **Edit** icon.
 - c. In Select Filter Field Display Format, select **Picklist** for searchable object fields that you want to see as dropdowns.
 - d. Save your changes.

Create Search Configuration for Trial Search

Configure the trial search settings to tailor result relevance and display options.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

1. Select a search configuration type.
 - a. From Setup, in the Quick Find box, enter *Criteria-Based Search and Filter*, and select it.
 - b. Click the **Search Configuration** tab and then click **New**.
 - c. For configuration type, select **Clinical Trial Search**, and then click **Next**.
2. Add details to the search configuration.
 - a. Enter a name for the search configuration, such as *Find a Clinical Trial*.
The API name is populated automatically.
 - b. For searchable object, find and select **Research Study Searchable Field**.
 - c. For Searchable Object Configuration, select the configuration record that you created in the searchable object configuration.
 - d. (Optional) Enter a description for the search configuration.
 - e. Click **Next**.
3. Select a FlexCard to display search results.
 - a. Find and select the **TrialManagementCandidateTrialSearchResult** Flexcard.
 - b. Click **Next**.
4. Configure distance criteria.
 - a. Select a unit of measure that you want your users to use to filter research studies.
 - b. Add values for the Distance Filter dropdown.
Users can use these options to filter research studies based on distance from their location.
5. Select fields to group and aggregate search results. For Search Result Display Mode, you can select from two options Grouping and Aggregation and Multiple Fields.
 - a. Select the Multiple Fields option to enable range-type filtering.

You can select up to 20 fields in total, which includes both fields and range types.

 - b. Select fields such as Intent, Phase, Research Study Type, Eligible Gender, Status for filtering, as needed.
 - c. Click **Next**.
6. Configure range types for number and date fields to filter search results.
 - a. Click **Add Range**.
 - b. Select the Range Type as In-Range or Range Overlap.
The In-Range type includes values that fall completely within the specified range. The Overlap Range type includes values that extend into or overlap with the specified range.
 - c. Click **Next**.
 - If you select Range Type as In-Range, then select an option from the Range Field. For example, Current Enrollee Count.
 - If you select Range Type as Range Overlap, then select a Minimum Range Field and a Maximum Range Field. For example, Current Enrollee Count as Minimum Range Field and Target Enrollee Count as a Maximum Range Field.
7. Select fields based on which search results can be sorted.
 - a. Select the fields that you want to display. For example, you can select Current Enrollee Count and Number of Sites.
 - b. Turn on **Single Sort** option.
Allows users to sort search results based on only one field at a time.
 - c. Click **Next**.

8. Skip select actions for search results page because actions don't apply for the card view.
9. Click **Done**
You see a toast message confirming that your search configuration is successfully created.
10. Activate your search configuration.

Set Up Experience Cloud Site for Participant Management

Provide a seamless experience for candidates who wish to participate in clinical trials using Experience Cloud. You can help your users build an engaging site that features the Criteria-Based Search and Filter widget, which enables candidates to easily find trials that match their criteria and start the prescreening and registration process. You can create multiple sites within your organization for different purposes and transition between them effortlessly.

REQUIRED EDITIONS

 **Important** To use the Participant Management features on Experience Cloud, users require the Customer Community Plus license.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To create an Experience Cloud site:

Create and Set Up Experiences

AND

View Setup and Configuration

To customize an Experience Cloud site:

Be a member of the site AND Create and Set Up Experiences

OR

Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

Be a member of the site AND Create and Set Up Experiences

OR

Be a member of the site AND an experience

USER PERMISSIONS NEEDED

admin or publisher in that site

To set up an Experience Cloud site, you must first enable Digital Experiences. For more information, see [Enable Digital Experiences](#).

If you haven't already created an Experience Cloud site, see [Create an Experience Cloud Site](#).

1. From Setup, under Digital Experiences, find and select **All Sites**.
2. To open the site that you want to add Criteria-Based Search and Filter components to, in the Action column, click **Builder**.
3. From Experience Builder Settings, click **General**, and then select the Public Access option.
4. Add the Criteria-Based Search and Filter widget to your Experience Cloud site homepage.
 - a. In the Experience Cloud builder, go to Components, then find and select Criteria-Based Search and Filter, and then drag the component onto the home page.
 - b. Click the Criteria-Based Search and Filter widget pane that you added, and then click **Select**.
 - c. In the Search Configurations page, move the Trial Search Configuration from the Available pane to the Selected pane, and click **OK**. For more information, see [Create Search Configuration for Trial Search](#).
5. Create a new page in your Experience builder.
 - a. On the Experience Cloud builder, on the top tool bar, click  to open the page's properties.
 - b. Click **New Page** at the bottom of the window.
 - c. In the New Page window, click **Object Pages**.
 - d. In New Object Pages window, find and select **Research Study**.
 - e. Click **Create**, and then click **Create**.
6. [Change the content layout in the Experience builder](#).
 - a. On the Experience Cloud builder, on the top left corner, click **Home** to open the Pages menu.
 - b. Expand Research study, and in the Research Study Detail option, click **Page Actions**, and then click **Page Settings**.
 - c. In the Properties tab, go to Layout, and click **Change**.
 - d. In the Change Content Layout window, under Current Layouts, select 2 columns, 2:1 ratio.
 - e. Click **Change**.
7. [Add Flexcards to the Experience Cloud page](#).
 - a. TrialManagementResearchStudyHighlights
 - b. TrialManagementResearchStudyDetails
 - c. TrialManagementResearchStudySites
 - d. TrialManagementResearchStudyLaunchEligibilityCheck
 - e. TrialManagementTrialEligibilityCriteria
8. Configure access for guest or unauthenticated users.
 - a. On the Experience builder, click  on the left sidebar.
 - b. In the General tab, under Guest User Profile, click <Site_Name> Profile link.
 - c. In the Profiles Setup page, click **Edit**.
 - d. Under General User Permissions, select **Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform**.

- e. Under Standard Object Permissions, give Read access to Omni Data Transformations, Omni Processes, and Omni UI Cards.
9. [Clone the permission set licenses](#) for participant management and omnistudio, and then assign them to guest users.
 - a. On the Experience Cloud builder, click  on the left sidebar.
 - b. In the General tab, under Guess User Profile, click <Site_Name> Profile link.
 - c. On the user profile page, click **View Users**.
 - d. Select the name of the guest user.
 - e. In the Permission Set Assignments section, click **Edit Assignments**.
 - f. From the Available Permission Sets list, select the permission set licenses that you cloned and move them to the Enabled Permission Sets list.
For example, Clinical Trial Guest, Omnistudio User, Omnistudio User.
 - g. In addition, also add a Criteria-Based Search and Filter for Experience Cloud permission set license.
 - h. Save your changes.
10. Go back to the Experience cloud builder and publish your Experience Cloud site.

See Also

[Create Search Configuration for Trial Search](#)

[Clone and Assign Permission Set Licenses for Participant Management Guest User](#)

Clone and Assign Permission Set Licenses for Participant Management Guest User

Participant Management provides built-in permission set licenses that you can clone and customize to give access to your guest users. You must also clone and modify Omnistudio user permission set license to assign them to the guest users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To assign permission set and permission set license:

Modify All Data and Privacy Center

1. From Setup, in the Quick Find box, enter *Permission Sets*, and select it.
2. Find the permission set license that you want to clone and customize and then click clone.
3. Enter a label and description, and then save your changes.
The API name is automatically populated.
4. Click the permission set label that you cloned, and then click **Object Settings**.
5. Under Object Settings, click **OmniScript Saved Sessions**, and then click **Edit**.

6. Under Object Permissions, disable the Create, Edit, and Delete option.
We can't assign these permissions to guest user.
7. Save your changes.
8. Similarly, repeat the steps to clone Omnistudio User. There are two permission set licenses with the same name.
9. Also, clone Clinical Trial Guest permission set license.
When you clone Clinical Trial Guest, make sure to provide Read access to status and location within the Care Program Site object.

Create Guest Users Sharing Rules in Participant Management

A guest user sharing rule is a special type of criteria-based sharing rule that you use to grant record access to unauthenticated guest users. Guest user sharing rules can grant only Read-Only access.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To create sharing rules: Manage Sharing

1. From Setup, in the Quick Find box, find *Sharing Settings* and select it.
2. Create a new sharing rule.
 - a. In the Sharing Rules related list, go to Omni Data Transformation Sharing Rules, and then click **New**.
 - b. In the Omni Transformation Sharing Rules Setup page, under Step 1: Rule Name, enter a label and description.
 - c. In Step 2: Select your rule type, select the **Based on criteria** option.
 - d. In Step 3: Select which records to be shared, select Field as **Active**, operator as **Equals**, and Value as **True**.
 - e. In Step 4: Select the guest users to share with, and select the site where you want these changes to apply.
 - f. Save your changes.
3. Similarly, create sharing rules for Omni Process and Omni UI Card.
4. Create sharing rules for Research Study, Research Study Searchable Field, Care Program Site, and Location.
Follow the above steps. However, for the Step 3, select the criteria based on what you want the guest user to access or see. For example, if you want the guest user to see the name of the research study, then select Field as **Name**, Operator as **Contains**, and Value as **Novel Antiviral Drug ZYX-789**.
5. Save your changes.

Create Authenticated Users Sharing Rules in Participant Management

Experience Cloud site sharing rules are a special type of criteria-based sharing rules that you use to grant record access to authenticated portal users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To create sharing rules: Manage Sharing

1. From Setup, in the Quick Find box, find *Sharing Settings*, and select it.
2. Click **Edit**.
3. For the Experience Cloud user who is already registered on the portal, select Default Internal Access as **Public Read Only**.
4. Select Default External Access as **Public Read Only** for these objects: Authorization Form, Authorization Form Text, Data Use Purpose, Research Study Candidate, and Care Program.
5. Save your changes.

Set Up Eligibility Assessment and Candidate Registration

With Omnistudio components, you can help users check their eligibility and register for clinical trials.

REQUIRED EDITIONS

To store responses after users check their eligibility and register for clinical trials, [set up the TrialManagement_CandidateEligibilityAndRegistration Omniscript](#). To let users check their eligibility and register for clinical trials without storing their responses, set up the [TrialManagement_CandidateEligibility](#) and [TrialManagement_CandidateEligibilityAndRegistrationMerged](#) Omniscripts.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

[Set Up the Omniscript for Eligibility Assessment and Candidate Registration](#)

Let your users check their eligibility and register for clinical trials, while storing their responses during eligibility assessment and registration.

[Set Up the Omniscript for Eligibility Assessment](#)

Help your users easily identify their eligibility for the clinical trials by setting up Omnistudio

components. With this feature, candidates can quickly determine their eligibility by responding to a few predefined questions.

Set Up the Omniscript for Candidate Registration

With Omnistudio components, you can provide a quick registration experience for your users. Set up the registration and manage duplicate registration scenarios to ensure candidates are registered for clinical trials.

Set Up the Omniscript for Eligibility Assessment and Candidate Registration

Let your users check their eligibility and register for clinical trials, while storing their responses during eligibility assessment and registration.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To enable Prefill Assessments:	Customize Application
	Omnistudio Designer
To edit and update Omnistudio components:	Omni Designer
To manage candidate registration:	Clinical Trial Manager

Before you set up the *TrialManagement_CandidateEligibilityAndRegistrationMerged* Omniscript, complete the prerequisites.

- Enable Discovery Framework.
 - Enable Prefill Assessment Questions.
 - Create Assessment Questions.
 - Create an Authorization Form Text record. Before you create this record, ensure that an Authorization Form record and a corresponding Content Document record are created. To learn more, see [Intelligent Document Automation for Consent and Disclosures](#).
 - Set Up Person Accounts. The topic linked here explains how to set up person accounts in Health Cloud. However, you can refer to the topic to follow the steps to set up person accounts in Life Sciences Cloud.
 - Enable OmniStudio Metadata, deploy custom lightning web components in standard runtime, and disable Managed Package Runtime in your org.

1. From the App Launcher, find and select **Omniscripts**.
 2. Create a version of the *TrialManagement_CandidateEligibilityAndRegistrationMerged* **Omniscript**, and then click **Edit Form**.

3. Add the assessment questions.
 - a. Select the assessment questions that you created for eligibility assessment.
 - b. Drag and drop the questions under the appropriate Omniscript headings. For example, if Participant Age? is your question, drag it under personal information.
 - c. Click **OK**.
4. Add the Authorization Form Text record details and Person Account record Id to the Omniscript.
 - a. In the Omniscript version that you created, select the CandidateRegistrationRequiredIds set values element.
 - b. In Set Values Properties, update the AuthorizationFormTextId and RecordTypeId values.
 - c. Save your changes.
5. Add the Omniscript version that you created to the Care Program Detail record.
 - a. From the App Launcher, find and select **Care Program Details**.
 - b. Open the Care Program Detail record that you want to add the Omniscript to.
 - c. Edit the care program detail record.
 - d. For Detail Type, select **Omni Process**.
 - e. For Detail Subtype, select the subtype that you created to use as a differentiator for participant management.
 - f. For Detail Record, select the Omniscript version you want to add to the record.
 - g. Save your changes.
6. Create and configure an Expression Set. For more information, see [Create An Expression Set](#).
7. Create a new version of the TrialManagement_GetCandidateEligibilityResult integration procedure.
 - a. From the App Launcher, find and select **Integration Procedures**.
 - b. From the Integration Procedures list view, select the *TrialManagement_GetCandidateEligibilityResult* integration procedure.
 - c. On the *TrialManagement_GetCandidateEligibilityResult* integration procedure page, click **Create Version**.

This integration procedure evaluates candidate responses and returns a value that indicates whether it's a match or not.
8. Add the expression set that you created to the new integration procedure version.
 - a. From the App Launcher, find and select **Omnistudio Integration Procedures**.
 - b. Select the integration procedure version that you created.
 - c. Under Structure, select **ExpressionSetForHealthCondition**.
 - d. In the Properties tab, for Configuration Name, enter the name of the expression set that you created.
 - e. Under Additional Input/Output/Failure Response, select **Send Only Additional Input**.
 - f. Under Additional Input, enter the key in the `DataInput:AssessmentQuestionAPIName` and `value in`
`%AssessmenResponseFormatConvertorAction:result:AssessmentQuestionAPIName%`
format. For example, if the assessment response is Participant_Gender then the key is
`DataInput:Participant_Gender` and value is
`%AssessmenResponseFormatConvertorAction:result:Participant_Gender%`.
 - g. Under Structure, select **ResponseForCandidateEligibility**.
 - h. Under Additional Output Response, replace the value of the isEligible additional output with
`IF((%ExpressionSetForHealthConditioncalculationResults:condition_output__1%
== null),`

```
false, ExpressionSetForHealthConditioncalculationResults:condition_output__1)
```

- i. Activate the integration procedure version.
9. Set up reCAPTCHA.
 - a. Get the Site Key and Secret Key from <https://www.google.com/recaptcha>. For more information, see [Get the Site Key and Secret Key from ReCaptcha](#).
 - b. From Setup, find and select **Web-to-Case HTML Generator**.
 - c. On the Setup page, click the lookup icon next to the **reCAPTCHA API Key Pair** field.
 - d. On the Lookup page, click **New**, and then enter the API Key Pair Nickname, Site Key, and Secret.
 - e. Save your changes.
10. Add the reCAPTCHA details to the Omniscript.
 - a. From the App Launcher, find and select **Omniscripts**.
 - b. Find and open the Omniscript version that you created.
 - c. On the Omniscript page, select **SiteGoogleCaptchaDetails**.
 - d. In Set Values Properties, update the SiteCaptchaAPIKeyPairNickName and SiteCaptchaKey values.
 - e. Activate the Omniscript version.
11. Add reCAPTCHA settings to the experience cloud site. For more information, see [Set Up ReCaptcha](#).
12. Update the Duplicate Management settings to avoid duplicate registrations.
 - a. From Setup, in the Quick Find box, enter *Matching Rules*, and then select **Matching Rules**.
 - b. Activate the Standard Person Account Matching Rule.
 - c. From Setup, in the Quick Find box, enter *Duplicate Rules*, and then select **Duplicate Rules**.
 - d. Click **New Rule**, and then select **Person Account**.
 - e. On the Duplicate Rules setup page, enter a rule name, description, actions, and conditions. For more information, see [Customize Duplicate Rules](#).
 - f. For Record-Level Security, select **Bypass Sharing Rules**.
 - g. Save your changes.
 - h. Activate the rule.
 - i. To create duplicate rules for Lead, repeat steps d to h.
13. To allow guest users to save their responses, add the Save Responses remote action to the *TrialManagement_CandidateEligibilityAndRegistrationMerged* Omniscript, and update the remote action properties.



Important To ensure that each assessment response is linked to the correct candidate, you can create a record-triggered flow to copy the value from the Custom-Context-Id field you created to the ResponseContextId field on the Assessment record.

- a. Drag the remote action element from the Build panel onto the canvas, and place it directly after the **Execute Candidate Registration** Integration Procedure Action element.
- b. Click the Remote Action element on the canvas and enter a name and field label in its Properties panel.
- c. In the Remote Properties section, set the value of Remote Class to *discoveryfrmwrk.StoreResponses* and the value of Remote Method to *invokeMethod*.
- d. In the Remote Properties section, under Remote options, update the key-value pairs as shown in the table.

You must [create a custom field](#) *Clinical_Context_Id* in the Assessment object.

Key	Value
Assessment.Clinical_Context_Id	%ResearchStudyCandidate%
Assessment.AssessmentStatus	Completed

- e. In the Remote Properties section, update the key-value pairs in the Extra Payload section. Maintain the key-value pairs as shown in the table, except for the last three, which you can customize based on your requirements.

Key	Value
omnascriptId	%omnascriptId%
language	%language%
type	%type%
runMode	%runMode%
sId	%sId%
theme	%theme%
subType	%subType%
userProfile	%userProfile%
timeStamp	%timeStamp%
userTimeZoneName	%userTimeZoneName%
userTimeZone	%userTimeZone%
userCurrencyCode	%userCurrencyCode%
userName	%userName%
omniProcessId	%omniProcessId%
localTimeZoneName	%localTimeZoneName%
getCandidatePersonalInformation	%getCandidatePersonalInformation%
getCandidateAndFamilyHealthInformation	%getCandidateAndFamilyHealthInformation%
getCandidateLifestyleInformation	%getCandidateLifestyleInformation%

- f. Enable **Send Only Extra Payload** checkbox.
g. Activate your Omniscript version.

Set Up the Omniscript for Eligibility Assessment

Help your users easily identify their eligibility for the clinical trials by setting up Omnistudio components. With this feature, candidates can quickly determine their eligibility by responding to a few predefined questions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To enable Prefill Assessments:	Customize Application
	Omnistudio Designer

Before you set up the *TrialManagement_CandidateEligibility* Omniscript, complete the prerequisites.

- [Enable Discovery Framework](#).
- [Enable Prefill Assessment Questions](#).
- [Create Assessment Questions](#).
- [Enable OmniStudio Metadata, deploy custom lightning web components in standard runtime, and disable Managed Package Runtime](#) in your org.

1. From the App Launcher, find and select **Omniscripts**.
2. Create a version of the *TrialManagement_CandidateEligibility* Omniscript, and then click **Edit Form**.
3. Add the assessment questions.
 - a. Select the assessment questions that you created for eligibility assessment.
 - b. Drag and drop the questions under the appropriate Omniscript headings. For example, if Participant Age? is your question, drag it under personal information.
 - c. Click **OK**.
4. Add the Omniscript version that you created to the Care Program Detail record.
 - a. From the App Launcher, find and select **Care Program Details**.
 - b. Open the care program detail record that you want to add the Omniscript to.
 - c. Edit the care program detail record.
 - d. For Detail Type, select **Omni Process**.
 - e. For Detail Subtype, select the subtype that you created to use as a differentiator for participant management.
 - f. For Detail Record, select the Omniscript version you want to add to the record.
 - g. Save your changes.
5. Create and configure an Expression Set. For more information, see [Create An Expression Set](#).
6. Create a new version of the *TrialManagement_GetCandidateEligibilityResult* integration procedure.
 - a. From the App Launcher, find and select **Integration Procedures**.
 - b. From the Integration Procedures list view, select the *TrialManagement_GetCandidateEligibilityResult*

integration procedure.

- c. On the *TrialManagement_GetCandidateEligibilityResult* integration procedure page, click **Create Version**.

This integration procedure evaluates candidate responses and returns a value that indicates whether it's a match or not.

7. Add the expression set that you created to the new integration procedure version.
 - a. From the App Launcher, find and select **Omnistudio Integration Procedures**.
 - b. Select the integration procedure version that you created.
 - c. Under Structure, select **ExpressionSetForHealthCondition**.
 - d. In the Properties tab, for Configuration Name, enter the name of the expression set that you created.
 - e. Under Additional Input/Output/Failure Response, select **Send Only Additional Input**.
 - f. Under Additional Input, enter the key in the `DataInput:AssessmentQuestionAPIName` and `value in %AssessmenResponseFormatConvertorAction:result:AssessmentQuestionAPIName%` format. For example, if the assessment response is `Participant_Gender` then the key is `DataInput:Participant_Gender` and value is `%AssessmenResponseFormatConvertorAction:result:Participant_Gender%`.
 - g. Under Structure, select **ResponseForCandidateEligibility**.
 - h. Under Additional Output Response, replace the value of the `isEligible` additional output with
`IF((%ExpressionSetForHealthConditioncalculationResults:condition_output__1% == null), false, ExpressionSetForHealthConditioncalculationResults:condition_output__1)`
 - i. Activate the integration procedure version.

See Also

[Create Assessment Questions](#)

[Create a Care Program Detail](#)

Set Up the Omniscript for Candidate Registration

With Omnistudio components, you can provide a quick registration experience for your users. Set up the registration and manage duplicate registration scenarios to ensure candidates are registered for clinical trials.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To edit and update Omnistudio components: Omni Designer

USER PERMISSIONS NEEDED

To manage candidate registration: **Clinical Trial Manager**

Before you set up the *TrialManagement_CandidateEligibilityAndRegistrationMerged* Omniscript, complete the prerequisites.

- Create an Authorization Form Text record. Before you create the record, make sure that you create an Authorization Form record and an Content Document record.
- [Set Up Person Accounts](#). The topic linked here explains how to set up person accounts in Health Cloud. However, you can refer to the topic to follow the steps to set up person accounts in Life Sciences Cloud.

1. From the App Launcher, find and select **Omniscripts**.
2. Create a version of the *TrialManagement_CandidateEligibilityAndRegistrationMerged* Omniscript, and then click **Edit Form**.
3. Add the Authorization Form Text record details and Person Account record Id to the Omniscript.
 - a. In the Omniscript version that you created, select the CandidateRegistrationRequiredIds set values element.
 - b. In Set Values Properties, update the AuthorizationFormTextId and RecordTypeId values.
 - c. Save your changes.
4. Set up reCAPTCHA.
 - a. Get the Site Key and Secret Key from <https://www.google.com/recaptcha>. For more information, see [Get the Site Key and Secret Key from ReCaptcha](#).
 - b. From Setup, find and select **Web-to-Case HTML Generator**.
 - c. On the Setup page, click the lookup icon next to the **reCAPTCHA API Key Pair** field.
 - d. On the Lookup page, click **New**, and then enter the API Key Pair Nickname, Site Key, and Secret.
 - e. Save your changes.
5. Add the reCAPTCHA details to the Omniscript.
 - a. From the App Launcher, find and select **Omniscripts**
 - b. Find and open the Omniscript version that you created.
 - c. On the Omniscript page, select **SiteGoogleCaptchaDetails**.
 - d. In Set Values Properties, update the SiteCaptchaAPIKeyPairNickName and SiteCaptchaKey values.
 - e. Activate the Omniscript version.
6. Add reCAPTCHA settings to the experience cloud site. For more information, see [Set Up ReCaptcha](#).
7. Update the Duplicate Management settings to avoid duplicate registrations.
 - a. From Setup, in the Quick Find box, enter *Matching Rules*, and then select **Matching Rules**.
 - b. Activate the Standard Person Account Matching Rule.
 - c. From Setup, in the Quick Find box, enter *Duplicate Rules*, and then select **Duplicate Rules**.
 - d. Click **New Rule**, and then select **Person Account**.
 - e. On the Duplicate Rules setup page, enter a rule name, description, actions, and conditions. For more information, see [Customize Duplicate Rules](#).
 - f. For Record-Level Security, select **Bypass Sharing Rules**.
 - g. Save your changes.
 - h. Activate the rule.
 - i. To create duplicate rules for Lead, repeat steps d to h.

Impact of Duplicate Rules in Candidate Registration

In Candidate Registration, the behavior of account creation and associated records is determined by whether duplicate rules are enabled. Candidate registration for a trial results in the creation of an account record and an associated research study candidate record. Registration for future trials results in the creation of a lead record and a consent record.

Impact of Duplicate Rules in Candidate Registration

In Candidate Registration, the behavior of account creation and associated records is determined by whether duplicate rules are enabled. Candidate registration for a trial results in the creation of an account record and an associated research study candidate record. Registration for future trials results in the creation of a lead record and a consent record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

Duplicate Rules Enabled for Person Account

Logged-in Users:

- Registering with a new email ID: Registration is successful and an account is created with a research study candidate record having a lookup to the newly created account.
- Registering with an email ID already used for prior registration: Registration fails because the research study candidate record exists for the specified account.
- Registering with an existing email ID for which an account exists: Registration is successful. Duplicate rules prevent the creation of an account. Instead, the feature retrieves the existing account, and a research study candidate record is created and linked to the retrieved account.

Guest Users:

- Registering with a new email ID: Registration is successful and an account is created with a research study candidate record having a lookup to the newly created account.
- Registration fails because duplicate rules prevent new account creation. Because the guest user doesn't have access to retrieve an existing account ID, the existing account can't be retrieved.

Duplicate Rules Enabled for Lead

Logged-in Users:

- Registering for future trials with a new email ID: Registration is successful, creating a lead.
- Registering for future trials with an email ID that has a pre-existing lead: Registration is successful. The

system uses the existing lead ID and creates a consent record.

Guest Users:

- Registering for future trials with a new email ID: Registration is successful, creating a lead.
- Registering for future trials with an email ID that has a preexisting lead: Registration fails because the duplicate rule prevents the creation of a lead. Because the guest user doesn't have access to retrieve the existing lead ID, the lead creation fails.

Example

-  **Note** If Duplicate Rules aren't enabled, then for every scenario, a record (duplicate) is created. Candidate Registration doesn't restrict the creation of accounts or leads, resulting in duplicate records.

Einstein Generative AI for Participant Management

Participant Management's Einstein Candidate Matching is an AI-enabled feature designed to automatically match candidates to the inclusion and exclusion criteria of research studies. Clinical trial coordinators or recruiters can use this information to build different candidate cohorts.

REQUIRED EDITIONS

-  **Note** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization. [Learn more](#)

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data for clinical trials: Clinical Trial Manager

With this feature, you can create a robust pool of candidates who meet specific trial requirements. As a result, you can improve the efficiency of clinical trials and reduce the time and cost of recruiting candidates.

Candidate Matching Implementation Options

Implement this feature using Generative AI capabilities or a Data Processing Engine with Actionable Lists.

Types of Implementation

Implementation	Description
Einstein Generative AI	With Generative AI capabilities, the feature understands a research study's inclusion and exclusion criteria. Einstein Candidate Matching uses trial-centric criteria to search structured and unstructured data in extensive databases of candidate or patient information, such as electronic medical records (EMR) and electronic health records (EHRs). This process helps clinical trial recruiters to identify all the candidates who qualify for further enrollment-related processes like an initial outreach to gauge interest in the trial or perform pre-screening for the clinical trial.
Data Processing Engine and Actionable Lists	If you want to implement the Candidate Matching feature without Generative AI capabilities, you can use the Prepare Candidate Details for Participant Management data processing engine definition and create actionable lists definition. This approach helps your users filter out candidates based on some basic criteria needed to match candidates to clinical trials.

With the Candidate Matching feature, the clinical trial coordinators are creating a pool of robust candidates to use for outreach. Knowing that these candidates meet the specific requirements of a research study, it's easier to convert them for final enrollment, which increases candidate conversion rates.

Candidate Matching Flows

You can use these built-in flows to initiate the candidate evaluation process from accounts, research study candidates, and actionable lists record pages.

- Candidate Evaluation for Research Study
- Evaluate Members for Research Study
- Evaluate Research Study Candidates
- Evaluate Candidates for Research Study

Candidate Matching Prompt Template

The Evaluate Research Study Candidate prompt template is preconfigured to facilitate candidate evaluation using Einstein Candidate Matching. This prompt template is triggered by the Candidate

Evaluation for Research Study flow. The prompt template uses Get Candidate Matching Context Data custom invocable action to get the candidate's medical data, along with the research study's inclusion and exclusion criteria. This data is then used to match candidates to trials.

 **Note** The prompt template isn't editable and therefore can't be customized.

Candidate Matching Quick Actions to Launch Flows

You can initiate the candidate evaluation process using the built-in quick actions from object record pages with a single click.

Object	Quick Action
Accounts (detail page)	Evaluate Candidate
Accounts (list view page)	Evaluate Candidates
Research Study Candidates (detail page)	Evaluate Candidate
Research Study Candidates (list view page)	Evaluate Candidates
Actionable Lists	Evaluate Candidates

 **Note** These quick actions are preconfigured on Accounts and Research Study Candidate record pages. To initiate candidate evaluation from actionable list members, you must create a bulk action configuration on Accounts.

Enable Candidate Matching for Participant Management

Give your users access to candidate matching features by enabling org preference in your Salesforce org. Users can then choose either AI-enabled Einstein Candidate Matching or a data processing engine with actionable lists as an implementation method to identify candidates for clinical trials.

Set Up Candidate Matching Using Einstein Generative AI

Use the Participant Management's Einstein Candidate Matching feature to automatically identify candidates who meet the criteria for specific clinical trials. With this feature, your users can build a robust pool of qualified candidates aligned with each trial's requirements.

Troubleshoot Batch Job Execution Errors

Einstein Candidate Matching uses a batch job to process large volumes of records within the flow to match candidates with clinical trials. If you encounter issues while executing the batch job, you can debug them.

Set Up Candidate Matching Using Data Processing Engine and Actionable Lists

Help users in setting up the Participant Management's Candidate Matching feature by using data processing engine and actionable lists. This approach helps them filter out candidates based on some basic criteria that are needed to match candidates to clinical trials.

Enable Candidate Matching for Participant Management

Give your users access to candidate matching features by enabling org preference in your Salesforce org. Users can then choose either AI-enabled Einstein Candidate Matching or a data processing engine with actionable lists as an implementation method to identify candidates for clinical trials.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data for clinical trials:	Clinical Trial Manager
-------------------------------------	------------------------

1. Turn on **Candidate Matching**.
 - a. From Setup, in the Quick Find box, enter *Participant Management Settings*, and select it.
 - b. Turn on **Participant Recruitment and Enrollment**.
 - c. In the Participant Management Setup page, go to the Match Candidates to Trials section and turn on **Candidate Matching**.
2. Turn on FHIR-aligned clinical data model.
 - a. From Setup, in the Quick Find box, enter FHIR, and select **FHIR R4 Support Settings**.
 - b. In the FHIR R4 Support Settings page, turn on **FHIR-Aligned Clinical Data Model**.
3. From Setup, enable these features if you are using Einstein Generative AI as your implementation method:
 - [Einstein Generative AI](#)
 - [Context Definition](#)
4. From Setup, enable these features if you are using data processing engine and actionable lists as your implementation method:
 - [Data Pipelines](#)
 - [Actionable Segmentation](#)

With the necessary features for Candidate Matching now enabled, assign the required permissions to your users.

See Also

[Salesforce Help: Einstein Generative AI](#)

[Salesforce Help: Einstein Generative AI for Participant Management](#)

[Salesforce Help: Add Data for Candidate Matching](#)

[Enable Candidate Matching for Participant Management](#)

[Assign Permission Sets for Participant Management Users](#)

Set Up Candidate Matching Using Einstein Generative AI

Use the Participant Management's Einstein Candidate Matching feature to automatically identify candidates who meet the criteria for specific clinical trials. With this feature, your users can build a robust pool of qualified candidates aligned with each trial's requirements.

REQUIRED EDITIONS

-  **Note** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization. [Learn more](#)

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data for clinical trials: Clinical Trial Manager

To initiate Einstein Candidate Matching: Clinical Trial Coordinator

To set up Einstein Generative AI: Prompt Template Manager

AND

Prompt Template User

Prerequisite: Complete the data setup for these objects by creating records from the object's homepage for Accounts, Care Programs, Care Program Eligibility Rules, Research Studies, Research Study Candidates, and Clinical Data Model objects.

1. Enable in-app assistance to users in sandbox orgs.
 - a. From Setup, in the Quick Find box, find and select **In-App Guidance**.
 - b. Click **Settings**.
 - c. Turn on **Adoption Assistance in Sandbox Orgs**.
 - d. Save your changes.
2. [Set up Einstein Generative AI](#).
3. To use the Einstein Generative AI capabilities, activate the prompt template as it's deactivated by default.
 - a. From Setup, in the Quick Find box, enter *Prompt Builder*, and select it.
 - b. Click **Activate**.
4. Configure the built-in **Candidate Evaluation for Research Study** flow to modify the flow run context and to save it as a new flow.
 - a. From Setup, enter *Flows*, and select it.
 - b. Open **Candidate Evaluation for Research Study** in the Flow Builder.

- c. Click .
- d. Click **Show Advanced**.
- e. In the How to Run the flow dropdown, select **System Context with Sharing-Enforces Record-Level Access**.
- f. Click **Done**.
- g. Click **Save As New Flow**, and enter a name.
- h. Save your changes.
- i. Activate your flow.

When you run this flow, the flow respects certain access controls, like organization-wide default settings, role hierarchies, sharing rules, manual sharing, terms, and territories. However, it doesn't respect other access controls, such as object permissions or field-level security that normally restrict a user's access to certain data. Ensure this flow is used with full awareness of its implications.

Your users can start using the Einstein Generative AI to identify candidates who match the eligibility criteria of a clinical trial.

See Also

- [Salesforce Help: Add Data for Candidate Matching](#)
- [Enable Candidate Matching for Participant Management](#)
- [Assign Permission Sets for Participant Management Users](#)

Troubleshoot Batch Job Execution Errors

Einstein Candidate Matching uses a batch job to process large volumes of records within the flow to match candidates with clinical trials. If you encounter issues while executing the batch job, you can debug them.

REQUIRED EDITIONS

-  **Note** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization. [Learn more](#)

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data for clinical trials: Clinical Trial Manager

1. From Setup, in the Quick Find box, enter *Monitor Workflow Services*, and select it.
2. Click **Candidate-Trial Matching Batch Job**.
3. Click the name that has a **Completed With Failures** status.
4. In the Research study candidate trial matching batch job setup page, select the Failed Records tab and

then click the name to check the failed record.

5. In the Batch Job Part Failed Record page, you can check the issue in the Error field in the Details tab.
6. Fix the issues and rerun the batch job. If the issue persists, contact your Salesforce support.

Set Up Candidate Matching Using Data Processing Engine and Actionable Lists

Help users in setting up the Participant Management's Candidate Matching feature by using data processing engine and actionable lists. This approach helps them filter out candidates based on some basic criteria that are needed to match candidates to clinical trials.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data for clinical trials:	Clinical Trial Manager
To initiate Einstein Candidate Matching:	Clinical Trial Coordinator
To enable Data Pipelines:	Data Pipelines Base User
To run a Data Processing Engine definition:	Customize Application AND Modify All Data AND Data Pipelines Base User
To enable Actionable Segmentation:	Actionable Segmentation AND Data Pipelines Base User

Prerequisite: Complete the data setup for these objects by creating records from the object's homepage for Accounts, Care Programs, Care Program Eligibility Rules, Research Studies, Research Study Candidates, and Clinical Data Model objects.

1. Clone the built-in **Prepare Candidate Details for Participant Management** data processing engine definition.

If your users want to implement the Candidate Matching feature without Einstein capabilities, you can

use this data processing engine definition and create an actionable list definition. To learn more about the data processing engine, see [Data Processing Engine](#).

- a. From Setup, enter *Data Processing Engine*, and select it.
 - b. Click **Prepare Candidate Details for Participant Management**.
 - c. In the Data Processing Engine builder, click **Save As**.
 - d. Enter a name, as needed, and click **Save**.
 - e. Activate the Data Processing Engine.
 - f. Run the definition.
2. Create an actionable list definition.
 - a. From Setup, enter *Actionable Segmentation Settings*, and select it.
 - b. Click **Use Existing Data Processing Engine**, and enter a name.
 - c. In the Object field, select an object from the dropdown.
 - d. Select the Data Processing Engine definition, and click **Save**.
 - e. In the list of definitions, find the one that you created, and click **Add Columns**.
 - f. Select the fields in the Available Fields section and add them to the Selected Fields section, and then click **Save**.
 - g. Similarly, click **Add Statuses** in the List Member Status Count field.
 - h. Enter the status value, and click **Save**.
 - i. Click **Activate** and then click **OK**.
 3. Create an actionable list.
 - a. From the App launcher, find and select **Actionable Lists**.
 - b. Click **New**, and enter a name of the actionable list.
 - c. Select the list definition that you created and activated earlier, and click **Next**.
 - d. Click **Add Filter**, you can add the values based on what you want to filter out.
 - e. Click **Apply**.
 - f. Click **Review and Save**.
 4. Create a bulk action configuration on Accounts.
For more information, see [Create Bulk Action Configurations](#). With this configuration, your users can access and initiate Evaluate Candidates quick action from actionable lists.
 5. Create a version of **Get Account Records from Actionable List Members** flow.
 - a. From Setup, in the Quick Find box, enter *Flows*, and select it.
 - b. Find and select the **Evaluate Members for Research Study** flow.
 - c. Click **Save As New Flow**, and enter a label.
 - d. If necessary, add a description.
 - e. Save your changes.
 - f. Activate your flow.

Clinical Excellence Console App for Participant Management

Clinical trial recruiters at investigative sites are often burdened with disparate solutions to track and monitor candidates' recruitment and enrollment progress as well as manage daily tasks and activities. With the Clinical Excellence Console App, you can help streamline the essential jobs for a trial recruiter by organizing important metrics and tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

The Clinical Excellence Console App offers:

- Home page
- Research Study Candidates
- Research Studies

Clinical Excellence Home Page

The Clinical Excellence home page features the enrollment dashboard that offers clinical trial coordinators visibility into candidates' clinical data and their enrollment progress through different enrollment stages. The enrollment dashboard displays key indicators, such as candidate rejection percentage, candidate conversion rate percentage, and candidate enrollment status. This dashboard enhances the efficiency of site coordinators or clinical trial recruiters by organizing metrics, tasks, and events that will enable them to operate efficiently.



- Research Studies: The total number of active research studies users are working on.
- Conversion Rate: The average candidate conversion rate across active research studies.
- Candidate Status: The count of candidates across different stages of research study enrollment.

 **Note** You can update these status values to align with the ones defined in the user org.

- Candidate Enrollment Progress report: The bar graph displays the current enrollee count and target enrollee count across active research studies.
- Candidate Rejection Ratio: The bar graph displays the percentage of candidates rejected for each research study.

Research Study Candidates

In the Clinical Excellence console app, you can access research study candidates. Opening a research

study candidate's record takes the user to the candidate's lightning page. Here, your users can find the candidate's medical information presented through a patient card that helps them track a candidate's condition by showing data from medical record fields. This lightning page allows your users to check candidates' medical history and add new treatments or care. In addition, this lightning page features an Evaluation Results tab, which provides detailed outcomes of how each candidate matches the criteria of a research study. With this feature, your users can make an informed decision about candidate selection.

On the Evaluation Results screen, you see different sections.



- **Inclusion Criteria:** The criteria candidates must meet to be eligible for the study. This section shows the number of candidates that meet the criteria.
- **Exclusion Criteria:** The criteria that reject candidates or participants from participating in the study. This section shows the number of excluded participants.
- **Status:** The status that indicates whether the candidate meets the specified criteria.
- **Reason:** The reason as to why a candidate is a match or not a match with the research study criteria.
- **Matching Reference:** The link to the reference record from which the system matched the criterion.

Research Studies

In the Clinical Excellence console app, you can access research studies. Clinical trial coordinators can build candidate cohorts from the research study record page or research study candidates list page with a single click. Users can select a research study's inclusion and exclusion criteria to check if candidates match the selected criteria. Users can then calculate the total number of candidates matching the selected criteria. They can also update the status of the research study candidates who match the criteria.



Set Up the Clinical Excellence Console Home Page

Help trial coordinators or recruiters use the Participant Management's Clinical Excellence Console App to streamline important jobs by organizing metrics and tasks. This console app includes a clinical excellence Home page. It also includes research study candidate and research study pages where trial coordinators can view candidates' medical data and candidate-matching evaluation results.

Flexcard for Enrollment Dashboard

The Participant Management's Clinical Excellence Console uses Flexcards to provide trial coordinators or recruiters with critical information about the recruitment and enrollment data of research study candidates. These Flexcards display the number of research studies, candidate conversion rate percentage, and candidate enrollment status.

Set Up the Clinical Excellence Console Home Page

Help trial coordinators or recruiters use the Participant Management's Clinical Excellence Console App to streamline important jobs by organizing metrics and tasks. This console app includes a clinical excellence Home page. It also includes research study candidate and research study pages where trial coordinators can view candidates' medical data and candidate-matching evaluation results.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data for clinical trials: Clinical Trial Manager

1. From Setup, in the Quick Find box, enter *Participant Management Settings*, and select it.
2. Turn on **Participant Enrollment**.
3. In the Participant Management Settings Setup page, click **Install Reports** under the Set Up Participant Management section.

To use the candidate enrollment progress and candidate rejection percentage reports in the clinical

excellence console's enrollment dashboard, you must install reports.

4. Configure Omnistudio settings.
 - a. From Setup, in the Quick Find box, enter *Omnistudio Settings*, and then select it.
 - b. Turn on **OmniStudio Metadata**.
 - c. Turn off **Managed Package Runtime**.
 - d. Turn on **Deploy Custom Lightning Web Components in Standard Runtime**.
- For more information, see https://help.salesforce.com/s/articleView?id=xcloud.os_omnistudio_settings.htm&type=5&language=en_US.
5. The built-in clinical excellence console Home page provides an Included Care Program Status Values specific to Salesforce. Update the values to align with the ones in your org.
 - a. From App Launcher, find and select **Clinical Excellence**.
 - b. On the Clinical Excellence Home page, click the (⚙) icon, and then click **Edit Page**.
 - c. In the Lightning App Builder, on the components pane, select **Research Studies**, and then in the configuration pane, update the Included Care Program Status Values field with the values defined in your org.
 - d. Select the **Conversion Rate** component, and then update the Included Care Program Status Value field with the values defined in your org.
 - e. Select the **Candidate Status** component, and then update the Included Care Program Status Value field with the values defined in your org.
 - f. Save your changes.
6. Update the formula fields with labels specific to your org for Candidate Enrollment Progress and Candidate Rejection reports.
 - a. On the Clinical Excellence Home page, select **View Report**.
 - b. On the Candidate Enrollment Progress report page, click **Edit**.
 - c. Under Columns, select the **Is Enrolled** formula field, and then click **Edit Formula**.
 - d. In the Formula field, update the built-in value **Enrolled** to the one that aligns with your org.
 - e. Apply your changes.
 - f. Save your changes.
 - g. To return to the dashboard view, click the **Home** tab, and then click  icon to view the updated reports.

Flexcard for Enrollment Dashboard

The Participant Management's Clinical Excellence Console uses Flexcards to provide trial coordinators or recruiters with critical information about the recruitment and enrollment data of research study candidates. These Flexcards display the number of research studies, candidate conversion rate percentage, and candidate enrollment status.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

The Enrollment Dashboard includes these Flexcards.

- TrialManagementConversionRate
- TrialManagementDisplayResearchStudyCount
- EnrollmentDashboardHeader
- TrialManagementDisplayCandidateEnrollmentAnalysis
- TrialManagementDisplayChildCard

If you want to learn more about Omnistudio Flexcards, see [OmniStudio Flexcards](#).

Participant Enrollment

Participant Enrollment features help your clinical trial managers, coordinators, and participants to prepare, send, and view consent forms. It includes consent management and randomization features that can be combined to create a participant enrollment journey using Salesforce orchestration capabilities.

Use flows and invocable actions to set up consents and randomization processes. These features streamline the enrollment workflow, which digitizes the enrollment processes.

[Enable Custom Sharing](#)

Give your users with access view and manage electronic consent forms. Users with a Customer Community Plus license can share Authorization Form Texts and Data Use Purpose records with Accounts, Contracts, and Users specified in the Information Authorization Request record.

[Clone and Activate a Flow for E-Consents](#)

Participant Management provides flows that you can use to digitize your consent management process. Clone and manage the flows so that your users can manage consent forms from an object page.

[Set Up Flows to Prepare Participant Consent Forms](#)

The electronic consent feature enables participants in clinical trials to provide their consent digitally. With this screen flow, you can help your users prepare the consent forms.

[Set Up flows to View Consent Forms](#)

Create a screen flow in Participant Management to enable access to the end users for viewing the consent forms. With this screen flow, your end users can access and digitally sign the consent forms, acknowledging their informed consent for clinical trials.

[Enable Research Study Randomization](#)

Give your users access to the randomization features. With randomization feature, participants enrolled for the clinical trials are randomly assigned (randomized) to different comparison groups.

[Using Block Generation](#)

Block randomization involves creating research study randomization blocks. Each block consists of several research study randomization block slots, which are linked to specific research study comparison groups.

[Set Up Block Randomization](#)

Help your users implement randomization by using a block algorithm type with the randomization

level as central.

[Set Up Criteria-Based Block Randomization](#)

Help your users implement criteria-based randomization in clinical trials with flows and invocable actions. With the custom implementation, you can extend its capabilities further to randomly assign candidates to comparison groups.

[Set Up Research Study Randomization with Custom Implementation](#)

Help your users implement randomization by using a custom algorithm type.

[Using Randomization to Anonymize Participant Allocation](#)

Randomization involves allocating clinical trial participants into different comparison groups. The randomization API is available as an invocable action allowing it to be used through a flow or via a REST invocation.

Enable Custom Sharing

Give your users with access view and manage electronic consent forms. Users with a Customer Community Plus license can share Authorization Form Texts and Data Use Purpose records with Accounts, Contracts, and Users specified in the Information Authorization Request record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

1. From Setup, in the Quick Find box, find *Participant Management Settings*, and select it.
2. In the Participant Management Settings setup page, turn on Custom Sharing.

Enable Digital Verification settings. To configure credentials for digital verification, set a record ID as the named credential. To learn more, see [Electronic Signatures](#).

Clone and Activate a Flow for E-Consents

Participant Management provides flows that you can use to digitize your consent management process. Clone and manage the flows so that your users can manage consent forms from an object page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To open, edit, or create a flow in Flow Builder: Manage Flow

1. From Setup, in the Quick Find box, enter *Flows*, and select it.
2. Open the **Review and Create Consent Requests** flow.
3. Click **Save As**.
4. Enter a label and description for the flow.
The API name is automatically populated.
5. Save your changes.
6. Activate the flow.

You can create a screen flow to use the above cloned flow as a subflow.

Set Up Flows to Prepare Participant Consent Forms

The electronic consent feature enables participants in clinical trials to provide their consent digitally. With this screen flow, you can help your users prepare the consent forms.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To open, edit, or create a flow in Flow Builder: Manage Flow

About this task

To allow users to launch the default flow that you cloned from an object page, you must create a screen flow and include the flow that you cloned earlier as a subflow. Then, create a quick action to launch this flow from the object page. This process is necessary if you want your users to prepare consent forms from an object page with a single click.

These steps are example to guide you in creating a similar flow. For more information on how to build flows, see [Build a Flow](#).

1. Open Flow Builder. From Setup, in the Quick Find box, enter *Flows*, select **Flows**, and then click **New Flow**.
2. Select Start From Scratch, then click **Next**.
3. Select the flow type as **Screen Flow**.
4. To get the research study candidate based on the Record ID passed as input to this screen flow, add a Get Records element. For example, select the Field as Id, Operator as Equals, and Value as recordId.
5. To get the research study that's associated with the previously fetched Research Study Candidate, add

- a Get Records element. For example, select the Field as Id, Operator as Equals, and Value as Research Study Candidate from Fetch_Research_Study_Candidate > Research Study ID.
6. To get the Data Use Purpose records associated with the care program that you fetched the research study for, add a Get Records element. For example, select the Field as PurposeId, Operator as Equals, and Value as Research Study from Fetch_Research_Study > Care Program ID.
 7. Add a Screen element.
 - a. In the components section, select the **Lookup** component for Data Use Purpose.
 - b. Fill in the mandatory details in the Properties panel. See [Flow Screen Input Component: Lookup](#).
 - c. Include an input option on the same screen. This option helps the user decide whether to create a digital verification record or use a digital signature as consent from the participant.
 - d. Select the data table layout on the edit screen page, and then under Configure Data Source, select the **Source Collection** field as Data Use Purposes from Fetch_Data_Use_Purpose.
 8. Add the **Review and Create Consent Records** flow that you cloned earlier as a subflow.
 - a. In Set Input Values, turn on ConsentGiverId, and select the value recordId.
 - b. Next, turn on DataUsePurposeId, and select the value Select Data Use Purpose > Select Purpose for Seeking Consent > First Selected Row > Data Use Prupose ID.
 - c. Next, turn on isDigitalVerificationRequired, and select the value Select Data Use Purpose > Please specify if consent via user login credentials is required by checking this checkbox. If not selected, the default method for providing consent will be using a scribble pad signature.
 9. To select the purpose of seeking consent, click **Run**, and then click **Next**.
 10. Activate your flow.

You can create a Quick Action to launch this screen flow. To create a quick action and add the action to a page layout, see [Create Quick Actions](#).

Set Up flows to View Consent Forms

Create a screen flow in Participant Management to enable access to the end users for viewing the consent forms. With this screen flow, your end users can access and digitally sign the consent forms, acknowledging their informed consent for clinical trials.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To open, edit, or create a flow in Flow Builder: Manage Flow

These steps are provided as an example to guide you in creating a flow. Use these instructions to fit your specific requirements. For more information on how to build flows, see [Build a Flow](#).

1. Open Flow Builder. From Setup, in the Quick Find box, enter *Flows*, select **Flows**, and then click **New**

Flow.

2. Select Start From Scratch, then click **Next**.
3. Select the flow type as **Screen Flow**.
4. Add the elements that you want to use to the canvas.
5. To fetch new Authorization Request Records, add a Get Records element. For example, you can label it as Fetch New Authorization Request Records.
 - a. In the Get Records of This Object section, select **Info Authorization Request**.
 - b. In Filter Info Authorization Request Records, select **Condition Requirements as All Conditions Are Met (AND)**.
 - c. Select the field as ResponseStatus, the operator as Equals, and the value as New.
6. Add a Screen element, and in the components section, find and select **Data Table**.
 - a. Select the data table layout on the edit screen page, and then under Configure Data Source, select the Source Collection field as Info Authorization Request From Fetch_InfoAuthorization_Request_Records.
 - b. Select Row Selection Mode as Single.
 - c. Click **Done**.
7. Add a Screen element.
 - a. In the Components section, find and select **Consent Form List View**.
 - b. Select Info Authorization Request ID, and Purpose ID.
 - c. Click **Done**.
8. Activate your flow.

See Also

[Clone and Activate a Flow for E-Consents](#)

Enable Research Study Randomization

Give your users access to the randomization features. With randomization feature, participants enrolled for the clinical trials are randomly assigned (randomized) to different comparison groups.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

1. From Setup, in the Quick Find box, find *Participant Management Settings*, and select it.
2. In the Participant Management Settings setup page, turn on Research Study Randomization.
3. Click **Create Decision Table**.

Using Block Generation

Block randomization involves creating research study randomization blocks. Each block consists of several research study randomization block slots, which are linked to specific research study comparison

groups.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

Ensure you complete the basic data setup before starting block randomization.

- Create Research Study Comparison Group records with allocation ratios.
- Create a Research Study Randomization record.

Block Generation

If you want to set up block generation during the research study randomization set up phase, you can use the built-in invocable action Generate Research Study Blocks to facilitate block generation.

Generating randomization blocks before candidate assignment helps trial managers check the quality of the randomization for the configured parameters and iterate until the randomization quality meets the customer's satisfaction.

This invocable action, which is also available as a REST endpoint, can generate research study randomization blocks based on the configuration you chose in the research study randomization.

The action takes the Research Study Randomization ID and the Research Study Target Count as input values. It returns the generated block IDs based on the defined configuration in the Research Study Randomization.

You can trigger the invocable action in various ways, including flows, Apex, or a REST API call.

Invoke Block Generation Invocable Action Using Flows

You can create a screen flow to invoke the Generate Research Study Blocks invocable action. Your flow should meet these criteria.

- The flow must have a research study randomization record ID as an input variable.
- The flow must collect the number of research study candidates meant to be part of the block randomization.
- The flow must use the invocable action Generate Research Study Blocks.
- This invocable action must use the research study randomization record ID and candidate count as input parameters.
- If required, the flow can display the result of the action element inside a screen element.

Launch this Flow from an Object Page

You can launch this flow from an object page using a quick action. To create a quick action and add it to a page layout, see [Create Quick Actions](#).

For example, you can create a quick action in a research study randomization. After the quick action is setup, you can use it to trigger the flow from research study randomization records. The blocks are generated according to the configuration defined in the research study randomization.

Set Up Block Randomization

Help your users implement randomization by using a block algorithm type with the randomization level as central.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To configure and manage randomization data: Clinical Trial Manager

1. From the App Launcher, find and select **Research Study Randomizations**.
2. Click **New**.
3. Enter a name for the research study randomization.
4. Select the research study that the randomization is associated with.
5. For algorithm type, select **Block**.
6. Enter a description for the research study randomization.
7. For randomization level, select **Central**.
8. Select the **Randomization Assigns Candidates to Groups** option.
You can store the association between Research Study Candidate and the Assigned Research Study Comparison Group as a record in the Research Study Comparison Group Candidates.
9. Enter Minimum Block Size Multiplier.
10. Enter Maximum Block Size Multiplier.
11. If you've not triggered the Block Generation API, enable the **Generate Block on Demand** option.
When you activate this setting, the system dynamically creates blocks when the participants are randomized by invoking the randomization API. This action ensures that randomization proceeds by generating new blocks when required.
12. Select the Status **Active**.
13. Save your changes.

See Also

[Create a Research Study](#)

Set Up Criteria-Based Block Randomization

Help your users implement criteria-based randomization in clinical trials with flows and invocable actions. With the custom implementation, you can extend its capabilities further to randomly assign candidates to comparison groups.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To create records and manage randomization data: Clinical Trial Manager

About this task

Create research study comparison group records with individual allocation ratios.

Define Research Study Randomization Criteria for a Research Study.

- The criteria are a combination of a set of factors, for example, a combination of Care Program Site, Gender, and Age Group.
- The entity Research Study Randomization Criteria captures the combination of these factors.
- You can introduce new fields in Research Study Randomization Criteria to accommodate additional factors for defining the criteria.
- After the factors are defined, you must populate individual records for Research Study Randomization Criteria, where each Criteria record corresponds to a combination of factors.
- For example, consider a study that requires two factors: care program site and gender. If the study is being conducted at two sites (site A and site B), and if two genders are considered (male and female), then the combination will be four possible criteria records.

After the criteria are defined, the admin has to specify a flow definition that takes in a particular Research Study Candidate ID and returns the Research Study Randomization Criteria ID to which the candidate belongs.

- For example, a candidate, Charles, who has enrolled at site A, must belong to Criteria 1.
- Since the process of determining the criteria of a candidate can change across different implementations, the setup requires you to create a flow that accommodates this work.
- The flow defined by you must use a decision table to find a matching criteria for a participant. A built-in implementation with a decision table and an auto launch flow has been provided, you can extend its capabilities further depending on your business use case. An auto-launch template flow Trail Management: Get Research Study Randomization Criteria for Enrolled Candidates has been included as the default implementation.
- Create a custom flow that returns the randomization criteria for a give candidate. It must have two

input string variables with apiName researchStudyCandidateId and researchStudyRandomizationId. It must have an output variable with apiName researchStudyRandomizationCriteriaId.

1. From the App Launcher, find and select **Research Study Randomizations**.
2. Click **New**.
3. Enter a name for the research study randomization.
4. Select the research study that the randomization is associated with.
5. For algorithm type, select **Block**.
6. Enter a description for the research study randomization.
7. For randomization level, select **Noncentral**.
8. Enter the apiName of the flow that you cloned in the Algorithm Flow Definition.
If you selected algorithm type as Block and randomization level as Noncentral, you can clone the Trial Management: Get Research Study Randomization Criteria for Enrolled Candidates flow. This flow calls an action to lookup in the decision table to get the ID of the Research Study Randomization Criteria record. To add new fields as input, you must create fields in Research Study Randomization Criteria.
9. The block randomization works as follows.
 - a. Creation of Research Study Randomization Blocks, where in each Research Study Randomization Block is associated to a set of Research Study Randomization Block Slots.
 - b. Each Research Study Randomization Block Slot is related to a Research Study Comparison Group.
 - c. The Generation of the blocks will be done first and the generated block slots are used for assigning candidates to comparison groups.
10. The generation of blocks can be done during the setup before the actual assignment process through the Setting up the generation of blocks invocable action and the generated blocks are used by the assignment process.
11. Select the **Randomization Assigns Candidates to Groups** option to store the association between Research Study Candidate and the Assigned Research Study Comparison Group as a record in the Research Study Comparison Group Candidates.
12. If the generation step isn't needed, then select **Generate Block on Demand** option.
When you activate this setting, the system dynamically creates blocks when participants enroll. This action ensures that randomization proceeds without waiting for predefined blocks to fill.
13. Select the status as **Active** for the Research Study Randomization.
14. Save your changes.

Set Up Research Study Randomization with Custom Implementation

Help your users implement randomization by using a custom algorithm type.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To create records in a research study: Clinical Trial Manager

1. From the App Launcher, find and select **Research Study Randomizations**.

2. Click **New**.

3. Enter a name for the research study randomization.

4. Select the research study that the randomization is associated with.

5. For algorithm type, select **Custom**.

6. Enter a description for the Research Study Randomization.

7. Select the **Randomization Assigns Candidates to Groups** option.

You can store the association between Research Study Candidate and the Assigned Research Study Comparison Group as a record in the Research Study Comparison Group Candidates.

8. Enter the apiName of the flow that you created for Randomization in the Algorithm Flow Definition.

You can create an autolaunch flow with input parameter as researchStudyCandidateId and output parameter as researchStudyComparisonGroupId.

9. For status, select **Active**.

10. Save your changes.

Using Randomization to Anonymize Participant Allocation

Randomization involves allocating clinical trial participants into different comparison groups. The randomization API is available as an invocable action allowing it to be used through a flow or via a REST invocation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

Randomization

To set up the randomization API during the design phase, use the 'Assign Candidate to Research Study Group' invocable action to assign the candidate to a research study comparison group to facilitate the randomization. Use these specific criteria to invoke the invocable action through the randomization API.

- The API will have an input parameter researchStudyCandidateId, which is the ID of the research study candidate who must be randomized.
- The API will have an output parameter researchStudyComparisonGroupId, which is the group ID where the participant fits based on the randomization.
- The API will have an output parameter such as candidateAllocationSourceId, which is the context through which the research study candidate is mapped to the research study group.

These output parameters can be accessible to the user only in these scenarios.

- If the attribute Randomization Assigns Candidates To Groups is set to false in the Research Study Randomization object, or
- If the attribute Randomization Assigns Candidates To Groups is set to true in the Research Study Randomization object and the user can access the Research Study Comparison Group Candidate object.

Invoke Randomization Invocable Action Using Flows

You can create a screen flow to invoke the Assign Candidate to Research Study Group invocable action. Your flow must meet these criteria.

- The flow must have a research study candidate record ID as an input variable.
- This invocable action must use the research study candidate record ID as an input parameter.
- The flow must use the invocable action Assign Candidate to Research Study Group.
- If necessary, the flow can display the result of the action element inside a screen element.

Launch this Flow from an Object Page

You can launch this flow from an object page with a quick action. To create a quick action and add it to a page layout, see [Create Quick Actions](#).

For example, you can create a quick action in a research study candidate. After the quick action is set up, you can use it to trigger the flow from research study candidate records. The participants are allocated according to the configuration defined in the research study randomization.

Use Participant Management

Participant Management helps organizations that conduct clinical research studies to make their recruitment and enrollment processes more efficient. Clinical trial coordinators or recruiters can use the Clinical Excellence Console app to track and monitor participant recruitment and enrollment progress. Clinical trial coordinators can use the Research Study Candidate page to add new Medication Requests, Health Conditions, Allergies, and Immunization records directly from the patient card.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

Participant Management offers valuable features like clinical trial search, prescreening eligibility, registration, Einstein candidate matching, consent management, and randomization. These tools help organizations reduce operational costs by reducing onboarding time and digitizing key processes in

clinical trials.

Create a Research Study

Speed up the process of recruiting and enrolling participants by creating research studies with the necessary details. Instead of updating multiple object records separately, manage the necessary information through a single, intuitive flow. Save time and reduce the risk of errors, making sure that your studies are set up and running smoothly.

Update a Research Study

Ensure participant eligibility by revising key details of the research study such as the name and title to better reflect the current focus, adjusting the dates to match the current timeline, and refining the inclusion and exclusion criteria. Select a new pre-eligibility questionnaire to effectively screen potential participants.

Add Clinical Information to the Patient Card

Use the patient card in the Research Study Candidates page to quickly view a candidate's clinical data, such as medications, health conditions, allergies, and last clinical encounters. You can also add new medication requests, health conditions, allergies, and immunizations from the patient card.

Track and Monitor Candidate Enrollment Progress

As a clinical trial coordinator or recruiter at Investigative sites, you can monitor candidate progress from Participant Management's Clinical Excellence Console app home page.

Identify Suitable Candidates for Clinical Trials

As a clinical trial coordinator or recruiter, you can initiate the candidate evaluation process from specific record pages. You can begin the process with a single click from a research study candidate, account, or actionable list member record.

View Candidates Matching the Research Study Criteria

As a clinical trial coordinator or recruiter, you can launch the cohort builder from a research study record page to match candidates with the inclusion and exclusion criteria you selected. The cohort builder shows the list of criteria for the research study.

Review Candidate Evaluation Results

Use the Evaluation Results tab in the Research Study Candidates page to view the evaluation results of Einstein Candidate Matching. You can also check different versions of evaluation results.

Create a Research Study

Speed up the process of recruiting and enrolling participants by creating research studies with the necessary details. Instead of updating multiple object records separately, manage the necessary information through a single, intuitive flow. Save time and reduce the risk of errors, making sure that your studies are set up and running smoothly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To create a research study:

Health Cloud Starter

AND

Clinical Trail Manager

1. From the App Launcher, find and select **Research Studies**.
2. Click **Create Study**.
3. On the Basic Information window, enter the required information.
4. On the Enrollment Information window, enter the target count of enrollees.
5. On the Participant Eligibility window, under Inclusion Criteria, select existing criteria or create a criteria that you want to include for the participant. To add more inclusion criteria, click **Add**. To remove criteria, click **Remove**.
6. Under Exclusion Criteria, select an existing or create a criteria that you want to exclude for the participant. To add more exclusion criteria, click **Add**. To remove criteria, click **Remove**. Click **Next**.
7. Select the pre-eligibility questionnaire for the candidate.
8. Click **Finish**.

The research study that you created now appears in the Research Studies list.

Update a Research Study

Ensure participant eligibility by revising key details of the research study such as the name and title to better reflect the current focus, adjusting the dates to match the current timeline, and refining the inclusion and exclusion criteria. Select a new pre-eligibility questionnaire to effectively screen potential participants.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To update a research study:

Health Cloud Starter

AND

Clinical Trail Manager

1. From the App Launcher, find and select **Research Studies**.

2. Open the research study that you want to update.
3. In the dropdown menu at the top-right corner of the page, select **Update Study Details**.
4. Update the details on the Basic Information, Enrollment Information, and the Participant Eligibility windows.
5. If needed, select a new pre-eligibility questionnaire.
6. Click **Finish**.

Add Clinical Information to the Patient Card

Use the patient card in the Research Study Candidates page to quickly view a candidate's clinical data, such as medications, health conditions, allergies, and last clinical encounters. You can also add new medication requests, health conditions, allergies, and immunizations from the patient card.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To view and manage data for clinical trials:

Clinical Trial Manager

Clinical Trial Coordinator

1. From the App Launcher, find and select **Clinical Excellence**.
2. To add a medication request in the Patient Card:
 - a. Click Add New Medication.
 - b. Select the status of the request.
 - c. Select the type of request.
 - d. Select a medication or a medication code.
 - e. Save your changes.See [MedicationRequest](#) for a full list of fields.
3. Similarly, you can follow these steps to add other clinical information as needed to the patient card.

Track and Monitor Candidate Enrollment Progress

As a clinical trial coordinator or recruiter at Investigative sites, you can monitor candidate progress from Participant Management's Clinical Excellence Console app home page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data, track, and monitor candidate enrollment progress:

Clinical Trial Manager

Clinical Trial Coordinator

1. From the App Launcher, enter *Clinical Excellence*, and select it.
2. On the Clinical Excellence Home page, you can view the Enrollment dashboard. The performance indicators within it are as follows.
 - Research Studies: displays the total number of candidates enrolled for research studies.
 - Conversion Rate: displays the average conversion rate of candidates.
 - Candidate Status: displays the status of candidate enrollment.
 - Candidate Enrollment Progress report: displays the bar graph with analysis of the enrollment progress of candidates in research studies.
 - Candidate Rejection Ratio: Displays the bar graph with analysis of the rejection ratio among candidates in research studies.
3. In the Quick Links section, click a tile as needed to access additional pages directly from the console app.

Identify Suitable Candidates for Clinical Trials

As a clinical trial coordinator or recruiter, you can initiate the candidate evaluation process from specific record pages. You can begin the process with a single click from a research study candidate, account, or actionable list member record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data, track, and monitor candidate enrollment progress:

Clinical Trial Manager

Clinical Trial Coordinator

1. Use the built-in Quick Actions to initiate the candidate evaluation process from the Accounts and Research Study Candidates pages. The quick actions are as follows:
 - Research Study Candidates list page: Evaluate Candidates
 - Research Study Candidates detail page: Evaluate Candidate

- Accounts list page: Evaluate Candidates
- Accounts detail page: Evaluate Candidate
- Actionable List Members: Evaluate Candidates

For bulk actions, you can initiate candidate evaluation from the research study candidate list or accounts list pages. If you want to evaluate a single record, you can do that from the research study candidate's detail or the account's detail page. You can also invoke the candidate evaluation process from the actionable lists members list view page.

- a. From the App Launcher, find and select **Research Study Candidates**.
 - b. In the Research Study Candidates list view page, click **Evaluate Candidates**.
Your admin is notified after the evaluation process is completed.
 - c. Click **Finish** on the Candidate Evaluation Process screen.
2. To view the candidate evaluation results.
- a. From the App Launcher, find and select **Clinical Excellence**.
 - b. In the Clinical Excellence console, open the **Research Study Candidates** page.
 - c. To view the candidate evaluation results, click the **Evaluation Results** tab.

View Candidates Matching the Research Study Criteria

As a clinical trial coordinator or recruiter, you can launch the cohort builder from a research study record page to match candidates with the inclusion and exclusion criteria you selected. The cohort builder shows the list of criteria for the research study.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To manage data and monitor candidate enrollment progress:

Clinical Trial Manager

Clinical Trial Coordinator

1. From the App Launcher, find and select the **Clinical Excellence** console app.
2. Go to Research Studies in the Clinical Excellence console app, and then click a research study record from where you want to launch the cohort builder.
3. From the research study record page, click **Launch Cohort Builder**.
4. From the builder, select the inclusion and exclusion criteria set up by your admin.
5. To calculate the total number of candidates matching the selected criteria, click **Calculate**.
The number is displayed on the page.
6. Click **View Candidates**.
7. From the list of candidates who match your selected criteria, select the ones whose status you want to update.

- a. Click **Update Candidate Status**.
- b. From the Change Candidate Status pop-up, select an option from the Select New Status field.
- c. In the Status Update Reason field, describe the reason for updating the status.
You can select only up to 100 records at one time.
- d. Save your changes.

Review Candidate Evaluation Results

Use the Evaluation Results tab in the Research Study Candidates page to view the evaluation results of Einstein Candidate Matching. You can also check different versions of evaluation results.

REQUIRED EDITIONS

 **Note** This tool uses generative AI, which can produce inaccurate or harmful responses. Review for accuracy and safety before using. [Learn more](#)

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license

USER PERMISSIONS NEEDED

To view and manage data for clinical trials:

Clinical Trial Manager

Clinical Trial Coordinator

1. From the App Launcher, find and select the **Clinical Excellence** console app.
2. Open the Research Study Candidates page to view the list of candidate records.
3. Select the candidate for which you want to review the evaluation results.
4. In the Research Study Candidate record, click the **Evaluation Results** tab.
5. On the results screen, you see different sections.
 - Inclusion Criteria: Determines the criteria required for candidates to be eligible to participate in the study. This section shows the number of participants that meet the criteria.
 - Exclusion Criteria: Determines the criteria that prevent candidates or participants from participating in the study. This section shows the number of excluded participants.
 - Status: This column shows the status that indicates whether the candidate meets the specified criteria.
 - Reason: This column provides context for the status assigned.
 - Matching Reference: This column provides a link to the reference record from which the system matched the criterion.
6. To review different versions of the evaluation results, select the versions from **Evaluation Versions** option.

Set Up Site Management

Life sciences organizations can identify suitable sites and investigators for conducting research studies. Identification of the right site, the initial step in the research study process, is crucial to the successful completion of a study.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Study managers who are part of the research study sponsor's organization can get a list of sites and investigators by using enhanced search capabilities. They can use the search results to assess a site's feasibility to conduct research studies. Study managers can create assessments on their own or with the help of generative AI.

At the sites, site investigators can respond to the assessments by logging in to a Digital Experience Cloud portal. Study managers can then review these responses on the assessment dashboard. On the search results page, they can use the summarize sites and investigators option and avoid going to the site and investigator record pages and related lists. Study managers can accelerate the identification process by assigning scores to the sites and investigators by considering various attributes including the total years of research study experience and the research publications. They can also assign scores to the responses that they receive by using the built-in formula question capabilities of the discovery framework. To mark a site for conducting assessments in the future, study managers can tag the sites and investigators.

Study managers and clinical trial coordinators can create and update the study details by using a single flow without updating the object records separately. Study managers can use the Site Selection console app to streamline the selection and activation of clinical trial sites by accessing the required features and reports in one place.

[Site Management Data Model and Permissions](#)

The Site Management data model lays the foundation for the Site Management feature.

[Data for Site Management](#)

Site Management uses data from various objects within your Salesforce org. After you search for sites and investigators, Site Management gets you the information that's available in the relevant objects in the org.

[Enable Site Management](#)

With Site Management, your users can identify the sites for conducting clinical research studies. Based on the customer request for the access to the Site Management features, turn on the org preferences in the Salesforce org.

[Enable Person Accounts Types for Site Management](#)

Configure site investigators as person accounts.

[Assign Permission Set Licenses](#)

Permission set licenses give study managers and site investigators access to the Site Management features. Make sure that you assign the required permission set licenses to users to help them use the features.

Link a Contact to Multiple Accounts

Easily track the relationships between sites and investigators. Get accurate data on sites and investigators, specifically if an investigator is connected to several sites.

Enable Criteria-Based Search and Filter for Site Management

With criteria-based search and filter, users can search for sites and investigators.

Enable Data Pipeline for Site Management

With a data pipeline, your users can query, consolidate, and compute the data in their Salesforce org. With the inbuilt data pipelines, users can streamline the collection of the data required for identifying relevant sites and investigators.

Set Up Data Processing Engine Definition for Site Management

Transform data that's available in different objects to a searchable object by setting up the Data Processing Engine for site and investigator search. The Data Processing Engine joins, calculates, and transforms the data across the required objects and aggregates them into your search capability.

Create a Default Criteria-Based Search and Filter Configuration

To search for sites and investigators, create a default search configuration that's specific to your search definitions. In addition to the basic search configuration, this Criteria-Based Search and Filter configuration defines the configurations for the searchable object and the required search action. For the Agentforce capabilities for site selection, search and filter is automatically configured when you set up the Site Selection Assistance topic.

Update the Searchable Object Configuration in Criteria-Based Search and Filter

In Criteria-Based Search and Filter, to map the search criteria fields to specific fields in the relevant source objects, update the searchable object configuration. Users can view the suggested options as they type the keywords, making the search faster.

Set Up Site and Site Investigator Scoring

Your users can classify site investigators by assigning scores to the investigators. Users can generate weighted scores for site investigators based on attributes such as clinical trial experience, trial performance-cycle times, and legal compliance. To generate scores, users can also use the existing Salesforce platform capabilities, such as the Business Rule Engine (BRE) or Data 360 features like Calculated Insights or Einstein Studio. Alternatively, users can bring in the proprietary scores that they've generated with their own tools.

Set Up Interest Tags for Sites and Investigators

With interest tags, your users can categorize sites and investigators. They can organize interest tags into up to three levels of categories. Study managers can also use the tags to identify a site or an investigator for conducting a specific research study in the future.

Install Omnistudio Package for Site Management

With the Omnistudio package, your users can use the discovery framework and other related functionalities in Site Management.

Enable Discovery Framework for Site Management

Study managers can use the Discovery Framework features to create site feasibility questionnaires and collect and validate the responses from the sites. The framework scans through the available data and

gets accurate results for your search.

Assign Omnistudio Permission Sets

Study managers require access permissions to create and manage Omnistudio components. Assign the required permissions to the study managers for creating and managing Flexcards, Omniscripts, Integration Procedures, and Omnistudio Data Mappers.

Enable Omnistudio Metadata API for Site Management

With Salesforce Omnistudio Metadata APIs, your users can deploy and retrieve standard objects for the Salesforce org. Omnistudio Metadata supports the OmniProcess (Omniscript and Integration Procedure), OmniDataTransform (Omnistudio Data Mapper), and OmniUiCard (Flexcard) standard objects.

Set Up Prefill Assessment Questions

With the Prefill Assessment Questions feature, your users can reuse the responses that they provided for similar questions in a past assessment. They can save the time and effort of responding to the same type of questions repeatedly.

Configure Generative AI Assessments for Sites and Investigators

Use the capabilities of generative AI to create assessment questions for identifying the sites and investigators for conducting clinical trials. Upload a PDF document that has the assessment questions and use generative AI to choose the relevant questions to be included in the assessment.

Configure Site Feasibility Scoring

Study managers can assign scores to the sites and investigators based on the assessment responses. The scoring feature uses the formula question capabilities in Discovery Framework to add a score value to each option in the questionnaire.

Add Flexcard to the Research Study Page

To enable study managers to view assessment details, add the SiteManagementAssessmentDataVisualization Flexcard to the Research Study page.

Configure Digital Experience for Site Management

Set up Experience Cloud for users to configure site and investigator assessments.

Configure Einstein for Agentforce

To improve the customer experience with Agentforce, you can take advantage of Einstein features, such as Einstein Bots.

Configure Site and Investigator Summarization

Site and investigator summarization presents all critical information in a concise format, making it easy for users to quickly review key details on their screen. Configure summarization by turning on context definitions and activating prompt templates. Then, add the summarization action to the sites and investigators search results page.

Configure Agentforce for Site Selection Assistance

Help your users use Agentforce to identify potential sites for running feasibility studies, allowing them to quickly assess and select the most suitable locations. With Agentforce, users can save time and resources, focusing on the most viable options for their projects.

Stage Management for Research Study or Care Program Orchestration

Simplify the implementation of complex stages in a research study or care program by using Stage Management in clinical trials. Define the stage sequence, establish milestones from initiation to

closure, and monitor operational progress at each stage. With Stage Management, give your users a comprehensive view of the record's stage progress seamlessly on a record page.

Contracts for Site Management

Sponsors and clinical trial organizations can use Salesforce Contract Lifecycle Management to manage the entire lifecycle of clinical trial contracts and agreements, from authoring to activation. In Site Management, configure contract workflows for non-disclosure or confidentiality disclosure agreements before site feasibility, and clinical trial agreements after site selection and qualification. Use contracts to make sure agreements are securely generated, reviewed, and executed quickly to accelerate the study startup and site activation process.

Using Site Management

Use Site Management to identify the suitable sites for conducting an efficient clinical research study for your products.

Site Management Data Model and Permissions

The Site Management data model lays the foundation for the Site Management feature.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Site Management

These objects are used in Site Management.

Object	Purpose
Account	Represents an individual account, which is an organization or person involved with your business (such as customers, competitors, and partners).
Account Contact Relation	Represents the relationship between a contact and one or more accounts.
Accreditation	Represents the professional accreditations of a facility.
Assessment Envelope	Represents the information about an envelope that contains the assessments related to a user.
Assessment Envelope Item	Represents the information about an item in an envelope that contains the assessments related to a user.

Object	Purpose
Asset	Represents an item of commercial value, such as a product sold by your company or a competitor that a customer purchases.
Business Hours	Specifies the business hours of your support organization.
Care Program	Represents a set of activities, such as patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.
Care Program Detail	Represents the detail records related to the care program.
Care Program Site	Represents the details about the care program site.
Care Program Site Contract	Represents the association of a care program site and a contract.
Care Provider Facility Specialty	Represents the specialty of the healthcare facility.
Care Service	Represents a healthcare treatment, service, or procedure offered by a provider, practitioner, or facility.
Care Site Investigator Searchable Field	Represents the information about the clinical trial investigator associated with a site.
Care Specialty	Represents a listing of provider specialty codes and descriptions.
Code Set Bundle	Represents a group of code sets across multiple systems and versions. All these code sets refer to the same conceptual entity.
Contact	Represents a contact, which is a person associated with an account.
Document Checklist Item	Represents a checklist item for a documentation file upload.
Healthcare Facility	Represents a healthcare facility and all its related details.
Healthcare Practitioner Facility	Represents the different locations where a practitioner provides services.
Healthcare Provider	Represents the business-level details of the

Object	Purpose
	healthcare organization or the practitioner.
Healthcare Provider Service	Represents a junction object between a Healthcare Service and a Healthcare Provider or a Healthcare Facility.
Healthcare Provider Specialty	Represents the specialties for a practitioner or a provider service organization.
Healthcare Provider Taxonomy	Represents the taxonomy or subspecialty codes for a practitioner or facility.
Location	Represents a warehouse, service vehicle, work site, or other element of the region where your team performs field service work.
Party Publication	Represents the details of a party's publication.
Person Employment	Represents the information about a person's employment.
Research Study	Represents the details of a research study that include its design, execution, and oversight.
Research Study Protocol Information	Represents the details of the research study protocol document.
Score Category	Represents the categories that are scored in a unified health profile.
Unit Of Measure	Defines the units and systems of units used to express and account for quantities.

In addition to these objects, Site Management uses the objects in the Discovery Framework data model to support Assessments.

Permissions and Permission Sets

Admin users of Site Management need these permissions and permission sets to use Site Management.

Permission	Type	Purpose
Context Service Admin	Permission set	Enables the user to perform CRUD operations on context objects.
Criteria-Based Search and Filter	Permission set	Helps users configure a search experience based on searchable

Permission	Type	Purpose
		objects and multiple fieldsets.
Data Pipeline Base User	Permission set	Gives users access to data pipelines.
Document Checklist	Permission set	Helps the user to access the Document Checklist feature.
Generative AI Assessment Questions	Permission set	Lets users draft assessment questions from an uploaded document by using Einstein generative AI.
Health Cloud Starter	Permission set	Provides access to the Health Cloud Starter features.
NLP Service	Permission set	Helps users access and configure NLP Service through the respective permission sets.
Omnistudio Admin	Permission set	Helps admin users to configure Omniscripts, Omnistudio Data Mappers, Integration Procedures, and FlexCards. This permission set also provides calculation runtime access.
Omnistudio User	Permission set	Helps users run Omniscripts, Omnistudio Data Mapper, Integration Procedures, and Flexcards. This permission set also provides calculation runtime access.
Prompt Template Manager	Permission set	Manage prompt templates using Prompt Builder and run them using generative AI features.
Scoring Framework Admin	Permission set	Allow admins to enable Scoring Framework and define models for scoring use cases.
Scoring Framework User	Permission set	Allows users to view predicted scores generated for use cases based on the defined models.
Study Manager for Site Management	Permission set	Gives users access to the research study management

Permission	Type	Purpose
		features in Site Management.

Study Managers need these permissions and permission sets to use Site Management.

Permission	Type	Purpose
Context Service Runtime	Permission set	Grants read access for context definitions and read and write access to all context present in the cache.
Criteria-Based Search and Filter	Permission set	Helps users configure a search experience based on searchable objects and multiple fieldsets.
Document Checklist	Permission set	Helps the user to access the Document Checklist feature.
Health Cloud Starter	Permission set	Provides access to the Health Cloud Starter features.
Natural Language Processing (NLP) Service	Permission set	Helps users access and configure NLP Service through the respective permission sets.
Omnistudio Admin	Permission set	Helps admin users to configure Omniscripts, Omnistudio Data Mappers, Integration Procedures, and FlexCards. This permission set also provides calculation runtime access.
Omnistudio User	Permission set	Helps users run Omniscripts, Omnistudio Data Mapper, Integration Procedures, and Flexcards. This permission set also provides calculation runtime access.
Prompt Template User	Permission set	Run prompt templates using generative AI features.
Scoring Framework User	Permission set	Allows users to view predicted scores generated for use cases based on the defined models.
Study Manager for Site	Permission set	Gives users access to the

Permission	Type	Purpose
Management		research study management features in Site Management.
Life Sciences Site Management Summarization	Permission set	Gives users access to the site and investigator summarization features in Site Management.

Site Investigators need these permissions and permission sets to use Site Management.

Permission	Type	Purpose
Omnistudio User	Permission set	Helps users run Omniscripts, Omnistudio Data Mapper, Integration Procedures, and Flexcards. This permission set also provides calculation runtime access.
Site Management Investigator for Experience Cloud	Permission set	Gives site investigators access to respond to the feasibility assessments and update the site profiles from an Experience Cloud site.

Data for Site Management

Site Management uses data from various objects within your Salesforce org. After you search for sites and investigators, Site Management gets you the information that's available in the relevant objects in the org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

To make the search results significant, enter values in the **Participates in Research Study** field on the Healthcare Provider object and the **Research Studies Conducted** field on the Healthcare Facility object. Data Processing Engine uses these fields to filter the search results for sites and investigators.

See Also

[Salesforce Help: Site Management Data Model and Permissions](#)

Enable Site Management

With Site Management, your users can identify the sites for conducting clinical research studies. Based on the customer request for the access to the Site Management features, turn on the org preferences in the Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To turn on Site Management:

Health Cloud Starter

AND

Study Manager for Site Management

1. From Setup, in the Quick Find box, enter *Site Management Settings* and select it.
2. To access the Site Management enrollment features, turn on Site Management.
When you turn on this feature setting, the Site Management guided setup appears.

Your Salesforce org now has access to the Site Management features and the data model.

Enable Person Accounts Types for Site Management

Configure site investigators as person accounts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To enable person accounts:

Health Cloud Starter

AND

Study Manager for Site Management

1. In the guided setup, under Set Up Site Management, click **Go to Setup** next to Enable Person Account

Types.

2. Turn on Enable Person Accounts.

See Also

[Salesforce Help: Enable Person Accounts for Use in Life Sciences Cloud](#)

Assign Permission Set Licenses

Permission set licenses give study managers and site investigators access to the Site Management features. Make sure that you assign the required permission set licenses to users to help them use the features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To assign permission set licenses: Manage Users

Site Management users require these permission set licenses to the feature:

ROLE	PERMISSION SET LICENSE
Study Manager	<ul style="list-style-type: none">• Context Service Runtime• Criteria-Based Search and Filter• Document Checklist• Health Cloud Starter• Natural Language Processing (NLP) Service• Omnistudio Admin• Omnistudio User: You can see two permission sets with this name. Assign both.• Prompt Template User• Scoring Framework User• Study Manager for Site Management• Life Sciences Site Management Summarization
Site Investigator	<ul style="list-style-type: none">• Omnistudio User: You can see two permission sets with this name. Assign both.• Site Management Investigator for Experience Cloud

ROLE	PERMISSION SET LICENSE
	<ul style="list-style-type: none"> • Life Sciences Site Management Summarization

1. From Setup, in the Quick Find box, enter *Users* and select it.
2. Click the user and on the user setup page, click **Permission Set Assignments**.
3. Click **Edit Assignments** next to Permission Set Assignments.
4. From the Available Permission Sets column, move the permission set licenses to the Enabled Permission Sets column.

See Also

[Salesforce Help: Assign Permission Sets for Life Sciences Cloud](#)

Link a Contact to Multiple Accounts

Easily track the relationships between sites and investigators. Get accurate data on sites and investigators, specifically if an investigator is connected to several sites.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure digital experience:

Health Cloud Starter

AND

Study Manager for Site Management

1. In the Site Management guided setup, under Set Up Site Management, click **Go to Setup** next to Enable Contacts to Multiple Accounts Settings.
2. In the Account Settings page, click **Edit**, and under Contacts to Multiple Accounts Settings, select **Allow users to relate a contact to multiple accounts**.
3. Save your changes.

Enable Criteria-Based Search and Filter for Site Management

With criteria-based search and filter, users can search for sites and investigators.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To turn on criteria-based search and filter:

Health Cloud Starter

AND

Study Manager for Site Management

1. In the Site Management guided setup, under Set Up Site Management, click **Go to Setup** next to Enable Criteria-Based Search and Filter.
2. Turn on Enable Criteria-Based Search and Filter.

See Also

[Salesforce Help: Enable Criteria-Based Search and Filter](#)

Enable Data Pipeline for Site Management

With a data pipeline, your users can query, consolidate, and compute the data in their Salesforce org. With the inbuilt data pipelines, users can streamline the collection of the data required for identifying relevant sites and investigators.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To enable a data pipeline:

Health Cloud Starter

AND

Data Pipeline Base User

Before you enable the data pipeline, make sure that Criteria-Based Search and Filter is enabled in the org.

1. In the guided setup, under Set Up Site Investigator Search, click **Go to Setup** next to Enable Data Pipeline.

2. Turn on Data Pipeline, and enable the Salesforce output connector.

See Also

[Salesforce Help: Enable Data Pipelines](#)

Set Up Data Processing Engine Definition for Site Management

Transform data that's available in different objects to a searchable object by setting up the Data Processing Engine for site and investigator search. The Data Processing Engine joins, calculates, and transforms the data across the required objects and aggregates them into your search capability.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To set up the Data Processing Engine definition: Data Pipeline Base User

-  **Note** The Data Processing Engine sources its data from healthcare providers and healthcare practitioner facilities that conduct research studies. If the number of records from healthcare practitioner facilities exceeds 1.5 million, the Data Processing Engine can encounter performance issues. Therefore, it is recommended to limit these records to 1.5 million or less. If you want to process more records, contact Salesforce Support.

Before you set up the Data Processing Engine, enable the Data Pipeline.

1. In the Site Management guided setup, under Set Up Site Investigator Search, click **Go to Setup** next to Set Up Data Processing Engine.
2. In the list of Data Processing Engine definitions, click **Populate Care Site Investigator Searchable Field**.
3. On the Site Investigator Searchable Field Data Processing Engine definition page, click the dropdown next to Save, and select **Save As**.
4. Specify a name for the new data processing engine definition, and select **Criteria-Based Search and Filter** as the process type. If needed, enter a description.
5. Save the data processing engine definition.
6. To update the search conditions for any object in the definition, click the object and add or update the condition on the Configuration page that opens. Save the changes.
7. Activate the data processing engine definition.
8. To clean up the Care Site Investigator Searchable Field entity before you run the Data Processing Engine, create another data processing engine definition or use a flow.
9. Schedule the data processing engine definition job to run based on your requirements.

See Also

[Salesforce Help: Set Up Data Processing Engine](#)

Create a Default Criteria-Based Search and Filter Configuration

To search for sites and investigators, create a default search configuration that's specific to your search definitions. In addition to the basic search configuration, this Criteria-Based Search and Filter configuration defines the configurations for the searchable object and the required search action. For the Agentforce capabilities for site selection, search and filter is automatically configured when you set up the Site Selection Assistance topic.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a default Criteria-Based Search and Filter configuration Health Cloud Starter

AND

Criteria-Based Search and Filter

 **Note** The values in the Filter Field Parsing section in the configuration appear as a picklist.

Before you create the default search configuration, make sure that you set up the Data Processing Engine definitions for the site and investigator search.

1. In the Site Management guided setup, under Set Up Site Investigator Search, click **Create Configuration** next to Create a Default Criteria-Based Search and Filter Configuration. An active search configuration with the required configuration records is created.
2. To update the fields in the search configuration, from Setup, go to the Criteria-Based Search and Filter setup page, and click **Site Investigator Search**. Click **Edit** and update the fields.

After you configure Criteria-Based Search and Filter, add the Criteria-Based Search and Filter component to a page.

[Configure Sharing Rules for Healthcare Facility Code Set](#)

The search for a Healthcare facility uses information in the Codeset field that is defined on the Code Set Bundle object. Code Set Bundle is a generic object that you can also use to store information that isn't related to site management. To help the Site Management users view only the healthcare facilities in the codeset, configure the object sharing rules feature on the Code Set Bundle object.

See Also

[Salesforce Help: Set Up Criteria-Based Search and Filter](#)

[Salesforce Help: Add the Criteria-Based Search and Filter Component to a Page](#)

Configure Sharing Rules for Healthcare Facility Code Set

The search for a Healthcare facility uses information in the Codeset field that is defined on the Code Set Bundle object. Code Set Bundle is a generic object that you can also use to store information that isn't related to site management. To help the Site Management users view only the healthcare facilities in the codeset, configure the object sharing rules feature on the Code Set Bundle object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure sharing rules for codeset:

Manage Sharing

Before you configure sharing rules, make sure that the healthcare facility codeset has the code set type set to Healthcare Facility Type.

1. From Setup, in the Quick Find box, enter *Sharing Settings* and select it.
2. Under Sharing Rules, next to the Code Set Sharing Rules, click **New**.
3. Enter the label name and rule name.
4. Select **Based on Criteria** as the rule type.
5. Select **Code Set Type** as the field. Select **equals** as the operator, and enter *Healthcare Facility Type* as the value.
6. In Share with, select **Public Groups** from the dropdown list, and select the public group where you want to configure the sharing settings.
7. Select **Read/Write** as the access level.
8. Save your changes.

See Also

[Salesforce Help: Sharing Rules](#)

Update the Searchable Object Configuration in Criteria-Based Search and Filter

In Criteria-Based Search and Filter, to map the search criteria fields to specific fields in the relevant source objects, update the searchable object configuration. Users can view the suggested options as they type the keywords, making the search faster.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To update the searchable object configuration:

Health Cloud Starter

AND

Criteria-Based Search and Filter

AND

Study Manager for Site Management

-  **Note** After you map the fields, the text fields in the source object appear as type ahead fields in the search criteria fields, and picklist fields appear as picklists.

Before you map the fields, make sure that Criteria-Based Search and Filter is enabled.

1. From Setup, in the Quick Find box, enter *Criteria-Based Search and Filter* and select it.
2. Go to **Searchable Object Configuration**, and then click **Site Investigator Search**.
3. In Criteria Field Mapping, click the edit icon.
4. Select the values in the Source Object, Source Field Type, and Source Object Field columns, and save your changes.

Set Up Site and Site Investigator Scoring

Your users can classify site investigators by assigning scores to the investigators. Users can generate weighted scores for site investigators based on attributes such as clinical trial experience, trial performance-cycle times, and legal compliance. To generate scores, users can also use the existing Salesforce platform capabilities, such as the Business Rule Engine (BRE) or Data 360 features like Calculated Insights or Einstein Studio. Alternatively, users can bring in the proprietary scores that they've generated with their own tools.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To set up site investigator scoring:

Health Cloud Starter

AND

Study Manager for Site Management

1. In the Site Management guided setup, under Set Up Site Investigator Search, click **Go to Setup** next to Set Up Site Investigator Scoring.
If the Site Management preference is enabled in the org, the **OverallInvestigatorScore** and the **OverallFacilityScore** categories are created by default.
2. To add classification to the score, click the score category, and then click **Add Classification**.
3. To edit a default score category, click the category, and then click **Edit Category**.
If you update the name of a default score category, make sure that you update the value field on the Investigator Score Category configuration page in the Data Processing Engine definition.
4. To add a score category to the score, click the score category, and then click **Add Classification**.

Set Up Interest Tags for Sites and Investigators

With interest tags, your users can categorize sites and investigators. They can organize interest tags into up to three levels of categories. Study managers can also use the tags to identify a site or an investigator for conducting a specific research study in the future.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To set up interest tags:

Study Manager for Site Management

To use the interest tagging feature for sites and investigators, enable tags for the Healthcare Facility and Healthcare Provider objects.

1. In the Site Management guided setup, go to Interest Tagging.
2. To enable topics for the objects, click **Go to Setup** next to Enable Topics for Objects.
3. To enable interest tags for the sites, click **Go to Setup** next to Enable Interest Tags.
4. In the Topics for Objects setup page, enable topics for the Healthcare Facility and Healthcare Provider objects.
5. To create tag categories for the sites, click **Create Tag Categories** next to Create Tag Categories.
6. Create the interest tags, and then click **Mark Complete**.
7. Add the interest tag component to the research study page, and then click **Mark Complete**.

See Also

[Salesforce Help: Enable Topics for Objects to Use with Interest Tags](#)

Salesforce Help: Enable Interest Tags

Salesforce Help: Create Tag Categories

[Salesforce Help: Add the Interest Tags Component to Record Pages](#)

Install Omnistudio Package for Site Management

With the Omnistudio package, your users can use the discovery framework and other related functionalities in Site Management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To install the Omnistudio package: [Omnistudio Admin](#)

1. Install the Omnistudio package.
 2. In the Site Management guided setup, go to Install Omnistudio Package, and click **Mark Complete**.

See Also

Salesforce Help: Omnistudio for Life Sciences Cloud

Enable Discovery Framework for Site Management

Study managers can use the Discovery Framework features to create site feasibility questionnaires and collect and validate the responses from the sites. The framework scans through the available data and gets accurate results for your search.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Enterprise and Unlimited Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To enable discovery framework:

Health Cloud Starter

AND

USER PERMISSIONS NEEDED

Omnistudio Admin

1. In the Site Management guided setup, under Get Your Org Ready for Assessments, click **Enable Discovery Framework** next to Enable Discovery Framework.
2. In the General Setting page, turn on Discovery Framework, Enhanced Questions, and Generative AI Assessment Questions.

See Also

[Salesforce Help: Discovery Framework and Assessments Prerequisites](#)

[Salesforce Help: Enable Discovery Framework](#)

Assign Omnistudio Permission Sets

Study managers require access permissions to create and manage Omnistudio components. Assign the required permissions to the study managers for creating and managing Flexcards, Omniscripts, Integration Procedures, and Omnistudio Data Mappers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To assign Omnistudio permission sets:

Manage Users

1. In the guided setup, under Get Your Org Ready for Assessments, click **Assign Omnistudio Permission Sets** next to Assign Omnistudio Permission Sets.
2. Assign the Omnistudio User permissions to the users.

See Also

[Salesforce Help: Omnistudio Permission sets](#)

Enable Omnistudio Metadata API for Site Management

With Salesforce Omnistudio Metadata APIs, your users can deploy and retrieve standard objects for the Salesforce org. Omnistudio Metadata supports the OmniProcess (Omniscript and Integration Procedure), OmniDataTransform (Omnistudio Data Mapper), and OmniUiCard (Flexcard) standard objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To enable Omnistudio Metadata APIs: [Omnistudio Admin](#)

1. In the Site Management guided setup, under Get Your Org Ready for Assessments, click **Enable Omnistudio Metadata** next to Enable Omnistudio Metadata.
 2. Turn on Omnistudio Metadata.

See Also

Salesforce Help: Enable Omnistudio Metadata API Support

Set Up Prefill Assessment Questions

With the Prefill Assessment Questions feature, your users can reuse the responses that they provided for similar questions in a past assessment. They can save the time and effort of responding to the same type of questions repeatedly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To set up prefill assessment questions:

Health Cloud Starter

AND

Study Manager for Site Management

AND

Omnistudio Admin

1. In the Site Management guided setup, under Get Your Org Ready for Assessments, click **Go to Setup** next to Set Up Prefill Assessment Questions.
 2. Turn on Prefill Assessment Questions.
 3. To set up the prefill questions, click **Set Up Prefill Questions**. For more information, see [Prefill Assessment Questions with Previously Submitted Responses in a Discovery Framework Omniscrypt](#).
 4. To configure the prefill assessment question decision table, click **Configure Decision Table**.

5. Add the decision table property to Omniscripts, and click **Mark as Complete**.
6. To add the prefill feature to the Omniscript, activate the SiteAssessment_QuestionResponse integration procedure, and click **Mark as Complete** next to Add Prefill Feature to Omniscripts.
7. To assign the required permission sets to the users to invoke the decision table, under Assign Permission for Decision Tables, click **Assign Permission** next to Assign Run Decision Table Permission.

See Also

[Salesforce Help: Prefill Assessment Questions with Previously Submitted Responses in a Discovery Framework Omniscript](#)

Configure Generative AI Assessments for Sites and Investigators

Use the capabilities of generative AI to create assessment questions for identifying the sites and investigators for conducting clinical trials. Upload a PDF document that has the assessment questions and use generative AI to choose the relevant questions to be included in the assessment.

REQUIRED EDITIONS

Before you configure assessments, make sure that you assigned the Generative AI Assessment Questions permission set to the users.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure Generative AI Assessments for Sites and Investigators:

Generative AI Assessments for Sites and Investigators

AND

Study Manager for Site Management

AND

Natural Language Processing (NLP) Service

AND

Scoring Framework User



Warning Generative AI can produce inaccurate or harmful responses. Review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

1. In the Site Management guided setup, under Enable Generative AI Assessment Generation, click **Mark Complete** next to Assign Assessment Generation Permission Set Licenses.
2. Click **Enable Industries AI** next to Enable Industries AI. Turn on Industries AI Setup.
3. In the Site Management guided setup, click **Enable Einstein** next to Enable Einstein. Turn on Einstein.
4. In the Site Management guided setup, click **Go to Setup** next to Enable Generative AI Assessment Questions. Turn on Generative AI Assessment Questions.
5. In the Site Management guided setup, click **Go to Setup** next to Configure Use Case for Gen AI Questionnaire. Create a use case configuration of the Assessment Questions Extraction type, and activate it.

See Also

[Salesforce Help: Einstein Generative AI for Health Cloud](#)

[Salesforce Help: Set Up Einstein Generative AI](#)

Configure Site Feasibility Scoring

Study managers can assign scores to the sites and investigators based on the assessment responses. The scoring feature uses the formula question capabilities in Discovery Framework to add a score value to each option in the questionnaire.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure site feasibility scoring:

Health Cloud Starter

AND

Omnistudio Admin

1. In the Site Management guided setup, under Configure Site Feasibility Score, click **Add Picklist Values** next to Add Picklist Values to Care Program Detail Subtype.
2. In Detail Subtype Picklist Values, click **New**.
3. In the text box, enter *Site Management*, and save your changes.
4. In the Site Management guided setup, under Configure Site Feasibility Score, click **Update Data Mapper** next to Update SiteManagementGetOmniRecordByResearchStudyId Data Mapper.
5. Clone the SiteManagementGetOmniRecordByResearchStudyId data mapper.
6. Open the data mapper, and add a condition for the Care Program Detail subtype.
7. Activate the data mapper.

Add the SiteManagementAssessmentDataVisualization Flexcard to the Research Study page.

See Also

[Salesforce Trailhead: Configure Unified Health Scoring](#)

Add Flexcard to the Research Study Page

To enable study managers to view assessment details, add the **SiteManagementAssessmentDataVisualization** Flexcard to the Research Study page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a default Criteria-Based Search and Filter configuration:

Health Cloud Starter

AND

Omnistudio Admin

1. From the App Launcher, find and select **Research Studies**.
2. Open a research study record.
3. Click **Setup**, and select **Edit Page**.
4. Place the Flexcard component in a suitable spot on the page layout.
We recommend that you create a dedicated tab on your page for this Flexcard and place it inside that tab.
5. Select the Flexcard component that you placed on the page.
6. In the component properties panel, select the **SiteManagementAssessmentDataVisualization** Flexcard.
7. Save your work and activate the page, if needed.

See Also

[Salesforce Trailhead: Add a FlexCard to a Lightning Page](#)

Configure Digital Experience for Site Management

Set up Experience Cloud for users to configure site and investigator assessments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure digital experience:

Health Cloud Starter

AND

Study Manager for Site Management

Before you configure digital experience for site management, make sure that you assigned the Assessment Envelope for Site Management in Experience Cloud permission set to your users.

1. In the Site Management guided setup, under Configure Digital Experiences, click **Enable Digital Experiences** next to Enable Digital Experiences. On the settings page, click **Enable**.
2. In the Site Management guided setup, under Configure Digital Experiences, click **Go to Assessment Setup** next to Configure External User Assessments.
3. Enable the external user assessments.
4. Set an expiration period for the assessment envelope.
5. In Send Email Assessment Flow, select **Send Assessment Envelope Email**. Save your changes.
6. Complete the steps under the Get Your Org Ready to Use Assessments, Create Assessments with Discovery Framework, and Add the Assessment Component to Pages sections.
7. To send assessments to multiple care program sites:
 - a. Under Configure Digital Experiences, click **Go to Setup** next to Update Site URL in Bulk Send Assessment Email Flow. The flow opens in Flow Builder.
 - b. In the Toolbox section in Flow Builder, select the ExperienceCloudSiteUrl constant, and update URL in the Value field as required.

If required, use the Send Assessments to Care Program Sites in Bulk screen flow to add an action in the Care Program Sites list view to send assessments to multiple sites.

[Configure External User Assessments for Site Management](#)

Help study managers send site feasibility questionnaire to the clinical trial sites. When the questionnaire is sent, the investigators at the sites receive a link to complete the assessment on the Experience Cloud portal within a specific date.

See Also

[Salesforce Help: Configure Digital Experiences Settings](#)

[Salesforce Help: Add the Assessment Component to Record and App Home Pages](#)

[Salesforce Help: Discovery Framework and Assessments Prerequisites](#)

[Salesforce Help: Assign a Permission Set License to a User](#)

Configure External User Assessments for Site Management

Help study managers send site feasibility questionnaire to the clinical trial sites. When the questionnaire is sent, the investigators at the sites receive a link to complete the assessment on the Experience Cloud portal within a specific date.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure assessments:

Industries Assessment permission set license

1. In the Site Management guided setup, under Configure Digital Experiences, click **Go to Assessment Setup** next to Configure External User Assessments.
2. In the Assessment Setup page, turn on **External User Assessments**.
3. Set the default number of days until the assessment envelope expires, and save your changes.

The assessment envelope contains all the assessments that the study manager sends to the sites. They can change the default expiration date before sending the assessments, but the expiration date can't exceed 30 days.

4. In Send Email Assessment Flow, click **Edit**.
5. Select the Send Email Assessment Flow that is customized for your requirements, and save your changes.

If the Send Email Assessment Flow isn't in the dropdown, check to see if it's activated.

See Also

[Salesforce Help: Customize the Assessment Envelope Email Template Flow](#)

Configure Einstein for Agentforce

To improve the customer experience with Agentforce, you can take advantage of Einstein features, such as Einstein Bots.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure Einstein:

Health Cloud Starter

AND

Study Manager for Site Management

1. Assign the permission set licenses to your users.
2. In the Site Management guided setup, under Configure Einstein, click **Mark Complete** next to Assign Permission Set Licenses.
3. In the Site Management guided setup, under Configure Einstein, click **Go to Setup** next to Turn on Einstein.
4. In the Einstein Setup page, turn on Einstein and deploy prompt templates.
5. In the Site Management guided setup, under Configure Einstein, click **Go to Setup** next to Turn on Einstein Bots.
6. In the setup page, turn on Einstein Bots.
7. In the Site Management guided setup, under Configure Einstein, click **Go to Setup** next to Turn on Agentforce.
8. In the setup page, turn on Agentforce, and create a new Agentforce Employee agent for site selection assistance.

See Also

[Salesforce Help: Set Up Einstein Generative AI](#)

Configure Site and Investigator Summarization

Site and investigator summarization presents all critical information in a concise format, making it easy for users to quickly review key details on their screen. Configure summarization by turning on context definitions and activating prompt templates. Then, add the summarization action to the sites and investigators search results page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure site and investigator summarization:

Health Cloud Starter

AND

Context Service Admin

AND

Life Sciences Site Management Summarization

1. In the Site Management guided setup, under Configure Site Investigator Summarization, turn on site investigator summarization.
2. Click **Go to Setup** next to Turn On Context Definitions.
3. In the Context Service Settings page, turn on Context Definitions.

4. Click **Go to Setup** next to Activate Prompt Templates for Summarization.
5. In the Prompt Builder, activate the Summarize Site or Investigator prompt template.
6. In the Site Management guided setup, under Configure Site Investigator Summarization, click **Go to Setup** next to Add Summarization Action to Search Results Page.
7. In the Criteria-Based Search and Filter setup page, activate Criteria-Based Search and Filter.
8. Create an action for summarizing site information.
 - a. Click Action Configuration, and click **New**.
 - b. Select *Summarize Site* as the name.
 - c. Select **Inline** as the action scope.
 - d. Select **LightningWebComponent** as the action type.
 - e. Select **Summarize Site** as the action reference.
 - f. If necessary, add a description for the action and specify whether the action is intended for Agentforce.
 - g. Save your changes.
9. Similarly, create an action for summarizing investigator information with **Summarize Investigator** as the name and the action reference.

See Also

[Salesforce Help: Set Up Criteria-Based Search and Filter](#)

Configure Agentforce for Site Selection Assistance

Help your users use Agentforce to identify potential sites for running feasibility studies, allowing them to quickly assess and select the most suitable locations. With Agentforce, users can save time and resources, focusing on the most viable options for their projects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To configure Agentforce:

Health Cloud Starter

AND

Prompt Template User

1. In the Site Management guided setup, under Configure Site Selection Assistance Agent, turn on site selection assistance topic and actions.
2. Click **Go to Setup** next to Create Agentforce Employee Agent.
3. Create an Agentforce Employee agent from the template.
4. In the Agentforce setup page, click the Agentforce Employee agent that you created, and select

Version 1.

5. In the Agentforce Builder page, click **New**, and select **Add from Asset Library**.
6. In the Add from Asset Library window, select **Site Selection Assistance** topic, and click **Finish**. The Site Selection Assistance topic is added to the Agentforce Employee agent.
7. In the Agentforce Builder page, click **Activate**.
8. Under Configure Site Selection Assistance Agent, click **Go to Setup** next to Activate Prompt template for Site Search Filters.
9. In the Prompt Builder page, if the prompt template is not activated, click **Activate**.

See Also

[Salesforce Help: Create an Agent from an Agentforce Employee Agent Template](#)

Stage Management for Research Study or Care Program Orchestration

Simplify the implementation of complex stages in a research study or care program by using Stage Management in clinical trials. Define the stage sequence, establish milestones from initiation to closure, and monitor operational progress at each stage. With Stage Management, give your users a comprehensive view of the record's stage progress seamlessly on a record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

See Also

[Salesforce Help: Stage Management](#)

Contracts for Site Management

Sponsors and clinical trial organizations can use Salesforce Contract Lifecycle Management to manage the entire lifecycle of clinical trial contracts and agreements, from authoring to activation. In Site Management, configure contract workflows for non-disclosure or confidentiality disclosure agreements before site feasibility, and clinical trial agreements after site selection and qualification. Use contracts to make sure agreements are securely generated, reviewed, and executed quickly to accelerate the study startup and site activation process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

See Also

[Salesforce Help: Salesforce Contracts](#)

Using Site Management

Use Site Management to identify the suitable sites for conducting an efficient clinical research study for your products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Use the Criteria-Based Search and Filter capabilities to search for sites and investigators. Use the discovery framework or the generative AI features to create assessments, and then send them to the identified sites. Review the assessment responses on the assessment dashboard. Assign scores to sites, investigators, and assessment responses. Tag a site for conducting assessments in the future.

Site Selection Console App

Study managers at life sciences organizations and contract research organizations often struggle with the site selection and activation process and the daily tasks because of the use of multiple, disconnected tools. Use the Site Selection console app to simplify these tasks by consolidating key metrics and activities into a single platform. Improve organization and efficiency, enhancing the overall site selection process.

Search for Sites and Investigators

Use Criteria-Based Search and Filter to search for sites and investigators.

View Site and Investigator Summaries on Search Results Page

Quickly get a summary of the key details of clinical trial sites and investigators directly from the search results page, without going to individual records and related lists. Use this efficient overview to save time and to streamline your site selection process.

Generate Site Feasibility Assessments

Site feasibility assessments give you a clear idea about the sites and the investigators working at the sites. Assessments bring you the data about a site that you want to consider for conducting your research studies.

Send Assessments to Sites

After you identify a site for conducting a research study, send a feasibility assessment to the site. The investigators at the site can respond to the questions in the feasibility assessments.

Review Assessment Details and Responses

Use the assessment dashboard to view the site assessment details and review the responses. View the total number of invitations, responses, and the minimum and maximum scores for an assessment.

Create a Research Study

Speed up site selection by creating research studies using a flow, instead of updating multiple object records separately. Save time and reduce the risk of errors, making sure that your studies are set up and running smoothly.

Update a Research Study

Ensure precise site selection by revising key details of the research study such as the name and title to better reflect the current focus, adjusting the dates to match the current timeline, and refining the inclusion and exclusion criteria. Select a new pre-eligibility questionnaire to effectively screen potential participants.

Site Selection Console App

Study managers at life sciences organizations and contract research organizations often struggle with the site selection and activation process and the daily tasks because of the use of multiple, disconnected tools. Use the Site Selection console app to simplify these tasks by consolidating key metrics and activities into a single platform. Improve organization and efficiency, enhancing the overall site selection process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

By default, the Site Selection console app includes these items:

- Home Page
- Research Studies
- Care Program sites
- Healthcare Providers
- Healthcare Facilities
- Assessments
- Site and Investigator Search
- Care Site Investigator Searchable Fields
- Omniscripts

[Consolidate Key Data By Using Site Selection Console App](#)

Streamline the site selection process by bringing together essential site selection metrics and activities in one place.

Consolidate Key Data By Using Site Selection Console App

Streamline the site selection process by bringing together essential site selection metrics and activities in one place.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To use the Site Selection console app:

Study Manager for Site Management

Add items to the list of default items available on the Site Selection console app, or edit the list.

1. From the App Launcher, find and select **Site Selection**.
2. From the dropdown, select the item that you want to update.
3. To add items to the list, select **Edit** from the dropdown.
4. Click **Add More Items**.
5. Select the item, and click **Add Items**.
6. Save the changes.

Search for Sites and Investigators

Use Criteria-Based Search and Filter to search for sites and investigators.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

By default, you can perform a search based on the investigator type, investigator therapeutic area, healthcare facility name, and healthcare facility specialty. Use the advanced filter options on the Search Criteria page to sort the results. Add fields to search criteria by configuring Criteria-Based Search and Filter. After you get the search results, add a site to the research study that you want to conduct.

USER PERMISSIONS NEEDED

To search for sites and investigators:

Health Cloud Starter

AND

Study Manager for Site Management

AND

Criteria-Based Search and Filter

Perform the site and investigator search from the page where you integrated the Criteria-Based Search and Filter component. The results for the fields where you select multiple values, for example Investigator Therapeutic Area, include values for the specified options. This section uses the Research Study page as an example for launching the Search Criteria fields.

-  **Note** Site Management shows only up to 4,000 characters for text field search results. For example, when you search for care specialties, if the results include 5,000 characters, Site Management truncates the results, and shows only 4,000 characters. If a search criterion has numeric values, Site Management removes it from the search results.

1. From the App Launcher, find and select **Research Studies**.
2. On the Site Investigator Search tab, under Search Criteria, enter the details, and then click **Search**. The search results appear on the same page.
3. To filter the search results, in the Filters section, enter the details, and click **Apply Filters**.
4. To add a site to a research study that you're conducting, click **Add Site to Study**.
5. Select the name of the research study, and click **Preview Selection**.
6. Review your selections, and click **Next**.
7. Click **Finish**.

View Site and Investigator Summaries on Search Results Page

Quickly get a summary of the key details of clinical trial sites and investigators directly from the search results page, without going to individual records and related lists. Use this efficient overview to save time and to streamline your site selection process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To summarize sites and investigators:

Healthcloud Starter

AND

Study Manager for Site Management

AND

Context Service Runtime

AND

Prompt Template User

On the search results page, view the crucial information about a site including its name, location, type, network affiliations, accreditation, and the operational and therapeutic characteristics. This information also covers the supported therapeutic areas, the types and phases of supported clinical trials, past performance in clinical trials, and compliance and quality metrics related to the site. Study managers can

also access the details of investigators, including their professional background, research experience, Good Clinical Practice (GCP) training, and research contributions.

1. From the App Launcher, find and select **Site Management**.
2. From the dropdown next to Site Management, select **Criteria-Based Search and Filter**.
3. Enter the details in the Search Criteria fields, and then click **Search**.
The search results appear on the same page.
4. To summarize the site information, from the dropdown next to the healthcare facility and the investigator in the search results, select **Summarize Site**.
5. On the confirmation window, click **I Understand** to proceed. If you don't want to see the Einstein AI disclaimer again, click **Don't show this again**.
The Site Summary page shows the summary of the site's details. To close the window, click **Done**.
6. To summarize the investigator information, from the dropdown next to the healthcare facility and the investigator in the search results, select **Summarize Investigator**.
7. On the confirmation window, click **I Understand** to proceed. If you don't want to see the Einstein AI disclaimer again, click **Don't show this again**.
The Investigator Summary page shows the summary of the site investigator's details. To close the window, click **Done**.

Generate Site Feasibility Assessments

Site feasibility assessments give you a clear idea about the sites and the investigators working at the sites. Assessments bring you the data about a site that you want to consider for conducting your research studies.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To generate site feasibility assessments:

Omnistudio Admin

AND

Study Manager for Site Management

AND

Natural Language Processing (NLP) Service

AND

Scoring Framework User

1. From the App Launcher, find and select **Assessment Questions**.
2. To create an assessment with existing questions, click **Select Questions**. On the Select Discovery Framework Usage Type window, select **Life Sciences Site Management** as the usage type.
3. To use Einstein generative AI to create an assessment, click **Draft Questions with Einstein**.

See Also

[Salesforce Help: Draft Assessment Questions With Assessment Generation](#)

Send Assessments to Sites

After you identify a site for conducting a research study, send a feasibility assessment to the site. The investigators at the site can respond to the questions in the feasibility assessments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To send assessments to sites:	Study Manager for Site Management
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1. From the App Launcher, find and select **Care Program Sites**.
2. Select the care program site, and click **Assessment Library**.
3. Select the assessment, and click **Send**.
4. Review the details, and click **Send**.

The assessment is sent to the site investigator's email address.

Review Assessment Details and Responses

Use the assessment dashboard to view the site assessment details and review the responses. View the total number of invitations, responses, and the minimum and maximum scores for an assessment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To review assessment details and responses:	Health Cloud Starter
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USER PERMISSIONS NEEDED

AND

Study Manager for Site Management

Use the histogram on the assessment dashboard for a comprehensive view of the assessment responses, based on the scores that you set for the questions. From the dashboard, go to the details of the assessment response from a specific site or investigator. Use the advanced filter option to filter the sites on the histogram, based on the minimum and maximum scores.

1. From the App Launcher, find and select **Research Studies**.
2. Select the research study that the assessment was completed for.
3. On the Assessment Survey tab, select the assessment, and click **Show Results**.
4. To filter the sites based on the assessment response scores, expand the Advanced Filters section, and enter the minimum and the maximum scores. Click **Apply Filters**.
5. To go to a specific response, in the list of sites and investigators, click **See Assessment Response**.

Create a Research Study

Speed up site selection by creating research studies using a flow, instead of updating multiple object records separately. Save time and reduce the risk of errors, making sure that your studies are set up and running smoothly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a research study:

Study Manager for Site Management

1. From the App Launcher, find and select **Research Studies**.
2. Click **Create Study**.
3. On the Basic Information window, enter the required information.
4. On the Enrollment Information window, enter the target count of enrollees.
5. On the Participant Eligibility window, under Inclusion Criteria, select existing criteria or create a criteria that you want to include for the participant. To add more inclusion criteria, click **Add**. To remove criteria, click **Remove**.
6. Under Exclusion Criteria, select an existing or create a criteria that you want to exclude for the participant. To add more exclusion criteria, click **Add**. To remove criteria, click **Remove**. Click **Next**.
7. Select the pre-eligibility questionnaire for the candidate.
8. Click **Finish**.

The research study that you created appears in the Research Studies list.

Update a Research Study

Ensure precise site selection by revising key details of the research study such as the name and title to better reflect the current focus, adjusting the dates to match the current timeline, and refining the inclusion and exclusion criteria. Select a new pre-eligibility questionnaire to effectively screen potential participants.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To update a research study:

Study Manager for Site Management

1. From the App Launcher, find and select **Research Studies**.
2. Open the research study that you want to update.
3. In the dropdown menu at the top-right corner of the page, select **Update Study Details**.
4. Update the details on the Basic Information, Enrollment Information, and the Participant Eligibility windows.
5. If needed, select a new pre-eligibility questionnaire.
6. Click **Finish**.

Administer Life Sciences Cloud

Set up Patient Engagement for Life Sciences by implementing features such as Care Programs, Financial Assistance Programs, Patient Program Outcome Management, and Pharmacy Benefits Verification.

Set Up Advanced Therapy Management

Advanced Therapy Management's Multi-Step Scheduling feature supports slot management and scheduling across multiple territories in a single place, to help users easily search for and book appointments across multiple sites. Advanced Therapy Orchestration provides flexible workflows that automatically execute all the components of an advanced therapy, from therapy stages and substages to individual tasks.

Set Up Benefit Verification

Integrate benefit verification into the end-to-end patient access workflow to help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's health benefits.

Set Up Care Programs

Maximize the impact of your care programs with enrollment and management tools to help drive adherence and improve outcomes. Care programs can cover services such as patient outreach, access to medications, access to care, financial assistance, or remote monitoring.

Set Up Financial Assistance Programs

Financial Assistance Program streamlines the enrollment of patients, helping them manage out-of-pocket medical expenses. Patient service reps can identify suitable assistance programs based on specific criteria and apply on behalf of the enrollees. Reps can view the status of the application and the history of any financial assistance that was provided to the enrollee. If the application is rejected, the patient service rep can file an appeal. After the application is approved, another patient service rep can view the details of the benefit disbursement, such as the count and benefit of reimbursed Copay coupons.

Set Up Patient Program Outcome Management

Patient Program Outcome Management streamlines the process of defining program outcomes and indicators, and connects program outcomes with patient progress, enabling measurement at the outcome level. Enhance care program efficacy and get clear insights into patient and program performance through Patient Program Outcome Management. Improve patient experience and adherence by building your customized assessments and logic to compute indicator results, and evaluate outcomes to refine patient service programs.

Set Up Patient Support Programs Analytics for Life Sciences Cloud

Patient Support Programs (PSP) Analytics provides a complete solution, including Tableau Einstein

dashboards, to improve patient and program outcomes. The dashboards give program leads and patient services reps the data-driven insights they need to optimize operational efficiency.

[Set Up Pharmacy Benefits Verification](#)

Gain quick access to patient care and verify benefit coverage details. Patient services representatives can use a streamlined process to assist patients in getting an accurate summary of their pharmacy benefits. Representatives can use a guided flow to initiate a verification request to payers and receive a response for pharmacy coverage details, including coverage status, co-pay, co-insurance, and deductibles.

[Set Up Provider Relationship Cards](#)

Set up provider relationship cards to quickly and efficiently show users what they need to know about providers and the facilities where they work, all in one place. Identify the information your users look for on each Provider Relationship Card, then use the card setup wizard to connect the various objects that contain that information.

[Set Up Provider Search for Life Sciences](#)

Powered by the provider data model, Provider Search helps your users find healthcare providers based on criteria such as location, specialty, and whether the provider is accepting new patients. You can even see the location of each provider right in Life Sciences Cloud.

Set Up Advanced Therapy Management

Advanced Therapy Management's Multi-Step Scheduling feature supports slot management and scheduling across multiple territories in a single place, to help users easily search for and book appointments across multiple sites. Advanced Therapy Orchestration provides flexible workflows that automatically execute all the components of an advanced therapy, from therapy stages and substages to individual tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

In the healthcare industry, advanced therapy refers to an innovative medical practice that uses genetics and biomarker information to manufacture personalized medication for patients with rare illnesses. The therapy involves multiple steps that are typically performed in different locations.

For example, in cell and gene therapy, the procedure involves:

- Apheresis—A biosample is collected from a patient.
- Manufacturing—The biosample is treated in a cell lab, where cells are isolated, genetically engineered, and grown.
- Infusion—The genetically treated biosample is introduced back into the patient's body to help eliminate abnormal and mutated genes that cause illness.

Personalized medicine requires smooth workflows and process integration across provider and pharmaceutical industries.

Advanced Therapy Management offers slot management and capacity configuration capabilities, so that admins can configure availability of resources at their assigned territories, and create and publish slots accordingly. Advanced Therapy Management's Multi-Step Scheduling brings together data about different sites, resources, and appointment slots in one place. Advanced Therapy Orchestration provides an orchestration flow that references subflows to execute therapy stages and substages. The therapy orchestration flows also generate runtime records, which capture the details of the flow execution, for care program enrollee work orders and work order steps and the related therapy tasks.

Advanced Therapy Management's Chain of Custody (CoC) and Chain of Identity (CoI) capabilities help you comply with pharmaceutical regulations and uphold safety standards across the lifecycle of an advanced therapy. CoC maintains a digital trail of the patient's collected biosample as it passes through the various advanced therapy stages, steps, and tasks. CoI ensures that the right patient receives the right treatment by assigning a unique identifier to the collected biosample.

[Learn About the Advanced Therapy Management Licenses](#)

Before you start with Advanced Therapy Management, ensure that your org has the appropriate add-on licenses. The Advanced Therapy Management permissions and licenses are included in Life Sciences Cloud and Health Cloud licenses. These licenses include 500 ATM patients and 1100 Orchestration Runs per org.

Create Profiles for Advanced Therapy Management Users

Users with different roles work on different aspects of Advanced Therapy Management. The user who searches for slots with the help of Multi-Step Scheduling creates the booking request. An internal user then reviews and confirms the booking. Based on your organization's roles and personas, set up profiles for users who book slots and users who confirm the requests.

Create Internal and External Users for Advanced Therapy Management

Create users and assign them the Advanced Therapy Management profiles that you created.

Learn About Multi-Step Scheduling

Advanced Therapy Management's Multi-Step Scheduling feature enables users to book appointment slots for all the steps of a procedure at one time. Service territory relationships streamline the search by providing information about affiliated territories where consecutive work types are performed.

Learn About Therapy Orchestration

Advanced Therapy Management's Therapy Orchestration helps you implement complex workflows for therapies using Salesforce Flows. In Therapy Orchestration, a parent orchestration flow references a series of subflows that execute all the components of a therapy. Each flow is highly flexible and can be customized according to the specific needs of your Salesforce org. You can automatically assign tasks at every step of the therapy to the relevant stakeholders involved, and easily monitor therapy progress from patient intake to infusion.

Set Up Advanced Therapy Management for Experience Cloud

Make your treatment center experience easily accessible to users with Advanced Therapy Management in an Experience Cloud site.

Use Advanced Therapy Management

Advanced Therapy Management helps users book appointments for a series of procedures across multiple service territories all at once. Multi-Step Scheduling eliminates the need for setting up and trying to coordinate individual appointments at multiple locations.

Learn About the Advanced Therapy Management Licenses

Before you start with Advanced Therapy Management, ensure that your org has the appropriate add-on licenses. The Advanced Therapy Management permissions and licenses are included in Life Sciences Cloud and Health Cloud licenses. These licenses include 500 ATM patients and 1100 Orchestration Runs per org.

Customers can purchase the Advanced Therapy Management - Patients (500) add-on license to enroll an additional 500 patients into advanced therapies, purchase the Scheduler Add-On license to get additional service appointments, and purchase the External App for Health Cloud license for treatment center employees who mostly use Experience Cloud.

Let's go through the list of licenses.

Advanced Therapy Management - Patients (500)

This license provides an additional capacity of 500 enrollees who you can enroll in advanced therapies. Orgs that use Life Sciences Cloud or Health Cloud can purchase this add-on license to get additional enrollment capacity.

This license also includes an additional 500 Orchestration Runs per org (as each additional patient requires one orchestrator run).

Scheduler Add-On License

Life Sciences Cloud and Health Cloud both offer 12000 service appointments per org per annum and 300 service appointments per user per annum. To use additional service appointments, purchase the Salesforce Scheduler–Additional Appointments license that provides 10000 additional service appointments per org per month.

External App for Health Cloud Add-On License

This license is for users who mostly work in Experience Cloud. These users are treatment center employees such as care coordinators, Apheresis clinicians, and shipping and packaging staff members.

Create Profiles for Advanced Therapy Management Users

Users with different roles work on different aspects of Advanced Therapy Management. The user who searches for slots with the help of Multi-Step Scheduling creates the booking request. An internal user then reviews and confirms the booking. Based on your organization's roles and personas, set up profiles for users who book slots and users who confirm the requests.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create profiles:

Manage Profiles and Permission Sets

In bio pharmaceutical companies that conduct advanced therapies, qualified treatment center (QTC) coordinators manage slot bookings and submit requests for scheduling appointments for care program enrollees. The gene therapy coordinators (GTC) then review and confirm the booking requests so that appointments are booked for the various work procedure steps.

Determine who can see only appointments relevant to their role by updating the visibility of work procedure steps based on user profile. For example, while gene therapy coordinators see all appointments in an appointment chain, qualified treatment center coordinators don't see the

manufacturing appointments.

1. From Setup, in the Quick Find box, enter *Profiles*, and select **Profiles**.
2. Click **New Profile**.
3. For Existing Profile, select **Standard User**.
4. Add a profile name for the user who creates the booking request. For example, *QTC Coordinator*.
5. Save your changes.

Repeat the steps to create a second profile. For example, if you have gene therapy coordinators who confirm requests, create a second profile named GTC Coordinator.

Create Internal and External Users for Advanced Therapy Management

Create users and assign them the Advanced Therapy Management profiles that you created.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

To create, edit, and delete Life Sciences Cloud data:

Health Cloud Starter perm set

To create, edit, and delete Health Cloud data:

Health Cloud Foundation perm set

OR

Manage Health Cloud

To create users:

Manage Internal Users

1. From Setup, in the Quick Find box, enter *Users*, and select **Users**.
2. Click **New User**.
3. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

4. For User License, select **Salesforce**.
5. For Profile, select the profile you created. For example, for treatment center coordinator, select *QTC coordinator*.
6. Save your changes.

Add another user for the profile that confirms the booking.

Learn About Multi-Step Scheduling

Advanced Therapy Management's Multi-Step Scheduling feature enables users to book appointment slots for all the steps of a procedure at one time. Service territory relationships streamline the search by providing information about affiliated territories where consecutive work types are performed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Admins can also configure shifts of service resources assigned to a service territory for a work type (work procedure step). Multi-Step Scheduling collates all of this data on two new tabs: Schedule Appointments and Reschedule Appointments. When users conduct basic and advanced searches, they view available time slots for all work types configured as per the time required to complete each work type. Users can then book their preferred slots for all work types, and reschedule and cancel appointments as well.

You can use Multi-Step Scheduling both in the context of Life Sciences Cloud and with other products.



Note When you enable Salesforce Scheduler settings, make sure to leave the Schedule Appointments Using Engagement Channels setting disabled. Advanced Therapy Management does not support multi-step scheduling with Engagement Channels.

[Assign Permission Sets and Permission Set Licenses To Your Advanced Therapy Management Users](#)

Help users manage slots with Advanced Therapy Management by assigning them the required permission sets and permission set licenses.

[Enable Salesforce Scheduler Settings](#)

Define the availabilities of service resources for work at a service territory by associating shifts with work types. To do this, you must first enable the Salesforce Scheduler for Health Cloud setting.

[Add the Appointment Slots Lightning Component to a Record Page](#)

Enable users to view and manage their scheduled and canceled appointments, and create new ones, by adding the Appointment Slots Lightning component to a record page. You can configure the Appointment Slots Lightning component on the record page of an Account, Case, Opportunity, or Care Program Enrollee object.

[Configure Scheduling Policies for Advanced Therapy Management](#)

Make it easy for multi-step scheduling users to find and book appropriate slots. Configure time slot intervals to determine the intervals in which each appointment starts. Also enable Salesforce Scheduler to use service territory member's shifts to search for slots.

Considerations for Defining Availability of Slots

Get to know about the advantages and disadvantages of using time slots versus shifts to define the availability of appointment slots.

Turn on Field-Level Security for Time Slots

Help users seamlessly search for slots by enabling the field-level security settings for the Maximum Appointment field in the Time Slot object. This setting is required for our internal APIs to fetch results for available slots.

Set Up Data For Advanced Therapy Management in Your Org

Empower users to schedule appointments easily across multiple sites. To use Multi-Step Scheduling effectively, you must set up the required data for all objects in Advanced Therapy Management's data model.

What Is Partial Rescheduling in Advanced Therapy?

Unlike a complete reschedule, partial reschedule cancels slots downstream from the work types you start with, and creates appointments in the existing service appointment group.

Visibility for Buttons in Appointment Slot Component

In Advanced Therapy Management, the status of the related service appointment group and the individual service appointments in the group determines the visibility of the Book New Slots, Reschedule Slots, and Cancel Slots buttons. You can provide conditional visibility of the Reschedule and Cancel buttons by cloning the Determine Cancel and Reschedule Button Visibility flow.

Add a Quick Action Button to Confirm Booking Slots in Advanced Therapy Management

To confirm booking requests, configure a quick action button on the highlights panel of a record page. You can configure the quick action button on the record pages of the Account, Case, Opportunity, and Care Program Enrollee objects.

How Are Slot Results Optimized in Advanced Therapy Management?

To offer the most optimized search results for available appointment slots, Advanced Therapy Management's Multi-Step Scheduling filters slot results through a combination of internal and external checks.

Keep Track of the Total Number of Patients Enrolled in Advanced Therapies

You can easily track the total number of enrollees in advanced therapies. This helps plan for enrollee count upgrades to accommodate increasing enrollees in advanced therapies. Usage-based entitlement details provide more information about the enrollee count that you can use for billing purposes.

Assign Permission Sets and Permission Set Licenses To Your Advanced Therapy Management Users

Help users manage slots with Advanced Therapy Management by assigning them the required permission sets and permission set licenses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

To create, edit, and delete Life Sciences Cloud data:

Health Cloud Starter permission set

To create, edit, and delete Health Cloud data:

Health Cloud Foundation permission set

OR

Manage Health Cloud

1. From Setup, in the Quick Find box, enter *Users*, and select **Users**
2. Select the appropriate user.
3. In the Permission Set License Assignment related list, and click **Edit Assignment**.
4. Select these permission set licenses:
 - Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Platform (for Health Cloud)
 - Multi-Step Scheduling
 - Action Plans
 - Industries Visit
 - Health Cloud Advanced Therapy Orchestration
5. Click **Save**.
6. In the Permission Set Assignments related list, click **Edit Assignment**.
7. Move the following permission sets to the Enabled Permission Sets list.
 - Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud)
 - Multi-Step Scheduling
 - Action Plans
 - Industries Visit
 - Health Cloud Advanced Therapy Orchestration
8. Save your work.

Enable Salesforce Scheduler Settings

Define the availabilities of service resources for work at a service territory by associating shifts with work

types. To do this, you must first enable the Salesforce Scheduler for Health Cloud setting.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

 **Note** Make sure to leave the Schedule Appointments Using Engagement Channels setting disabled. Advanced Therapy Management does not support multi-step scheduling with Engagement Channels.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, and then select *Salesforce Scheduler Settings*.
2. Enable **Salesforce Scheduler for Health Cloud and Life Sciences Cloud**.

Add the Appointment Slots Lightning Component to a Record Page

Enable users to view and manage their scheduled and canceled appointments, and create new ones, by adding the Appointment Slots Lightning component to a record page. You can configure the Appointment Slots Lightning component on the record page of an Account, Case, Opportunity, or Care Program Enrollee object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

USER PERMISSIONS NEEDED

Manage Multi-Step Scheduling features

1. Go to the record page where you want to add the Lightning component.
2. Select  and then select **Edit Page**.
3. In Lightning App Builder, drag the Appointment Slots component onto an editable part of the page.

4. In the Properties pane, select **Book New Slots**, **Reschedule Slots**, and **Cancel Slots**.
5. Save and activate your changes.
6. Assign as the org default.

Configure Scheduling Policies for Advanced Therapy Management

Make it easy for multi-step scheduling users to find and book appropriate slots. Configure time slot intervals to determine the intervals in which each appointment starts. Also enable Salesforce Scheduler to use service territory member's shifts to search for slots.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To edit the default scheduling policies:

Asset Scheduler add-on license

1. From Setup, in the Quick Find box, enter *Scheduling*, and then select **Scheduling Policies**.
2. Click **Edit** next to Default Appointment Scheduling Policy.
3. In Appointment Start Time Interval, select the appropriate time interval for appointment slots, in minutes. For example, select **60** to set one-hour time intervals between appointment start times.
4. Choose how you want to configure the availability of slots.
 - a. To configure availability with only shift records, enable **Use service territory member's shift**. Disable **Use service territory's operating hours with shifts** and **Enforce Account's Visiting Hours**.
 - b. To configure availability with shift records and the time slots for the operating hours at a service territory, enable **Use service territory member's shift** and **Use service territory's operating hours with shifts**. Disable **Enforce Account's Visiting Hours**.
 - c. To configure availability with only time slots, disable **Use service territory member's shift** and **Use service territory's operating hours with shifts**. Make sure you assign time slots to work types.
5. Save your changes.

See Also

[Salesforce Help: Scheduling Policy Rules in Salesforce Scheduler](#)

[Salesforce Help: Determine Appointment Time Slots with Shifts](#)

Considerations for Defining Availability of Slots

Get to know about the advantages and disadvantages of using time slots versus shifts to define the availability of appointment slots.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

There are two ways in which you can define availability for work types at a service territory: time slots and shifts. Let's look at the advantages and disadvantages of each of these methods of defining availability.

Time Slots

Time slots are created for service territories as a whole. All work types assigned to a service territory are performed in the same time slots.

Advantage: Time slots are active for a long period. For example, if a work type involves a vaccination drive with follow-up doses every 6 months, you can create time slots that last the entire period.

Disadvantage: Time slots are the same for all work types performed at a service territory. For example, if you have both apheresis and manufacturing being performed at the same hospital, their time slots are always at the same time.

Shifts

Shifts are created for work types.

Advantage: You can define separate shifts for different work types. For example, even if apheresis and manufacturing are performed at the same hospital, they can have different slots based on their shifts.

Disadvantage: Shifts can't be used for extended periods of time. Recurring shifts can help you define availability for up to 3 months, but not beyond that time period.

Turn on Field-Level Security for Time Slots

Help users seamlessly search for slots by enabling the field-level security settings for the Maximum Appointment field in the Time Slot object. This setting is required for our internal APIs to fetch results for available slots.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To set field-level security:

Manage Profiles and Permission Sets

AND

Customize Application

-  **Note** You must enable the field-level security settings irrespective of whether you want to use the Shift object or Time Slot object to define availability of slots.

Explore the complete list of field-level security settings for Salesforce Scheduler objects [here](#).

1. From the object management settings for Time Slot, click **Fields & Relationships**.
2. Click **Maximum Appointments** and then select **Set Field-Level Security**.
3. Go to the profile you set up for Multi-Step Scheduling user and mark **Visible**.
4. Save your changes.

See Also

[Salesforce Help: Field-Level Security \(FLS\) Permissions Checklist](#)

Set Up Data For Advanced Therapy Management in Your Org

Empower users to schedule appointments easily across multiple sites. To use Multi-Step Scheduling effectively, you must set up the required data for all objects in Advanced Therapy Management's data model.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Let's first get a sense of the Advanced Therapy Management objects and what they store. Check out the [Advanced Therapy Management data model diagram](#).

A work procedure stores information about a process, such as a program or a therapy, and is performed at a service territory, defined as the parent service territory. Each work procedure comprises steps,

represented by a work type record. When a work type is associated with a work procedure, it's referred to as a work procedure step. Each work type is made up of work type steps that represent the substages in a therapy stage.

Work types are performed by services resources at a service territory, defined as child service territory. Service resources are modeled as assets and assigned to a territory as a service territory member. You can define the shift for a service territory member. You can also define a shift for a service territory member assigned to a particular work type through the shift work topic record. When you set up the availability of the service resources, you can book available slots for a work type. Service territory relationships help users book appointments for affiliated sites.

Let's walk through an example of a bio-pharmaceutical company offering advanced therapy. Charles Green, a patient diagnosed with a rare blood disease, is enrolled in a Gene Therapy Care Program that offers an advanced therapy treatment called Cell and Gene Therapy (CGT). Cell and Gene Therapy is performed at Goodly Healthification Cell and Gene Therapy Center (parent service territory).

The Cell and Gene Therapy work procedure has three steps: apheresis, manufacturing, and infusion, each of which is performed at a different service territory and has more substeps, such as Identity Verification work type step under Apheresis.

Apheresis CGT is performed at Goodly Healthification Apheresis Center by Apheresis Medical Staff, modeled as an asset. Shifts are defined for the Apheresis Medical Staff, assigned as a service territory member. After shift records are created, slots are available for booking. Site-to-site relationships (service territory relationship) help the qualified treatment center (QTC) coordinator book appointments for manufacturing and infusion as well, as they can easily view the slots available for the next steps.

Let's look at what each object stores.

Advanced Therapy Management Objects

Object	Description	Example
Work Procedure	Represents information about a procedure or process that's part of a program, such as a care program.	Cell and Gene Therapy
Work Type	Represents a type of work to be performed.	Apheresis CGT
Work Procedure Step	Represents information about the work type that's a part of a work procedure.	Apheresis CGT, Cell and Gene Therapy
Work Type Step	Represents each step within a work type.	Identity Verification step that's part of Apheresis CGT
Work Type Extension	Represents additional information about a work type.	The icon URL for the work type.

Object	Description	Example
Service Territory	Represents a geographic or functional region in which work is performed. This can refer to an organization where a work procedure or a work procedure step is performed.	Goodly Healthification Apheresis Center
Service Resource	Represents an asset engaged for work. This can be a meeting room, equipment, or the medical staff assigned to the hospital.	Apheresis Medical Staff
Service Territory Relationship	Represents site-to-site relationships between service territories based on work types performed.	If Apheresis CGT is held at Goodly Healthification Apheresis Center, the next work type (Manufacturing CGT) should always be held at Goodly Healthification Manufacturing Center.
Service Territory Work Type	Represents the relationship between a service territory and a work type for Salesforce Scheduler appointments. This object stores information about whether slots have been published.	Apheresis CGT at Goodly Healthification Apheresis Center
Service Territory Member	Represents a service resource who can be assigned in a service territory.	Goodly Healthification Apheresis Medical Staff (service resource) assigned to Goodly Healthification Apheresis Center (service territory) as an asset
Shifts	Represents a service resource's shift.	Availability of a service resource who is assigned to a particular service territory.
Shift Work Topic	Represents a service resource's shift availability for a particular work type.	Availability of a resource assigned to a service territory for a particular work type.

1. Set Up a Work Procedure for Advanced Therapy Management

A *work procedure* stores information about an overall process, and can include several tasks, whose details are stored in *work procedure steps*. In Advanced Therapy Management, a work procedure can

represent a particular kind of treatment or therapy, involving steps or tasks such as apheresis or infusion.

2. Set Up a Work Type for Advanced Therapy Management

A work type represents a template for a pending task and collects information about operating hours, estimated duration, and unit of duration. In Advanced Therapy Management, a work type represents treatment steps such as apheresis or infusion. Relate a work type to a work procedure by creating a work procedure step record.

3. Set Up Operating Hours for Work Types and Service Territories

Configure operating hours to represent the hours during which a work type or a service territory is available.

4. Set Up a Work Procedure Step for Advanced Therapy Management

A work procedure step brings together information about a work type and a work procedure. A work procedure step is similar to a work type, but stores information about a step or task only in the context of a work procedure. Work procedure steps also store information about the sequence of steps in a work procedure and the time required before the work procedure step can begin.

5. Set Up a Work Type Extension

Add additional information about work types using the work type extension field. For example, use the Icon URL field to upload an icon for a work type.

6. Set Up a Service Territory for Advanced Therapy Management

A service territory is a location or region where a work is performed by a service resource. In Advanced Therapy Management, service territories are the locations where a work procedure, such as Cell and Gene Therapy, takes place.

7. Set Up a Service Resource for Advanced Therapy Management

A service resource is an agent or crew that performs a work type at a service territory. A service resource can also refer to a particular meeting room, facility, or even an asset assigned to a service territory. In Advanced Therapy Management, service resources are medical staff modeled as an asset at a service territory where a work type, such as apheresis, is performed.

8. Set Up a Service Territory Relationship in Advanced Therapy Management

Help Multi-Step Scheduling users narrow down their searches by establishing site-to-site relationships for service territories where consecutive work procedure steps are performed.

9. Add a Service Territory Member To a Service Territory Record

Configure records for service territory members assigned to a service territory. In Advanced Therapy Management, work procedure steps like apheresis are performed by medical staff at a particular hospital. To represent the medical staff, configure service territory members who are service resources assigned to a work type at a service territory.

10. Set Up Shifts For Services Resources in Advanced Therapy Management

To make appointment slots available for booking through Multi-Step Scheduling, configure shifts for service resources assigned to a service territory. For example, in Advanced Therapy Management, medical staff assigned to a hospital operate in shifts that determine the availability of appointment slots.

11. Set Up a Shift Work Topic For Shifts in Advanced Therapy Management

Configure the availability of a service resource assigned to a service territory for a particular work type.

12. Set Up a Service Territory Work Type For Advanced Therapy Management

To indicate that slots are published (available for booking) for particular work procedure steps, configure a relationship between service territories and work types performed at the service territories.

See Also

[Salesforce Help: How Work Types, Work Type Groups, and Service Territories Work Together](#)

Set Up a Work Procedure for Advanced Therapy Management

A *work procedure* stores information about an overall process, and can include several tasks, whose details are stored in *work procedure steps*. In Advanced Therapy Management, a work procedure can represent a particular kind of treatment or therapy, involving steps or tasks such as apheresis or infusion.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

Make sure you create a care program for the therapy program.

1. From the App Launcher, find and select **Work Procedure**.
2. Click **New**.
3. Add the name of the work procedure in the Work Procedure Name field. For example, Cell and Gene Therapy.
4. Add a description.
5. For Reference Record, select the object associated with the work procedure. For example, the care program associated with cell and gene therapy.
6. For Lead Time Unit Type, select the default unit of measure used to calculate the lead time for each work procedure step, **Hours**, **Days**, or **Minutes**.

The default lead time unit type is days.

You can override this value by specifying the Lead Time Unit Type in a work procedure step.

7. For Associated Flow Orchestrator Name, enter `healthcloud_ato_flows_ATMOrcChnd`.
If you're configuring a customized orchestration flow, add the customized flow's API name here.
8. To activate the work procedure, select **Active**.
9. Save your changes.

See Also

[Salesforce Help: Create a Care Program and Add Related Records](#)

Set Up a Work Type for Advanced Therapy Management

A work type represents a template for a pending task and collects information about operating hours, estimated duration, and unit of duration. In Advanced Therapy Management, a work type represents treatment steps such as apheresis or infusion. Relate a work type to a work procedure by creating a work procedure step record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create work type records: Create, Read, Edit, Delete on Work Type

For more granular lead times, you can model transportation logistics as a work type with its own lead time and add it as a work procedure step in a procedure. When coordinators book appointment slots for a work procedure, they can book transportation logistic slots with varying site pickup times.

 **Note** You can schedule a maximum of 10 work types in a work procedure.

1. From the App Launcher, find and select **Work Type**.
2. Click **New**.
3. Add the name of the work type. For example, *Apheresis CGT*.
4. Add a description.
5. Select the operating hours during which a work type is operational.
6. Add the duration of the work type, and the unit in which the duration is measured. For example, if apheresis takes place over four hours, the Estimated Duration is *4*, and the Duration Type is *Hours*.

7. Save your changes.

Set Up Operating Hours for Work Types and Service Territories

Configure operating hours to represent the hours during which a work type or a service territory is available.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

1. From the App Launcher, find and select **Operating Hours**.
2. Click **New**.
3. Add a name and description for the operating hours specific to your work type or service territory.
4. Select the time zone for the work type or service territory.
5. Set up time slots for work types.



Note Set up Service Appointment Windows only if you want to use operating hours' time slots to define the availability of slots. Time slots can be used with or without shift records.

- To use operating hours (time slots) along with shifts, enable **Use service territory member's shift** and **Use service territory's operating hours with shifts** in Scheduling Policies.
- To only use operating hours (time slots), disable **Use service territory member's shift** and **Use service territory's operating hours with shifts** in Scheduling Policies. Make sure you assign time slots to work types.

- a. Under Set Service Appointment Windows, click **Add Row**

b. Select a day and add start and end times for the time slot.
c. Add work types that are operational in the service appointment windows.
6. Save your changes.

See Also

[Salesforce Help: Set Up Operating Hours in Salesforce Scheduler](#)

[Salesforce Help: Configure Scheduling Policies for Advanced Therapy Management](#)

Set Up a Work Procedure Step for Advanced Therapy Management

A work procedure step brings together information about a work type and a work procedure. A work procedure step is similar to a work type, but stores information about a step or task only in the context of a work procedure. Work procedure steps also store information about the sequence of steps in a work procedure and the time required before the work procedure step can begin.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

In Advanced Therapy Management, a work procedure step refers to a work type associated with a work procedure, such as apheresis or infusion that's part of a cell and gene therapy.

1. From the App Launcher, find and select **Work Procedure Steps**.
2. Click **New**.
3. Select the work type associated with the work procedure step. For example, Apheresis CGT for Cell and Gene Therapy.
4. Enter a sequence number for the work procedure step. For example, apheresis is 1, manufacturing is 2, and infusion is 3.
If you don't see Sequence Number on the Work Procedure Steps record, go to the object management settings for Work Procedure Step. Select Page Layouts, and then select Work Procedure Step Layout. Drag and drop the Sequence Number field on an editable part of the page.
5. Select the work procedure associated with the work procedure step.
6. For Lead Time, enter the time required before the work procedure step can begin.
7. For Lead Time Unit Type, select the unit of measure used to calculate the lead time.
If you leave this field blank, the Lead Time Unit Type specified in the work procedure is used.
8. Save your changes.

Repeat the process for each step (work type) in a work procedure.

Set Up a Work Type Extension

Add additional information about work types using the work type extension field. For example, use the Icon URL field to upload an icon for a work type.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

USER PERMISSIONS NEEDED

Manage Multi-Step Scheduling features

1. From the App Launcher, find and select **Work Type Extension**.
2. Click **New**.
3. Select the work type for which you want to upload an icon.
4. If the work type requires scheduling, select **Scheduling Required**.
5. If the work type can be performed at child service territories that aren't part of the parent service territory, select **Non Standard**.
6. Enter the URL of the image representing the work type.
7. Save your changes.

Set Up a Service Territory for Advanced Therapy Management

A service territory is a location or region where a work is performed by a service resource. In Advanced Therapy Management, service territories are the locations where a work procedure, such as Cell and Gene Therapy, takes place.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create Service Territory records:	Create, Read, Edit, Delete on Service Territory records
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Set up operating hours to represent the hours in which the service territory is active.

First create a parent service territory for the work procedure organization where the work procedure is performed. Then, create service territories for the locations where work procedure steps such as apheresis, manufacturing, and infusion are performed.

1. From the App Launcher, find and select **Service Territories**.
2. Click **New**.
3. Enter a name for the service territory. For example, Goodly Healthification Cell and Gene Therapy Center.
4. Select the hours during which the service territory is operational.
5. Select **Active**.
-  6. Click **Save & New**.
7. Enter a name for the service territory. For example, Goodly Healthification Apheresis Center.

8. Select the parent service territory to indicate where the work procedure is performed. Select a parent service territory only if you're creating service territories for work types.
9. Select the hours during which the service territory is operational.
10. Select **Active**.
11. Save your changes.

See Also

[Salesforce Help: Set Up Service Territories in Salesforce Scheduler](#)

Set Up a Service Resource for Advanced Therapy Management

A *service resource* is an agent or crew that performs a work type at a service territory. A service resource can also refer to a particular meeting room, facility, or even an asset assigned to a service territory. In Advanced Therapy Management, service resources are medical staff modeled as an asset at a service territory where a work type, such as apheresis, is performed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create Service Resource records: Create, Read, Edit, Delete on Service Resource records

First create a record for the asset, and then create a service resource with the associated asset.

1. From the App Launcher, find and select **Assets**.
2. Click **New**.
3. Add a name for the asset. For example, *Goodly Healthification Apheresis Asset*.
4. Associate the asset with an account. For example, select the account of the service territory.
5. Save your changes.
6. From the App Launcher, find and select **Service Resource**.
7. Click **New**.
8. Add a name for the service resource. For example, *Goodly Healthification Apheresis Medical Staff*.
9. Select the asset you created in the previous steps.
10. In Resource Type, select **Asset**.
11. Select **Active**.

12. Save your changes.

Repeat the steps to create assets and service resources for each work procedure step that is performed at

a service territory.

See Also

[Salesforce Help: Set Up Service Resources in Salesforce Scheduler](#)

Set Up a Service Territory Relationship in Advanced Therapy Management

Help Multi-Step Scheduling users narrow down their searches by establishing site-to-site relationships for service territories where consecutive work procedure steps are performed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

For example, if apheresis is held at Goodly Healthification Apheresis Center, the next work procedure step—manufacturing—is at Goodly Healthification Manufacturing Center.

1. From the App Launcher, find and select **Service Territory Relationships**.
2. Click **New**.
3. Select a service territory. For example, select the service territory associated with work type apheresis, *Goodly Healthification Apheresis Center*.
4. Select the work type associated with the selected service territory. In our example, *Apheresis CGT*.
5. Select the service territory to establish a site-to-site relationship for the next work type with. In our example, select the service territory where the manufacturing work type is performed, *Goodly Healthification Manufacturing Center*.

6. Save your changes.

Add a Service Territory Member To a Service Territory Record

Configure records for service territory members assigned to a service territory. In Advanced Therapy Management, work procedure steps like apheresis are performed by medical staff at a particular hospital. To represent the medical staff, configure service territory members who are service resources assigned to a work type at a service territory.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create Service Territory Member records:	Create, Read, Edit, Delete on Service Territory Member records
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1. From the App Launcher, find and select **Service Territories**.
2. Select the Service Territory record for which you want to add a service territory member.
3. In the Related tab, under Service Territory Member, click **New**.
4. Select the service resource modeled as an asset in a service territory. For example, Goodly Healthification Apheresis Medical Staff.
5. The service territory is preselected. For example, Goodly Healthification Infusion Center.
6. For Territory Type, select Primary.
7. Under Duration, select a start date and an end date, to indicate the date range during which the resource is a member of the service territory.

8. Save your changes.

Set Up Shifts For Services Resources in Advanced Therapy Management

To make appointment slots available for booking through Multi-Step Scheduling, configure shifts for service resources assigned to a service territory. For example, in Advanced Therapy Management, medical staff assigned to a hospital operate in shifts that determine the availability of appointment slots.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

To associate a shift with a work type, enable the Salesforce Scheduler for Health Cloud setting.

1. From the App Launcher, find and select **Shifts**.

2. Click **New**.

3. Enter start and end times for the shift.

 **Note** If you're creating recurring shifts, the start time and the end time must be 24 hours or less.

4. For Status, select **Confirmed**.

5. Select the service resource for whom you're configuring the shift.

 **Note** The service territory member associated with this service resource must have membership dates that overlap with the dates for the shift.

6. Select the work type for this shift.

7. For Time Slot Type, select **Normal**.

8. For Type, select **Recurring**.

If you don't see Type on the Shift record, go to the object management settings for Shift. Click Page Layouts and select Shift Layout. Drag and drop the Type field on an editable part of the page.

9. Select whether you want the recurring shifts to be daily, monthly, or weekly.

a. For daily occurrence, select the number of days it repeats. Select the date until which the shifts are expected to continue or the number of times it's expected to continue.

b. For weekly occurrence, select the frequency with which it repeats and the days on which it repeats. Select the date until which the shifts are expected to continue or the number of times it's expected to continue.

c. For monthly occurrence, select the frequency with which it repeats. Choose if the shift occurs on a particular day every week, or on a specific date. Finally, select the date until which the shifts are expected to continue or the number of times it's expected to continue.

10. Save your changes.

See Also

[Salesforce Help: Manage Shifts in Salesforce Scheduler](#)

[Salesforce Help: Enable the Salesforce Scheduler for Health Cloud Setting](#)

Set Up a Shift Work Topic For Shifts in Advanced Therapy Management

Configure the availability of a service resource assigned to a service territory for a particular work type.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

USER PERMISSIONS NEEDED

OR

Manage Multi-Step Scheduling features

1. From the App Launcher, find and select **Shifts**.
2. Select the shift record associated with the service territory you set up.
3. From the Related tab, go to Shift Work Topic, and click **New**.
If you don't see Shift Work Topic in the Related tab, go to the Object Manager in Setup and select Shifts. Click Page Layouts and select Shift Layout. Drag the Shift Work Topic field onto the page under Related Lists, and save your changes.
4. The shift created for a service resource assigned to a service territory is preselected.
5. Select **All Topics Supported**.
6. Save your changes.

Set Up a Service Territory Work Type For Advanced Therapy Management

To indicate that slots are published (available for booking) for particular work procedure steps, configure a relationship between service territories and work types performed at the service territories.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

Slots are published when you create records in the Shift object for the selected service territory and work type. For instance, if shifts have been created for the medical staff for apheresis work type at an apheresis center, you can create a service territory work type and indicate that slots have been published.

1. From the App Launcher, find and select **Service Territories**.
2. Select the appropriate Service Territory record.
3. In the Related tab, Under Service Territory Work Type, click **New**.
4. Add a work type. For example, add Apheresis CGT.
5. The associated service territory where you want to publish slots is preselected. In our example, Goodly

Healthification Apheresis Center.

6. If there are Shift records for the service resource assigned to the service territory, select **Slot Published**.
7. Save your changes

What Is Partial Rescheduling in Advanced Therapy?

Unlike a complete reschedule, partial reschedule cancels slots downstream from the work types you start with, and creates appointments in the existing service appointment group.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Partial reschedule starts with the work type to reschedule; appointments for subsequent work types are rescheduled accordingly based on the defined lead time.

-  **Note** The lead time restriction doesn't apply for the work type that precedes the work type being rescheduled.

Let's look at an example. Initially, you have apheresis booked on December 1, manufacturing on December 4, and infusion on December 7. Each work type has a lead time of two days because it takes two days to move the biosample from one service territory to another. Unfortunately, there's a delay while transporting the biosample from the apheresis center to the manufacturing site, so you must reschedule the appointment for the manufacturing work type. Because of the required lead time, you're required to reschedule the infusion work type as well.

In partial rescheduling, you select December 8 as the new slot date for manufacturing, and infusion is automatically rescheduled to December 10.

Partial rescheduling also accommodates scenarios in which the treatment center coordinator wants to move up an appointment due to criticality of the patient's medical condition. Partial rescheduling lets you disregard the lead time restriction for the preceding work type.

Let's go back to the example, where apheresis was booked on December 1, manufacturing on December 4, and infusion on December 7. The condition of the patient is now critical, so the engineered biosample is transported overnight from the manufacturing lab to the infusion service territory. Using partial rescheduling, the treatment center coordinator can disregard the lead time of the preceding work type (manufacturing) and reschedule the appointment for the infusion work type from December 7 to December 5.

Partial Reschedule Versus Full Reschedule

While with complete reschedule, you can create a series of appointments, with Partial Reschedule you

can select a work type in the middle of an appointment series and rebook slots downstream for each work type that follows.

Partial Reschedule Versus Full Reschedule

While with complete reschedule, you can create a series of appointments, with Partial Reschedule you can select a work type in the middle of an appointment series and rebook slots downstream for each work type that follows.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Let's look at the differences between full chain reschedule and partial reschedule.

Full Reschedule	Partial Reschedule
You can reschedule slots only from the first work type.	You can reschedule slots starting from any work type except the first.
Creates two service appointment groups.	Uses the same service appointment group.
The status of the existing service appointment group is "Rescheduled", and status of the new service appointment group is "Awaiting Approval."	The status of the service appointment group remains the same, that is, "Awaiting Approval."
Reschedules all appointments in a series.	Reschedules one or more appointments in a series.

See Also

[Partially Reschedule Appointment Slots for an Advanced Therapy](#)

Visibility for Buttons in Appointment Slot Component

In Advanced Therapy Management, the status of the related service appointment group and the individual service appointments in the group determines the visibility of the Book New Slots, Reschedule Slots, and Cancel Slots buttons. You can provide conditional visibility of the Reschedule and Cancel buttons by cloning the Determine Cancel and Reschedule Button Visibility flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

At any point in time, there's only one service appointment group that is active, which means the appointment is in progress.

Book New Slots

The Book New Slots button is visible on the Care Program Enrollee record pages when no service appointment groups are booked, and when there's an inactive service appointment group with a Canceled or Rescheduled status. The button is also visible on the record pages of the Case, Account, and Opportunity objects.

 **Note** The Book New Slots button is visible only when the care program enrollee's status is Active. When the care program enrollee's status is Inactive, the button is disabled.

Reschedule Slots and Cancel Slots

The Reschedule Slot and Cancel Slot buttons are visible on the service appointment group only if the service appointment group status is Awaiting Approval, None, or Scheduled.

Here are some scenarios that affect the visibility of the Book New Slots, Reschedule Slots, and Cancel Slots buttons, in the form of a table.

Scenario	Service Appointment Group (Active or InActive)	Visibility of Book New Slots button	Visibility of Reschedule Slots button	Visibility of Cancel Slots button
The Appointment Slot tab is empty because there are no service appointment groups.	Inactive or Not applicable	Visible	Hidden	Hidden
The QTC coordinator books slots and creates a service appointment group. Each service appointment's status is set to	Active	Hidden	Visible	Visible

Scenario	Service Appointment Group (Active or InActive)	Visibility of Book New Slots button	Visibility of Reschedule Slots button	Visibility of Cancel Slots button
None , and the service appointment group status is Awaiting Approval .				
The GTC coordinator approves the booking and the status of the service appointment group is Scheduled .	Active	Hidden	Visible	Visible
The QTC coordinator opts for partial rescheduling. The statuses of the deleted slots are Canceled and newly rescheduled slots are None . The service appointment group status is still Awaiting Approval .	Active	Hidden	Visible	Visible
The QTC coordinator opts for full chain rescheduling and creates a service appointment group, with the statuses of all service	Active	Hidden	Visible	Visible

Scenario	Service Appointment Group (Active or InActive)	Visibility of Book New Slots button	Visibility of Reschedule Slots button	Visibility of Cancel Slots button
appointments as None , and service appointment group status set to Awaiting Approval . The original service appointment group status is Rescheduled (inactive), but the new group is active.				
The QTC coordinator cancels the service appointment group. The statuses of both the service appointment group and all service appointments are Canceled .	Inactive	Visible	Hidden	Hidden

Customize the Visibility of the Reschedule and Cancel Buttons

The Determine Cancel and Reschedule Button Visibility autolaunched Salesforce Flow controls the display of the Reschedule and Cancel buttons on the Appointment Slots Lightning component. Clone the flow to add your custom logic to hide or show the buttons.

Customize the Visibility of the Reschedule and Cancel Buttons

The Determine Cancel and Reschedule Button Visibility autolaunched Salesforce Flow controls the display of the Reschedule and Cancel buttons on the Appointment Slots Lightning component. Clone the flow to add your custom logic to hide or show the buttons.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To edit the flows:

Manage Flows

The *Determine Cancel and Reschedule Button Visibility* flow uses a couple of decision elements to control the visibility of the Reschedule and Cancel buttons. The flow checks whether a service appointment group exists for the care program enrollee's record Id passed into the flow. If a service appointment group exists, the flow then checks whether the first appointment slot can be updated.

To customize the visibility of the Reschedule and Cancel buttons, clone the flow and add your custom logic.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Select **Determine Cancel and Reschedule Button Visibility**.
3. In Flow Builder, click **Save As**.
4. In the Save as new flow window, enter a flow label. The flow API name is auto-populated.
5. Add, remove, and modify the elements to add your custom logic.
6. Save and activate the cloned flow.

See Also

[Salesforce Help: Flow Builder](#)

Add a Quick Action Button to Confirm Booking Slots in Advanced Therapy Management

To confirm booking requests, configure a quick action button on the highlights panel of a record page. You can configure the quick action button on the record pages of the Account, Case, Opportunity, and Care Program Enrollee objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

When users submit a request for booking appointment slots, the appointments are submitted for approval. Our automated and customizable Confirm Booking Request Salesforce Flow enables internal users like gene therapy coordinators to approve the request. To help gene therapy coordinators quickly access the flow, add the quick action button on the record page of a Care Program Enrollee object.

1. From the object management settings for Care Program Enrollee, click **Buttons, Links, and Actions**.
2. Click **New Action**, and enter these values:
 - a. For Action Type, select **Flow**.
 - b. For Flow, select **Confirm Booking Request**.
 - c. For Standard Label Type, select **None**.
 - d. For Label, enter *Confirm Booking Request*.
 - e. The Name field is auto-populated based on the Label field. Leave it as is.

3. Save your work.

4. Add the new action button to the Care Program Enrollee page layout.
 - a. From the object management settings for Care Program Enrollees, select **Page Layouts**.
 - b. Select **Care Program Enrollee Layout**.
 - c. If the buttons in the Salesforce Mobile and Lightning Experience Actions section aren't visible, click **override the predefined actions**.
 - d. Drag the Confirm Booking Request action from Mobile and Lightning Actions (1) to the Salesforce Mobile and Lightning Experience Actions section (2).

5. Save your changes.


See Also

[Salesforce Help: Confirm Slot Booking Request](#)

How Are Slot Results Optimized in Advanced Therapy Management?

To offer the most optimized search results for available appointment slots, Advanced Therapy Management's Multi-Step Scheduling filters slot results through a combination of internal and external checks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Multi-Step Scheduling is built on top of Lightning Scheduler APIs to efficiently retrieve search results. Using a number of search criteria, such as date ranges, lead time, service territory relationships, restrictions on the number of work types and locations, Multi-Step Scheduling provides the most optimal slot results for your appointments.

External Checks

- For each work type that's part of a work procedure, we optimize slot results using a given date range for the work type. In the Schedule Appointments tab, under basic search, you can select a work type and its start and end dates. Only the slots that fall in the selected date range are retrieved.
- Slot results are also filtered by the work type's lead time. Lead time refers to the time required to complete a work type in days. For example, if the lead time for apheresis is 20, the next work type, that is, manufacturing can only be scheduled after 20 days or more. Accordingly, slot results are filtered by the availability of the manufacturing work type at an interval of 20 days or more.
- Service territory relationships defined for each work type also help filter the slot results. A service territory relationship sets up site-to-site mappings that determine the locations where subsequent work types are performed. For example, if apheresis is performed at Goodly Healthification Apheresis Center, you can set up a service territory relationship so that the next step of manufacturing takes place at Goodly Healthification Manufacturing Center. Similarly, you can create another service territory relationship between Goodly Healthification Manufacturing Center and Goodly Healthification Infusion Center where infusion is performed. Service territory relationships help users find slots based on the locations where work types are performed.
- Slots results are filtered through search criteria restrictions set up for work types and their corresponding locations. In the Schedule Appointments tab, under advanced search, you can search up to 5 work types, and select 3 locations for each work type. These restrictions help reduce the available slot results so that you can select the most optimal slot chain.
- In the Schedule Appointments tab, you can view search results for one service territory for a work type at a time. For example, if apheresis is performed at Goodly Healthification Apheresis Center and Live Young Medical Center, you can select the service territory for which you want to view the slot results.

- Slot results are optimized by the work procedure organization the service territories are part of. In the search results, you can view slots results for only those service territories that are affiliated to a work procedure organization, that is, a parent service territory.
- When you enable Advanced Scheduling settings, override the default work type step lead time, and set up service territory prioritization rules, the slot formation logic searches for the shortest lead time by comparing the lead time configured for the work procedure step and the total lead time calculated using work type steps' lead time override. The work procedure step must be held at the combination of child service territories that has the highest priority number. If the total lead time calculated using

the work type steps is more than the configured work procedure step lead time, the slot formation logic discards the slot results and searches for slots in the combination of child service territories that has the second-highest priority.

Internal Check

The slot formation logic uses an internal check to find the most optimal results for the slot chain. Slot formation starts from the work type with the least number of available appointment slots. For example, if apheresis and infusion both have 1000 available slots, and manufacturing has only 3, the slot formation logic picks manufacturing as the starting point, and creates the permutations accordingly. This logic minimizes duplication of effort, as incomplete slot chain permutations are eliminated right at the start.

All the checks help reduce the number of available slots and optimize the search to offer the most appropriate slots.

Keep Track of the Total Number of Patients Enrolled in Advanced Therapies

You can easily track the total number of enrollees in advanced therapies. This helps plan for enrollee count upgrades to accommodate increasing enrollees in advanced therapies. Usage-based entitlement details provide more information about the enrollee count that you can use for billing purposes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

1. To view the total number of enrollees in advanced therapies:
 - a. From Setup, in the Quick Find box, enter *Multi-Step Scheduling*, and select **Multi-Step Scheduling Settings**.
 - b. Go to the Utilization Count tab.
View the current number of care program enrollees in advanced therapies.
2. To view usage-based entitlements:
 - a. From Setup, in the Quick Find box, enter *Company Information*, and select **Company Information**.
 - b. Go to Usage-Based Entitlements.

- c. View Health Cloud: Maximum Care Program Enrollees in Advanced Therapy to track the Allowance and Amount Used fields.

Learn About Therapy Orchestration

Advanced Therapy Management's Therapy Orchestration helps you implement complex workflows for therapies using Salesforce Flows. In Therapy Orchestration, a parent orchestration flow references a series of subflows that execute all the components of a therapy. Each flow is highly flexible and can be customized according to the specific needs of your Salesforce org. You can automatically assign tasks at every step of the therapy to the relevant stakeholders involved, and easily monitor therapy progress from patient intake to infusion.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

In Advanced Therapy Management, a therapy workflow involves multiple stages that occur in sequence or in parallel, such as patient intake, apheresis, manufacturing, and infusion. Each stage has multiple substages that must be completed in sequential order. For example, the apheresis stage has substages like verification of patient identity, collection of the biosample, and delivery of the biosample. Each substage consists of tasks that are assigned to different users and can be performed in parallel.

To orchestrate a therapy, first you must set up the relevant therapy records before the flow is executed (setup construct). Make sure you configure a care program, a corresponding work procedure, work procedure steps, work types, work type steps, and action plan templates with task flows or component tasks. At the time of execution of the flows (runtime construct), care program enrollee work order, care program enrollee work order step, and assessment task records are generated. You can set up teams, team members, and participant roles to assign the tasks to users.

Keep in mind the terms used to refer to therapy stages, substages, and tasks throughout Advanced Therapy Management.

Level	Example	Setup Construct	Runtime Construct
Therapy	Cell and Gene Therapy	Care Program, Work Procedure	None
Stage	Apheresis	Work Type, Work Procedure Step	Care Program Enrollee Work Order
Step or Substage	Create Patient Identity Verification Step	Work Type Step, Action Plan Template	Care Program Enrollee Work Order Step
Task	Document Scan	Task Definitions in	Assessment Tasks (such

Level	Example	Setup Construct	Runtime Construct
		Action Plan Template	as Flow and Component Tasks)

Therapy Orchestration offers two sample flows that are customizable templates that you can clone to add, modify, or remove substages, per your requirements. The sample flows generate care program enrollee work order steps for Patient Intake and Apheresis. You can clone and customize the sample flows to set up care program enrollee work order steps for other work procedure steps, like Manufacturing and Infusion.

- Generate Work Order Steps for Patient Intake
- Generate Work Order Steps for Apheresis

 **Note** Starting from Winter '24, you can't view or add new data in the Associated Flow Name field on the Work Procedure Step object. You can continue executing the *Generate Work Order Steps for Patient Intake* and *Generate Work Order Steps for Apheresis* flows using data that was stored in the Associated Flow Name field before Winter '24. However, this approach isn't recommended. Instead, create records for substages in a therapy stage using Work Type Step records, and associate an action plan template with the work type step to create therapy tasks.

Apart from the sample flows, Therapy Orchestration provides a simplified framework for implementing all the different stages, substages, and tasks of a therapy using an orchestration flow that loops through other flows.

Flow Name	Flow Type	Purpose
Process Advanced Therapy Work Orders	Flow Orchestration	Loops through four autolaunched flows and one evaluation subflow to complete all the stages of an advanced therapy.
Start Therapy Work Order	Autolaunched flow	Initiates therapy stages and generates runtime records called Care Program Enrollee Work Orders.
Start Therapy Work Order Step	Autolaunched flow	Initiates therapy substages and generates runtime records called Care Program Enrollee Work Order Steps using the Create Care Program Enrollee Work Order Step invocable action. This invocable action also generates tasks based on the

Flow Name	Flow Type	Purpose
		actionPlanTemplateId input parameter, and assigns the task to a care team member with a corresponding role.
Evaluate Step and Task Completion Status	Evaluation flow	Checks whether all the tasks and custody records associated with a substage are complete. When all tasks are completed, the orchestrator transitions to the next substage in the sequence.
Create Custody Chain Entries	Autolaunched flow	Creates custody chain entry records. Optionally, the flow also creates a custody item.
Override Custody Verification Type When Work Order Is Changed	Record triggered autolaunched flow	Creates custody records when the status of a care program enrollee work order changes to In Progress.
Override Custody Verification Type When Work Order Step Is Changed	Record triggered autolaunched flow	Creates custody records when the status of a care program enrollee work order step changes to In Progress.
Complete Therapy Work Order Step	Autolaunched flow	Sets the Care Program Enrollee Work Order Step status to complete, and ends the substage.
Complete Therapy Work Order	Autolaunched flow	Sets the Care Program Enrollee Work Order status to complete, and ends the stage.

After you run the flows, you can follow the details of the orchestration, including the status and the date it was created, in the Orchestration Run records. In the Related tab, view the therapy stages and steps that are executed.

[Assign Permission Sets Licenses and Permission Set to Therapy Orchestration Users](#)

Enable users to execute advanced therapy workflows and automate task assignment by assigning the required permission sets licenses and corresponding permission sets.

[Configure Data Capture for Objects](#)

To make sure that the orchestrator is notified of any changes to the Care Program Enrollee Work Order and Care Program Enrollee Work Order Step records, configure data capture for these objects.

[Configure Flow Events in Advanced Therapy Management](#)

To resume the Advanced Therapy Management flow orchestrator, turn off the flow events.

Add Lightning App Builder Components to Track Step Progress

Help users track the progress of therapy steps or substages (work procedure steps) and tasks (care program enrollee work order steps) by adding the Work Procedure Step Progression and Work Order Step Progression components to the Care Program Enrollee record page. These components enable users to view completed, current, and upcoming tasks.

Quick Guide to a Successful Therapy Orchestration

Therapy Orchestration involves a bunch of tasks to be performed in a particular order. Find the list of tasks you must perform to configure the right data, and run the default flows and your own customized flows in one place.

Considerations for Running the Default Therapy Orchestration Flows

Perform prerequisite tasks before you run the default flows for therapy orchestration.

Prepare to Run the Therapy Orchestration Flows in Advanced Therapies

Therapy Orchestration's flows are highly flexible and you can customize them according to the needs of your Salesforce org. Add, remove, and modify therapy stages and steps, and create action plan templates for the different stakeholders in a therapy. Create work type steps to represent each therapy step and associate it with an action plan template. Add team members who can be assigned a task in a therapy step.

Manually Assign Therapy Tasks to Users

Make sure stakeholders in a therapy step don't miss their assigned tasks due to configuration errors. Create a custom field on the Assessment Task object and configure an Apex trigger to assign therapy tasks using criteria-based sharing.

Create a Lightning Aura Component for Tasks in Therapy Orchestration

Help users perform component tasks that involve navigating to different screens. Set up a Lightning Aura Component to help users navigate to the Schedule Appointments tab to book slots as part of a component task.

Update Component Task Status with Lightning Message Channel

To change the status of a component task, publish a message through a Lightning message channel and create a Lightning aura component.

Repeat Stages In a Therapy Orchestration

Advanced Therapy Orchestration helps you perform two types of flows: linear flows and non-linear flows that repeat stages. While linear flows are the norm, non-linear flows are built to intervene in situations when things don't go according to plan.

Use Advanced Scheduling and Decision Tables

Provide flexibility for users to find appropriate appointment slots with Advanced Scheduling settings. Accommodate operational and regulatory variances in lead time based on country or service territory. Help users select their preferred locations for performing therapy processes based on priority-based override rules. Customize field lists that store therapy task data according to the country of enrollment.

Get to Know Custody Management

Advanced Therapy Management's Chain of Custody (CoC) and Chain of Identity (CoI) capabilities help you comply with pharmaceutical regulations and uphold safety standards across the lifecycle of an advanced therapy. CoC helps you maintain a digital trail of the patient's collected biosample as it passes through the various stages, steps, and tasks of an advanced therapy. CoI ensures that the right

patient receives the right treatment by assigning a unique identifier to the collected biosample.

Generate Customized Work Order Steps or Therapy Tasks for Users

The Generate Work Order Steps for Patient Intake flow and the Generate Work Order Steps for Apheresis flow create runtime records of care program enrollee work order steps. Care program enrollee work order steps are then assigned to different stakeholders as tasks in a therapy. For example, Biosample Collection is a care program enrollee work order step or a task assigned to a lab technician. You can clone the flows to create work order steps for other therapy stages like Manufacturing and Infusion. Also, you can customize the default flows to add, remove, or modify work order steps for apheresis and patient intake, and delegate tasks to various stakeholders in your org.

Assign Permission Sets Licenses and Permission Set to Therapy Orchestration Users

Enable users to execute advanced therapy workflows and automate task assignment by assigning the required permission sets licenses and corresponding permission sets.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create, edit, and delete Health Cloud data:

Health Cloud Foundation permission set

OR

Manage Health Cloud user permission

To create, edit, and delete Life Sciences Cloud data:

Health Cloud Starter permission set

As a prerequisite, make sure you create and assign profiles for Therapy Orchestration users.

1. From Setup, in the Quick Find box, enter *Users*, and select **Users**.
2. Select the appropriate user for therapy orchestration.
3. In the Permission Set License Assignments related list, click **Edit Assignment**.
4. Select these permission set licenses:
 - Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Platform (for Health Cloud)
 - Multi-Step Scheduling
 - Action Plans
 - Industries Visit
 - Health Cloud Advanced Therapy Orchestration

5. Click **Save**.
6. In the Permission Set Assignments related list, click **Edit Assignment**.
7. Move the following permission sets to the Enabled Permission Sets list.
 - Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud)
 - Multi-Step Scheduling
 - Action Plans
 - Industries Visit
 - Health Cloud Advanced Therapy Orchestration
8. Click **Save**.

Configure Data Capture for Objects

To make sure that the orchestrator is notified of any changes to the Care Program Enrollee Work Order and Care Program Enrollee Work Order Step records, configure data capture for these objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:	Health Cloud Advanced Therapy Orchestration permission set
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1. From Setup, in the Quick Find box, enter **Change Data Capture** and select it.
2. On the Data Capture setup page, from Available Entities, find the Care Program Enrollee Work Order object, and move it to Selected Entities.
3. From Available Entities, find the Care Program Enrollee Work Order Step object, and move it to Selected Entities.
4. Save the changes.

Configure Flow Events in Advanced Therapy Management

To resume the Advanced Therapy Management flow orchestrator, turn off the flow events.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:	Health Cloud Advanced Therapy Orchestration permission set
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1. From Setup, in the Quick Find box, enter **Advanced Therapy Management Settings** and select it.
2. Turn on **Configure Flow Events for Advanced Therapy Management**.

Add Lightning App Builder Components to Track Step Progress

Help users track the progress of therapy steps or substages (work procedure steps) and tasks (care program enrollee work order steps) by adding the Work Procedure Step Progression and Work Order Step Progression components to the Care Program Enrollee record page. These components enable users to view completed, current, and upcoming tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To configure the component:	Customize Application
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1. From the App Launcher, find and select **Care Program Enrollees**.
2. Select a care program enrollee record, click  , and then click **Edit Page**.
3. In Lightning App Builder, from the Standard list of components, drag the Work Order Step Progression component onto an editable part of the page. In the settings section, select:
 - **Allow optional tasks** to enable the users to add optional tasks to a step.
 - **Show refresh button** to show the refresh button in My Tasks.
 - **Show last refresh time** to show the time when My Tasks was last refreshed.
4. In Lightning App Builder, from the Standard list of components, drag the Work Procedure Step Progression component onto an editable part of the page. In the settings section, select:
 - **Show refresh button** to show the refresh button in the stage progression section in the care program enrollee page.
 - **Show last refresh time** to show the time when the stage progression section in the care program enrollee page was last refreshed.
5. Activate the page as **Org Default**, **App Default**, or **App, Record Type, and Profile** depending on your requirements.
6. Click **Save**.

Quick Guide to a Successful Therapy Orchestration

Therapy Orchestration involves a bunch of tasks to be performed in a particular order. Find the list of tasks you must perform to configure the right data, and run the default flows and your own customized flows in one place.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

- Make sure you set up data in your org to represent the therapy.
 - [Create a care program](#) and set the [category as Advanced Therapy](#).
 - [Create a work procedure record and associate it with the care program](#). Add the orchestration flow's API name in the Associated Flow Orchestrator Name field.
 - [Create work types](#) for each therapy stage, such as apheresis or patient intake.
-  **Note** For work types that don't require scheduling and have no associated service appointments, you must add an enrollment location (service territory) in the Care Program Enrollee record. Also, make sure that the related Service Territory Work Type record has a team associated with it, and that the team has a role and user assigned.
 - [Create work procedure steps](#) that correspond with the work types created.
 - [Create a participant role](#) to represent the user who is assigned a therapy task. [Set Up User Groups for Care Teams](#) to enable multiple users with the same role to perform a therapy task.
 - [Create a team](#). [Add team members](#) and associate a participant role with the team member. The team member is associated with a user.
 - [Create an action plan template](#) to create tasks for each step in a therapy stage.
 - [Create a task flow](#) or [component task](#). Task flows launch a flow, while component tasks take you to a screen or tab of your choice.
 - [Publish the template](#) and copy the template ID.
 - [Create a work type step and associate it with the action plan template](#).
 - As a prerequisite for the first time you run the orchestration flow, you must [override the original evaluation flow](#). Even if you use a customized orchestration flow with the original evaluation flow, you must override it.
- Advanced Therapy Orchestration offers both linear flows and non-linear flows that help you repeat stages. You can customize the flows any way you want, for example, to create conditional branching. To set up customized workflows, follow these steps:
 - [Clone and customize the orchestration flow, and add your own evaluation flow](#). Make sure you add the API name of your customized orchestration flow to the work procedure record.
 - [Create component tasks to navigate to different screens](#).
 - [Update task status using a Lightning Message Channel](#).

Considerations for Running the Default Therapy Orchestration Flows

Perform prerequisite tasks before you run the default flows for therapy orchestration.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

To run the default orchestration flow, configure these items:

- Associate the work procedure with a care program record.
- Set the care program record's category to advanced therapy.
- Override the Evaluate Step and Task Completion Status flow.

To generate runtime records, clone the Generate Work Order Steps for Patient Intake sample flow or the Generate Work Order Steps for Apheresis sample flow. Associate the cloned flow with the corresponding work procedure step record.

 **Note** Starting from Winter '24, you can't view or add new data in the Associated Flow Name field on the Work Procedure Step object. You can continue executing the *Generate Work Order Steps for Patient Intake* and *Generate Work Order Steps for Apheresis* flows using data that was stored in the Associated Flow Name field before Winter '24. However, this approach isn't recommended. Instead, create records for substages in a therapy stage using Work Type Step records, and associate an action plan template with the work type step to create therapy tasks.

[Set the Care Program Category for Advanced Therapies](#)

Therapy Orchestration only works for specialized care programs like advanced therapies. To ensure users can implement orchestration workflows for an advanced therapy care program, configure the Category field in the care program record.

[Associate a Work Procedure with a Care Program for Advanced Therapies](#)

To run the therapy orchestration flows, first link a work procedure record to an advanced therapy care program record.

[Override the Therapy Orchestration Evaluation Flow](#)

The evaluation flow checks whether all the tasks in a step are complete. Based on the result of the evaluation flow, the orchestration flow determines whether to move on to the next step in the orchestration. But the evaluation flow only checks for tasks owned by the current user. To run the evaluation flow in the context of the system rather than in the context of a user, you must clone and override the original evaluation flow.

[Set the Care Program Category for Advanced Therapies](#)

Therapy Orchestration only works for specialized care programs like advanced therapies. To ensure users

can implement orchestration workflows for an advanced therapy care program, configure the Category field in the care program record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To edit care programs: Read access on Care Program object

To add the Category field: Health Cloud Advanced Therapy Orchestration permission set

1. From the App Launcher, find and select **Care Programs**.
2. Select the care program record associated with a therapy.
3. In the dropdown, click **Edit**.
4. In the Category field, select **Advanced Therapy**.
5. Save your changes.

See Also

[Salesforce Help: Create a Care Program and Add Related Records](#)

Associate a Work Procedure with a Care Program for Advanced Therapies

To run the therapy orchestration flows, first link a work procedure record to an advanced therapy care program record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To edit work procedure records: Use the Multi-Step Scheduling permission set

1. From the App Launcher, find and select **Work Procedure**.
2. Select the work procedure record for which you want to orchestrate an advanced therapy.
3. In the Reference Record field, select the care program the advanced therapy is part of.
4. Save your changes.

See Also

[Salesforce Help: Set Up a Work Procedure for Advanced Therapy Management](#)

Override the Therapy Orchestration Evaluation Flow

The evaluation flow checks whether all the tasks in a step are complete. Based on the result of the evaluation flow, the orchestration flow determines whether to move on to the next step in the orchestration. But the evaluation flow only checks for tasks owned by the current user. To run the evaluation flow in the context of the system rather than in the context of a user, you must clone and override the original evaluation flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To use Therapy Orchestration:	Health Cloud Advanced Therapy Orchestration permission set
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To open, edit, or create a flow in Flow Builder:	Manage Flow
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 **Note** You must override the original evaluation flow before you run the orchestration flow for the first time. Even if you customize the orchestration flow, but use the original evaluation flow with it, you must override it.

1. From Setup, find and select **Flows**.
2. Select **Evaluate Step and Task Completion Status**.
3. In Flow Builder, click **Save As**.
4. In the Save as flow override window, make the following changes.
 - a. Enter a name for your new flow. The API name is auto-populated.
 - b. Click **Show Advanced**.
 - c. In the How to Run the Flow field, select **System Context Without Sharing –Access All Data**.
 - d. Click **Save**.
 - e. Click **Activate**.

Prepare to Run the Therapy Orchestration Flows in Advanced Therapies

Therapy Orchestration's flows are highly flexible and you can customize them according to the needs of your Salesforce org. Add, remove, and modify therapy stages and steps, and create action plan templates for the different stakeholders in a therapy. Create work type steps to represent each therapy step and associate it with an action plan template. Add team members who can be assigned a task in a therapy step.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Here's a video of the process to help you get started.

Watch the video: <https://play.vidyard.com/guo6aP3KYrZuctDBZaFkDP>

If you aren't able to watch the video in full screen mode, open the video on a new tab:  [Prepare to Use Advanced Therapy Orchestration](#).

[Set Up Participant Roles for Therapy Orchestration](#)

Configure participant roles before you assign tasks or care program enrollee work order steps to users in your org. When you create teams dedicated to performing a work type in your org, assign roles to the team members so that they can perform the therapy tasks.

[Set Up User Groups for Care Teams](#)

Help your care team perform therapy tasks faster by assigning assessment or digital verification tasks to a user group rather than a single user. With user groups you can configure more than one user in a role, such as a doctor or clinician, who can perform the same task. For example, you can select user groups as designated verifiers in electronic signature trails. Any user in the user group can sign the digital verification record.

[Create Teams and Team Members for Therapy Orchestration](#)

Help enhance the quality of care offered to advanced therapy patients by setting up teams per service territory, per work type (stage), and per user. Configure team members, assign a participant role, and associate the team member records with users in your org who perform the tasks.

[Create Action Plan Templates for Therapy Orchestration](#)

Action plan templates are a reusable set of action items or activities used in therapy orchestration to create therapy tasks.

[Create a Task Flow for Action Plan Templates in Advanced Therapies](#)

Help stakeholders in a therapy step perform actions by adding flows to action plan templates and assigning the flows to participant roles.

[Create a Component Task for Action Plan Templates in Therapy Orchestration](#)

Create component tasks using Lightning Web components that help users navigate to different screens to complete tasks assigned to them.

[Publish the Action Plan Template for Therapy Orchestration](#)

You must publish an action plan template before you can associate it with a work type step record. You can't edit published action plan templates, so make sure you create task flows and component tasks before you publish a template.

[Set Up a Work Type Step in Advanced Therapy Management](#)

A *work type step*, also called a milestone, refers to a step within a therapy stage. A stage is represented by a work type or work procedure step record. You can break a stage into work type steps with their

own lead time. Create a work type step and assign a default lead time for the record, or override the default lead time settings based on your requirements. Also, associate a work type step with an action plan template to create the therapy tasks that are part of the work type step.

Clone and Customize the Orchestration Flow in Advanced Therapies

To modify the default configurations and modify the orchestration according to your requirements, clone the Process Advanced Therapy Work Orders orchestration flow. If you want to add your own evaluation flow, you can add it here.

Assign a Team to a Service Territory Work Type Record

In an advanced therapy, work types like apheresis are performed at service territories like a hospital or clinic. Care teams are set up at each territory for each work type based on the user or team member performing the therapy task. To associate a therapy task with a role, first assign a team to a service territory work type record.

Set Up Participant Roles for Therapy Orchestration

Configure participant roles before you assign tasks or care program enrollee work order steps to users in your org. When you create teams dedicated to performing a work type in your org, assign roles to the team members so that they can perform the therapy tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create participant roles:

Health Cloud Advanced Therapy Orchestration permission set

You can also:

- Assign task flows and component tasks in action plan templates to participant roles.
- Select participant roles as designated verifiers for electronic signature records in signature trails. Any user who belongs to a selected participant role can sign the electronic signature record.

When you create a participant role, ensure the role links to a team member (user or user group), and that the team is assigned to a corresponding service territory work type.

1. From Setup, in the Quick Find box, enter *Participant Roles*, and then select **Participant Roles**.
2. To create a participant role, click **New**.
3. Enter a participant role name. The API name is auto-populated.
4. In Parent Object, select **Team**.
5. For Default Access Level, select **Read/Write**.
6. Select **Active**.



7. Save your changes.
8. Repeat these steps to create as many participant roles as needed.

Set Up User Groups for Care Teams

Help your care team perform therapy tasks faster by assigning assessment or digital verification tasks to a user group rather than a single user. With user groups you can configure more than one user in a role, such as a doctor or clinician, who can perform the same task. For example, you can select user groups as designated verifiers in electronic signature trails. Any user in the user group can sign the digital verification record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:

Health Cloud Advanced Therapy Orchestration permission set

1. From Setup, in the Quick Find box, enter *Public Groups*, and then select **Public Groups**.
2. Click **New**.
3. For Search, select **Users**.
4. Select the members you want to add to the user group. Drag members from the Available Members to the Selected Members column.
5. Save your changes.

Create Teams and Team Members for Therapy Orchestration

Help enhance the quality of care offered to advanced therapy patients by setting up teams per service territory, per work type (stage), and per user. Configure team members, assign a participant role, and associate the team member records with users in your org who perform the tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create teams and team member records: Health Cloud Advanced Therapy Orchestration permission set

1. From the App Launcher, find and select **Teams**.
 2. Click **New**.
 3. In the New Team window, add the following changes.
 - a. Enter a name for your team.
 - b. In Status, select **Active**.
 4. From the App Launcher, find and select **Team Members**.
 5. Click **New**.
 6. In the New Team Member window, add the following changes.
 - a. For Role, select a participant role.
 - b. For Team, select the team you created.
 - c. In Member, first select **User**, and then search and select a user who is part of the team. Alternatively, select **Group**, and then search and select a user group.
-  **Note** To select a group, first create the group in Public Groups in Settings, and add the users you want to include. See [Set Up User Groups for Care Teams](#) for more information.
7. Save your changes.

Create Action Plan Templates for Therapy Orchestration

Action plan templates are a reusable set of action items or activities used in therapy orchestration to create therapy tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create action plan templates: Industries Visit permission set

AND

Health Cloud Advanced Therapy Orchestration permission set

1. From the App Launcher, find and select **Action Plan Templates**.
2. Click **New**.

3. Enter a name for your action plan template. For example, *Biosample Collection Action Plan*.
4. In Action Plan Type, select **Assessment Execution**.
5. In Target Object, select **Care Program Enrollee Work Order Step**.

6. Save your changes.

See Also

[Salesforce Help: Work with Action Plan Template](#)

Create a Task Flow for Action Plan Templates in Advanced Therapies

Help stakeholders in a therapy step perform actions by adding flows to action plan templates and assigning the flows to participant roles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create action plan templates:

Industries Visit permission set

AND

Health Cloud Advanced Therapy Orchestration
permission set

 **Note** When you create or customize a flow that you want to reference in a task flow, make sure it has the `assessmentTaskId`, `carePgmEnrolleeWkOrdStepId`, and the `careProgramEnrolleeId` input parameters.

1. From the App Launcher, find and select **Action Plan Templates**.
2. Select the appropriate action plan template.
3. In Task Flows, click **Add Flow**.
4. In the Add Flow window, add the following details.
 - a. Select a flow for the task.
 - b. In Responsible Role, select the role you want to assign the task to.
 - c. Enter a display order.
 - d. If the task is mandatory, select **Required**.
- e. Save your changes.


See Also

[Salesforce Help: Work with Action Plan Template](#)

Create a Component Task for Action Plan Templates in Therapy Orchestration

Create component tasks using Lightning Web components that help users navigate to different screens to complete tasks assigned to them.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create action plan templates:

Industries Visit permission set

AND

Health Cloud Advanced Therapy Orchestration
permission set

Make sure you create a Lightning Aura component in your org.

1. From the App Launcher, find and select **Action Plan Templates**.
2. Select the appropriate action plan template.
3. In Component Tasks, click **Add Component Task**.

 **Note** Only flow and component tasks are supported in an Action Plan Template when the target is Care Program Enrollee Work Order Step.

4. In the New Component Task window, add the following details.
 - a. Enter a name for your component task.
 - b. In Fully Qualified Name, add the name of the component with the prefix of the namespace. For example, if the name of your aura component is *advanced_therapy*, the fully qualified name is *c__advanced_therapy*.
 - c. In Responsible Role, select the participant role who is assigned this task.
 - d. Add a display order.
 - e. If the task is mandatory, select **Required**.
 - f. Save your changes.

See Also

[Salesforce Help: Work with Action Plan Template](#)

Publish the Action Plan Template for Therapy Orchestration

You must publish an action plan template before you can associate it with a work type step record. You can't edit published action plan templates, so make sure you create task flows and component tasks before you publish a template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create action plan templates:

Industries Visit permission set

AND

Health Cloud Advanced Therapy Orchestration
permission set

1. From the App Launcher, find and select **Action Plan Templates**.
2. Select the appropriate action plan template for which you've set up task flows and component flows.
3. Click **Publish Template**.
4. Click **Publish**.

Set Up a Work Type Step in Advanced Therapy Management

A *work type step*, also called a milestone, refers to a step within a therapy stage. A stage is represented by a work type or work procedure step record. You can break a stage into work type steps with their own lead time. Create a work type step and assign a default lead time for the record, or override the default lead time settings based on your requirements. Also, associate a work type step with an action plan template to create the therapy tasks that are part of the work type step.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Multi-Step Scheduling permission set

OR

Manage Multi-Step Scheduling features

1. From App Launcher, find and select **Work Type Steps**.
2. Click **New**.
3. Enter a name for the work type step.
4. Select the parent work type. For example, select **Apheresis**.
5. In lead time, add the number of days or hours required to complete the work type step.



Note The sum of lead time of Work Type Steps mustn't exceed the lead time defined for a Work Procedure Step. The default lead time is in days. You can update the lead time unit in the work procedure record.

6. To indicate the order of the work type step, add a sequence number.
7. To indicate the therapy task that's performed as part of the work type step, select the action plan template associated with the task.



8. Save your changes.

Clone and Customize the Orchestration Flow in Advanced Therapies

To modify the default configurations and modify the orchestration according to your requirements, clone the Process Advanced Therapy Work Orders orchestration flow. If you want to add your own evaluation flow, you can add it here.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To use Therapy Orchestration:

Health Cloud Advanced Therapy Orchestration permission set

To open, edit, or create a flow in Flow Builder:

Manage Flow

1. From Setup, in the Quick Find box, enter *Flows* and then select **Flows**.
2. Click **Process Advanced Therapy Work Orders**.
3. In Flow Builder, click **Save As**.

4. In the Save as a New Flow window, for **Orchestration Label**, enter a name for your flow.
5. The Orchestration API Name is auto-populated. Make a note of the API name.
6. Save your changes.
7. In the cloned orchestration flow, you can add your own evaluation flow, and change the input values of the **currentWorkOrderStepId** and **associatedOrchestrationStepStatus**. Make these updates in each of the 10 Complete Therapy Work Order Step [x] step resources.
8. Save your changes.
9. In App Launcher, find and select **Work Procedure**.
10. Select the appropriate work procedure record.
11. In the Associated Flow Orchestrator Name field, enter the API name of the new flow.
12. Save your changes.

See Also

[Salesforce Help: Flow Builder](#)

Assign a Team to a Service Territory Work Type Record

In an advanced therapy, work types like apheresis are performed at service territories like a hospital or clinic. Care teams are set up at each territory for each work type based on the user or team member performing the therapy task. To associate a therapy task with a role, first assign a team to a service territory work type record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To add a team:

Health Cloud Advanced Therapy Orchestration permission set

As a prerequisite, make sure you create an org-level team and create records for the associated team members.

1. From the App Launcher, find and select **Service Territories**.
2. Select the appropriate service territory associated with your therapy's work procedure step or a work type.
3. In the Related tab, go to Service Territory Work Type.
4. Select an existing service territory work type record.
5. Click  next to Teams.
6. Select the team you created.

 **Note** Make sure a matching team is found and that the Service Appointment record includes

both Work Type and Service Territory details. If this information is missing, the task's AssignedToId will remain null until those values are populated.

7. Save your changes.

Manually Assign Therapy Tasks to Users

Make sure stakeholders in a therapy step don't miss their assigned tasks due to configuration errors. Create a custom field on the Assessment Task object and configure an Apex trigger to assign therapy tasks using criteria-based sharing.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To define an Apex trigger:	Author Apex
To create sharing rules:	Manage Sharing
To use assessment tasks:	Industries Visit permission set

1. Create a custom field on the Assessment Task object, with the Text data type.
 - a. From the object management settings for Assessment Task, go to **Field & Relationships**.
 - b. Click **New**.
 - c. Select Text as the data type, and click **Next**.
 - d. Enter a field label. The API name is auto-populated.
 - e. Add a value for the maximum length of the text field.
 - f. Click **Next, Next, and Save**.
2. Add to your existing Apex Trigger for the Assessment Task object or, if your org doesn't already have one, create one with these instructions.
 - a. Click  , and click **Developer Console**.
 - b. Click **File | New | Apex Trigger**.
 - c. Enter a trigger name, and select Assessment Task from the sObject picklist.
 - d. Delete the auto-generated content and paste this sample content.

```
trigger TriggerName on AssessmentTask (before insert) {  
    for(AssessmentTask obj: Trigger.new) {  
        obj.CustomAssignee__c = obj.AssignedToId;  
    }  
}
```

3. Create a group of users you want to share the task with.

- a. From Setup, in the Quick Find box, enter *Public Group*, and then select **Public Group**.
 - b. Click **New**.
 - c. Add a label for your group. The Group Name is auto-populated.
 - d. In Search, select Users.
 - e. Select the users you want to share a task with and click **Add** to move them from Available Members to Selected Members.
 - f. Save your changes.
4. Create a criteria-based sharing rule.
 - a. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**.
 - b. In Manage sharing settings for, select **Assessment Tasks**.
 - c. In the Sharing Rules related list, click **New**.
 - d. Enter a label. The rule name is auto-populated.
 - e. In Select your rule type, select **Based on criteria**.
 - f. As you've created an Apex trigger, you can select the custom field as the criteria. Under Select which records to be shared, select the custom field, and then select **EQUALS**. Leave the value as blank.
 - g. In Select the users to share with, select **Public Group**, and then select the group you created.
 - h. In Select the level of access for the users, select **Read/Write**.
 - i. Save your changes.

See Also

[Apex Developer Guide: Apex Quick Start](#)

[Salesforce Security Guide: Create Criteria-Based Sharing Rules](#)

Create a Lightning Aura Component for Tasks in Therapy Orchestration

Help users perform component tasks that involve navigating to different screens. Set up a Lightning Aura Component to help users navigate to the Schedule Appointments tab to book slots as part of a component task.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create Aura Components: Apex Class Access

1. Click  , and then select **Developer Console**
2. Click **Files | New | Lightning Component**.
3. In New Lightning Bundle, add a name and click **Submit**.
4. In the Component tab, delete the auto-generated content and paste this sample content.

```
<aura:component implements="lightning:isUrlAddressable,force:appHostable,fle
```

```
xipage:availableForAllPageTypes">
    <aura:attribute name="pageReference" type="Object"/>
    <aura:handler name="init" value="{! this }" action=" {! c.init } "/>
    <lightning:navigation aura:id="navService"/>
</aura:component>
```

5. In the Controller tab, delete the auto-generated content and paste this sample content.

```
({
    init : function(cmp, event, helper) {
        var navService = cmp.find("navService");
        var pageReference = {
            type: 'standard__navItemPage',
            attributes: {
                apiName: 'standard-ScheduleAppointments',
            }
        };
        cmp.set("v.pageReference", pageReference);
        navService.navigate(pageReference);
    }
})
```

6. Save your changes.

See Also

[Salesforce Help: Create a Custom Component for a Component Task](#)

Update Component Task Status with Lightning Message Channel

To change the status of a component task, publish a message through a Lightning message channel and create a Lightning aura component.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Assessment Tasks: Industries Visit permission set

To change a component task's status, publish to the

`lightning__industries_componentTaskInput` lightning message channel. You must add values to

these input parameters.

- `assessmentTaskId` : Represents the current assessment task.
- `requestedStatus` : Represents the status you want to update. The valid status values are NotStarted, InProgress, and Completed.
- `updatedStatus` : Represents the status of the tasks that are updated manually. Use this parameter to refresh the component task.



Note The `assessmentTaskId` input parameter is mandatory, but you also must enter a value for one of the other two parameters.

1. Publish a message to `lightning__industries_componentTaskInput` Lightning message channel with this structure.

```
var message = {  
    assessmentTaskId: "0x00",  
    requestedStatus: "InProgress",  
};
```

2. When the status is updated, a success message is published in the `lightning__industries_componentTaskOutput` lightning message channel with this structure.

```
outputObject = {  
    assessmentTaskId: "0x000",  
    result: "Success"  
}
```

3. Create a Lightning aura component. Use the sample code in these steps to create your code. Change the status of the task as required.
 - a. Click , and click **Developer Console**.
 - b. Click **File | New | Lightning Component**.
 - c. Enter a name for your aura component.
 - d. Click **Submit**.
 - e. In the Component tab, replace the auto-generated code with this sample code.

```
<aura:component description="Work Order Step progression"  
implements="flexipage:availableForRecordHome,lightning:isUrlAddressable">  
  
<lightning:messageChannel type="lightning__industries_componentTaskInput"  
aura:id="ComponentTaskInputChannel"/>  
<lightning:button label="Send Message" title="Send Message" onclick=" {!c.sendMessage } "/>  
  
</aura:component>
```

- f. In the Controller tab, replace the auto-generated code with this sample code.

```
( {
    sendMessage : function(cmp, event, helper) {

        var payload = {
            assessmentTaskId : "0egxx00000000MbAAI", // update the assessment Task ID.
            requestedStatus : "Completed"
        };
        cmp.find("ComponentTaskInputChannel").publish(payload);
    }
})
```

4. Save your changes.

Use the Lightning aura component in the component task.

See Also

[Lightning Aura Components Developer Guide: Create a Message Channel](#)

[Lightning Aura Components Developer Guide: Publish on a Message Channel](#)

Repeat Stages In a Therapy Orchestration

Advanced Therapy Orchestration helps you perform two types of flows: linear flows and non-linear flows that repeat stages. While linear flows are the norm, non-linear flows are built to intervene in situations when things don't go according to plan.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

In an ideal scenario, the orchestration workflow starts at the first stage of Apheresis, runs through all the care program enrollee work orders steps and tasks. The user who is assigned a task logs in to the Advanced Therapy Management app, and performs the task. The next user then logs in to perform the consecutive task and so on. This way all the stages, steps, and tasks are performed in a linear order.

But what happens when a therapy stage fails? For example, what if a manufactured personalized medicine doesn't meet quality assurance (QA) and apheresis has to be redone?

The patient's therapy orchestration doesn't have to stop. Advanced Therapy Management offers non-linear flows that can repeat stages. In these non-linear flows, Therapy Orchestration is used with Multi-Step Scheduling to reschedule slots and rerun the orchestration flow. In this preceding example where Apheresis has to be repeated, the Therapy Orchestration workflows are reset to the beginning of the Apheresis stage and generates new tasks that are assigned to the same users. The information generated

in the second round of Apheresis is captured separately.

See Also

[Repeat a Stage in a Therapy Orchestration](#)

Use Advanced Scheduling and Decision Tables

Provide flexibility for users to find appropriate appointment slots with Advanced Scheduling settings. Accommodate operational and regulatory variances in lead time based on country or service territory. Help users select their preferred locations for performing therapy processes based on priority-based override rules. Customize field lists that store therapy task data according to the country of enrollment.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Find out the requirements for using advanced scheduling and creating override rules.

Functionality	Requirement
To override default lead time of work types	Enable Advanced Scheduling and generate decision table
To set up service territory prioritization rules	Enable Advanced Scheduling and generate decision table
To customize field lists and make mandatory fields optional	Generate decision table
To create custody records by overriding the custody verification type	Generate decision table

[Enable Advanced Scheduling Settings](#)

To set up location-based prioritization rules and overrule the default lead time of therapy processes, activate advanced scheduling for therapies.

[Configure Decision Tables to Override Default Settings](#)

Override default lead times, field optionality, and custody verification type for a specific set of conditions by first creating decision tables.

[Set Up Service Territory Prioritization Rules](#)

Help users search for available slots in their preferred work procedure step locations with service territory prioritization rules. For every parent service territory where a therapy is held, configure a set of child service territories where work procedure steps are held, with a priority number assigned to each set.

Override Default Lead Time Based on Hierarchy

The time required to complete a therapy can differ based on geographical region, service territory, or the therapy stage or step. Accommodate these differences in lead time by overriding the default lead time of a work type step.

Override Optionality of Mandatory Fields Based on Hierarchy

Help users capture therapy data according to the requirements of the country or service territory where the therapy is performed. Display a customized list of fields and make optional fields mandatory for a combination of conditions, based on the priority number assigned to each combination.

Enable Advanced Scheduling Settings

To set up location-based prioritization rules and overrule the default lead time of therapy processes, activate advanced scheduling for therapies.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:

Health Cloud Advanced Therapy Orchestration permission set

-  **Note** After you activate Advanced Scheduling settings, you can't disable it. After you activate Advanced Scheduling settings, you can't disable it. When Advanced Scheduling is enabled, lead time is determined only from work type steps, overriding any lead time defined in work procedure steps.

1. From Setup, in the Quick Find box, enter *Advanced Therapy Management Settings*, and then select **Advanced Therapy Management Settings**.
2. Click **Activate Advanced Scheduling**, and then click **Enable**.

Configure Decision Tables to Override Default Settings

Override default lead times, field optionality, and custody verification type for a specific set of conditions by first creating decision tables.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:	Health Cloud Advanced Therapy Orchestration permission set
--	--

The conditions required to conduct a particular therapy aren't uniform across specialties and geographies. The lead time for a work type step varies depending on country, region, or any other criteria. Similarly, the tasks for a therapy may require different fields to be optional or mandatory, based on a set of conditions. To accommodate for variances in lead time and field optionality, create decision tables. Decision tables configure metadata of input and output parameters to override default settings. In Advanced Therapy Management, decision tables generate metadata for lead time override, field optionality override, and custody verification type override.

1. From Setup, in the Quick Find box, enter *Advanced Therapy Management Settings*, and then select **Advanced Therapy Management Settings**.
2. Under Configure Decision Tables, click **Generate Decision Tables**.
3. Activate each decision table.

Set Up Service Territory Prioritization Rules

Help users search for available slots in their preferred work procedure step locations with service territory prioritization rules. For every parent service territory where a therapy is held, configure a set of child service territories where work procedure steps are held, with a priority number assigned to each set.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:	Health Cloud Advanced Therapy Orchestration permission set
To set up service territory prioritization rules:	Multi-Step Scheduling permission set

Service territory prioritization rules use ascending order of priority, that is, the combination of conditions with priority number 1 is picked first.

For example, Cell and Gene Therapy is a work procedure held at Goodly Healthification Cell and Gene Therapy Center (parent service territory). There are two sets of preferred locations for work procedure steps.

- Set A: Apheresis, manufacturing, and infusion are all performed in New York (Priority 1)
- Set B: Apheresis, manufacturing, and infusion are all performed in Chicago (Priority 2)

When the treatment center coordinator searches for slots, the slot formation logic first checks for available slots in Set A (Priority 1). If no slots are found, the slot formation logic checks for the next preference (Set B, Priority 2).



Note Make sure that you enable Advanced Scheduling in your org. When Advanced Scheduling is enabled, Advanced Therapy Management ignores service territory relationships while building slot chains.

1. From App Launcher, find and select **Work Type Service Territory Scheduling Priorities**, and click **New**.
2. Select the parent service territory.
3. Select the work procedure.
4. Select a work type that's part of the selected work procedure.
5. Select the service territory where the selected work type is performed.
The service territory where the related work type is performed must be associated with a parent service territory record, such as a treatment center.
6. The Usage Type field is autopopulated. Keep it as is.
7. Assign a priority number to the combination of conditions.
 - Set a priority number for all steps in a work procedure for the prioritization rule to be valid.
 - Priorities are configured per work procedure. Different work procedures in the same location can have different priorities.
 - The priority number must be unique for each combination of work procedure, work type, parent service territory, and child service territory where the work type is performed.
 - If the same work procedure exists in multiple locations, adjust the priority numbers to reflect the preferred location order.
 - Enable Advanced Scheduling for these rules to take effect.



8. Save your changes.

Override Default Lead Time Based on Hierarchy

The time required to complete a therapy can differ based on geographical region, service territory, or the therapy stage or step. Accommodate these differences in lead time by overriding the default lead time of a work type step.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:	Health Cloud Advanced Therapy Orchestration permission set
To override the default lead time of a work type step:	Multi-Step Scheduling permission set
To update decision tables:	Health Cloud Starter permission set

Appointment slots are calculated based on the lead time of work procedure steps, that is, the time taken to complete a therapy stage, such as Apheresis. This lead time is calculated by adding the lead time of individual work type steps that make up a work procedure step. You can set up a default lead time for each work type step. However, lead time for a work type step can vary based on different conditions. For example, the time taken to complete the Identity Verification step (work type step) takes 2 days in New York, but 1 day in San Francisco. To account for variations in lead time according to certain conditions, override a work type step's lead time using a Work Type Step Lead Time Override record.

Set a combination of conditions, such as work procedure, work type, work type step, country, and service territory, and assign a priority to the combination. When the treatment center coordinator searches for slots, the *Calculate Work Procedure Step Lead Time Using Work Type Steps* flow computes the total lead time of a work procedure step by invoking the Work Type Step Lead Time Override decision table. This decision table references the override logic you set up in the Work Type Step Lead Time Override record, and considers the override logic with the highest priority.

If no override logic is configured, the flow considers the default lead time.

-  **Note** The logic for the work type step's lead time override considers the record with the highest priority, in descending order. So, a Work Type Step Lead Time Override record with priority number 9 is considered over another record with priority number 8.

Lead time override and service territory prioritization rules are used together for finding the most appropriate slots. If the total calculated lead time for the set of child service territories (where work type steps are held) with the highest prioritization rule is less than the work procedure step lead time

configured, the slot formation logic considers total lead time calculated using work type steps.

If the total calculated lead time for a prioritized set of child service territories (work type steps) is more than the work procedure step lead time configured, the slot formation logic doesn't consider any slots for that combination of child service territories, and instead searches for the service territory prioritization rule with a lower priority.

-  **Note** Make sure you activate Advanced Scheduling settings and generate decision tables for lead time override.

1. From Setup, in the Quick Find box, enter *Decision Tables*, and then click **Decision Tables**. Click **Enable**.
2. Click the dropdown next to the Work Type Step Lead Time Override decision table, and then click **Activate**.
3. From App Launcher, find and select **Work Type Step Lead Time Override**, and click **New**.
4. Add the conditions for an override.
 - a. Select a work type.
 - b. Select a work procedure.
 - c. Select a service territory.
 - d. Select a work type step.
 - e. Assign a priority to the combination of conditions.
 - f. Select the country in which the conditions are applicable.
 - g. Add the lead time for the work type step. The default lead time is in days. You can change the lead time unit in the Work Procedure record.

 - h. Save your changes.

Override Optionality of Mandatory Fields Based on Hierarchy

Help users capture therapy data according to the requirements of the country or service territory where the therapy is performed. Display a customized list of fields and make optional fields mandatory for a combination of conditions, based on the priority number assigned to each combination.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:

Health Cloud Advanced Therapy Orchestration permission set

For example, for a therapy task called “Verify Details”, the admin must capture the Account Number field

of the Account object for patients in India. The Account Number field is mandatory only in India. For the same therapy task, the Account Number field is optional for advanced therapies in Germany or the US. To comply with country-specific regulations and requirements, create an Advanced Therapy Field Optionality Override record, and assign a priority number for the combination of conditions.

Field optionality override rules use descending order of priority, that is, between priority number 10 and priority number 1, number 10 is picked first. For example, the Account object's Account Number field is mandatory for India, when the service territory (treatment center) is Mumbai, and this combination has a priority of 10. There's another combination of conditions where the Healthcare Provider object's Name field is mandatory for India, while the service territory can be any state. The second combination has a priority of 1. The first field optionality record, with the priority number of 10 is considered for the override.

-  **Note** You can make an optional field mandatory for a specific set of conditions, but you can't make a mandatory field optional.

You can customize and add more conditions for the field optionality override as needed.

1. From Setup, in the Quick Find box, enter *Decision Tables*, and then click **Generate Decision Tables**. Click **Enable**.
2. Click the dropdown next to the Field Optionality Override decision table, and then click **Activate**.
3. From App Launcher, find and select **Advanced Therapy Field Optionality Overrides**, and click **New Override Rule**.
Optionally, click **New** to add a customized field list using a JSON string.
4. On the first window, add the conditions for an override.
 - a. Select a country.
 - b. Assign a priority to the combination of conditions.
 - c. Select a service territory.
 - d. Add a task name.
 - e. Select a work procedure.
 - f. Select a work type.
 - g. Select a work type step.

 - h. Click **Next**.
5. Select the object, and then select fields that you want to make mandatory.
 - a. To add an object, click .
 - b. Find and select the object you want to add.
 - c. Select the fields you want to display.
 - d. To change a field from optional to required, click **Mandatory**.

 - e. Click **Next**.
6. Add a display order for each of the selected fields.
7. Save your changes.

Get to Know Custody Management

Advanced Therapy Management's Chain of Custody (CoC) and Chain of Identity (CoI) capabilities help you comply with pharmaceutical regulations and uphold safety standards across the lifecycle of an advanced therapy. CoC helps you maintain a digital trail of the patient's collected biosample as it passes through the various stages, steps, and tasks of an advanced therapy. CoI ensures that the right patient receives the right treatment by assigning a unique identifier to the collected biosample.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

You can create custody records automatically as part of Advanced Therapy Management's Therapy Orchestration. When you create an enrollee record, Therapy Orchestration is set in motion. When a care program enrollee work order (such as Apheresis) is in progress, the *Override Custody Verification Type When Work Order Is Changed* flow creates the related custody records. When a care program enrollee work order step (Identity Verification) is in progress, the *Override Custody Verification Type When Work Order Step Is Changed* flow creates the related custody records.

You can create electronic signature records for chain of custody entries automatically by creating a flow or overriding a managed flow. You can also use a subflow to confirm if all signatures on a trail are complete.

The *Evaluate Step and Task Completion Status* flow checks whether custody of a biosample for each step and task has been fulfilled. The *Process Advanced Therapy Work Orders* orchestration flow moves on to the following step, if any, only after custody is complete.

As part of CoI, you assign a unique identifier that represents the biosample (custody item). The identifier can originate in Salesforce or from external systems. Maintaining the CoI ensures the integrity of the custody item.

[Configure Custody Records With Workflows](#)

To successfully execute the therapy orchestration workflows and capture custody data, set up a Custody Verification Type Override decision table and create a Custody Verification Type Override record.

[Configure Chain of Identity for a Custody Item](#)

When the Create Custody Chain Entries flow is executed, it creates custody items and custody chain entries. Add a unique identifier to the custody item to maintain a chain of identity throughout all the therapy orchestration processes.

[Track Chain of Custody Data](#)

Capture all custody-related changes in a therapy orchestration workflow, including the date and time of past events, and new data that's generated after every change. Ensure regulation compliance by tracking and auditing the history of chain of custody events.

Configure Custody Records With Workflows

To successfully execute the therapy orchestration workflows and capture custody data, set up a Custody Verification Type Override decision table and create a Custody Verification Type Override record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To setup and manage Chain of Custody:

Health Cloud Advanced Therapy Orchestration permission set

OR

Chain of Custody User permission set

When a therapy stage (work order) or a therapy step (work order step) is in progress, the corresponding *Override Custody Verification Type When Work Order Is Changed* flow or the *Override Custody Verification Type When Work Order Is Step Changed* flow is triggered.

These record-triggered flows invoke the Custody Verification Type Override decision table to get the custody verification type and execute the *Create Custody Chain Entries* subflow. The *Create Custody Chain Entries* subflow generates custody chain entry records and optionally creates a custody item.

 **Note** Make sure the Custody Chain Entry object's fields have field-level security set to visible.

If a custody item requires signatures, use a new flow or override a managed flow to automatically create electronic signature records when you create or update related custody chain entry records. You can also create a subflow to confirm if all signatures on a trail are complete.

For each work order, work order step, or task where the custody item requires verification, create a signature trail (digital verification setup record) and define signature details (digital verification details record). Then, use a custody verification type override record to set the verification type (number of signatures required) and link a signature trail to the custody item.

1. From Setup, in the Quick Find box, enter *Decision Tables*, and then click **Generate Decision Tables**.
2. Click **Enable**.
3. Click the dropdown next to the Custody Verification Type Override decision table, and then click **Activate**.
4. From App Launcher, find and select **Custody Verification Type Overrides**, and then click **New**.

5. Add the conditions for an override.
 - a. Select a work type.
 - b. Select a work procedure.
 - c. Select a service territory.
 - d. Select a work type step.
 - e. Select a country.
 - f. Add a task name.
 - g. For the Custody Verification Type, select the number of signatures required to verify this custody item. If you don't need to capture signatures, select **Not Applicable**.
 - h. Assign a priority to the combination of conditions.
 - i. For Digital Verification Setup, if signatures are required to verify this custody item, select a signature trail.

A signature trail sets the number of required signatures and determines if designated verifiers must sign the records in a specific order. After you create the trail, configure the signature details.

- j. Save your changes.

Configure Chain of Identity for a Custody Item

When the Create Custody Chain Entries flow is executed, it creates custody items and custody chain entries. Add a unique identifier to the custody item to maintain a chain of identity throughout all the therapy orchestration processes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To setup and manage Chain of Custody:

Health Cloud Advanced Therapy Orchestration permission set

OR

Chain of Custody User permission set

 **Note** Make sure the Custody Item object's fields have field-level security set to visible.

1. From App Launcher, find and select **Custody Items**.
2. Select next to the custody item record where you want to add or update the unique identifier.
3. In External Identifier, add the identifier for the item.
4. Save your changes.

Track Chain of Custody Data

Capture all custody-related changes in a therapy orchestration workflow, including the date and time of past events, and new data that's generated after every change. Ensure regulation compliance by tracking and auditing the history of chain of custody events.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To setup and manage Chain of Custody:

Health Cloud Advanced Therapy Orchestration permission set

OR

Chain of Custody User permission set

To create custom report types:

Manage Custom Report Types

To set field history tracking:

Customize Application

1. Set field history tracking on Custody Item. See [Field History Tracking](#).
2. Create a custom report type with Custody Item as the primary object. See [Create a Custom Report Type](#).

Alternatively, from App Launcher, find and select Custody Items, and view a list of custody item records.

Generate Customized Work Order Steps or Therapy Tasks for Users

The Generate Work Order Steps for Patient Intake flow and the Generate Work Order Steps for Apheresis flow create runtime records of care program enrollee work order steps. Care program enrollee work order steps are then assigned to different stakeholders as tasks in a therapy. For example, Biosample Collection is a care program enrollee work order step or a task assigned to a lab technician. You can clone the flows to create work order steps for other therapy stages like Manufacturing and Infusion. Also, you can customize the default flows to add, remove, or modify work order steps for apheresis and patient intake, and delegate tasks to various stakeholders in your org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To customize therapy orchestration flows:	Health Cloud Advanced Therapy Orchestration permission set
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-  **Note** Starting from Winter '24, you can't view or add new data in the Associated Flow Name field on the Work Procedure Step object. You can continue executing the *Generate Work Order Steps for Patient Intake* and *Generate Work Order Steps for Apheresis* flows using data that was stored in the Associated Flow Name field before Winter '24. However, this approach isn't recommended. Instead, create records for substages in a therapy stage using Work Type Step records, and associate an action plan template with the work type step to create therapy tasks.

1. From Setup, enter *Flows*, and then select **Flows**.
2. Select the Generate Work Order Steps for Patient Intake flow or the Generate Work Order Steps for Apheresis flow.
3. Click **Save As**.
4. Enter a name for your new flow. The API name is auto-populated.

 **Tip** Make a note of the API name as you must add it to the work procedure step record.

5. Make the following customizations.
 - a. To add a care program enrollee work order step, click the  between action elements.
 - b. Select **Action**.
 - c. In the New Action, for Action, select **Create Care Program Enrollee Work Order Step**.
 - d. Enter a label. For example, Check Medication History. The API name is auto-populated.
 - e. In Action Plan Template ID, add the ID of the published action plan template you created for a task specific to the new work order step.
The Action Plan Template ID is in the URL of the browser on the Action Plan Template's record.
 - f. For Care Program Enrollee ID, select **recordId**.
 - g. Select the label you created for the work order step.
 - h. Add a sequence number.
 - i. Save your changes.
 - j. From the App Launcher, find and select **Work Procedure Steps**.
 - k. Select the work procedure step where you want to add the new care program enrollee work order step.
 - l. Click  next to Associated Flow Name.
 - m. Add the API name of the flow you created.
 - n. Save your changes.

See Also

[Salesforce Help: Add and Edit Elements](#)

Set Up Advanced Therapy Management for Experience Cloud

Make your treatment center experience easily accessible to users with Advanced Therapy Management in an Experience Cloud site.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

[Set Up an Experience Cloud Site for Advanced Therapy Management](#)

To set up an Experience Cloud site, first enable Digital Experiences and create a site. Then, add profiles that can access your Experience Cloud site.

[Configure an Experience Cloud Site for Advanced Therapy Management](#)

Configure the Experience Cloud site for your advanced therapy console. Create users who can access the site and customize the Digital Experience site per your requirements.

Set Up an Experience Cloud Site for Advanced Therapy Management

To set up an Experience Cloud site, first enable Digital Experiences and create a site. Then, add profiles that can access your Experience Cloud site.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create an Experience Cloud site:

Create and Set Up Experiences

AND

View Setup and Configuration

Make sure your org has the following user licenses: Customer Community, Customer Community Plus, or the External Apps Login User.

1. Set your (system administrator's) role as CEO.

2. [Enable Digital Experiences](#) for Advanced Therapy in Experience Cloud.
3. [Create an Experience Cloud site](#) for your treatment center.
4. Add profiles to your Experience Cloud site.
 - a. In the newly created site, click **Administration**, and then click **Members**.
 - b. Under Search Profiles, for Search, select **Customer**.
 - c. Move the desired profiles from the Available Profiles to the Selected Profiles. For example, move the External Apps Login User. You can move any of these community profiles to the Selected Profiles list: Customer Community Plus Login User, Customer Community Plus User, Customer Community Plus User Cloned, Customer Community User, and External Apps Login User.
 - d. Save your changes.

Configure an Experience Cloud Site for Advanced Therapy Management

Configure the Experience Cloud site for your advanced therapy console. Create users who can access the site and customize the Digital Experience site per your requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To customize an Experience Cloud site: Create and Set Up Experiences

To publish an Experience Cloud site: Create and Set Up Experiences

1. Create site users who can access the Advanced Therapy Experience Cloud site. Select an Experience Cloud user license, and the corresponding Experience Cloud profile:
 - a. In the digital site, click **Administration**, and then click **Salesforce Setup**.
 - b. From App Launcher, find and select **Advanced Therapy Management**.
 - c. Create an account record with Person Account record type. Create a corresponding contact record.
 - d. From the highlights panel of the contact record, click  and then click **Enable Customer User**.
 - e. In the New User page in Setup, add your email and a unique username that's not your email.
 - f. In User License, select an Experience Cloud user license. For example, select **External Apps Login**.
 - g. In Profile, select an Experience Cloud profile. For example, select **External Apps Login User**.
 - h. Save your changes.
 - i. In the Related List of the new user, click **Permission Set Assignments**.
 - j. Move the Multi-Step Scheduling, Health Cloud Foundation, and Health Cloud Advanced Therapy Orchestration permission sets from the Available Permission Sets to Enabled Permission Sets.
 - k. Save your changes.
2. Configure the Menu Items in Experience Cloud:
 - a. From Setup, enter *All Sites* and then select **All Sites**.

- b. Click **Builder**.
 - c. Click , and then click **Navigation**.
 - d. Click  next to the Default Navigation, and then click **Edit**.
 - e. In the Menu Editor, click **Add Menu Item**.
 - f. Enter a name for the menu item. For example, enter *Work Type Extension*.
 - g. In Type, select **Salesforce Object**.
 - h. Select the object type. For example, select **Work Type Extension**.
 - i. In Default List View, select all records of this object. For example, select **All Work Type Extensions**.
 - j. Click **Publicly Available**.
 - k. Click **Save Menu**.
 - l. Repeat all the substeps in this step to add more objects in the menu items.
 - m. From Builder, click , and drag the Appointment Slots component on to an editable part of the page.
 - n. From the top-right corner of the Digital Site page, click **Publish**, **Publish**, and **Got It**.
3. Create sharing rules for these objects:
- a. Account
 - b. Action Plan Template
 - c. Advanced Therapy Field Optionality Override
 - d. Care Program
 - e. Geo Country
 - f. Operating Hours
 - g. Orchestration Runs
 - h. Orchestration Stages
 - i. Orchestration Steps
 - j. Orchestration Work Items
 - k. Service Territory
 - l. Service Territory Relationship
 - m. Shift
 - n. Work Procedure
 - o. Work Type
 - p. Work Type Service Territory Scheduling Priority
 - q. Work Type Step Lead Time Override

You can customize the Advanced Therapy digital site portal as needed.

See Also

[Salesforce Help: Create Sharing Rules](#)

Use Advanced Therapy Management

Advanced Therapy Management helps users book appointments for a series of procedures across multiple service territories all at once. Multi-Step Scheduling eliminates the need for setting up and trying to coordinate individual appointments at multiple locations.

Admins can set up service territory relationships that determine the designated service territories for

each step in a slot chain and can configure resource availability and assignment details. Collating this information about available slots for all work types on a single screen makes it easier for users to book slots.

Users can sign electronic records to verify key record updates or record workflow steps such as Chain of Custody events for Advanced Therapies. The Pending Signatures section of a page such as the Home page or the Care Program Enrollee detail page lists electronic signature records that are ready for you to sign. To learn more, see [Electronic Signatures](#).

Schedule, Cancel and Reschedule Appointment Slots

Use Multi-Step Scheduling to schedule appointment chains, and reschedule or cancel appointments all at one time.

Confirm Slot Booking Request

When you book slots, the booking requests are initially submitted for confirmation. Advanced Therapy Management offers a customizable Salesforce Flow to enable internal users, like gene therapy coordinators, to seamlessly confirm appointment booking requests.

Configure an Enrollee Record to Create Tasks and Custody Records

Therapy Orchestration executes auto-launched and record-triggered flows to generate therapy tasks and custody records. Create a care program enrollee record for an advanced therapy to automatically create tasks, custody items, custody chain entries, and electronic signature records.

View and Perform the Therapy Tasks Assigned to You

Complete the tasks allocated to you as part of an advanced therapy orchestration step. To keep track of the therapy progression, go to the care program enrollee record page, and view the completed and upcoming tasks in the My Tasks section.

Create Ad Hoc Tasks

New patient requirements and emergency situations emerge as the therapy enters a new stage. These requirements or situations aren't part of the initial therapy plan. To address such unplanned requirements and situations, add ad hoc tasks in the relevant steps of the therapy stage. To create the task, use the predefined action plan template or build it from scratch by using the available options. Assign the task to the relevant user or group and define mandatory tasks.

Get a Complete View of an Enrollee's Advanced Therapy

Use the Advanced Therapy Management app to access all the information related to an advanced therapy in one place, including the progress of work procedure steps (therapy stages), work order steps (therapy substages), and therapy tasks. Also, track the execution of the orchestration flows from the Orchestration Run record page.

Repeat a Stage in a Therapy Orchestration

Therapy Orchestration not only helps you perform smooth orchestration runs, but also helps mitigate unexpected errors where a therapy stage has to be repeated.

Schedule, Cancel and Reschedule Appointment Slots

Use Multi-Step Scheduling to schedule appointment chains, and reschedule or cancel appointments all at one time.

Multi-Step Scheduling pulls information from service resources' availability at the service territories they're assigned to. The Service Territory Relationships records map service territories where consecutive procedure steps are performed. With all of this information in one centralized place, you can easily find available slots chains.

Schedule Appointments Using Published Slots

Search for published slots and schedule appointments for patients enrolled in a work procedure.

Schedule Appointments When Slots Are Not Published

In some cases, appointment slots are not published by the service territory. You can still book appointments for the other steps in the procedure. But if no slots aren't available for the service territory where manufacturing is performed, reach out to the service territory contact for details.

Reschedule a Series of Appointments for an Advanced Therapy

In case of sudden unavailability of enrollees, you can easily reschedule the booked slots. But rescheduling occurs for the entire slot chain, meaning all the appointments that are part of the work procedure are rescheduled.

Partially Reschedule Appointment Slots for an Advanced Therapy

Partially reschedule an appointment series downstream with the work type you want to reschedule.

Cancel a Series of Appointments for an Advanced Therapy

Sometimes you can't reschedule appointments due to unavailability of either the service resources or your enrollees, or both. In such cases, you can cancel the booking entirely.

Schedule Appointments Using Published Slots

Search for published slots and schedule appointments for patients enrolled in a work procedure.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:	Manage Multi-Step Scheduling features
To include users in Salesforce Scheduler appointments:	Let a user be included in appointments in Salesforce Scheduler
To create, edit and delete Health Cloud data:	Manage Health Cloud

 **Note** Appointment slots are *published* when shifts are configured for the service resource assigned to a service territory. Your admin can help with that.

1. From App Launcher, find and select **Care Program Enrollees**.

Alternatively, from the patient's record page, go to the Related tab and navigate to the Care Program

Enrollee list.

 **Note** Make sure you add the Related List lightning component to the patient's record page.

2. Select the enrollee record you want to schedule appointments for.

3. Click **Book New Slots**.

The Schedule Appointments tab is now visible.

4. To perform a basic search:

- Select a work procedure. For example, the broader therapy process such as Cell and Gene Therapy.
- For Work Procedure Organization, select the parent service territory for the work procedure.
- Search with date ranges for either the first work type or the last work type. Select the work type and enter the dates.

d. Click **Search**.

5. To search using additional criteria, expand Advanced Search:

- Select a work type.
- Select up to three locations where the work type is performed.
- To broaden your search, add more work types and associated locations.

d. Click **Search**.

6. To view the available slots, click on the results. You can view the available slots in the consecutive work types as well.

7. Select a time slot for each step of the work procedure.



8. Click **Book Selected Slots**.

9. Review the patient details and the slot details.



10. Click **Submit**.

The request for scheduling slots is submitted for review.

Schedule Appointments When Slots Are Not Published

In some cases, appointment slots are not published by the service territory. You can still book appointments for the other steps in the procedure. But if no slots aren't available for the service territory where manufacturing is performed, reach out to the service territory contact for details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:

Manage Multi-Step Scheduling features

To include users in Salesforce Scheduler appointments:

Let a user be included in appointments in Salesforce Scheduler

USER PERMISSIONS NEEDED

To create, edit and delete Health Cloud data: Manage Health Cloud

For Advanced Therapy Management, consider a situation when the available slots are not published for the apheresis work type. The qualified treatment center (QTC) coordinator can still proceed with booking slots for apheresis as they can manually enter the start and end dates of the slot.



Warning Don't manually book slots for manufacturing if no slots are available for the service territory where manufacturing is performed. Instead, reach out to the service territory contact for help.

1. From App Launcher, find and select **Care Program Enrollees**.

Alternatively, from the patient's record page, go to the Related tab and navigate to the Care Program Enrollee list.



Note Make sure you add the Related List lightning component to the patient's record page.

2. Select the enrollee record you want to schedule appointments for.

3. Click **Book New Slots**.

The Schedule Appointments tab is now visible.

4. To perform a basic search:

- a. Select a work procedure. For example, the broader therapy process such as Cell and Gene Therapy.
- b. For Work Procedure Organization, select the parent service territory for the work procedure.
- c. Search with date ranges for either the first work type or the last work type. Select the work type and enter the dates.
- d. Click **Search**.

5. To search using additional criteria, expand Advanced Search:

- a. Select a work type.
- b. Select up to three locations where the work type is performed.
- c. To broaden your search, add more work types and associated locations.
- d. Click **Search**.

6. To view the available slots, click on the results. You can view the available slots in the consecutive work types as well.

7. If the time slots for apheresis haven't been published, you see a prompt to reach out to the Service Territory contact.



8. Click **Book Selected Slots**.

9. Review the patient details and the slot details.

10. For slots that haven't been published, elect a start time and end time to book the appointment.



11. Click **Submit**.

The request for scheduling slots is submitted for review.

See Also

[Salesforce Help: Schedule Appointments Using Published Slots](#)

Reschedule a Series of Appointments for an Advanced Therapy

In case of sudden unavailability of enrollees, you can easily reschedule the booked slots. But rescheduling occurs for the entire slot chain, meaning all the appointments that are part of the work procedure are rescheduled.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:	Manage Multi-Step Scheduling features
To include users in Salesforce Scheduler appointments:	Let a user be included in appointments in Salesforce Scheduler
To create, edit and delete Health Cloud data:	Manage Health Cloud

In Advanced Therapy Management, if a patient has a change in plans and is unavailable for the apheresis appointment, the QTC coordinator can reschedule the appointment to a later date. The appointments for the consequent work types of manufacturing and infusion are also rescheduled accordingly.

1. From App Launcher, find and select **Care Program Enrollees**.

Alternatively, from the patient's record page, go to the Related tab and navigate to the Care Program Enrollee list.



Note Make sure you add the Related List lightning component to the patient's record page.

2. Select the enrollee record associated with the appointment slot that needs rescheduling.
3. Select **Reschedule Slots**.
The Reschedule Appointments tab is now visible.
4. Run a basic search or an advanced search.
5. Click **Reschedule Slots**.
6. Review the patient details and the slot details.
7. Click **Submit**.

See Also

[Salesforce Help: Schedule Appointments Using Published Slots](#)

Partially Reschedule Appointment Slots for an Advanced Therapy

Partially reschedule an appointment series downstream with the work type you want to reschedule.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:	Manage Multi-Step Scheduling features
To include users in Salesforce Scheduler appointments:	Let a user be included in appointments in Salesforce Scheduler
To create, edit and delete Health Cloud data:	Manage Health Cloud

1. From App Launcher, find and select **Care Program Enrollees**.

Alternatively, from the patient's record page, go to the Related tab and navigate to the Care Program Enrollee list.



Note Make sure you add the Related List lightning component to the patient's record page.

2. Select the enrollee record associated with the appointment slot that needs rescheduling.

3. Select **Reschedule Slots**.

4. Select the work type to reschedule. For Partial Reschedule, select any work type except the first one.

5. Click **Done**.

In Appointment History on the Reschedule Appointments tab, you can view the previous appointment slots for the work types to reschedule.

6. Run a basic search or an advanced search.



Note You must select new slots for all subsequent work types in the series. For example, if you reschedule the Manufacturing work type, also select slots for the Infusion work type that follows the Manufacturing work type.

7. Click **Reschedule Slots**.

8. Review the patient details and the slot details.

9. Click **Submit**.

Cancel a Series of Appointments for an Advanced Therapy

Sometimes you can't reschedule appointments due to unavailability of either the service resources or your enrollees, or both. In such cases, you can cancel the booking entirely.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features:	Manage Multi-Step Scheduling features
To include users in Salesforce Scheduler appointments:	Let a user be included in appointments in Salesforce Scheduler
To create, edit and delete Health Cloud data:	Manage Health Cloud

1. From App Launcher, find and select **Care Program Enrollees**.

Alternatively, from the patient's record page, go to the Related tab and navigate to the Care Program Enrollee list.

 **Note** Make sure you add the Related List lightning component to the patient's record page.

2. Select the enrollee record associated with the appointment slot that needs canceling.

3. Select **Cancel Slots**.

Under Appointment Slots, the statuses of the appointments are changed to canceled.

See Also

[Salesforce Help: Schedule Appointments Using Published Slots](#)

Confirm Slot Booking Request

When you book slots, the booking requests are initially submitted for confirmation. Advanced Therapy Management offers a customizable Salesforce Flow to enable internal users, like gene therapy coordinators, to seamlessly confirm appointment booking requests.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features	Manage Multi-Step Scheduling features
To include users in Salesforce Scheduler appointments	Let a user be included in appointments in Salesforce Scheduler
To create, edit and delete Health Cloud data	Manage Health Cloud

For example, after the QTC coordinator books slots for apheresis, manufacturing and infusion, the request must be confirmed by a gene therapy coordinator. The new and automated Confirm Booking Request Salesforce Flow helps gene therapy coordinators approve the request, and changes the status of the requested appointments to "Scheduled".

 **Note** Your admin must configure the quick action button for the automated Confirm Booking Request Flow and add the button to the highlights panel of the care program enrollee record page.

1. From App Launcher, find and select the record page where the admin added the quick action button.
2. To trigger the Flow, click **Confirm Booking Request** (1) in the highlights panel.
3. To accept the booking request, click **Confirm**.



The statuses of the appointments are updated to “Scheduled” (2), and the booking request is confirmed.

See Also

[Salesforce Help: Add a Quick Action Button to Confirm Booking Slots in Advanced Therapy Management](#)

Configure an Enrollee Record to Create Tasks and Custody Records

Therapy Orchestration executes auto-launched and record-triggered flows to generate therapy tasks and custody records. Create a care program enrollee record for an advanced therapy to automatically create tasks, custody items, custody chain entries, and electronic signature records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:	Health Cloud Advanced Therapy Orchestration permission set
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1. From the App Launcher, find and select Care Program Enrollees.
2. To create a care program enrollee record, click **New**.
3. Add a name.
4. Select a care program that has its Category field set as Advanced Therapy.
5. Select an account, lead, or user to represent the care program enrollee.
6. In Enrollment Location, select the service territory where an advanced therapy care program is executed.
7. Save your changes.
8. View the stages, steps, and therapy tasks generated on the care program enrollee record page.
[Perform the therapy tasks assigned to you.](#)
9. From App Launcher, find and select **Custody Items**.
10. View the record created by the latest therapy orchestration run.
11. From App Launcher, find and select **Custody Chain Entries**.

12. View the record created by the latest therapy orchestration run.

View and Perform the Therapy Tasks Assigned to You

Complete the tasks allocated to you as part of an advanced therapy orchestration step. To keep track of the therapy progression, go to the care program enrollee record page, and view the completed and upcoming tasks in the My Tasks section.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access assessment tasks:	Industries Visit permission set
To access the Advanced Therapy Management app:	Health Cloud Advanced Therapy Orchestration permission set

-  **Note** The Care Program Enrollee record page can also include the Pending Signatures section, which lists the electronic signature records that are ready for you to sign.

1. From the App Launcher, find and select **Care Program Enrollees**.
2. Select the Care Program Enrollee record that you're assigned a task for.
3. In My Tasks, find and select the task assigned to you.

-  **Note** You can view all tasks, but can access only the tasks that are assigned to you.
4. Complete the task flow or component task set up by your admin.

-  **Note** To refresh the My Tasks and the stage progression sections, click the refresh button in any of the sections. You can also view the time when these components were last refreshed. To resume any stalled stage or step, in the dropdown at the top-right corner of the page, select **Resume Transition Process**.

Create Ad Hoc Tasks

New patient requirements and emergency situations emerge as the therapy enters a new stage. These requirements or situations aren't part of the initial therapy plan. To address such unplanned requirements and situations, add ad hoc tasks in the relevant steps of the therapy stage. To create the task, use the predefined action plan template or build it from scratch by using the available options. Assign the task to the relevant user or group and define mandatory tasks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

 **Important** You can create an ad hoc task only in the step of a stage that's already completed or is in progress.

[Create an Ad Hoc Task by Using an Action Template](#)

In a step of a therapy stage, create ad hoc tasks by using an action plan template.

[Create an Ad Hoc Task Without an Action Template](#)

In a step of a therapy stage, create an ad hoc task from scratch by using the available options. You can add up to 10 ad hoc tasks in a therapy stage.

Create an Ad Hoc Task by Using an Action Template

In a step of a therapy stage, create ad hoc tasks by using an action plan template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features: Manage Multi-Step Scheduling features

To create, edit and delete Health Cloud data: Manage Health Cloud

1. From App Launcher, find and select **Care Program Enrollees**.

Alternatively, from the patient's record page, go to the Related tab and navigate to the Care Program Enrollee list.



Note Make sure you add the Related List Lightning component to the patient's record page.

2. Select the enrollee record associated where you want to add the ad hoc task.

3. In the **My Tasks** section, expand the dropdown and select **Add Task**.

4. On the Create Adhoc Tasks page, click **Using Action Plan Template**, and click **Next**.

5. Select the therapy step where you want to add the task and select the action plan template.

6. To select the tasks in the template, click the plus sign, and then click **Next**.

7. On the **Review Task Assignments** page, update the assignments if needed, and then click **Done**.

Create an Ad Hoc Task Without an Action Template

In a step of a therapy stage, create an ad hoc task from scratch by using the available options. You can add up to 10 ad hoc tasks in a therapy stage.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Multi-Step Scheduling features: Manage Multi-Step Scheduling features

To create, edit and delete Health Cloud data: Manage Health Cloud

1. From App Launcher, find and select **Care Program Enrollees**.

Alternatively, from the patient's record page, go to the Related tab and navigate to the Care Program Enrollee list.

 **Note** Make sure you add the Related List Lightning component to the patient's record page.

2. Select the enrollee record where you want to add the ad hoc task.

3. In the **My Tasks** section, expand the dropdown and select **Add Task**.

4. On the Create Ad Hoc Tasks page, click **Create Tasks Without Using Action Plan Template**, and then click **Next**.

5. Fill these details.

Field	Description
Select Step	Select the therapy step from the dropdown.
Relate To	Select the user or group to which you want to assign the task.
Assigned To	Select the specific user or group.
Subject	Add the title of the task that you want to add.
Is Required	Select if you want to mark the task as required.

6. Save the changes.

Get a Complete View of an Enrollee's Advanced Therapy

Use the Advanced Therapy Management app to access all the information related to an advanced therapy in one place, including the progress of work procedure steps (therapy stages), work order steps (therapy substages), and therapy tasks. Also, track the execution of the orchestration flows from the

Orchestration Run record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To access the Advanced Therapy Management app:

Health Cloud Advanced Therapy Orchestration permission set

View the progression of the advanced therapy through the various stages in the Work Procedure Step Progression section. In My Tasks, view the progress of therapy tasks assigned to you or other stakeholders in a therapy. You can also view the scheduled, rescheduled, and canceled appointments in the Appointment Slots section.

1. From App Launcher, find and select **Advanced Therapy Management**.
2. Select a care program enrollee record that's associated with an advanced therapy.
View the Work Procedure Step Progression section, the My Tasks section, and the Appointment Slots section.
3. From App Launcher, find and select **Orchestration Run**.
4. Select an orchestration record.
5. Go to the Related tab to view the orchestration stage and step runs.



Repeat a Stage in a Therapy Orchestration

Therapy Orchestration not only helps you perform smooth orchestration runs, but also helps mitigate unexpected errors where a therapy stage has to be repeated.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Therapy Orchestration and Multi-Step Scheduling are used together in non-linear flows to reschedule slots and rerun the orchestration. The workflows are reset to the beginning of a therapy stage and executed again. You can repeat the chain of appointments from any stage of therapy and reassign a fresh set of tasks to the relevant stakeholders in each therapy step.

Consider a situation where a clinician notices that the biosample was destroyed at the time of

transportation to the manufacturing lab. This means that Apheresis has to be repeated. The clinician immediately notifies the gene therapy coordinator.



As the gene therapy coordinator, you log into the Advanced Therapy Management app to reschedule the appointments, with Apheresis as the starting point. After you reschedule the appointments, the Apheresis clinician sees that the patient's therapy orchestration has been reset to Apheresis in the Work Procedure Step Progression component. Each task is generated again and assigned to the relevant user.

Set Up Benefit Verification

Integrate benefit verification into the end-to-end patient access workflow to help caregivers and patients reduce the time and effort it takes to find out what coverage is available under each patient's health benefits.

To learn more about Benefit Verification, see [Health Cloud Help: Benefit Verification](#).

Set Up Care Programs

Maximize the impact of your care programs with enrollment and management tools to help drive adherence and improve outcomes. Care programs can cover services such as patient outreach, access to medications, access to care, financial assistance, or remote monitoring.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Use the Life Sciences Program Management data model to define programs and manage relationships and activities within them. Then configure an Experience Cloud component that you can deploy to show which programs a person is enrolled in.

[Map External Program Enrollment Fields to Your Org](#)

To use the Care Program Enrollments API to create program enrollment records, create mappings from source system fields to Salesforce target entities and attributes.

[Manage Care Program Enrollment Flows](#)

Give your users a streamlined, guided care program enrollment process. With Flow Builder, you can clone and configure the Program Enrollment flow and take advantage of the rich care program management data model.

[Create an Experience Cloud Site and Set Up Member Access](#)

Care program participants who are members of a site can log in and review and consent to forms related to their care program.

Add Consent Documents to a Care Program

Add consent documents to a care program by defining the relationship in the Data Use Purpose tab or by copying existing consent documents for a new care program.

Register and Ship Devices for Care Programs

Help patients stay on course with their care metric targets by registering healthcare devices or creating a shipping request to deliver devices to them. Care Coordinators can then track biometric data from these devices, identify healthcare gaps, and engage with patients for follow-ups.

Use Care Programs

Enroll participants in care programs like a diet and nutrition class or an employer-sponsored wellness program. Stay compliant by capturing electronic signatures and tracking consent for each care program enrollment. Consent can take place with the participant providing consent in person, using a tablet or mobile device. Patients and members who aren't physically present can log into their Experience Cloud site, then view and provide consent for documents related to the program.

Map External Program Enrollment Fields to Your Org

To use the Care Program Enrollments API to create program enrollment records, create mappings from source system fields to Salesforce target entities and attributes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

1. From Setup, in the Quick Find box, enter *Care System Field Mapping*, and then select **Care System Field Mapping**.
2. Click **New Care System Field Mapping**.
3. Enter these values:

Field	Description
Label	The label for this care system field mapping.
Name	The unique name used by the API.
Source System	Name of the system from which the record was sourced.
Target Object	Name of the parent entity for the external ID.
External ID Field	The ID of the field in the external system.

Field	Description
IsActive	Select to activate this configuration and make it available to users.
Role	The role the entity field represents.

4. Save your work.

Manage Care Program Enrollment Flows

Give your users a streamlined, guided care program enrollment process. With Flow Builder, you can clone and configure the Program Enrollment flow and take advantage of the rich care program management data model.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

[Configure User Permissions and Sharing Rules](#)

Set up organization-wide default sharing settings and grant specific access to the objects that make up a care program. Create and clone permission sets to give users the correct access to forms and other data.

[Create User Records for Care Program Site Participants](#)

Create user records that include permission for participants to log in to a site in order to review and consent to the related forms. Person accounts store information about specific people by combining certain account and contact fields into one record. Person accounts are the recommended record types for care plan participants.

[Create a Care Program and Add Related Records](#)

To create a care program, define the program and the relationships and activities within it. Also create a care program product and care program provider and other records as needed.

[Create a Care Program Goal](#)

Create a Care Program Goal, and associate it with a care program.

[Care Program Providers](#)

To help a care team identify the primary healthcare practitioner associated with a care program provider, create an association between the practitioner and the provider. This link also allows the care team to look up all the healthcare practitioners involved with a care program provider.

[Configure the Program Enrollment Flow](#)

Use Flow Builder to automate your care program enrollment process. We've delivered an enrollment flow that helps your users select a program, add related products and providers, and capture the participant's consent.

Configure User Permissions and Sharing Rules

Set up organization-wide default sharing settings and grant specific access to the objects that make up a care program. Create and clone permission sets to give users the correct access to forms and other data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

1. Set org-wide sharing for the following objects to be Private, Public Read Only, or Public Read/Write, as necessary.

Authorization Form

Authorization Form Consent

Authorization Form Data Use

Authorization Form Text

Care Program

Care Program Enrollee Product

Care Program Enrollment Card

Care Program Product

Care Program Provider

Data Use Purpose

2. Create a permission set that gives access to the objects used to manage consent forms. Select **Object Settings** in your new permission set and enable the following object permissions.

Authorization Forms: Read

Authorization Form Consents: Read, Create, Edit

Authorization Form Data Uses: Read

Authorization Form Texts: Read

Data Use Purposes: Read

3. Clone the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation permission set

(for Health Cloud). Select **Object Settings** in your cloned permission set and configure Read access for these objects.

Care Programs

Care Program Enrollees

Care Program Enrollee Products

Care Program Enrollment Cards

Care Program Products

Care Program Providers

4. Enable care coordinators and care managers to enroll participants in programs.

- a. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
- b. Clone the Standard User profile and add a profile name.
- c. In the cloned profile, click **Edit** and scroll to General User Permissions.
- d. Enable Run Flows.

 **Note** Care Program Enrollee requires at least an Account, User, or Lead record and has a validation preventing a duplicate of an Account, User, or Lead relationship.

5. Allow care coordinators to enroll patients in the same care program more than one time.

- a. From Setup, in the Quick Find Box, enter *Program Enrollee Settings*, and then select **Program Enrollee Settings**.
- b. Enable **Multiple Enrollments in the Same Care Program**.

 **Note** Enabling this setting removes the validation that prevents duplicate enrollments in a care program. It only checks that at least one of the Account, Lead, or User fields in a care program enrollee record are populated.

 **Note** After you enable this setting, you can't disable it.

6. To enable participants to view content in a site, clone the Customer Community Plus User profile or a similar profile that includes View Content permission. Grant the View Content in Portal permission to the cloned profile.

- a. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
- b. Clone the Customer Community Plus User profile and add a profile name.
- c. In the cloned profile, click **Edit** and scroll to General User Permissions.
- d. Enable View Content in Portals.
- e. Save your changes.

Create User Records for Care Program Site Participants

Create user records that include permission for participants to log in to a site in order to review and consent to the related forms. Person accounts store information about specific people by combining certain account and contact fields into one record. Person accounts are the recommended record types

for care plan participants.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Make sure to enable Experience Cloud in your org.

1. From the App Launcher, find and select **Accounts**.
2. To open a patient's record page, click the name of a patient
3. Click , and select **Enable Customer User**.

This option opens a new user record in your Salesforce org with some details prepopulated from the contact record.

4. Edit the user record for this external user and assign the Customer Community Plus license and the cloned Customer Community Plus profile.
5. Click **Save**.
6. Select **Permission Sets** and add the cloned Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set and the permission set you created to manage access to consent forms.

 **Note** Make sure to add the user to the library associated with the care program consent forms.

Create a Care Program and Add Related Records

To create a care program, define the program and the relationships and activities within it. Also create a care program product and care program provider and other records as needed.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Make sure you create records for the Product and the Provider objects. You must associate these records with the Care Program Product and Care Program Provider, respectively.

1. Create a care program.
 - a. From the App Launcher, find and select **Care Programs**.
 - b. Click **New**, and enter the name of the care program. For example, create a care program called *Diabetes Control* for patients who have high blood sugar.

- c. Select the parent program the care program is part of, if any.
- d. If you create a care program for advanced therapies, in Category, select **Advanced Therapy**.



Note Make sure you add the Category field to the Care Program Page Layout

- e. Enter the start date and end date for the care program.
- f. Add a description for the care program.
- g. Select the status of the care program.
- h. Save your changes.

2. Create a care program product.

- Note** Unless you specify a product in the Product field, you won't be able to choose a product when you enroll a patient to the care program using the Care Program Enrollment Flow.

- a. From the App Launcher, find and select **Care Program Products**.
- b. Click **New**, and enter the name of the care program product.
- c. In Care Program, select the care program record the product is for. For example, select the care program you created in the previous step, that is, *Diabetes Control*.
- d. Select a product.
- e. Select the status of the care program product.
- f. Save your changes.

3. Create a care program provider.

- a. From the App Launcher, find and select **Care Program Provider**.
- b. Click **New**, and enter the provider's name.
- c. Select the account that provides the product to the enrollee.
- d. Select the care program product you created in the previous step.
- e. Select the status of the care program provider.
- f. Save your changes.

4. Optionally, configure the following records based on how your company uses care programs.

- **Care Program Eligibility Rules:** Define the eligibility criteria for participation in a care program. Use the Care Program Eligibility Rules object to associate a care program with an enrollment eligibility criteria record.
- **Care Program Enrollee:** Create records for participants enrolled in a care program. Indicate whether the patient was at a long-term healthcare facility during enrollment, add the Lead Id representing the patient, and specify the opt-out date and reason.
- **Care Program Enrollee Product:** Create records that associate care program enrollees with care program products, care program providers, or both.
- **Care Program Enrollment Card:** Create a care program membership card that includes the enrollee's name and a membership card number or enrollment number.
- **Care Program Team Member:** Create records for people who deliver services under a program, such as a program manager or care coordinator.

Create a Care Program Goal

Create a Care Program Goal, and associate it with a care program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

To create goals as part of a care program, define the care program goals.

1. On the Care Program Goals tab, click **New**.
2. Enter the goal name. For example, Reduce Sugar Intake.
3. Select a care program.
To create a care program, click **New Care Program**.
4. Select a **Start Date** and an **End Date**.
5. Choose the status of the care program goal.
6. Save your work.

Care Program Providers

To help a care team identify the primary healthcare practitioner associated with a care program provider, create an association between the practitioner and the provider. This link also allows the care team to look up all the healthcare practitioners involved with a care program provider.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

1. In the App Launcher, select **Care Program Healthcare Providers** and then click **New**.
2. Add a name for the association between a care program provider and healthcare provider (healthcare professional).
3. Choose a care program provider.
4. Choose a healthcare provider.

New Care Program Healthcare Provider

Information

* Care Provider Association Name <input type="text"/>	Primary Provider 
* Care Program Provider 	Healthcare Provider 
Search Care Program Providers... 	Search Healthcare Providers... 
Source System 	Source System Identifier 
<input type="text"/>	<input type="text"/>
Effective To 	Effective From 
<input type="text"/> 	<input type="text"/> 

Buttons: Cancel, Save & New, Save

 **Note** To assign this healthcare provider as the primary provider, select **Primary Provider**.

5. Save your changes.

Configure the Program Enrollment Flow

Use Flow Builder to automate your care program enrollment process. We've delivered an enrollment flow that helps your users select a program, add related products and providers, and capture the participant's consent.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

If your enrollment process requires that consent happen apart from enrollment, remove the Enrollment Consent Forms component from the Program Enrollment flow. Create a separate flow that uses the enrollee record and then add the Consent Form List View component to the flow.

 **Note** The Enrollment Consent Forms component is supported only when it's used with the ProgramManagement object. The Microsoft Edge browser isn't supported for electronic signature capture during consent. Patient enrollment and the review and acceptance of consent documents not requiring a signature are supported in Microsoft Edge.

1. From Setup, enter *Flows* in the Quick Find box, select **Flows**, and then click **New Flow**.
2. In New Flow screen, select **All + Template**.

3. Select the Program Enrollment flow type, and click **Next**.
4. The elements for a basic enrollment and consent flow appear in the builder. Drag any additional elements you want to use onto the canvas.
5. Select each of the flow elements and configure the screen properties.
6. Save your flow.
7. Add the Enroll in Program quick action to a record page.



Note Health Cloud orgs that were created before Winter '20 must add the Enroll in Program quick action to the Person Account or Account page layout. Newer orgs that use the delivered flow and page layout without making any changes don't require this step.

- a. From the object management settings for Person Account, go to Page Layouts and select **Person Account Layout**.
 - b. If the buttons in the Salesforce Mobile and Lightning Experience Actions section aren't visible, click **override the predefined actions**.
 - c. Click **Mobile & Lightning Actions**.
 - d. Drag the Enroll in Program action into the Salesforce Mobile and Lightning Experience Actions section.
- Note** Under **Quick Actions**, there's an Enroll in Program action, but it isn't supported in the Lightning app. Make sure to use the Enroll in Program action found in the **Mobile & Lightning Actions** section.
- e. Save your changes.

Create an Experience Cloud Site and Set Up Member Access

Care program participants who are members of a site can log in and review and consent to forms related to their care program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Clone the Customer Community Plus User profile or a similar profile that includes View Content permission. Grant the View Content in Portal permission to the cloned profile.

1. From Setup, in the Quick Find box, enter *All Sites*, and then select **All Sites**.
2. Select **Workspaces** next to your Experience Cloud site.
3. Click **Administration | Members**.
4. Select the cloned Customer Community Plus profile.
5. Click **Add**.
6. Save your changes.
7. From Workspace, go to **Builder** and click .
8. Drag the Care Programs for Health Cloud Empower component from the Components panel onto an

editable area of the page.

9. Edit the properties of the component, as necessary.
10. From Home, select **+New Page**.
11. To create a custom detail page for Care Program Enrollee, click **Object Pages**, and select the Care Program Enrollee object.
12. Click **Create**.
13. Drag the Care Program Consent Forms component onto an editable area of the page.
14. Publish and activate the site.

Add Consent Documents to a Care Program

Add consent documents to a care program by defining the relationship in the Data Use Purpose tab or by copying existing consent documents for a new care program.

[Associate New Consent Documents with a Care Program](#)

To associate new consent documents with a care program, define the relationship in the Data Use Purpose tab. Provide more information about each consent form with Authorization Form and Authorization Form Text. Then, use Authorization Form Data to associate the consent form with the care program.

[Copy Existing Consent Documents for a New Care Program](#)

To copy existing consent documents for a new care program instead of creating documents from scratch, clone the documents from a Data Use Purpose record.

[Upload Care Program Consent Documents](#)

Upload and organize the consent documents that are associated with a care program. Each document that is stored in the document library resides in a folder. The folder's attributes determine the accessibility of the folder and the documents within it.

[Grant Site Members Access to Consent Documents](#)

Make sure site members can view and consent to documents when they log into the site and open their care program card.

Associate New Consent Documents with a Care Program

To associate new consent documents with a care program, define the relationship in the Data Use Purpose tab. Provide more information about each consent form with Authorization Form and Authorization Form Text. Then, use Authorization Form Data to associate the consent form with the care program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Make sure you have the consent form you want to use for your care program in your org. If you don't have a consent form in your org, navigate to the Files tab and upload a consent form file.

1. Create a data use purpose for your consent form. Data Use Purpose is a container for the forms that go with a care program. For example, in a knee post-arthroscopy care program, there can be several forms to consent to. A participant must consent to a physical therapy session for treatment, or equipment rental, or a home health visit.
 - a. From the App Launcher, find and select **Data Use Purpose**, and then select **New**.
 - b. Enter a name for the data use purpose, such as *Pre-Arthroscopy Program Consent Forms*.
 - c. Select the name of the care program from the Purpose field.

 **Note** The Legal Basis field and the checkbox that lets users opt out of the consent process aren't used for care programs.

- d. Save your changes.
2. Next, create an Authorization Form record to provide information about each consent form.
 - a. From the App Launcher, find and select **Authorization Form**, and then select **New**.
 - b. Enter the name, revision number, and effective dates of the consent form.
 - c. Add a default auth form text to use if text isn't available for a specific language.
If you don't have a default auth form text record available in your org, create a default auth form text record after you save the Authorization Form record. Add the default auth form text record to the Authorization Form record.

 **Note** If Intelligent Document Automation is enabled in your org, only Authorization Form records that have an associated record in the Default Auth Form Text field are displayed in the care program enrollment flow

- d. If the program requires that the participant consents to the form, select **Signature Required**.
 - e. Save your changes.

3. Create an Authorization Form Text record to manage the text associated with the consent form. You can create multiple text versions for the same consent form to support different languages, regions, and situations.

- a. From the App Launcher, find and select **Authorization Form Text**, and then select **New**.
 - b. Enter the name of the text for the consent form. For example, *Consent for Treatment (Spanish)*.
 - c. For Summary Auth Form Text, add a summary to describe the form's purpose and display to customers when asking for their consent.
 - d. For Authorization Form, select the associated authorization form record.
 - e. Select the locale for the content document.

Make sure that the value in the Locale field matches the language of the org or the site in which the form is viewed. The consent form doesn't appear when the Locale field is incorrect. Create an authorization form text record for each language supported in your org.

- f. Select the checkbox for **Is Active**.

 **Note** If Intelligent Document Automation is enabled in your org, only Authorization Form Texts records that are active are displayed in the care program enrollment flow.

- g. For Content Document, select the uploaded consent form.
 - h. Save your changes.

4. Connect the consent form with the care program.
 - a. From App Launcher, find and select **Authorization Form Data Uses**.
 - b. Select **New**
 - c. Enter the name of the form in the Authorization Form field.
 - d. Add the name of the care program in the Data Use Purpose field.
 - e. Save your changes.

Copy Existing Consent Documents for a New Care Program

To copy existing consent documents for a new care program instead of creating documents from scratch, clone the documents from a Data Use Purpose record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

1. From the App Launcher, go to Data Use Purpose and then click the record that contains the existing consent documents.
2. Click the **Clone** arrow, and then click **Clone with Related**.
3. Select the objects you want to clone and click **Next**.
4. Give this data use purpose a descriptive name, such as Pre-Arthroscopy Program Consent Forms Clone.
5. In the **Purpose** field, select the care program to clone the consent forms to.
6. Save your changes.

Upload Care Program Consent Documents

Upload and organize the consent documents that are associated with a care program. Each document that is stored in the document library resides in a folder. The folder's attributes determine the accessibility of the folder and the documents within it.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

-  **Note** Files larger than 25 MB, unknown file types, password-protected files, and copy-protected PDFs can't be previewed. Some Microsoft Office 2007 features don't display correctly in previews. If a file can be previewed, but a preview doesn't exist, contact your Salesforce admin who can try to regenerate the preview.

1. From the App Launcher, go to Files.
2. Select **Libraries** and click **New Library** to create a library for consent documents.
3. Add a name and a description for the library.
4. Click **Add Files** and select the consent form you want to add to the library.
You can upload from your desktop or select a form that's already been uploaded to the Files tab.

Grant Site Members Access to Consent Documents

Make sure site members can view and consent to documents when they log into the site and open their care program card.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

-  **Tip** You can also manage Files membership through a public group or by adding a single user. If you're doing this via API, use the ContentWorkspaceMember object to manage library membership.

1. From the App Launcher, go to Files, and open the library that contains the consent forms.
2. Click **Manage Members**.
3. Add a site member and configure the access level to the consent forms.

Register and Ship Devices for Care Programs

Help patients stay on course with their care metric targets by registering healthcare devices or creating a shipping request to deliver devices to them. Care Coordinators can then track biometric data from these devices, identify healthcare gaps, and engage with patients for follow-ups.

Configure Tab Visibility

You can configure which tabs to show on the Register Device and Create Shipping Request screen to give your users a streamlined experience.

1. From Setup, in the Quick Find box, enter *Flows*, and select **Flows**.
2. In the list of flows, click **Register Device and Create Shipping Request**.
3. In Flow Builder, double-click **Register Device and Create Shipping Request**.
4. In the Edit Screen window, click **Register Device and Create Shipping Request**.
5. Configure which tabs to show.
 - To display both the Register Devices and the Create Shipping Requests tabs, on the right pane, in the Tab Settings field, enter *All*.
 - To display the Register Devices tab only, on the right pane, in the Tab Settings field, enter *Register*.

- To display the Create Shipping Requests tab only, on the right pane, in the Tab Settings field, enter *Ship*.
6. Click **Done**.

Add an Action to the Patient's Account Page

Configure an action for the flow you created and add the action to the person account page layout.

1. From the object management setting for Accounts, click **Buttons, Links, and Actions**.
2. Select **New Action**.
3. In Action Type, select **Flow**.
4. In Flow, select **Register Device and Create Shipping Request**.
5. In Standard Label Type, select **None**.
6. Add a label, name, and description for the new action.
7. Save your changes.
8. From the object management setting for Person Accounts, go to Page Layouts.
9. Select **Person Account Layout**.
10. From the Mobile & Lightning Actions menu, drag the **Register Device and Create Shipping Request** field onto an editable part of the page.
11. Save your changes.

Register a Device for a Patient

1. On the patient's account page, click **Register Device and Create Shipping Request**.
2. Select the products that represent the device types to register, and then click **Next**.
3. Register devices for the patient.
4. Save your changes.

Create a Shipping Request

1. On the patient's account page, click **Register Device and Create Shipping Request**.
2. Select the products that represent the device types to ship to the patient, and then click **Next**.
3. Add the shipping information for the devices that you want to ship to the patient:
 - a. Click the **Create Shipping Request** tab.
 - b. Click **Edit** next to Quantity.
 - c. Add the shipping information for the device, and then click **Save Shipping Info**.
4. Save your changes.



Note Starting Summer '21, the organization-wide default sharing setting for the Product object is Private. If you're new to Salesforce, to use the object for device registrations, change the sharing setting to Public Read/Write.

Use Care Programs

Enroll participants in care programs like a diet and nutrition class or an employer-sponsored wellness program. Stay compliant by capturing electronic signatures and tracking consent for each care program enrollment. Consent can take place with the participant providing consent in person, using a tablet or mobile device. Patients and members who aren't physically present can log into their Experience Cloud site, then view and provide consent for documents related to the program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

[Enroll a Participant in a Care Program](#)

It's quick and easy to enroll someone in a care program and capture their consent to participate.

[Associate a Healthcare Professional with a Care Program Provider](#)

To let the care team identify the primary healthcare professional associated with a care program provider, associate a healthcare professional with a care program provider. This association also allows the care team to look up all healthcare professionals for care program providers.

Enroll a Participant in a Care Program

It's quick and easy to enroll someone in a care program and capture their consent to participate.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud



1. From the Detail page of a participant's Person Account record, select **Enroll in Program**.
2. Select the care program from the list of available programs.
3. Click **Next**.
4. Select the products that are related to the program and click **Next**.
To filter the list to see only the products you've selected, click **Show Selected**.
5. Select the providers associated with the product and click **Next**.
If the product doesn't have an associated provider, you can skip it and click **Next**.
6. Review the products and providers associated with the program.
You can navigate to previous screens, and make changes, if necessary.
7. Click **Enroll**.

8. If the participant is present with you, have them review any related consent forms by selecting the name of the form.
9. Have the participant sign in the signature box and click **Consent** for forms that require a signature or click **Accept** for forms that are informational only.
10. Click **Finish**.

 **Note** When the participant isn't physically present, they can log into the Experience Cloud site and see which programs have forms to review and to provide consent for. The care program card indicates that there are forms to review. When the participant selects the card, the Care Program Enrollee page opens so that they can review forms and provide consent, if necessary.

Associate a Healthcare Professional with a Care Program Provider

To let the care team identify the primary healthcare professional associated with a care program provider, associate a healthcare professional with a care program provider. This association also allows the care team to look up all healthcare professionals for care program providers.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Make sure that the field-level security of the Source System Identifier, Status Reason, Source System, and Parent Record Type fields is set to visible for all profiles.

1. In the App Launcher, select **Care Program Healthcare Providers** and then click **New**.
2. Add information for the association between the healthcare provider (healthcare professional) and the care program provider.

New Care Program Healthcare Provider

Information

* Care Provider Association Name <input type="text"/>	Primary Provider 
* Care Program Provider 	Healthcare Provider 
Search Care Program Providers... 	Search Healthcare Providers... 
Source System 	Source System Identifier 
<input type="text"/>	<input type="text"/>
Effective To 	Effective From 
<input type="text"/> 	<input type="text"/> 

Buttons: Cancel, Save & New, Save

 **Note** To assign this healthcare provider as the primary provider, select **Primary Provider**.

3. Save your changes.

Set Up Financial Assistance Programs

Financial Assistance Program streamlines the enrollment of patients, helping them manage out-of-pocket medical expenses. Patient service reps can identify suitable assistance programs based on specific criteria and apply on behalf of the enrollees. Reps can view the status of the application and the history of any financial assistance that was provided to the enrollee. If the application is rejected, the patient service rep can file an appeal. After the application is approved, another patient service rep can view the details of the benefit disbursement, such as the count and benefit of reimbursed Copay coupons.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

By leveraging scalable orchestration and automating processes, companies can significantly reduce enrollment time, ensuring faster access to assistance for eligible patients. Financial assistance programs enhance patient enrollment and adherence, minimize dropouts, and improve access to care through streamlined patient service programs. By empowering your patient service rep to efficiently guide and enroll patients, companies can improve access to care and overall program and patient outcomes.

The enrollment of a patient in a financial assistance program includes these steps.

Apply for a Financial Assistance Program

Your patient service reps can create an application to enroll a patient in a suitable assistance program. They can connect with patients, get their details, and submit the application on their behalf.

The application to enroll a patient in a suitable financial assistance program goes through multiple eligibility criteria. The program checks the patient eligibility by verifying their insurance type and benefits status. If the patient is eligible, then it calculates and assigns benefits, and finally disburses the benefits. If the application doesn't meet all the defined criteria, then it gets rejected. You can easily configure the eligibility criteria based on your business needs.

File an Appeal

For the rejected applications, patient service reps can file an appeal. Typically, the reps fix the issues because of which the application got rejected and submits an appeal. If all the issues were fixed, then the appeal can be approved or even rejected by another patient service rep. You can configure an appeal assignment by defining your rules according to your business requirements.

Salesforce provides the ability for your admins and service reps to define the limit to file an appeal against one application. Your admin can define the timeout for an appeal. By default, an appeal is timed out if there's no action taken on it within 30 days after it's filed.

[Financial Assistance Program Data Model and Permissions](#)

Financial Assistance Program uses a data model that supports interoperability. Enable your patient services representative to apply for a financial assistance application and file an appeal on behalf of a care program enrollee by assigning appropriate levels of access to the relevant objects.

[Permission Sets for Financial Assistance Program Users](#)

To get started with Financial Assistance Program, assign the appropriate permission sets to your users.

[Set Up the Business Rules Engine for Financial Assistance Programs](#)

Set up the Business Rules Engine (BRE) to create complex lookups and calculations in Financial Assistance Programs. Before setting up BRE, provide the BRE Rule Engine Runtime permissions to your users. The BRE configurations include creating lookup tables and expression sets for financial assistance program eligibility and financial assistance program recommendation.

[Set up Assessment for Financial Assistance Program](#)

To enable Assessments, you must install Omnistudio, enable Discovery Framework, and update the Omnistudio settings.

[Configure Care Limit Type](#)

To determine the financial assistance that's available to a care program enrollee, define care limit types such as copay, co-insurance, and total out-of-pocket expenses. If you have configured Benefits Verification on your org, the copay care limit type is created already.

[Update Page Layout Configurations for Financial Assistance Program](#)

Certain fields on the objects that are required for using Financial Assistance Program aren't available on the objects, by default. You must edit the objects and add them to the object.

[Customize Picklist Values for Financial Assistance Program Fields](#)

To make it easier for patient services representatives to choose the appropriate options, customize the picklist values for fields in Financial Assistance Program objects.

Data Management for Financial Assistance Program

To help your users get the most out of Financial Assistance Programs, configure your org with the necessary data.

Refresh the Financial Assistance Program Decision Tables

Refresh the decision tables to include the changes that you made to the Program and Program Recommendation Rules objects. You must refresh the decision tables each time after you update these objects.

Financial Assistance Program Flows

Enable your patient service reps to apply for financial assistance programs on behalf of enrollees by using Salesforce flows. Understand how these flows work together, the key steps in enrollment for an assistance program, and the prerequisites before making any customizations.

Update the Application Appeal Limit

When an application is rejected, a patient service representative can file an appeal to address the issues that caused the initial rejection. When your reps file an appeal, they can use the rejection comments to resolve specific issues.

Add Financial Assistance Program to the Care Program Enrollee Record Page

Enable your patient services representatives to apply for a financial assistance program on behalf of a patient by adding the [FinancialAssistanceProgramContainer](#) FlexCard to the Care Program Enrollee record page.

Create Sharing Rules for Financial Assistance Program

A user sharing rule is a special type of criteria-based sharing rule that you use to grant record access to the users. For each rule, you assign access permissions to a specific set of users.

Edit the Organization-Wide Sharing Defaults for Financial Assistance Program

Edit the organization-wide default sharing default settings on certain objects to provide access to a set of users.

Edit Field-Level Security Settings for User Profiles in Financial Assistance Program

Edit the field-level security settings for the Applicant and the Application Form objects to provide edit access to certain user profiles.

Create and Activate a Service Process Definition

Create a service process definition in the Service Process Studio and activate it so that when a patient service rep files an appeal, the case record gets linked with the relevant application form ID.

Use Financial Assistance Program

Financial Assistance Program streamlines the process of enrolling a patient in an assistance program. It reduces the turnaround time to onboard patients and gather their insurance details, and ensures seamless access to healthcare by enrolling them in a suitable assistance program.

Financial Assistance Program Data Model and Permissions

Financial Assistance Program uses a data model that supports interoperability. Enable your patient services representative to apply for a financial assistance application and file an appeal on behalf of a

care program enrollee by assign appropriate level of access to the relevant objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Here's the set of objects and the level of user access required for the Financial Assistance Program application and appeal process.

Object	Purpose	Access
Applicant	Represents information about the individual that's applying for the Financial Assistance Program.	<ul style="list-style-type: none"> • Create • Read
Application Form	Represents the high-level information of an application that's submitted for the program.	<ul style="list-style-type: none"> • Create • Read <p>Assign the View All Records permission to enable patient services representatives to view the applications submitted by other patient services representatives.</p>
Application Form Relation	Represents the relationship between an application form and the program.	<ul style="list-style-type: none"> • Create • Read
Assessment	Stores the header data for an assessment.	<ul style="list-style-type: none"> • Create • Read
Assessment Question	Represents the container object that stores the questions required for an assessment.	<ul style="list-style-type: none"> • Read
Assessment Question Response	Represents the container object that stores the questions required for an assessment.	<ul style="list-style-type: none"> • Create • Read
Assessment Question Version	Stores the question versions for the assessment questions.	<ul style="list-style-type: none"> • Read

Object	Purpose	Access
Benefit	Represents information about benefits associated with the program.	<ul style="list-style-type: none"> • Read • Edit
Benefit Assignment	Represents the enrollment information of an individual that is captured in an application.	<ul style="list-style-type: none"> • Create • Read
Benefit Disbursement	Represents the allocation of an enrollee's benefit that can be made as monetary or non-monetary with different frequencies.	<ul style="list-style-type: none"> • Create • Read
Benefit Type	Represents information about the type of benefits	<ul style="list-style-type: none"> • Read
Care Benefit Verify Request	Request for verification of benefits.	<ul style="list-style-type: none"> • Read
Care Program	Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.	<ul style="list-style-type: none"> • Read
Care Program Enrollee	Represents a participant enrolled in a care program.	<ul style="list-style-type: none"> • Read
Care Program Enrollee Product	Represents the affiliation between a care program enrollee and a care program product, a care program provider, or both.	<ul style="list-style-type: none"> • Read
Care Program Product	Represents the affiliation between a care program and a care program product, care program provider, or both.	<ul style="list-style-type: none"> • Read
Case	Represents an appeal filed for a rejected application.	<ul style="list-style-type: none"> • Create • Edit • Read

Object	Purpose	Access
Coverage Benefit	Represents the benefits provided to a covered member by a purchaser's plan.	<ul style="list-style-type: none"> • Read • Edit
Coverage Benefit Item	Specific service covered by the insurance plan.	<ul style="list-style-type: none"> • Read
Coverage Benefit Item Limit	Allows you to track details associated with a specific benefit as it relates to expenditures, limits, coverage levels, eligibility, and exclusion.	<ul style="list-style-type: none"> • Read
Medication	Represents detailed information about different medications.	<ul style="list-style-type: none"> • Read
Medication Request	Represents a request or order for the supply of medication, along with information about how it should be administered.	<ul style="list-style-type: none"> • Read
Member Plan	Represents details about the insurance coverage for a member or subscriber.	<ul style="list-style-type: none"> • Read
Omni Process Assessment Question Version	Represents a junction between an OmniScript process and an assessment question version.	<ul style="list-style-type: none"> • Read
Process exception	Represents a business exception, such as a processing failure on an order summary.	<ul style="list-style-type: none"> • Create • Read
Program	Represents information about the enrollment and disbursement of benefits in a program.	<ul style="list-style-type: none"> • Read
Program Enrollment	Represents details of enrollment for benefits in a program.	<ul style="list-style-type: none"> • Read
Purchaser Plan	Represents the payer plan that a purchaser makes available to its members and members' dependents.	<ul style="list-style-type: none"> • Read

Object	Purpose	Access
Service Catalog Request	Represents a request made by a user using the Service Catalog.	<ul style="list-style-type: none"> • Create • Edit • Read
Service Catalog Item Dependency	Represents the dependencies of a service catalog item	<ul style="list-style-type: none"> • Create • Edit • Read

See Also

[Life Sciences Cloud Developer Guide: Financial Assistance Program](#)

Permission Sets for Financial Assistance Program Users

To get started with Financial Assistance Program, assign the appropriate permission sets to your users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Permission	Purpose
Health Cloud Foundation	Assigns read access to additional Health Cloud platform capabilities.
Health Cloud Starter	Provides access to Health Cloud Starter features.
Industry Service Excellence	Gives the admin access to objects and features for Industry Service Excellence.
Manage Financial Assistance Program	Give users access to the Financial Assistance Program and its features.
OmniStudio Admin	Allows admin users to configure Omniscripts, Dataraptors, Integration Procedures, and Flexcards. This permission set also provides calculation runtime access.
OmniStudio User	Allows users to execute Omniscripts, Dataraptors, Integration Procedures, and Flexcards. This permission set also provides calculation runtime access.

Permission	Purpose
Rule Engine Designer	Provides read and edit access to the calculate run time objects.
Rule Engine Runtime	Provides read access to the calculate run time objects.

See Also

[Data Protection and Privacy: Assign Permission Set to Users](#)

Set Up the Business Rules Engine for Financial Assistance Programs

Set up the Business Rules Engine (BRE) to create complex lookups and calculations in Financial Assistance Programs. Before setting up BRE, provide the BRE Rule Engine Runtime permissions to your users. The BRE configurations include creating lookup tables and expression sets for financial assistance program eligibility and financial assistance program recommendation.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To set up the Business Rules Engine:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

AND

OmniStudio Admin permission set

AND

OmniStudio User permission set

AND

Rule Engine Designer permission set

AND

USER PERMISSIONS NEEDED

Rule Engine Runtime permission set

See Also

- [Salesforce Trailhead: Get to Know Business Rules Engine](#)
- [Salesforce Help: Decision Tables for Business Rules Engine](#)

Create the Financial Assistance Program Eligibility Lookup Table

Create a lookup table for Financial Assistance Program Eligibility.

1. From the App Launcher, find and select **Lookup Tables**.
2. Click **New**.
3. Select **Decision Table**, and then click **Next**.
4. Select **Create Decision Table**, and click **Next**.
5. In the **Name** field, enter *Financial Assistance Program Eligibility*.
The API name is populated automatically.
6. Enter a description.
7. In the **Application Usage** field, select **Default**.
8. In the **Decision Table Type** field, select **Low Volume**.
9. Select the **LifeSciencesPSP_ProgramEligibility** template, and then click **Save & Next**.
10. In the **Preview & Save** page, click **Finish**. The Financial Assistance Program Eligibility lookup table appears.
11. Click **Activate**.

Create the Financial Assistance Program Recommendation Lookup Table

Create a lookup table for Financial Assistance Program Recommendation.

1. From the App Launcher, find and select **Lookup Tables**.
2. Click **New**.
3. Select **Decision Table**, and then click **Next**.
4. Select **Create Decision Table**, and click **Next**.
5. In the **Name** field, enter *Financial Assistance Program Recommendation*.
The API name is populated automatically.
6. Enter a description.
7. In the **Application Usage** field, select **Default**.
8. In the **Decision Table Type** field, select **Low Volume**.
9. Select the **LifeSciencesPSP_ProgramRecommendation** template, and then click **Save & Next**.
10. In the **Preview & Save** page, click **Finish**. The Financial Assistance Program Recommendation lookup table appears.
11. Click **Activate**.

Verify the Status of the Lookup Tables

After you create and activate the lookup tables, verify that their status is active.

1. From the App Launcher, find and select **Lookup Tables**.
2. Click the lookup table, and review the status in the **Status** field.

Create an Expression Set for Financial Assistance Program Eligibility Rules

Create an expression set for calculating the Financial Assistance Program Eligibility Rules.

1. From the App Launcher, find and select **Expression Set Templates**.
2. In the **Expression set Templates** page, click **Financial Assistance Program Eligibility Rules**.
3. In the Financial Assistance Program Eligibility Rules Expression Set page, click **Save As**, and then select **New Expression Set**.
4. In the New Expression Set window that appears, verify the name and the description for the expression set, and click **Save**.
The expression set's first version is also created by default and opens in a new browser tab. The version inherits the template's components, such as resources and steps.
5. To open the Expression Set Properties page, click the gear button.
6. In the Expression Set Properties page, enter **1** in the **Rank** field.
7. Save and activate the expression set.

Create an Expression Set for Financial Assistance Program Recommendation Rules

Create an expression set for calculating the Financial Assistance Program Recommendation Rules.

1. From the App Launcher, find and select **Expression Set Templates**.
2. In the Expression set Templates page, click **Financial Assistance Program Recommendation Rules**.
3. In the Financial Assistance Program Recommendation Rules Expression Set page, click **Save As**, and then select **New Expression Set**.
4. In the New Expression Set window that appears, verify the name and the description for the expression set, and click **Save**.
The expression set's first version is also created by default and opens in a new browser tab. The version inherits the template's components, such as resources and steps.
5. To open the Expression Set Properties page, click the gear button.
6. In the Expression Set Properties page, enter **1** in the **Rank** field.
7. Save and activate the expression set.

Verify the Expression Sets for Financial Assistance Program Recommendation Rules

After you activate the expression set for Financial Assistance Program Recommendation Rules, verify that

the expression set has been created.

1. From the App Launcher, find and select **Expression Sets**.
2. Verify that the expression set you created appears in the Expression Sets list.

Set up Assessment for Financial Assistance Program

To enable Assessments, you must install Omnistudio, enable Discovery Framework, and update the Omnistudio settings.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To set up assessments:

Manage Financial Assistance Program permission set

AND

OmniStudio Admin permission set

AND

OmniStudio User permission set

See Also

[Salesforce Help: Assessments and Surveys](#)

Prepare Your Org to Use Assessments

To use Financial Assistance Program, install Omnistudio. See [Install Omnistudio](#).

1. Enable Discovery Framework.
 - a. From Setup, in the Quick Find box, enter *Discovery Framework*, and then select **General Settings**.
 - b. Turn on **Discovery Framework**, **Enhanced Questions**, **Import or Export**, and **Sample Templates**.
2. Update the Omnistudio settings.
 - a. From Setup, in the Quick Find box, enter *OmniStudio Settings*, and then select **OmniStudio Settings**.
 - b. Turn off **Managed Package Runtime**.
 - c. Verify that Omnistudio MetaData is turned on.

Deploy Financial Assistance Program Assessments

1. In Setup, search for **Discovery Framework Sample Templates**.
2. Click **Deploy** for the Financial Assistance Program Application Assessment template with v2 as Available New Version. Then click Deploy again.
3. Activate Integration Procedures.
 - a. From the App Launcher, find and select **OmniStudio Integration Procedures**.
 - b. In the quick find field, enter *lsfinc* to show the relevant Integration Procedures.
 - c. Click **LsFinclAsst/CreateApplicationFormAndRelatedRecordsWithAttachments**.
 - d. In the **Integration Procedure Designer** page for the Integration Procedure, click **Activate Version**.
 - e. In the Integration Procedures list, click **LsFinclAsst/GetSelectedDrugsData**.
 - f. In the **Integration Procedure Designer** page for the integration procedure, click **Activate Version**.
4. Record the Omnistudio package namespace.
 - a. In Setup, in the Quick Find box, enter *Installed Packages*.
 - b. In the Installed Packages section, copy the Omnistudio package namespace in the **Namespace Prefix** column.
5. Update OmniScript.
 - a. From the App Launcher, find and select **OmniScripts**.
 - b. Click **FinancialAssistanceProgram/ApplicationForm**, and click the appropriate version of the OmniScript.
 - c. Click **Save Responses**.
 - d. In the **Remote Class** field under the Remote Properties section on the right, replace the current entry with the following: *OmnistudiopackagenameSpace.StoreResponses*. Replace *OmnistudiopackagenameSpace* with the OmniStudio package namespace that you recorded.
 - e. Activate the version.

Configure Care Limit Type

To determine the financial assistance that's available to a care program enrollee, define care limit types such as copay, co-insurance, and total out-of-pocket expenses. If you have configured Benefits Verification on your org, the copay care limit type is created already.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a care limit type:

Manage Financial Assistance Program permission set

USER PERMISSIONS NEEDED

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From Setup, in the Quick Find box, enter *Care Limit Type*, and then under Benefits Verification, select **Care Limit Type**.
2. Verify that **copay** is present in the Care Limit Type list. If **copay** isn't present, proceed to the next step.
3. Click **New Care Limit Type**.
4. Enter *CoPay* for the label and the name.
5. Enter *copay* as the limit type.
6. In Metric Type, select the unit by which the benefit limit is measured. You can select Money or Amount.
 **Note** Select **Money** if the limit is on the amount that is billed. If the limit can't be measured in terms of money, time, or amount, select **Text** so that the user can type a description.
7. Save the changes.

Update Page Layout Configurations for Financial Assistance Program

Certain fields on the objects that are required for using Financial Assistance Program aren't available on the objects, by default. You must edit the objects and add them to the object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To update page layout configurations:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

Here's the list of objects and their fields that you must enable in the Page Layout.

Object	Required Fields
Applicant	Care Program Enrollee
Assessment	Applicant
Benefit	<ul style="list-style-type: none"> • Enrollee Limit Frequency • Enrollee Amount Limit • Enrollee Transaction Amount Limit • Budget Amount Used
Benefit Assignment	<ul style="list-style-type: none"> • Maximum Benefit Amount • Minimum Benefit Amount
Care Program Enrollee Product	Program
Coverage Benefit	Pharma Copay Amount
Program	Application Appeal Limit
Program Enrollment	Care Program Enrollee
Program Recommendation Rule	Active Commercial Insurance

1. From the object management settings for Applicant, go to Page Layouts.
2. On the Page Layouts page, select **Applicant Layout**.
3. From the Fields section of the layout table, drag the Care Program Enrollee field to the Applicant Detail section.
4. To add the required fields to the page layouts for the other objects shown in the table, repeat these steps.

See Also

[Salesforce Help: Page Layouts](#)

Customize Picklist Values for Financial Assistance Program Fields

To make it easier for patient services representatives to choose the appropriate options, customize the picklist values for fields in Financial Assistance Program objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

User Permissions Needed	
To edit the objects:	Manage Financial Assistance Program permission set AND Health Cloud Starter permission set OR Health Cloud Foundation permission set

You must include picklist values for these objects and their fields.

Object	Field	Picklist Value
Benefit	Enrollee Limit Frequency	<ul style="list-style-type: none"> • Monthly • Yearly • Quarterly • On Demand
Program Recommendation Rule	Rule Type	<ul style="list-style-type: none"> • Eligibility • Recommendation
Program	Program Type	<ul style="list-style-type: none"> • copay • Patient Assistance Program • Quick Start
Medication Request	Type	<ul style="list-style-type: none"> • Proposal • Plan • Order • Original Order • Option
	Status	<ul style="list-style-type: none"> • Active • OnHold • Canceled • Completed

1. From Setup, in the Object Manager, enter *Benefit*, and select **Benefit**.
2. On the Fields and Relationships tab, select **Enrollee Limit Frequency**.
3. In the Enrollee Limit Picklist Values section, click **New**.

4. Enter *Monthly, Yearly, Quarterly, On Demand* in a single line.
5. Save your changes.
6. To add picklist values to the fields on other objects as listed in the table, repeat these steps.

See Also

[Salesforce Trailhead: Get Started with Picklists](#)

Data Management for Financial Assistance Program

To help your users get the most out of Financial Assistance Programs, configure your org with the necessary data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

[Create a Person Account](#)

Before you set up a care program enrollee record, create a person account record.

[Create a Care Program](#)

Create a Care Program for the financial assistance program.

[Create Care Program Enrollee](#)

Create a Care Program Enrollee for the financial assistance program. You can create a care program enrollee directly from the Care Program Enrollee object or from the Care Program Enrollee Product object.

[Create a Product](#)

Create a product for the care program.

[Create a Care Program Product](#)

Create a care program product for the care program.

[Create a Program](#)

Create a financial assistance program.

[Create a Care Program Enrollee Product](#)

Create a care program enrollee product for the care program enrollee. You can create a care program enrollee product directly from the Care Program Enrollee Product object or from the Care Program Enrollee object.

[Create a Care Program Assistance](#)

Create a care program assistance for the care program enrollee.

[Create a Purchaser Plan](#)

Create a purchaser plan for the financial assistance program.

[Create a Member Plan](#)

Create a member plan for the financial assistance program.

[Create Program Recommendation Rules](#)

Create program recommendation rule records for the financial assistance program recommendation and eligibility. For example, create [Insulin Financial Assistance Rule - Eligibility](#) and [Insulin Financial Assistance Rule - Recommendation](#) for the Insulin programs.

[Create Medication](#)

Create a medication for the financial assistance program.

[Create a Medication Request](#)

Create a medication request for the financial assistance program.

[Create a Care Benefit Verify Request](#)

Care Benefit Verify Request represents the request of verification of benefits for the financial assistance program.

[Create a Coverage Benefit](#)

Create a coverage benefit rule coverage benefit for the financial assistance program.

[Create a Coverage Benefit Item](#)

Create a coverage benefit item for the financial assistance program.

[Create a Benefit Type](#)

Create a benefit type for the financial assistance program.

[Create a Coverage Benefit Item Limit](#)

Create coverage benefit item limits for the financial assistance program.

[Create a Benefit](#)

Create coverage benefit item limits for the financial assistance program.

Create a Person Account

Before you set up a care program enrollee record, create a person account record.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a person account:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

Before you create a person account:

- Enable Person Accounts.
 - In the Person Account page layout, add Birthdate to the page, and click **Save As**.
1. From the App Launcher, find and select **Accounts**.
 2. Click **New**.
 3. Select **Person Account**, and click **Next**.
 4. Enter the last name.
 5. Enter the birth date. To use Financial Assistance Program, the patient must be 18 years or above.
 6. Enter the billing state. To use Financial Assistance Program, the state must be Arizona or Texas.
 7. Enter the billing country. To use Financial Assistance Program, the country must be US.
 8. Save the details.

See Also

[Salesforce Help: Enable Person Accounts for Use in Life Sciences Cloud](#)

Create a Care Program

Create a Care Program for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a care program:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

-
1. From the App Launcher, find and select **Care Programs**.
 2. Click **New**.
 3. Enter a program name and start date.
 4. Save the details.

Create Care Program Enrollee

Create a Care Program Enrollee for the financial assistance program. You can create a care program enrollee directly from the Care Program Enrollee object or from the Care Program Enrollee Product object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a care program enrollee:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Care Program Enrollees**.
2. Click **New**.
3. Enter the name for the care program enrollee.
4. Select the account of the enrollee.
5. Select the care program.
6. Save the details.

Create a Product

Create a product for the care program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a product:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Products**.
2. Click **New**.
3. Enter a product name, and select **Active**.

4. Save the changes.

Create a Care Program Product

Create a care program product for the care program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a care program product:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Care Program Products**.
2. Click **New**.
3. Enter the name, and select the product and the care program.
4. Save the changes.

Create a Program

Create a financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a program:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health

USER PERMISSIONS NEEDED

Cloud Foundation permission set

1. From the App Launcher, find and select **Programs**.
2. Click **New**.
3. Enter a name for the financial assistance program.
4. Enter the start date of the financial assistance program.
5. Enter a summary for the financial assistance program.
6. Enter an application appeal limit.
7. For Program Type, select Copay, Patient Assistance Program, or Quick Start.
8. Save the changes.

Create a Care Program Enrollee Product

Create a care program enrollee product for the care program enrollee. You can create a care program enrollee product directly from the Care Program Enrollee Product object or from the Care Program Enrollee object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a care program enrollee product:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Care Program Enrollee Products**.
2. Click **New**.
3. Select **Care Program Enrollee**, **Care Program Product**, and **Program**.
4. Save the details.

Create a Care Program Assistance

Create a care program assistance for the care program enrollee.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a care program assistance:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Care Program Assistances**.
2. Click **New**.
3. Select **Care Program**, **Care Program Product**, and **Program**.
4. Save the details.

Create a Purchaser Plan

Create a purchaser plan for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a purchaser plan:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Purchaser Plans**.
2. Click **New**.
3. Enter the start date and the end date of the plan.
4. For the plan type, select PPO, HMO, or Workers Comp.
5. For the plan status, select **Active**.

6. Save the changes.

Create a Member Plan

Create a member plan for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a member plan:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Member Plans**.
2. Click **New**.
3. Enter a name for the member plan.
4. Enter the start date and the end date of the member plan.
5. Specify whether the plan is primary or secondary.
6. For the status, select Select **Active**.
7. Select the member.
8. For the plan, select the purchaser plan.
9. Save the changes.

Create Program Recommendation Rules

Create program recommendation rule records for the financial assistance program recommendation and eligibility. For example, create **Insulin Financial Assistance Rule - Eligibility** and **Insulin Financial Assistance Rule - Recommendation** for the Insulin programs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a program recommendation rule:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Program Recommendation Rules**.
2. Click **New**.
3. Enter a name for the program recommendation rule.
4. In the **Program** field, select the Financial Assistance Program.
5. In the **Minimum Age** field, enter the minimum age of the patient.
6. In the **Maximum Age** field, enter the maximum age of the patient.
7. In the **Country** field, enter the name of the country.
8. In the **Recommended Program Priority** field, specify the priority of the Financial Assistance Program. Enter 1 for setting the program as the recommended program. The lowest number has the highest priority.
9. In the **Rule Type** field, select **Eligibility**.
10. Select **Inclusion Rule**.
11. Save the details.
12. Clone the rule that you created.
13. In the **Rule Type** field, select **Recommendation**.
14. Select **Active Commercial Insurance** if there's a commercial member plan for the person account.
15. Save the details.

Create Medication

Create a medication for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a medication:

Manage Financial Assistance Program permission set

AND

USER PERMISSIONS NEEDED

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Medications**.
2. Click **New**.
3. Enter the name and select the product.
4. Enter the end date of the prescription period. This date must be a future date.
5. Save the details.

Create a Medication Request

Create a medication request for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a medication request:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

If the pharmacy benefits of the prescribed drug are verified then instead of creating a medication request, you must update the Prescription Period End field of the existing medication record.

Here are the steps to create a medication request.

1. From the App Launcher, find and select **Medication Requests**.
2. Click **New**.
3. For the status, Select **Active**.
4. Select the medication.
5. Select the patient.
6. Select the end date of the prescription period.
7. Select a medication request type.
8. Save the changes.

Create a Care Benefit Verify Request

Care Benefit Verify Request represents the request of verification of benefits for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a care benefit verify request:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

If the pharmacy benefits of the prescribed drug are already verified, then instead of creating a care benefit verify request, you must update the status of the existing care benefit verify request record to Completed.

1. From the App Launcher, find and select **Care Benefit Verify Requests..**
2. Click **New**.
3. Select a member plan.
4. Select the appropriate status.
The date of the request must be a date after the care program start date.
5. In the **Authorized Prescription** field, enter the Medication Request.
6. Save the changes.

Create a Coverage Benefit

Create a coverage benefit rule coverage benefit for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a coverage benefit:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

If the pharmacy benefits of the prescribed drug are already verified then instead of creating a coverage benefit, you must update the Active field of the existing coverage benefit record to **True**.

Here are the steps to create a coverage benefit.

1. From the App Launcher, find and select **Coverage Benefits**.
2. Click **New**.
3. Enter a name for the coverage benefit.
4. Select the member.
5. Select the member's plan, and then select **Active**.
6. Select a care benefit verify request.
7. Enter other details as needed and save your changes.

Create a Coverage Benefit Item

Create a coverage benefit item for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a coverage benefit item:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

If the pharmacy benefits of the prescribed drug are already verified then instead of creating a coverage benefit item, you must update the Active field of the existing coverage benefit item record to **True**.

Here are the steps to create a coverage benefit item.

1. From the App Launcher, find and select **Coverage Benefit Items**.
2. Click **New**.
3. Enter a name for the Coverage Benefit Item.
4. Select the member.
5. Select the coverage benefit.
6. Select **Active**.
7. Save the changes.

Create a Benefit Type

Create a benefit type for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a benefit type:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Benefit Types**.
2. Click **New**.
3. For the process type, select **Financial Assistance**.
4. For the type, select **Monetary**.
5. Save the details.

Create a Coverage Benefit Item Limit

Create coverage benefit item limits for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a coverage benefit item limit:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Coverage Benefit Item Limits**.
2. Click **New**.
3. From the App Launcher, find and select **Coverage Benefit Item Limits**.
4. Click **New**.
5. Enter a name for the coverage benefit item limit.
6. Select the coverage benefit item.
7. Select the care limit type.
8. In the **Applied Limit** field, enter the Copay amount if the Care Limit Type is Copay.
9. Save the changes.

Create a Benefit

Create coverage benefit item limits for the financial assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a benefit:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Benefits**.
2. Click **New**.
3. Enter a name for the benefit.
4. Select the benefit type.
5. Select the frequency of the Enrollee limit.

6. For the budget amount used, enter 0.
7. Enter the amount limit for the enrollee.
8. Enter the transaction amount limit for the enrollee.
9. Select the financial assistance program.
10. Select **Active**.
11. For the payout frequency, enter the values that are mapped in enrollee limit frequency.
12. Select the benefit end date.
13. Enter the maximum benefit amount for the enrollee.
14. Save the changes.

Refresh the Financial Assistance Program Decision Tables

Refresh the decision tables to include the changes that you made to the Program and Program Recommendation Rules objects. You must refresh the decision tables each time after you update these objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To refresh decision tables:

Manage Financial Assistance Program permission set

AND

Rule Engine Designer permission set

AND

Rule Engine Runtime permission set

1. From Setup, in the Quick Find box, enter *Decision Tables*.
2. Select the Financial Assistance Program Eligibility Decision Table.
3. Click **Refresh**.
4. Repeat the steps for Financial Assistance Program Recommendation Decision Table.

See Also

[Salesforce Help: Decision Tables for Business Rules Engine](#)

Financial Assistance Program Flows

Enable your patient service reps to apply for financial assistance programs on behalf of enrollees by using Salesforce flows. Understand how these flows work together, the key steps in enrollment for an assistance program, and the prerequisites before making any customizations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Patient service reps can apply for a financial assistance program through a care program enrollee record page. If the application is rejected, they can file an appeal against the same application. Salesforce automation takes care of checking the patient eligibility, verifying the insurance type, verifying the patient's benefits status, calculating and assigning benefits, and finally disbursing the benefits for the relevant application or appeal.

For appeals, Salesforce automation checks the appeal status and takes the necessary action accordingly. Tailor these flows to adjust the timeout for filing an appeal.

[Financial Assistance Program Flows](#)

Salesforce ships flows that you can use to automate various tasks within the Financial Assistance Program. You can customize the flows to run patient assistance programs according to your requirements.

[Clone and Activate the Financial Assistance Program Flows](#)

Streamline the process for applying for a financial assistance program and filing an appeal by cloning and activating the Process Application for Financial Assistance Program, and Update the Check Appeal Status and Take Action flows. Simply clone the default flows and activate it.

[Customize the Appeal Timeout](#)

Every appeal against the rejection of a financial assistance program application gets timed out if there's no action taken on it. Enable your patient service reps to customize the appeal timeout by updating flows and Integration Procedures.

Financial Assistance Program Flows

Salesforce ships flows that you can use to automate various tasks within the Financial Assistance Program. You can customize the flows to run patient assistance programs according to your requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Here's the list of flows that are shipped to you with the product. See [Flow Builder](#) for more information on the Flow Builder.

Flows in Financial Assistance Program

Flow	Description
Process Application for Financial Assistance Program	Determines an applicant's eligibility for a financial assistance program. If the applicant is eligible, enrolls them in the program and disburses the calculated benefit to them.
Verify Insurance Type	Verifies if the patient has commercial insurance.
Check Benefit Verification Status	Checks whether a patient has completed benefit verification for the drugs that are part of the financial assistance program.
Check Patient Eligibility	Checks whether a patient is eligible to be enrolled in a financial assistance program.
Calculate and Assign Benefits	Calculates and assigns the financial assistance program benefits to a care program enrollee.
Disburse Benefits	Disburses the financial assistance program benefits to a care program enrollee.
Check Appeal Status and Take Action	Verifies if an appeal is approved, rejected, or has timed out, and takes the necessary actions accordingly.

See Also

[Salesforce Help: Orchestrations](#)

[Automate Tasks with Flows](#)

Clone and Activate the Financial Assistance Program Flows

Streamline the process for applying for a financial assistance program and filing an appeal by cloning and activating the Process Application for Financial Assistance Program, and Update the Check Appeal Status and Take Action flows. Simply clone the default flows and activate it.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To clone and activate the Process Application for Financial Assistance Program flow:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

To clone and activate the Check Appeal Status and Take Action flow:

Manage Financial Assistance Program permission set

AND

Industry Service Excellence permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. Clone and activate the Process Application for Financial Assistance Program flow.

- a. From Setup, in the Quick Find box, enter *Flows* and select it.
- b. Open the Process Application for Financial Assistance Program flow.
- c. In the Flow Builder, click **Save as New Orchestration**.
- d. Enter a flow label, and a description.
- e. Save and activate the new flow.

2. Clone and activate the Check Appeal Status and Take Action flow.

- a. From Setup, in the Quick Find box, enter *Flows* and select it.
- b. Open the Check Appeal Status and Take Action flow.
- c. In the Flow Builder, click **Save as New Flow**.
- d. Enter a flow label, and a description.
- e. Save and activate the new flow.

See Also

[Salesforce Help: Orchestrations](#)

[Automate Your Business Processes](#)

[Flow Builder for Flow Orchestration](#)

Customize the Appeal Timeout

Every appeal against the rejection of a financial assistance program application gets timed out if there's no action taken on it. Enable your patient service reps to customize the appeal timeout by updating flows and Integration Procedures.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To update a flow and an Integration Procedure:

Manage Financial Assistance Program permission set

AND

Industry Service Excellence permission set

AND

OmniStudio Admin permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

By default, the appeal gets timed out after 30 days of its creation, but you can customize this appeal timeout setting to suit your business needs.

Update the Check Appeal Status And Take Action Flow

To update the appeal timeout, create a version of the Check Appeal Status and Take Action flow by editing its wait element value and unit of appeal timeout.

Prerequisite: Make sure that you already cloned and activated the Check Appeal Status and Take Action flow.

1. From Setup, in the Quick Find box, enter *Flows* and select it.
2. Open the Check Appeal Status and Take Action flow.
3. In Flow Builder, click **Wait for Appeal Action Response**.
4. Click **Edit Element**.
5. Under Wait Configurations, click **Appeal Timed Out**.
6. Click **Resume Event**.
7. Enter the offset number and offset unit in hours or days.
8. Save the flow as a new version, and then activate the flow.

Create a Version of the LSAPERecommendedAssistancePrograms Integration Procedure

To update the appeal timeout, create a version of the LSAPERecommendedAssistancePrograms Integration Procedure and update the ReapplyTimeout and DiffInDays input fields.

1. From App Launcher, find and select **OmniStudio**.
2. Click the arrow next to OmniStudio FlexCards, and select **OmniStudio Integration Procedures**.
3. In the search bar, type and select **LSAPERecommendedAssistancePrograms**.
4. Click **LSAPERecommendedAssistancePrograms (Version 1)**.
5. Under Structure, click **Procedure Configuration**.
6. Click **Create Version**.
7. Click **GetShowReapplyStatus** Remote Action.
8. Under Additional Input, for ReapplyTimeout, enter the period after which you want to time out a financial assistance program appeal.
9. Set DiffInDays to true if the unit of measure for timeout is in days, else set it to false.
10. Go to **Procedure Configuration**, click **Save**, and then click **Activate Version**.

Create a Version of the GetApplicationTabDetails Integration Procedure

To update the appeal timeout, create a new version of the GetApplicationTabDetails Integration Procedure and update the ReapplyTimeout and DiffInDays input fields.

1. From App Launcher, find and select **OmniStudio**.
2. Click the arrow next to OmniStudio FlexCards, and select **OmniStudio Integration Procedures**.
3. Search for and select **GetApplicationTabDetails**.
4. Click **GetApplicationTabDetails (Version 1)**.
5. Under Structure, click **Procedure Configuration**.
6. Click **Create Version**.
7. Click **ModifyStageAndStep** Remote Action.
8. Under Additional Input, for ReapplyTimeout, enter the period after which you want to time out a financial assistance program appeal.
9. Set DiffInDays to true if the unit of measure for timeout is in days, else set it to false.
10. Go to Procedure Configuration, save your changes, and then activate the new version.

See Also

- [Automate Tasks with Flows](#)
- [Omnistudio](#)
- [Omnistudio Integration Procedures](#)

Update the Application Appeal Limit

When an application is rejected, a patient service representative can file an appeal to address the issues that caused the initial rejection. When your reps file an appeal, they can use the rejection comments to

resolve specific issues.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

You can define the number of appeals that your representatives can file for a single application. If you reach this limit, you can reapply to the same assistance program by creating another application.

To customize the application appeal limit, update the Application Appeal Limit field on the program entity.

 **Important** Before you file an appeal, you must define the application appeal limit.

See Also

[Create a Program](#)

Add Financial Assistance Program to the Care Program Enrollee Record Page

Enable your patient services representatives to apply for a financial assistance program on behalf of a patient by adding the `FinancialAssistanceProgramContainer` FlexCard to the Care Program Enrollee record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To modify pages:

Manage Financial Assistance Program permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

To add flexcards:

Omnistudio Admin permission set

AND

USER PERMISSIONS NEEDED

Omnistudio User permission set

To add the FlexCard to use Financial Assistance Program, install Omnistudio in your org.

1. From the App Launcher, find and select **Care Program Enrollees**.
2. Open a care program enrollee record.
3. Click **Setup**, and select **Edit Page**.
4. Place the Flexcard component at an appropriate spot on the page layout.



Tip We recommend that you create a dedicated tab on your page for this Flexcard and place it inside that tab.

5. Select the Flexcard component that you placed on the page.
6. In the component properties panel, in Flexcard Name, select **FinancialAssistanceProgramContainer**.
7. Save your work and activate the page, if needed.

See Also

[Salesforce Help: FlexCards](#)

[Salesforce Help: OmniStudio for Life Sciences Cloud](#)

Create Sharing Rules for Financial Assistance Program

A user sharing rule is a special type of criteria-based sharing rule that you use to grant record access to the users. For each rule, you assign access permissions to a specific set of users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create sharing rules: [Manage Sharing](#)

To use Financial Assistance Program, create record sharing rules with these access levels:

Sharing Settings for Financial Assistance Program

Sharing Rule	Access Level
Assessment Question	Read Only
Benefit Type	Read Only
Care Program	Read Only

Sharing Rule	Access Level
Care Program Enrollee Product	Read Only
Care Program Product	Read Only
Coverage Benefit	Read/Write
Coverage Benefit Item	Read Only
Medication	Read Only
Member Plan	Read Only
Omni Data Transformation	Read Only
Omni Process	Read Only
Omni Process Assessment Question Version	Read Only
Omni UI Card	Read Only
Program	Read Only
Purchaser Plan	Read Only
Service Catalog Request	Read Only

1. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select it.
2. Under Sharing Rules, go to the sharing rule, for example Care Program Sharing Rules, and then click **New**.
3. Enter a label and description for the rule.
4. Select **Based on Record Owner** as the rule type.
5. To determine the records to be shared, select the record owner role and user.
6. Select the users with whom the records must be shared.
7. Select the access level for the users. For Example:
Read Only
8. Save your changes.

Edit the Organization-Wide Sharing Defaults for Financial Assistance Program

Edit the organization-wide default sharing default settings on certain objects to provide access to a set of users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create sharing rules: Manage Sharing

To use Financial Assistance Program, update the internal access settings of these objects to Public Read Only:

- Benefit Assignment
- Flow Orchestration Instance Related Obj
- Orchestration Run
- Orchestration Stage Run
- Orchestration Step Run
- Process Exception
- Program Enrollment

1. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select it.
2. Under Organization-Wide Defaults, click **Edit**, and then update the default internal access of the objects to Public Read Only.
3. Save your changes.

Edit Field-Level Security Settings for User Profiles in Financial Assistance Program

Edit the field-level security settings for the Applicant and the Application Form objects to provide edit access to certain user profiles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

1. From Setup, in the Quick Find box, enter *Profiles*, and then select it.
2. Select a profile, and then click **View** that corresponds to the Applicant object.
3. In the Applicant Field-Level Security page, click **Edit** and provide edit access to all the fields.
4. Save your changes.
5. Similarly, edit the security settings of Usage Type and other fields for the Application Form object.

Create and Activate a Service Process Definition

Create a service process definition in the Service Process Studio and activate it so that when a patient service rep files an appeal, the case record gets linked with the relevant application form ID.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create service process definition

Manage Financial Assistance Program permission set

AND

Industry Service Excellence permission set

Prerequisite: Make sure that the Industry Service Excellence permission set is assigned to the admin and patient service reps.

Financial Assistance Program comes with an out-of-the-box service process definition template, Appeal Extension. You must create a service process definition by using this template and then activate it.

1. From Setup, in the Quick Find box, find, and select **Service Process Studio**.
2. Click **New Service Process**.
3. Click **Create From Template**.
4. Click **Appeal Extension**, and click **Save and Launch**.
5. On the Details tab, enter API Name as *AppealExtension*.
6. Click the Fulfillment Flow tab. Or, click **Next**, and skip to the Fulfillment Flow tab by clicking **Next** on each tab.
7. Click **Activate**.

See Also

[Service Process Studio](#)

[Service Process Studio: Create and Activate Service Process Definitions](#)

Use Financial Assistance Program

Financial Assistance Program streamlines the process of enrolling a patient in an assistance program. It reduces the turnaround time to onboard patients and gather their insurance details, and ensures seamless access to healthcare by enrolling them in a suitable assistance program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

View the status of the application and the history of any financial assistance that's provided to the enrollee. If the application is approved, view the details of the benefit disbursement, such as the count and benefit of reimbursed Copay coupons. If the application is rejected, file an appeal.

Financial Assistance Program Application

Financial Assistance Program helps patients procure expensive drugs that they can't afford otherwise. It enhances the patient engagement on drugs by helping them meet the out-of-pocket expenses for their drugs. The program also improves patient enrollment in various patient service programs and reduces patient dropouts from the program.

Apply for a Financial Assistance Program

Apply for a suitable financial assistance program on behalf of the care program enrollee.

Financial Assistance Program Appeal

Patient service reps can address a rejected financial assistance program application by filing an appeal. Before reps file an appeal, they can review the rejection comments to understand the reasons for the application's rejection. They can then correct the issues and file the appeal.

File an Appeal for a Financial Assistance Program

File an appeal against a rejected application on behalf of a care program enrollee.

Approve or Reject an Appeal

After a patient service rep files an appeal, another patient service rep verifies whether the issues that led to the rejection of the application were resolved, and then approves or rejects the appeal.

Reapply for a Financial Assistance Program

If an appeal times out or the maximum number of allowed appeals for an application is reached, you can initiate a new application for the same financial assistance program on behalf of the care program enrollee.

View Benefit Disbursements Details for a Patient

View the details of the benefits that the patient has received. The disbursement details include the count of benefit coupons and cards.

Financial Assistance Program Application

Financial Assistance Program helps patients procure expensive drugs that they can't afford otherwise. It enhances the patient engagement on drugs by helping them meet the out-of-pocket expenses for their drugs. The program also improves patient enrollment in various patient service programs and reduces patient dropouts from the program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Apply for a financial assistance program on behalf of a patient by using a guided workflow. If the application meets all the criteria, then it gets approved. If it doesn't meet the criteria, it gets rejected but you can file an appeal against the rejection.

Apply for a Financial Assistance Program

Apply for a suitable financial assistance program on behalf of the care program enrollee.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To apply for a financial assistance program:

- Manage Financial Assistance Program permission set
- Health Cloud Starter permission set OR Health Cloud Foundation permission set
- Rule Engine Designer permission set
- Omnistudio User permission set

-
1. From the App Launcher, find and select **Care Program Enrollees**.
 2. Click any care program enrollee.
 3. Click the **Financial Assistance Program** tab, and then click **Available Programs**.
 4. To launch a guided flow and to apply for a financial assistance program, click **Apply** that corresponds to the program.
 5. In the **Patient Details** page, upload the proof of citizenship, and click **Next**.
 6. In the **Patient insurance Details** page, select the prescribed drug, and **Next**.
In the **Patient insurance Details** page, you can optionally add the secondary commercial insurance details and upload the supporting documents.
 7. In the **Review and Submit Application** page, review the application details, and click **Submit**.

 **Note** The flow logic and submitting process run simultaneously and can take some time.

8. Review the status of the application and expand the **Verification Checklist** to view the details of each step of the application lifecycle.

Financial Assistance Program Appeal

Patient service reps can address a rejected financial assistance program application by filing an appeal. Before reps file an appeal, they can review the rejection comments to understand the reasons for the application's rejection. They can then correct the issues and file the appeal.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Appeals can be filed multiple times to ensure resolution. However, if no action is taken on an appeal, it automatically times out after 30 days. Salesforce has a 30-day timeout period to ensure timely processing. If an appeal times out without getting approved or rejected, the reps can reapply for the financial assistance program by submitting a new application. This streamlined process maintains efficiency and gives reps the flexibility to support patients effectively.

 **Tip** You can modify the appeal limit to be filed against an application by using the Application Appeal Limit field on the Program object.

See Also

[Update the Application Appeal Limit](#)

[Customize the Appeal Timeout](#)

File an Appeal for a Financial Assistance Program

File an appeal against a rejected application on behalf of a care program enrollee.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To file an appeal for a financial assistance program:

Manage Financial Assistance Program permission set

AND

Rule Engine Designer permission set

AND

Omnistudio User permission set

AND

Industry Service Excellence permission set

AND

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Care Program Enrollees**.
2. Click any care program enrollee.
3. Click the Financial Assistance Program tab.



Note The tab name for your Salesforce org can vary based on your admin setup.

4. To see the rejected application, click **View Application**.
5. On the Applications tab, click **File Appeal**.
6. If needed, enter a description and upload supporting documents, and click **Done**.



Note The flow logic and submitting process run simultaneously and can take some time.

After a patient service rep files an appeal, another rep reviews it to verify whether the identified issues were resolved. Based on the evaluation, the reviewing rep either approves or rejects the appeal.

See Also

[Update the Application Appeal Limit](#)

[Customize the Appeal Timeout](#)

Approve or Reject an Appeal

After a patient service rep files an appeal, another patient service rep verifies whether the issues that led to the rejection of the application were resolved, and then approves or rejects the appeal.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To update an appeal for a financial assistance program:

Manage Financial Assistance Program permission set

AND

Rule Engine Designer permission set

AND

Omnistudio User permission set

AND

Industry Service Excellence permission set

AND

USER PERMISSIONS NEEDED

Health Cloud Starter permission set OR Health Cloud Foundation permission set

1. From the App Launcher, find and select **Care Program Enrollees**.
2. Click any care program enrollee.
3. Click the Financial Assistance Program tab.



Note The tab name for your Salesforce org can vary based on your admin setup.

4. Under Appeals History, expand the application that the appeal is filed for.
5. Verify the reasons for which the application was rejected initially.
6. Click Accept Appeal or Reject Appeal.

To review the status of the application and to view the details of each step of the application lifecycle, expand the **Verification Checklist**.

See Also

[File an Appeal for a Financial Assistance Program](#)

Reapply for a Financial Assistance Program

If an appeal times out or the maximum number of allowed appeals for an application is reached, you can initiate a new application for the same financial assistance program on behalf of the care program enrollee.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To reapply for a financial assistance program:

- Manage Financial Assistance Program permission set
- Health Cloud Starter permission set OR Health Cloud Foundation permission set
- Rule Engine Designer permission set
- OmniStudio User permission set

Before you reapply for a financial assistance program, make sure that you correct the errors in the application form. To view the error details, go to the Verification Checklist section in the rejected application status page.

1. From the App Launcher, find and select **Care Program Enrollee**.
2. Click any care program enrollee.
3. Click the **Financial Assistance Program** tab, and then click **Available Programs**.
4. To launch a guided flow and to apply for a financial assistance program, click **Reapply** that corresponds to the program.
5. In the **Patient Details** page, upload the proof of citizenship, and click **Next**.
6. In the **Patient insurance Details** page, select the prescribed drug, and **Next**.



Note In the **Patient Insurance Details** page, you can optionally add the secondary commercial insurance details and upload the supporting documents.

7. In the **Review and Submit Application** page, review the application details, and click **Submit**.
8. Review the status of the application and expand the **Verification Checklist** to view the details of each step of the application lifecycle.

View Benefit Disbursements Details for a Patient

View the details of the benefits that the patient has received. The disbursement details include the count of benefit coupons and cards.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To view the benefit disbursement details:

- Manage Financial Assistance Program permission set
- Health Cloud Starter permission set OR Health Cloud Foundation permission set
- Rule Engine Designer permission set
- OmniStudio User permission set

-
1. From the App Launcher, find and select **Care Program Enrollee**.
 2. Click any care program enrollee.
 3. Click the **Financial Assistance Program** tab, and then click **Assistance History**.

Set Up Patient Program Outcome Management

Patient Program Outcome Management streamlines the process of defining program outcomes and indicators, and connects program outcomes with patient progress, enabling measurement at the outcome level. Enhance care program efficacy and get clear insights into patient and program

performance through Patient Program Outcome Management. Improve patient experience and adherence by building your customized assessments and logic to compute indicator results, and evaluate outcomes to refine patient service programs.

Patient Program Outcome Management harnesses the power of Einstein generative AI to generate the program and patient outcome summary. These summaries empower program leads and patient services reps with critical insights, enabling them to identify and address deviations from expected outcomes early. This proactive approach makes sure that patients stay on track to achieve their goals, improving overall program success.

With Patient Program Outcome Management, you can:

- Evaluate program and patient performance
- Enhance program effectiveness
- Improve program and patient outcomes
- Improve patient engagement, adherence, and satisfaction
- Reduce the patient drop-off risk

Here are some of the key offerings of Patient Program Outcome Management.

Patient Support Programs Console App

Patient Support Programs has a console app that serves as a one-stop shop for program leads and patient services reps. This app centralizes all related functionalities, enabling easy access and management. You can also configure the app to meet your specific business needs, enhancing overall efficiency and effectiveness.

Program Outcome Summary Generation using Einstein Generative AI

Salesforce's Einstein generative AI empowers program leads to obtain insightful summaries of program outcomes, providing a clear understanding of how programs are performing against defined outcomes over a specific period. These summaries help program leads identify underperforming programs and take preventive measures to mitigate risks. Additionally, they support informed decision-making to achieve better program outcomes.

Patient Outcome Summary Generation using Einstein Generative AI

With Salesforce's Einstein generative AI capabilities, patient services reps can obtain the insightful summary of an individual patient performance and engagement, and gain a clear understanding of the patient performance against defined outcomes and periods. This summary helps patient services reps in identifying the patient performance and improving patient engagement and adherence. It also helps in identifying patient drop-off rates from a care program, and helps prevent such cases.

User Personas for Patient Program Outcome Management

Patient Program Outcome Management has two types of activities. The optimal way to use Patient

Program Outcome Management is to divide and conquer these activity types with different user personas.

Permission Sets for Patient Program Outcome Management Users

To get started with Patient Program Outcome Management, assign permission sets to your user profiles based on their required level of access.

Patient Program Outcome Management Data Model and Permissions

Patient Program Outcome Management uses a variety of objects to capture program outcomes and measures. A program lead defines the program outcome and indicators, and links patient progress with program outcomes. A case manager works with patients and captures patient reported outcomes.

Customize Picklist Values for Outcome and Indicator Entities

Customize the picklist values, making it easier for case managers to choose the appropriate options.

Add or Manage Data for Patient Program Outcome Management

To help your users get the most out of the Patient Program Outcome Management, configure your org with the necessary data. Add a care program and a care program enrollee, define outcomes and indicators, and calculate indicator result and party indicator result.

Indicator Result Calculation Flow

Use Patient Program Outcome Management to measure outcomes at the care program level. To have consistent and real-time results, program leads can create a flow to calculate indicator results.

Patient Support Programs Console App

The Patient Support Programs console app in Life Sciences Cloud is a single-stop shop for patient services reps and program leads to monitor different aspects of care programs and care program enrollees. Program leads and patient services reps can customize this app to suit their needs and can effectively manage their daily tasks by accessing the functionalities of patient support programs via this app.

Einstein Generative AI for Patient Program Outcome Management

Harness the power of Einstein generative AI to streamline the daily tasks of program leads and patient services reps. Patient Program Outcome Management uses Einstein generative AI-based flows to generate patient and program outcome summary.

Generate Program Outcome Summary

With the power of Einstein generative AI, Patient Program Outcome Management enables program leads to generate a comprehensive program summary for defined outcomes over a specific period. This summary provides detailed insights into overall program performance and effectiveness. It also helps program leads take informed decisions to mitigate risks and take the steps to improve the overall program performance. These next best actions make sure that the program achieves the intended outcomes and deliver value to patients.

Generate Patient Outcome Summary

Gain valuable insights into individual patient performance and engagement through a comprehensive summary view. Patient Program Outcome Management uses Einstein generative AI capabilities to generate patient outcome summary for defined outcomes over a specific period. This summary plays a key role in identifying the patient drop-off risks and helps reps take the steps to improve patient engagement and adherence.

User Personas for Patient Program Outcome Management

Patient Program Outcome Management has two types of activities. The optimal way to use Patient Program Outcome Management is to divide and conquer these activity types with different user personas.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

- Data Setup - Salesforce Admin: The program lead sets up the org with the right data. They define care programs and products, enroll patients in care programs, and define program outcomes and indicators to define their progress. Program leads can also generate the program and patient outcome summaries, and can take preventive actions to mitigate any risks.
- Track Patient Progress - Standard User: The patient services reps connects with patients, comprehends their needs, aids them in their healthcare journey, tracks patient progress, and generates the patient outcome summary. Reps can take preventive actions if the patients aren't on track to achieve the outcomes.

Permission Sets for Patient Program Outcome Management Users

To get started with Patient Program Outcome Management, assign permission sets to your user profiles based on their required level of access.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

Here are the list of permission sets used in Patient Program Outcome Management.

Permission Set Name	Purpose
Access Patient Support Programs as a Case Agent	Give patient services reps access to patient support programs.
Access Patient Support Programs as a Program Lead	Give program leads access to patient support programs.
Access Patient Support Programs Using Einstein	Expose patient support programs powered by Einstein generative AI.

Permission Set Name	Purpose
Context Service Admin	Enables the user to perform CRUD operations on context entities/objects.
Context Service Runtime	Enables the user to perform read operation on context entities/objects.
Health Cloud Foundation	Assigns read access to additional Health Cloud platform capabilities.
Health Cloud Starter	Provides access to Health Cloud Starter features.
Patient Program Outcome Management	Provides access to patient program outcomes and its related functionalities.
Prompt Template Manager	Manage prompt templates using Prompt Builder and run them using generative AI features.
Prompt Template User	Run prompt templates using generative AI features.

See Also

[Salesforce Help: Manage Permission Set Assignments](#)

Patient Program Outcome Management Data Model and Permissions

Patient Program Outcome Management uses a variety of objects to capture program outcomes and measures. A program lead defines the program outcome and indicators, and links patient progress with program outcomes. A case manager works with patients and captures patient reported outcomes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Here's the set of objects used in Patient Program Outcome Management and the level of access that case managers need for the objects.

Object	Purpose	Access
Account	Business Accounts represent organizations involved with your business, and Person Accounts represent patients.	Read

Object	Purpose	Access
Care Program	Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.	Read
Care Program Enrollee	Represents a participant enrolled in a care program.	<ul style="list-style-type: none"> • Create • Read • Edit • Delete
Indicator Assignment	Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity.	Read
Indicator Definition	Represents information about the indicator assignment and the process of measuring and calculating the indicator results.	Read
Indicator Performance Period	Represents information about a specified time period including the frequency of calculating indicator results and the baseline value of the indicator.	Read
Indicator Result	Represents the result of an indicator assignment for the specified time period that can be used to track the performance of the indicator.	<ul style="list-style-type: none"> • Create • Read • Edit • Delete
Outcome	Represents information about the expected change in participants that is driven by the organization's activity.	Read
Outcome Activity	Represents a junction between the outcome and the object that's related to the activity undertaken by an organization to achieve that outcome.	Read

Object	Purpose	Access
Party Indicator Result	Represents information about a party for which the indicator result is calculated.	<ul style="list-style-type: none"> • Create • Read • Edit • Delete
Time Period	Represents the time period that's used to calculate the indicator performance and result.	Read
Unit Of Measure	Represents the units of measure for care metrics and care observations.	Read

See Also

[Discovery Framework Standard Objects](#)

Customize Picklist Values for Outcome and Indicator Entities

Customize the picklist values, making it easier for case managers to choose the appropriate options.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To edit indicator assignments, indicator definitions, outcomes, and outcome activities:	Patient Program Outcome Management permission set
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You must include picklist values for these Salesforce objects and their fields.

Object	Field
Indicator Assignment	Indicator Assignment Type
	Status
Indicator Definition	Status
Outcome	Status
	Term

Object	Field
Outcome Activity	Type

- From the object management settings for indicator assignment object, go to Fields and Relationships.
- Select **Indicator Assignment Type**.
- In the Indicator Assignment Type Picklist Values section, click **New**.
- Enter *Outcome* and *Care Program*. Enter each value on its own line.



Note You can configure any value based on your business needs, but the Patient Program Outcome Management data model supports the calculation of indicator results at the care program and outcome levels.

- Save your changes.
You've configured the picklist values for the Indicator Assignment Type field for the Indicator Assignment object.
- Similarly, add the Outcome and Care Program values for the Type field for the Outcome Activity object.
- Similarly, configure the picklist values for all fields mentioned in the table.

Add or Manage Data for Patient Program Outcome Management

To help your users get the most out of the Patient Program Outcome Management, configure your org with the necessary data. Add a care program and a care program enrollee, define outcomes and indicators, and calculate indicator result and party indicator result.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Define Care Programs and Care Program Enrollees

Patient Program Outcome Management uses care program and care program enrollee as the backbone of its operation. To create a care program, define the program and the relationships and activities within it. To create a care program enrollee, define a person account.

Define Outcomes and Outcome Activities

Add outcomes to track the changes that you expect to see in care program enrollees and ultimately at a care program level. Use outcome activities to connect outcomes to the efforts, such as care programs or care program enrollees, that contribute to the end goal.

Indicators for Measuring Results

Measure outcomes consistently by creating a library of indicators, connect those indicators to what you're measuring, and add time-bound baseline and target values to track your results against.

Connect indicator definitions to programs to track the effectiveness of programs. Connect indicator definitions to outcomes to track the effectiveness of the tasks that are done by participants.

Indicator Results for Tracking Progress

Measure the value of indicator assignments with indicator results.

Define Care Programs and Care Program Enrollees

Patient Program Outcome Management uses care program and care program enrollee as the backbone of its operation. To create a care program, define the program and the relationships and activities within it. To create a care program enrollee, define a person account.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create care program records:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

To create care program enrollee records:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

Make sure that you create records for the Account object to represent the patient.

1. Create a care program.
 - a. From the App Launcher, find and select **Care Programs**.
 - b. Click **New**, and enter the name of the care program.
For example, create a care program called Diabetes Control for patients who have high blood sugar.
 - c. If needed, select the parent program associated with the care program.
 - d. Select a category for the care program.
For example, to use a care program in the patient support program record, select **Patient Services** as the category.
-  **Note** Make sure that you add the Category field to the Care Program page layout.
- e. Enter the start date of the care program.
 - f. If necessary, enter the program's end date.

- g. Add a description for the care program.
 - h. Select the status of the care program.
 - i. Find and select a program sponsor, if any.
 - j. Save your changes.
2. Create a care program enrollee.
 - a. From the App Launcher, find and select **Care Program Enrollees**.
 - b. Click **New**, and enter the name of the care program enrollee.
 - c. In Care Program, select the care program record that you want to enroll the care program enrollee to.
 - d. Select an account.
 - e. Select the status of the care program enrollee.
 - f. Save your changes.

Define Outcomes and Outcome Activities

Add outcomes to track the changes that you expect to see in care program enrollees and ultimately at a care program level. Use outcome activities to connect outcomes to the efforts, such as care programs or care program enrollees, that contribute to the end goal.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create an outcome:	Patient Program Outcome Management permission set
To create an outcome activity:	Patient Program Outcome Management permission set

1. From the App Launcher, find and select **Outcomes**.
2. Click **New**.
3. Enter a name that describes the outcome.
4. Select the status.
5. If needed, select the intended direction and term, and enter a description.
6. Save your work.
7. In the Outcome Activities related list, click **New**.
8. Name the outcome activity.
9. Select the type.
For example, the Care Program.
10. Enter the record that you want to track in the lookup field that matches what you selected in the Type field.
For example, if you selected Care Program as the type, use the Care Program field to look up and

connect to the care program that you want to measure.

11. Save your work.
12. Similarly, add other outcome activities as needed.

Indicators for Measuring Results

Measure outcomes consistently by creating a library of indicators, connect those indicators to what you're measuring, and add time-bound baseline and target values to track your results against. Connect indicator definitions to programs to track the effectiveness of programs. Connect indicator definitions to outcomes to track the effectiveness of the tasks that are done by participants.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To use Patient Program Outcome Management: Patient Program Outcome Management permission set

Define Indicator Definitions

Use Indicator Definitions to build your library of indicators to consistently measure your outcomes.

Define Indicator Assignments

Use Indicator Assignments to connect indicator definitions to multiple outcomes or care programs.

Define Time Periods

Define time periods to calculate the indicator performance and result. This time period is used in indicator performance period.

Define Indicator Performance Periods

Define indicator performance periods so that you can measure time-bound indicator results.

Define Indicator Definitions

Use Indicator Definitions to build your library of indicators to consistently measure your outcomes.

1. From the App Launcher, find and select **Indicator Definitions**.
2. Click **New**.
3. Enter a name that describes the indicator definition.
4. Select the status.
5. Select the unit of measure.

 **Tip** If you don't see the unit of measure that you want to use, talk to your Salesforce admin before you add any unit of measure so that you can maintain a clean list.

6. If needed, enter a description.

7. Save your changes.

Define Indicator Assignments

Use Indicator Assignments to connect indicator definitions to multiple outcomes or care programs.

1. From the App Launcher, find and select **Indicator Definitions**.
2. Click the indicator definition that you want to connect to what you're measuring.
3. Go to the related lists.
4. In the Indicator Assignments related list, click **New**.
5. Enter a name that describes the indicator assignment.
6. Select the indicator assignment type.
For example, Care Program or Outcome.
7. Enter the record that you want to measure this lookup field for the selected indicator assignment type.
For example, if you selected Outcome as the type, use the Outcome field to look up and connect to the outcome that you want to measure.
8. Select the status.
9. Save your work.

Define Time Periods

Define time periods to calculate the indicator performance and result. This time period is used in indicator performance period.

1. From the App Launcher, find and select **Time Periods**.
2. Click **New**.
3. Enter a name that describes the time period.
For example, if you measure indicators by quarters, name the time period Q1FY23.
4. Enter the start date and time.
5. Enter the end date and time.
6. Save your work.
7. Similarly, define more time periods, if needed.

Define Indicator Performance Periods

Define indicator performance periods so that you can measure time-bound indicator results.

1. From the App Launcher, find and select **Indicator Performance Periods**.
2. Click **New**.
3. Enter a name that describes the indicator performance period.
4. Select the time period.
5. Select the indicator assignment.
6. To track the target values for this time period, enter a target value and select the target progress.
7. To track the baseline values for this time period, enter a baseline value.
8. In Description and Baseline Description, enter additional details, if necessary.

9. Save your work.

Indicator Results for Tracking Progress

Measure the value of indicator assignments with indicator results.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To use Patient Program Outcome Management:	Patient Program Outcome Management permission set
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Data Aggregation for Indicator Results

Before you enter an aggregated result value, you must collect the data about what you're measuring.

To collect data for indicator result calculation, you can use various venues, such as by talking to care program enrollees in person or on the phone, and through the assessment or survey tools available in Salesforce, online forms, and external datasets.

Automatically Calculate Indicator Results from Data in Your Org

Add a flow to calculate the indicator results to an indicator definition and, with the click of a button, generate the indicator results associated with an indicator performance period.

Manually Add and Manage Indicator Results

Enter indicator results to track them against time-bound, baseline, and target values.

Manually Add and Manage Party Indicator Results

Enter the party indicator results associated with the indicator results.

Data Aggregation for Indicator Results

Before you enter an aggregated result value, you must collect the data about what you're measuring. To collect data for indicator result calculation, you can use various venues, such as by talking to care program enrollees in person or on the phone, and through the assessment or survey tools available in Salesforce, online forms, and external datasets.

Use Discovery Framework and Assessments, a survey or assessment tool from Salesforce, to collect data. Program leads can set up custom assessments by using Discovery Framework. See [Create an Assessment with Discovery Framework](#).

You can use Patient Program Outcome Management data model with Discovery Framework and Assessments to gather data for indicator result calculation. You can use Salesforce flows with your own outcome calculation algorithms to store results in the Patient Program Outcome Management data model.

Automatically Calculate Indicator Results from Data in Your Org

Add a flow to calculate the indicator results to an indicator definition and, with the click of a button, generate the indicator results associated with an indicator performance period.

1. Add the flow to an indicator definition.
 - a. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
 - b. Copy the API name of the flow that your admin created to calculate indicator results.
 - c. From the App Launcher, find and select the indicator definition associated with the indicator performance period that you want to calculate indicator results for.
 - d. On the indicator definition, in Flow Definition API Name, paste the flow API name.
2. Run the flow to create indicator results.
 - a. Go to the related lists on the indicator definition, and select an indicator assignment.
 - b. Go to the related lists on the indicator assignment, and select the indicator performance period that you want to measure the results for.
 - c. Click **Calculate Indicator Results**.

Manually Add and Manage Indicator Results

Enter indicator results to track them against time-bound, baseline, and target values.

1. Aggregate the data collected.
2. Find the indicator performance period that you want to add an indicator result to.
3. Click **Related**.
4. On the Indicator Results related list, click **New**.
5. Enter a result value.
6. Enter a measurement date.
7. To track interim or final results, select the result type.
8. In Description, provide more information about the results.
9. Save your work.

Similarly, you can create a flow to automatically populate the indicator results.

See Also

[Salesforce Help: Indicator Result Calculation Flow](#)

Manually Add and Manage Party Indicator Results

Enter the party indicator results associated with the indicator results.

1. From the App Launcher, find and select **Party Indicator Results**.
2. Click **New**.
3. Find the indicator result.
4. Enter a measurement date.
5. Enter a result value.

6. In Party, find and select the care program enrollee.
7. Save your work.

Similarly, you can create a flow to automatically populate the party indicator results.

Indicator Result Calculation Flow

Use Patient Program Outcome Management to measure outcomes at the care program level. To have consistent and real-time results, program leads can create a flow to calculate indicator results.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

The Patient Program Outcome Management data model supports manual and automatic calculation of indicator results. Program leads can create a flow of the Indicator Results Process type that automatically creates the indicator results and populates the final score in the Result Value field on the Indicator Result object.

Let's look at an example where Charles Green is a care program enrollee who is enrolled in a Diabetes Management care program. To calculate the indicator results, the admin first defines outcomes such as Improve Quality of Life and Improve Patient Engagement, and link these outcomes with the Diabetes Management care program on the Outcome Activity object.

Next, the admin defines Improve Quality of Life via Assessments in an indicator definition record. In the Indicator Assignment record, the admin can link this indicator definition with care program or outcomes. Calculate an indicator result at a care program or at an outcome level depending on the value selected in the Indicator Assignment Type field on the Indicator Assignment object. Also, define the start and end dates on the Time Period object. Create an indicator performance period record to link an indicator assignment and period.

Lastly, based on your business needs, create a flow of the Indicator Result Flow process type and build a logic to calculate the indicator result for a given period. To calculate the indicator result, the flow collates the response value score for each assessment question response.

When you use this flow, keep these considerations in mind.

- If you're creating a custom flow, to show the Calculate Indicator Results button on indicator performance periods, use the Indicator Result Flow process type. The button appears only if the linked flow is active. Click the button on an indicator performance period to run the flow that's on the associated indicator definition.
- To calculate results when a user doesn't have access to all the records that are used to calculate the results, run the flow in system context to get accurate results.
- In Setup, add the Flow API Name field to the flow list view so that users without the Manage Flow app

permission can copy the flow API name and run the flow.

See Also

[Salesforce Help: Build a Flow](#)

Patient Support Programs Console App

The Patient Support Programs console app in Life Sciences Cloud is a single-stop shop for patient services reps and program leads to monitor different aspects of care programs and care program enrollees. Program leads and patient services reps can customize this app to suit their needs and can effectively manage their daily tasks by accessing the functionalities of patient support programs via this app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Assign Permissions to Users

To access the Patient Support Programs console app, admins must assign the Access Patient Support Programs as a Program Lead permission set to themselves and the Access Patient Support Programs as a Case Agent permission set to patient services reps.

Patient Support Programs Console App for Program Leads

Program leads can configure this app to create customized dashboards and reports to track program performance. They can create custom components to track the number of enrollees enrolled in a particular care program and how well that program is performing. This app acts as a single stop to evaluate the performance of programs and to identify the ones that don't meet the intended outcomes, helping program leads take preventive actions to mitigate any risks.

Patient Support Programs Console App for Patient Services Reps

Patient services reps can also personalize this app by creating custom dashboards and reports related to the care program enrollees, and can track their performance against defined outcomes. This personalized space can be enhanced using custom components and can help reps improve patient engagement and adherence, and can reduce patient drop-off risks.

Einstein Generative AI for Patient Program Outcome Management

Harness the power of Einstein generative AI to streamline the daily tasks of program leads and patient

services reps. Patient Program Outcome Management uses Einstein generative AI-based flows to generate patient and program outcome summary.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

Patient Program Outcome Management embeds generative AI capabilities to help program leads and patient services reps to summarize program and patient outcomes. Generate multiple summaries based on your selected outcomes and time period. Use our built-in prompt templates to improve efficiency and accuracy, leading to better outcomes.

 **Warning** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

[Turn On Einstein for Patient Support Program](#)

Give your patient services reps access to the Einstein generative AI by turning on Einstein for patient support programs.

[Context Definition Understanding and Enablement](#)

Patient Program Outcome Management uses Einstein generative AI to generate patient and program outcome summaries. These summaries are generated using a screen flow, which in turn uses context service to fetch the data. Before context service performs its magic, you must turn on context definition.

[Workflow of Program and Patient Outcome Summary Generation](#)

Patient Program Outcome Management has two flows that use Einstein's generative AI to generate the program and patient outcome summary. Generate program and patient outcome summary by using Flow Builder, Context Services, Prompt Template, and Embedded AI. Explore how these capabilities work together, the key steps in summary generation, and the prerequisites before making any customizations.

Turn On Einstein for Patient Support Program

Give your patient services reps access to the Einstein generative AI by turning on Einstein for patient support programs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein

GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To enable Einstein AI

Customize Application and Access Patient Support Programs Using Einstein (for Life Sciences Cloud)

OR

Customize Application (for Health Cloud)

1. Turn On Einstein Generative AI:
 - a. From Setup, in the Quick Find box, enter and then select *Einstein Setup*.
 - b. Enable **Turn on Einstein**.
2. From Setup, in the Quick Find box, enter *Life Sciences*, and then select **Patient Support Program Settings**.
3. Turn on **Einstein for Patient Support Program**.

See Also

[Salesforce Help: Set Up Einstein Generative AI](#)

Context Definition Understanding and Enablement

Patient Program Outcome Management uses Einstein generative AI to generate patient and program outcome summaries. These summaries are generated using a screen flow, which in turn uses context service to fetch the data. Before context service performs its magic, you must turn on context definition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

Patient Program Outcome Management comes with two predefined context definitions, CareProgramOutcomeSummary and PatientOutcomeSummary, that enable the efficient retrieval and consumption of data in program and patient outcome summary.

! **Important** You can't edit or remove the CareProgramOutcomeSummary and PatientOutcomeSummary context definitions. If you want to change anything, first clone it, and then make the changes.

Each context definition has two mappings, CareProgramSummaryMapping, and OutcomeSummaryMapping. These two mappings are created to fetch data for indicator results at the care program and outcomes levels.

CareProgramOutcomeSummary

The CareProgramOutcomeSummary context definition hydrates data for program outcome summary generation. The nodes and attributes in this structure are mapped to the Indicator Assignment, Indicator Performance Period, Indicator Result, and Outcome Activity objects.

PatientOutcomeSummary

The PatientOutcomeSummary context definition hydrates data for patient outcome summary generation. The nodes and attributes in this structure are mapped to the Indicator Assignment, Indicator Performance Period, Indicator Result, Party Indicator Result, and Outcome Activity objects.

Turn On Context Service

See [Turn On Context Service](#).

See Also

[Salesforce Help: Context Service](#)

Workflow of Program and Patient Outcome Summary Generation

Patient Program Outcome Management has two flows that use Einstein's generative AI to generate the program and patient outcome summary. Generate program and patient outcome summary by using Flow Builder, Context Services, Prompt Template, and Embedded AI. Explore how these capabilities work together, the key steps in summary generation, and the prerequisites before making any customizations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

[Capabilities for Summary Generation](#)

Explore the capabilities that are used to generate program and patient outcome summary.

[Key Steps to Generate Program Outcome Summary](#)

Use Einstein Embedded AI to trigger a Salesforce flow that uses invocable action to map data into a suitable format. Use Context Service to hydrate the data related to program outcome summary, and pass the information into process automation tools. Create a prompt template to include the specific instructions to be used for generating a summary.

[Key Steps to Generate Patient Outcome Summary](#)

Use Einstein Embedded AI to trigger a Salesforce flow that uses invocable action to map data into a suitable format. Use Context Service to hydrate the data related to patient outcome summary, and pass the information on to process automation tools. Create a prompt template to include specific

instructions to be used for generating a summary.

Capabilities for Summary Generation

Explore the capabilities that are used to generate program and patient outcome summary.

- Einstein Embedded AI: Einstein Embedded AI integrates intelligent features directly into Salesforce workflows, providing predictive analytics, automated insights, and personalized recommendations to enhance decision-making and efficiency for all users.
- Flow Builder: Flow Builder is a declarative tool for building complex workflows. Elements in a flow can run various actions, such as aggregate data, create or update records, and assign values to resources. See [Flow Builder](#).
- Invocable Actions: Use invocable actions to create reusable actions or methods that can be invoked from process builders, flows, or even external applications via REST API calls.
- Context Service: Context Service enables easy retrieval and consumption of information in tools such as Flows. It comprises context definitions, which is a structured set of data required to run a process. Patient Program Outcome Management has predefined context definitions called CareProgramOutcomeSummary and PatientOutcomeSummary that are used in program and patient outcome summary generation. See [Context Service](#).
- Einstein generative AI: Einstein generative AI uses advanced models to generate human-like text and content, enabling dynamic content creation, automated responses, and improved customer interactions within Salesforce.
- Prompt Template: Prompt Template is a reusable prompt that includes placeholders for specific details about the context in which the template is being used. After the placeholders are filled with relevant data, you can use this prompt template to connect with Large Language Models (LLM) to perform specific tasks such as creating a summary and sending an email. See [Create a Prompt Template](#).



Warning This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

Key Steps to Generate Program Outcome Summary

Use Einstein Embedded AI to trigger a Salesforce flow that uses invocable action to map data into a suitable format. Use Context Service to hydrate the data related to program outcome summary, and pass the information into process automation tools. Create a prompt template to include the specific instructions to be used for generating a summary.

Review the key steps in the program outcome summary generation process by using the predefined context definitions, invocable actions, and a screen flow.

1. After the indicator results are calculated, admins can generate a program outcome summary.
2. On any care program record page, the **Generate Program Summary** button launches the Generate Care Program Summary screen flow.
3. To retrieve all information related to a program outcome summary, the flow invokes the Ls

Commercial Context Data Provider invocable action which takes data from the CareProgramOutcomeSummary context definition. The outcome data returned by the context service is used in the succeeding steps.

4. After further calculations, the flow invokes the Serialize Apex Records To Stringified JSON invocable action to serialize the records returned by apex class into Stringified JSON.
5. At the end, the flow invokes the programOutcomeSummary invocable action that calls the Summarize Patient Support Program Outcomes prompt template. The output from the Summarize Patient Support Program Outcomes prompt template is passed to Large Language Models (LLM) which in turn generates the required text. The final text returned by LLM is shown to users as the program outcome summary.



Note Info: By default, the Summarize Patient Support Program Outcomes prompt template uses the OpenAI GPT 4 Turbo model. You can't edit or remove the Summarize Patient Support Program Outcomes prompt template. To make changes to the template, open the Summarize Patient Support Program Outcomes prompt template from Setup, and create a copy by clicking **Save as**.



Important Info: The Summarize Patient Support Program Outcomes prompt template generates the program outcome summary where outcome is associated with Indicator Assignment. To generate the summary where the care program is associated with Indicator Assignment, you must customize the prompt template according to your business needs.



Warning This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

See Also

[Salesforce Help: Standard Prompt Templates](#)

[Salesforce Help: Changing LLM Configurations](#)

Key Steps to Generate Patient Outcome Summary

Use Einstein Embedded AI to trigger a Salesforce flow that uses invocable action to map data into a suitable format. Use Context Service to hydrate the data related to patient outcome summary, and pass the information on to process automation tools. Create a prompt template to include specific instructions to be used for generating a summary.

Here are the key steps in the patient summary generation process by using the predefined context definitions, invocable actions, and a screen flow.

1. After the indicator results are calculated, patient services reps can generate a patient outcome summary.
2. On any care program enrollee record page, the Generate Patient Summary button launches the Generate Patient Summary screen flow.
3. To retrieve all information related to a patient outcome summary, the flow invokes the Ls Commercial Context Data Provider invocable action which takes data from the PatientOutcomeSummary context definition. The outcome data returned by the context service is used in the succeeding steps.

4. After further calculations, the flow invokes the Serialize Apex Records To Stringified JSON invocable action to serialize the records returned by apex class into Stringified JSON.
5. At the end, the flow invokes the patientOutcomeSummary invocable action that calls the Summarize Patient Outcomes prompt template. The output from the Summarize Patient Outcomes prompt template is passed to Large Language Models (LLM) which in turn generates the required text. The final text returned by LLM is shown to users as a patient outcome summary.



Note Info: By default, the Summarize Patient Outcomes prompt template uses the OpenAI GPT 4 Turbo model. You can't edit or remove the Summarize Patient Outcomes prompt template. To make changes to the template, open the Summarize Patient Outcomes prompt template from Setup, and create a copy by clicking **Save as**.



Important Info: The Summarize Patient Outcomes prompt template generates the patient outcome summary where outcome is associated with Indicator Assignment. To generate the summary where the care program is associated with Indicator Assignment, customize the prompt template to meet your business needs.



Warning This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

See Also

[Salesforce Help: Standard Prompt Templates](#)

[Salesforce Help: Changing LLM Configurations](#)

Generate Program Outcome Summary

With the power of Einstein generative AI, Patient Program Outcome Management enables program leads to generate a comprehensive program summary for defined outcomes over a specific period. This summary provides detailed insights into overall program performance and effectiveness. It also helps program leads take informed decisions to mitigate risks and take the steps to improve the overall program performance. These next best actions make sure that the program achieves the intended outcomes and deliver value to patients.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To generate a patient outcome summary for program leads:

Context Service Admin permission set

USER PERMISSIONS NEEDED

AND

Context Service Runtime permission set

AND

Prompt Template Manager permission set

AND

Prompt Template User permission set

AND

Access Patient Support Programs as a Program Lead permission set

AND

Patient Program Outcome Management permission set

The summary is divided into three sections. The first section highlights the program's performance against the defined outcomes and time period. The second section outlines what is going well, while the third section identifies areas that need improvement along with recommended next best actions. You can easily copy the summary with a single click.

Important If you wish to customize the GenerateCareProgramSummary flow as per your business needs, you must implement the `TransposeContext` interface.

You can easily generate the program outcome summary for any care program with just the click of one button.

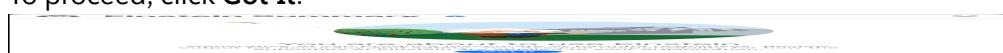
1. From the App Launcher, find and select **Care Program**.

2. Click any care program.

3. Click **Generate Program Summary**.

The Generate Care Program Summary screen flow is launched.

4. To proceed, click **Got It**.



5. On the next screen, select the outcomes against which you want to generate the summary. You can select **All**, or any individual outcomes, and click **Next**.

6. On the next screen, select the time period against which you want to generate the summary, and click **Next**.

The program outcome summary is generated.

Here's a sample program outcome summary.



To copy the program outcome summary, click **Copy**. You can share this summary with the patient, healthcare provider, or practitioner.

 **Warning** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

See Also

[Salesforce Help: Einstein Generative AI & Trust](#)

Generate Patient Outcome Summary

Gain valuable insights into individual patient performance and engagement through a comprehensive summary view. Patient Program Outcome Management uses Einstein generative AI capabilities to generate patient outcome summary for defined outcomes over a specific period. This summary plays a key role in identifying the patient drop-off risks and helps reps take the steps to improve patient engagement and adherence.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To generate a patient outcome summary for program leads:

Context Service Admin permission set

AND

Context Service Runtime permission set

AND

Prompt Template Manager permission set

AND

Prompt Template User permission set

AND

USER PERMISSIONS NEEDED

Access Patient Support Programs as a Program Lead permission set

AND

Patient Program Outcome Management permission set

To generate a patient outcome summary for patient services reps:

Context Service Admin permission set

AND

Context Service Runtime permission set

AND

Prompt Template Manager permission set

AND

Prompt Template User permission set

AND

Access Patient Support Programs as a Case Agent permission set

AND

Patient Program Outcome Management permission set

The summary is divided into three sections. The first section highlights the patient's performance against the defined outcomes and time period. The second section outlines what is going well, while the third section identifies areas that need improvement along with recommended next best actions. This summary can be easily copied with a single click.

Important If you wish to customize the Generate Patient Summary flow as per your business needs, you must implement the `TransposeContext` interface.

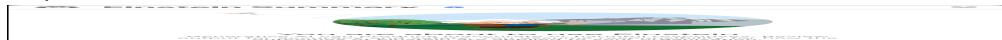
You can easily generate the patient outcome summary for any care program enrollee with just the click of one button. Here are the steps to generate a patient outcome summary.

1. From the App Launcher, find and select **Care Program Enrollee**.
2. Click any care program enrollee.

3. Click **Generate Patient Summary**.

The Generate Patient Summary screen flow is launched.

4. To proceed, click **Got It**.



5. Select the outcomes for which you want to generate the summary. Select **All**, or any individual outcomes, and click **Next**.

6. Select the time period for which you want to generate the summary, and click **Next**.

The patient outcome summary is generated.

Here's a sample patient outcome summary.



To copy the patient outcome summary, click **Copy**. You can share this summary with the patient, healthcare provider, or practitioner.



Warning This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

See Also

[Salesforce Help: Einstein Generative AI & Trust](#)

Set Up Patient Support Programs Analytics for Life Sciences Cloud

Patient Support Programs (PSP) Analytics provides a complete solution, including Tableau Einstein dashboards, to improve patient and program outcomes. The dashboards give program leads and patient services reps the data-driven insights they need to optimize operational efficiency.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

Integrated with Data 360, the patient support program analytics dashboards provide detailed data visualizations and analysis of key performance indicators. These indicators can include patient enrollment status, program completion milestones, and patient engagement levels. The setup generates custom dashboards that use program activity data to deliver key insights and provide real-time guidance. These dashboards improve operational efficiency by centralizing key metrics and reducing manual data collection, while enhancing decision-making by providing real-time data on patient enrollment and adherence. This increased visibility helps stakeholders monitor program health and identify trends at a glance.

The dashboards further help to optimize resource allocation by pinpointing programs or patient segments that need more attention. This focus on data-driven interventions helps drive better patient outcomes by giving reps and program leads the information they need to personalize support.

Set Up Patient Support Programs Analytics

To access dashboards and analytics for all patient support programs in Life Sciences Cloud, set up Patient Support Programs Analytics.

Patient Support Program Analytics Dashboards

Gain comprehensive insights into Patient Support Program (PSP) engagement, adherence, and financial support. These analytics dashboards empower Program Leads and Patient Services Reps to monitor program performance and patient outcomes. Users can identify successes and challenges, take timely corrective actions, and adjust strategies to improve patient adherence and overall health outcomes.

Set Up Patient Support Programs Analytics

To access dashboards and analytics for all patient support programs in Life Sciences Cloud, set up Patient Support Programs Analytics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To view the setup page for Patient Support
Program Analytics: Data Cloud Architect

 **Note** The Analytics Apps and Template functionality included as a part of Tableau Einstein is available in English only.

To set up Patient Support Programs Analytics, create and map Data 360 assets and ingest Data 360 data. Use the Patient Support Programs Analytics guided setup to configure Data 360.

1. From Setup, in the Quick Find box, enter *Patient Support Programs Analytics Setup*, and then select **Patient Support Program Analytics Setup**.
2. [Build Your Data 360 Connection](#).
3. [Configure Access to Patient Support Programs Analytics](#).
4. [Install and Deploy Patient Support Programs Analytics](#).
5. [Install Patient Support Programs Analytics App](#).

[Build Your Data 360 Connection](#)

Configure your Data 360 connection for Life Sciences Cloud. Data 360 is automatically provisioned in your Salesforce org.

Configure Access to Patient Support Programs Analytics

Assign permissions to view and manage Patient Support Programs Analytics.

Install and Deploy Patient Support Programs Analytics

To view components such as data streams, calculated insights, and data graphs from Data 360, install and deploy the Patient Support Programs Analytics data kits from Data 360 in your Salesforce org.

Install Patient Support Programs Analytics App

After your Patient Support Program Analytics data is ingested into Data 360, you're ready to install the app to help you get insights on all your patient support programs in Life Sciences Cloud.

Add Patient Support Programs Analytics Dashboards

After your Patient Support Program Analytics app is installed, add analytics dashboards for your program leads and patient services reps to gain real-time insights into program performance. The dashboards provide a clear view of patient enrollment and adherence, which helps program leads optimize operational efficiency and resource allocation. The data also help reps proactively intervene and personalize support, and drive better patient outcomes.

Build Your Data 360 Connection

Configure your Data 360 connection for Life Sciences Cloud. Data 360 is automatically provisioned in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To access Data Cloud Setup: Data Cloud Architect

1. To check if Data 360 is enabled on your Salesforce org, from Setup, in the Quick Find box enter *Data Cloud Setup*, and select **Data Cloud Setup Home**.
If Data 360 is enabled, you can see details regarding your Data 360 instance on your home org along with your org's details.
2. To enable data exchange between your org and Data 360, connect Data 360 to your Salesforce org.
 - a. From Setup, in the Quick Find box, enter *Salesforce CRM* and select **Salesforce CRM**.
 - b. Click **New**.
 - c. Click **Connect to a Salesforce org**.
 - d. After your org is connected, verify that the connection is visible and active.

See Also

[Salesforce Help: Connect Data](#)

Configure Access to Patient Support Programs Analytics

Assign permissions to view and manage Patient Support Programs Analytics.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To ingest objects and fields:

Data Cloud Architect

AND

View All Records and Read permission on the object being ingested.

AND

Data Cloud Salesforce Connector

AND

Clinical Trial Manager

AND

Health Cloud Starter (for Life Sciences Cloud)

AND

Life Sciences Commercial Admin

In your Salesforce org, assign Read and View All permissions to the Data Cloud Salesforce Connector permission set to ingest data from different patient support programs of Life Sciences Cloud.

1. Assign the Data Cloud User, Clinical Trial Manager, and Tableau Next Admin permission sets to your program leads and patient services reps.
2. Enable Discovery Framework.
 - a. From Setup, in the Quick Find box, enter *Discovery Framework*, and then select **General Settings**.
 - b. Turn on Discovery Framework, and Enhanced Questions.
3. Enable Surveys.
 - a. From Setup, in the Quick Find box, enter *Survey*, and then select **Survey Settings**.
 - b. Turn on Surveys.

4. Enable Site Management.
 - a. From Setup, in the Quick Find box, enter *Site Management*, and then select **Site Management Settings**.
 - b. Turn on Site Management.
5. Enable Participant Management, Adverse Events, and Research Study Randomization.
 - a. From Setup, in the Quick Find box, enter *Participant Management*, and then select **Participant Management Settings**.
 - b. Turn on Participant Recruitment and Enrollment, Adverse Events, and Research Study Randomization.
6. To ingest Life Sciences Cloud data, update the system settings of Data Cloud Salesforce Connector permission set.
 - a. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
 - b. Select **Data Cloud Salesforce Connector**.
 - c. To update the system settings to ingest Life Sciences Cloud data, select **System Permissions**.
 - d. Click **Edit**.
 - e. Enable access to the these system permissions - Access PSP Financial Assistance, Manage Patient Program Outcomes, Gives users access to verify and reverify pharmacy benefits, Manage Site Management, Discovery Framework Platform User, and Design and run clinical trials.
7. Save your changes.

See Also

[Salesforce Help: Manage Permission Set Assignments](#)

[Salesforce Help: Discovery Framework and Assessments Prerequisites](#)

[Salesforce Help: Site Management](#)

[Salesforce Help: Surveys](#)

[Salesforce Help: Participant Management](#)

Install and Deploy Patient Support Programs Analytics

To view components such as data streams, calculated insights, and data graphs from Data 360, install and deploy the Patient Support Programs Analytics data kits from Data 360 in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

[Install the Patient Support Programs Data Kit](#)

To access data mappings, data streams, and generate calculated insights in Data 360, install the data kit bundles available in your Salesforce org.

[Verify Data Kit Installation](#)

Verify that your data kit is installed and the required Data Model Objects (DMO) are created.

[Deploy the Patient Support Programs Analytics Data Kit](#)

Create data streams from a data kit to connect your Salesforce org to Data 360. Data streams help you

install data bundles which contain stream source objects.

Install the Patient Support Programs Data Kit

To access data mappings, data streams, and generate calculated insights in Data 360, install the data kit bundles available in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To install a data kit: Data Cloud Architect

! **Important** Before you install the data kit package, log in to the Salesforce org where you want to install it.

1. To install the package, copy your install URL.

URL: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tWs000000ZZ7IIAG>

2. Enter your Salesforce credentials.
3. Select the audience for the installation.
4. Select **Install**.

During the installation, you can safely navigate away from this page.

To verify that the package is installed, check your email.

Verify Data Kit Installation

Verify that your data kit is installed and the required Data Model Objects (DMO) are created.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To install a data kit: Data Cloud Admin

! **Important** In Setup, on the Installed Packages page, verify that the Salesforce Standard Data Model SSOT version is 1GP or later. If the version is older than 1GP, contact your Salesforce account executive.

1. From Setup, in the Quick Find box, enter *Data Kits* and select **Data Kits**.
2. Verify that your installed data kit and the details of the data kit package are visible.
3. To ensure that all your associated data streams and mappings are created, from the App Launcher, find and select **Data Cloud**.
4. To ensure that your data model objects are ingested into Data 360, select the **Data Model** tab.

Deploy the Patient Support Programs Analytics Data Kit

Create data streams from a data kit to connect your Salesforce org to Data 360. Data streams help you install data bundles which contain stream source objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To deploy the data kit components: Data Cloud Architect

1. From the App Launcher, find and select **Data Cloud**.
2. Select **Data Streams**.
3. Click **New**.
4. Select **Salesforce CRM**, and then select **Next**.
5. Under Custom Bundles, select **Life Sciences Cloud Data Bundle**.
6. Select **Next**.
7. Select **Default** as your data space, and select **Next**.
8. Verify the objects under your selected bundle, and select **Next**.
9. Verify the fields associated with the objects in the bundle, and select **Next**.
10. Verify that the data model objects for the selected bundle are available and select **Deploy**.

Install Patient Support Programs Analytics App

After your Patient Support Program Analytics data is ingested into Data 360, you're ready to install the app to help you get insights on all your patient support programs in Life Sciences Cloud.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To install Patient Support Program Analytics apps:

Data Cloud Architect

AND

Any admin or design time user permission set in
Life Sciences Cloud

1. From Setup, in the Quick Find box, enter *Life Sciences*, and then select **Patient Support Program Analytics Setup**.
2. Under Patient Support Programs Analytics, select **Dataspace**, and click **Install**.

If the installation fails, use an API tool to delete the app and repeat the steps in [Set Up Patient Support Programs Analytics](#).

To retrieve the ID of the app you want to delete, first, send a `GET` request to `/services/data/{version}/app-framework/apps`. Then, use that ID to send a `DELETE` request to `/services/data/{version}/app-framework/apps/{id}`.

Add Patient Support Programs Analytics Dashboards

After your Patient Support Program Analytics app is installed, add analytics dashboards for your program leads and patient services reps to gain real-time insights into program performance. The dashboards provide a clear view of patient enrollment and adherence, which helps program leads optimize operational efficiency and resource allocation. The data also help reps proactively intervene and personalize support, and drive better patient outcomes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To add Patient Services Program Analytics dashboards:

Data Cloud Architect

AND

Any admin or design time user permission set in
Life Sciences Cloud

Before you add analytics dashboards, make sure that you [Install Patient Support Programs Analytics App](#).

1. From App Launcher, find and select **Patient Support Programs**.

2. On home page, Click **Setup**, and select **Edit Page**.
3. Place the Tableau Next Dashboard component at an appropriate spot.
4. In Dashboard, find and select **Program Lead Analytics**.
5. Under the Set Component Visibility section, click **Add Filter**.
6. In Field, click **Select**.
7. On the Select Field window, from the dropdown, select **User**, then select **Profile**, then select **Name**, and then click **Done**.
8. Select **Equal** as operator, and enter the name of profile of your program lead as value.
9. Click **Done**.
10. Place another Tableau Next Dashboard component at an appropriate spot.
11. In the Dashboard search field, find and select **Patient Services Rep Analytics**.
Optionally, you can customize the visibility of individual dashboard.
12. Save your changes, and activate the page.

See Also

[Salesforce Help: Create an App Home Page with the Lightning App Builder](#)

Patient Support Program Analytics Dashboards

Gain comprehensive insights into Patient Support Program (PSP) engagement, adherence, and financial support. These analytics dashboards empower Program Leads and Patient Services Reps to monitor program performance and patient outcomes. Users can identify successes and challenges, take timely corrective actions, and adjust strategies to improve patient adherence and overall health outcomes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** editions where Patient Support and Programs is enabled

[Program Lead Analytics Dashboards](#)

Use the Program Lead Analytics dashboard to improve your Patient Support Programs (PSPs). Gain comprehensive insights into how patients are involved and how financial assistance works. For Life Sciences cloud, this tool enables program leads monitor consolidated patient engagement metrics and financial benefits across multiple programs, allowing them to quickly identify successes and challenges. Analyze patient adherence, program impact, and service delivery to make data-driven adjustments that improve patient health outcomes, enhance medication adherence, and ensure vital financial support.

[Patient Services Rep Analytics Dashboards](#)

Use the Patient Services Rep Analytics dashboards to gain insights into a specific program within Life Sciences. These dashboards help care agents track key performance indicators, analyze patient dropouts, monitor cases raised by patients, and understand how long cases remain open. It also provides detailed benefit information relevant to the program. This focused approach ensures care agents have the specific data needed to manage their assigned program effectively.

Program Lead Analytics Dashboards

Use the Program Lead Analytics dashboard to improve your Patient Support Programs (PSPs). Gain comprehensive insights into how patients are involved and how financial assistance works. For Life Sciences cloud, this tool enables program leads monitor consolidated patient engagement metrics and financial benefits across multiple programs, allowing them to quickly identify successes and challenges. Analyze patient adherence, program impact, and service delivery to make data-driven adjustments that improve patient health outcomes, enhance medication adherence, and ensure vital financial support.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Patient Engagement Dashboard for Program Leads

Monitor and visualize patient engagement metrics to gain insights into Patient Support Program (PSP) interaction, empowering program leads to customize interventions and provide targeted support. Use real-time patient engagement metrics to monitor low engagement or adherence, and personalize communication and follow-ups.

Payer and Benefits

Track key programs and patient metrics to optimize patient support. Monitor total programs, enrolled patients, and payer interactions to identify trends. Analyze financial assistance needs and benefit verification statuses to ensure patients receive the necessary support. Evaluate program effectiveness by understanding patient distribution by benefit verification status and payer efficiency.

Patient Engagement Dashboard for Program Leads

Monitor and visualize patient engagement metrics to gain insights into Patient Support Program (PSP) interaction, empowering program leads to customize interventions and provide targeted support. Use real-time patient engagement metrics to monitor low engagement or adherence, and personalize communication and follow-ups.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Filter the data in the Patient Engagement dashboard by region, patient support program, and time period to get personalized and targeted analysis.

- The KPIs section highlights Patient Support Program (PSP) performance using key metrics. Monitor total programs, patient enrollment, and assessment rates to gauge program reach and engagement. To assess recruitment effectiveness track patient response to interventions and calculate enrollment

rates.

- The Assessment Outcome section measures the effectiveness of patient care and success of treatments by tracking key performance indicators. Improve health outcomes, patient satisfaction, patient adherence rates, and patients' quality of life. Analyzing these KPIs helps organizations refine their products and services for a more patient-centric healthcare system.
- The Programs that Need Attention section highlights critical insights into life sciences programs. Identify programs that need immediate attention, benchmark successful initiatives by patient engagement, and delve into detailed program specifics. Make informed decisions and efficiently allocate resources to optimize program performance and accelerate progress.



Example A program lead can use the Patient Engagement dashboard to find patterns in how patients interact with and follow a specific program. By filtering the data by region and time, leads can pinpoint areas with low engagement and proactively implement targeted interventions, such as personalized communication campaigns or follow-up calls, to improve patient participation and treatment adherence.

Key Performance Indicators in Patient Engagement Dashboard

Learn the definitions of key metrics in the Patient Engagement dashboard.

Key Performance Indicators in Patient Engagement Dashboard

Learn the definitions of key metrics in the Patient Engagement dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Metric	description
Total Programs	Shows the overall reach and scope of your patient services by tracking the number of active programs. Use this metric to understand the your offerings and identify opportunities for expansion or consolidation.
Total Patients Enrolled	Indicates collective enrollment across all programs to gauge overall patient engagement. Use this figure to evaluate the effectiveness of your outreach strategies and allocate resources appropriately.
Patients Assessed	Determines the proportion of patients who have completed initial evaluations or assessments. Use this metric to track the efficiency of your intake

Metric	description
	processes and ensure timely patient care.
Patients Responded	Measures the number of patients who have engaged with interventions or communications. Use this metric to assess the effectiveness of patient outreach and adjust communication strategies for better engagement.
Enrollment Rate	Calculates the percentage of eligible patients who successfully enroll in your programs. Use this rate to evaluate recruitment effectiveness and optimize enrollment processes.
Assessment Outcome	Evaluates the results of patient assessments to determine the effectiveness of care and treatment plans. Use this metric to refine patient support strategies and improve health outcomes.
Health Outcome Improvement	Tracks enhancements in patient health status resulting from program participation. Measure this improvement to demonstrate the tangible impact of your interventions on patient well-being.
Patient Satisfaction	Evaluates patient contentment with the services and support received. Use satisfaction data to identify areas for improvement in service delivery and enhance the patient experience.
Patient Adherence Rate	Monitors the consistency with which patients follow their prescribed treatment plans or program guidelines.
Quality of Life Improvement	Shows the positive changes in patients' overall well-being and daily functioning. Use this metric to show the comprehensive benefits of your programs by tracking improvements in quality of life.
Programs That Need Attention	Identifies specific programs that exhibit lower performance or require immediate intervention. Prioritize resources and strategic adjustments for these programs to optimize their effectiveness.
Leading Programs by Patients	Identifies programs with the highest patient enrollment and engagement. Use this metric to analyze successful strategies and replicate best practices across other initiatives.

Metric	description
Program Details	Shows comprehensive information about individual programs to understand their specific objectives, patient demographics, and performance metrics. Use these details for in-depth program analysis and strategic decision-making.

Payer and Benefits

Track key programs and patient metrics to optimize patient support. Monitor total programs, enrolled patients, and payer interactions to identify trends. Analyze financial assistance needs and benefit verification statuses to ensure patients receive the necessary support. Evaluate program effectiveness by understanding patient distribution by benefit verification status and payer efficiency.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Filter the data in the Payer and Benefits dashboard by region, patient service program, and facility name to get personalized and targeted analysis.

- The KPIs section highlights key metrics such as total programs, total patients enrolled, total payers, patients that need financial assistance, and patients with verified benefits, providing a comprehensive overview of program performance and patient engagement.
- The Program Enrollment and Benefit section streamlines patient onboarding, improves financial access, ensures program eligibility, and forecasts capacity by monitoring patients by benefit verification status.
- The Payer Efficiency Analysis section is crucial for financial planning and negotiations. It includes Lead Payer by Number of Patients for identifying top insurance companies by patient volume, and Amount Coverage Analysis for detailing financial reimbursements.

[Key Performance Indicators in Payer and Benefits Dashboard](#)

Learn the definitions of key metrics in the Payer and Benefits dashboard.

Key Performance Indicators in Payer and Benefits Dashboard

Learn the definitions of key metrics in the Payer and Benefits dashboard.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Metric	description
Total Programs	Shows the overall reach and scope of your patient services by tracking the number of active programs. Use this metric to understand your offerings and identify opportunities for expansion or consolidation.
Total Patients Enrolled	Indicates collective enrollment across all programs to gauge overall patient engagement. Use this figure to evaluate the effectiveness of your outreach strategies and allocate resources appropriately.
Total Payers	Indicates the number of different payers involved in your patient's services. Use this metric to understand the diversity of your financial support network and identify key relationships.
Patients that Need Financial Assistance	Shows the number of patients that require financial support for their treatment or program participation. Use this metric to assess the demand for financial aid and allocate resources effectively.
Patients with Benefits Verified	Calculates the percentage of eligible patients whose benefits are successfully verified. Use this rate to evaluate the efficiency of your benefit verification processes and ensure timely access to care.
Program Enrollment and Benefits Verification	Evaluates the integrated process of patient enrollment and benefits verification to ensure onboarding. Use this metric to refine intake procedures and improve patient access to programs.
Leading Programs by Patients	Tracks programs with the highest patient enrollment to identify successful initiatives. Use this metric to understand which programs are most effective at attracting and retaining patients.
Patients by Benefit Verification Status	Shows the distribution of patients based on their benefit verification status. Use this data to identify bottlenecks in the verification process and enhance patient support.

Metric	description
Payer Efficiency Analysis	Monitors the effectiveness and promptness of different payers in processing benefits and reimbursements.
Lead Payer by Number of Patients	Identifies the top insurance companies or payers by the volume of patients they cover within your programs. Use this metric to understand key financial partnerships and resource allocation.
Amount Coverage Analysis	Shows the financial reimbursements and coverage provided by different payers for services rendered. Use this metric to analyze and prioritize the resources to ensure adequate funding for programs.
Program Details	Shows comprehensive information about individual programs to understand their specific objectives, patient demographics, and performance metrics. Use these details for in-depth program analysis and strategic decision-making.

Patient Services Rep Analytics Dashboards

Use the Patient Services Rep Analytics dashboards to gain insights into a specific program within Life Sciences. These dashboards help care agents track key performance indicators, analyze patient dropouts, monitor cases raised by patients, and understand how long cases remain open. It also provides detailed benefit information relevant to the program. This focused approach ensures care agents have the specific data needed to manage their assigned program effectively.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Patient Engagement Dashboard for Patient Services Rep

Monitor and visualize patient engagement metrics to gain insights into Patient Support and Program (PSP) interaction, empowering patient services reps to customize interventions and provide targeted support. Use real-time patient engagement metrics to monitoring low engagement or adherence, and using tools to personalize communication and follow-ups.

Payer and Benefits

Track essential patient metrics such as total enrolled patients, assessed patients, and response rates. Monitor retention rates, patient adherence, and churn trends to identify at-risk patients. Analyze case

status, resolution times, and case aging to optimize workflow and ensure timely patient support.

Patient Engagement Dashboard for Patient Services Rep

Monitor and visualize patient engagement metrics to gain insights into Patient Support and Program (PSP) interaction, empowering patient services reps to customize interventions and provide targeted support. Use real-time patient engagement metrics to monitoring low engagement or adherence, and using tools to personalize communication and follow-ups.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Filter the data in the Patient Engagement dashboard by region, patient support program, and facility name to get personalized and targeted analysis.

- The KPI section highlights critical metrics for evaluating the program's effectiveness and reach. It tracks total patients enrolled to show overall uptake and patients assessed to monitor initial progress. The Patients responded section indicates treatment efficacy, while the retention rate measures long-term engagement and patient satisfaction.
- The Patient Adherence and Churn Analysis section helps manage patients by identifying issues with treatment or diagnosis if patients don't improve. It also tracks how often patients stop treatment, providing insights into their satisfaction and challenges, with the goal of keeping them engaged and improving their health.
- The Case Status and Resolution Analysis section shows how cases are handled by looking at their current status and how long they take to resolve. This helps quickly find problems and check how well patient support works. Knowing where cases get stuck and how long they take to finish helps teams improve service and use resources better.



Example A patients services rep can use the Patient Adherence and Churn Analysis section to monitor a specific patient's adherence to their treatment plan. If the dashboard shows a patient's adherence declining or indicates they're at risk of dropping out, the patients services rep can proactively reach out to provide personalized support, address challenges, and reinforce the importance of continued participation, ultimately improving patient outcomes and retention.

Key Performance Indicators in Patient Engagement Dashboard

Learn the definitions of key metrics in the Patient Engagement dashboard for Patient Services Rep.

Key Performance Indicators in Patient Engagement Dashboard

Learn the definitions of key metrics in the Patient Engagement dashboard for Patient Services Rep.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Metric	description
Total Patients Enrolled	Indicates the total number of patients who join a program to understand its overall reach and adoption. Use this metric to gauge the program's popularity and the effectiveness of enrollment efforts.
Patients Assessed	Determines the proportion of patients who complete initial evaluations. Use this metric to track the assessment processes and ensure timely onboarding of patient's into the programs.
Patients Responded	Measures the number of patients who engage with or respond to program interventions. Use this metric to evaluate the effectiveness of communication strategies and patient engagement initiatives.
Retention Rate	Calculates the percentage of patients who continue to actively participate in the program. Improve patient outcomes by focusing on strategies that enhance long-term patient engagement and satisfaction.
Patients Not Responding to Assessment	Identifies the number of patients who complete their assessments. Reach out to these patients to encourage participation and ensure they receive the necessary evaluations.
Patients Churn Trend	Observes patterns and changes in patient dropout rates over specific periods. Understand the factors contributing to patient churn to implement preventative measures and improve retention.
Open Cases	Tracks the number of active patient-related issues that are still awaiting resolution. Prioritize and manage these cases efficiently to ensure timely support and address patient needs.
Avg. Resolution Time (Days)	Measures the average time it takes to resolve a patient-related case. Reduce resolution time to enhance patient satisfaction and improve the

Metric	description
	efficiency of support services.
Case Status Distribution	Visualizes the breakdown of cases by their current status (for example, pending, in progress, resolved). Allocate resources effectively by understanding the workload across different case stages.
Case Aging Analysis (Days)	Monitors how long open cases have been awaiting resolution. Address older cases promptly to prevent prolonged patient issues and ensure consistent support.
Program Details	Shows comprehensive information for each specific program, including its objectives, patient demographics, and performance metrics. Use these details for in-depth program evaluation and strategic planning.

Payer and Benefits

Track essential patient metrics such as total enrolled patients, assessed patients, and response rates. Monitor retention rates, patient adherence, and churn trends to identify at-risk patients. Analyze case status, resolution times, and case aging to optimize workflow and ensure timely patient support.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Filter the data in the Payer and Benefits dashboard by region, patient support program, and facility name to get personalized and targeted analysis.

- The KPI section highlights key metrics across program participation, patient enrollment, payer engagement, and financial assistance. These dashboards provide crucial insights into the operational efficiency and patient support aspects of life sciences initiatives.
- The Benefits Covered and Verified section details the benefits verification process by region and status. This helps to track and manage benefit inquiries, including total verifications, processing times, and real-time updates.
- The Payer Utilization section features two key dashboards: Lead Payers by Patients and Amount Coverage Analysis. The first helps identify major payers, while the second offers insights around the amount which the insurers cover.

[Key Performance Indicators in Payer and Benefits Dashboard](#)

Learn the definitions of key metrics in the Payer and Benefits dashboard for patient services reps.

Key Performance Indicators in Payer and Benefits Dashboard

Learn the definitions of key metrics in the Payer and Benefits dashboard for patient services reps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions of Life Sciences Cloud

Metric	description
Total Programs	Indicates the overall reach and scope of your patient support by tracking the number of active programs. Use this metric to understand the breadth of your offerings and identify opportunities for expansion or consolidation.
Total Patients Enrolled	Shows the collective enrollment across all programs for the overall patient engagement. Use this figure to evaluate the effectiveness of your outreach strategies and allocate resources appropriately.
Total Payers	Determines the number of different payers involved in your patient's support. Use this metric to understand the diversity of your financial support network and identify key relationships.
Patients that Need Financial Assistance	Measures the number of patients requiring financial support for their treatment or program participation. Use this metric to assess the demand for financial aid and allocate resources effectively.
Patients with Benefits Verified	Calculates the percentage of eligible patients whose benefits have been successfully verified. Leverage this rate to evaluate the efficiency of your benefit verification processes and ensure timely access to care.
Program Enrollment and Benefits Verification	Evaluates the integrated process of patient enrollment and benefits verification to ensure seamless onboarding. Use this metric to refine intake procedures and improve patient access to programs.

Metric	description
Leading Programs by Patients	Tracks programs with the highest patient enrollment to identify successful initiatives. Use this metric to understand which programs are most effective at attracting and retaining patients.
Patients by Benefit Verification Status	Shows the distribution of patients based on their benefit verification status. Use this data to identify bottlenecks in the verification process and enhance patient support.
Payer Efficiency Analysis	Monitors the effectiveness and promptness of different insurers in processing benefits and reimbursements. Improve financial operations by optimizing interactions with key payers.
Lead Payer by Number of Patients	Identifies the top insurance companies or payers by the volume of patients they cover within your programs. Assess this metric to understand key financial partnerships and resource allocation.
Amount Coverage Analysis	Determines the financial reimbursements and coverage provided by different payers for support rendered. Prioritize resources by analyzing this data to ensure adequate funding for programs.
Program Details	Shows comprehensive information about individual programs to understand their specific objectives, patient demographics, and performance metrics. Use these details for in-depth program analysis and strategic decision-making.

Set Up Pharmacy Benefits Verification

Gain quick access to patient care and verify benefit coverage details. Patient services representatives can use a streamlined process to assist patients in getting an accurate summary of their pharmacy benefits. Representatives can use a guided flow to initiate a verification request to payers and receive a response for pharmacy coverage details, including coverage status, co-pay, co-insurance, and deductibles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Pharmacy benefits verification plays a crucial role in patient services programs. Verifying patients' benefits is key to improving patient drug access and adherence, and enhances patient outcomes, especially for chronic illnesses. Drug manufacturers, providers, and pharmacies can use the process to promptly prescribe and administer the right medication to patients.

The process of checking real-time pharmacy benefits involves:

Pharmacy Benefits Verification Request

Representatives can use a guided flow to seamlessly verify pharmacy coverage benefits by initiating a verification request for clearing houses or payors. Pharmacy Benefits Verification supports two types of verification requests.

- Electronic Verification Request
- Manual Verification Request

The verification request includes information about the patient, practitioner, drug, and pharmacy. Each request is created for a single member plan, and representatives can generate multiple requests for different drugs under any member plan available for a patient. If the member plan isn't created for the patient, representatives can easily create member plans directly from a care program enrollee record page.

Pharmacy Benefits Verification Response

For a manual verification request, representatives can manually connect with payors or clearing houses to get detailed coverage information, including coverage status, co-pay, co-insurance, and deductibles. However, for electronic verification requests, Salesforce integrates with the third-party clearing houses or payors through MuleSoft. The clearing houses then further connect with the payors and get the patients' benefit details. This immediate access to accurate benefit summaries helps representatives generate and share benefit packages with patients.

Generate Call Script and Benefit Summary with Einstein Generative AI

To accelerate the verification of pharmacy benefits, representatives can generate an AI-powered call script. This call script includes all the missing coverage fields and plays a key role in getting missing information from payors. Additionally, representatives can also generate a concise summary of the patients' pharmacy benefits.

Pharmacy Benefits Verification Data Model

Pharmacy Benefits Verification uses a data model that's FHIR-CARIN and NCPDP aligned to store the data and make the data model interoperable.

Org Setup for Pharmacy Benefits Verification

Before you use Pharmacy Benefits Verification, you must prepare your org by completing tasks such as assigning permission sets to your users, configuring setup entities, enabling history tracking, and adding picklist values to certain objects.

Benefits Verification Requests

Understand the two types of pharmacy benefits verification requests that your representative can create to verify patients' benefits details.

Data Management for Pharmacy Benefits Verification

To help your users get the most out of the Pharmacy Benefits Verification, configure your org with the necessary data. For patients, admins must set up the data that's automatically populated in the guided flow. For pharmacies, purchaser plans, member plans, products, care program, and related objects, admins must set up the data that's further used in creating the verification request.

Add Pharmacy Benefits Verification to the Care Program Enrollee Record Page

Enable case managers to verify the pharmacy benefits coverage details by adding the **PharmacyBenefitsVerification** Flexcard to the Care Program Enrollee record page.

Pharmacy Benefits Reverification

Use Pharmacy Benefits Reverification to periodically check a patient's eligibility for pharmacy benefits under their health insurance. Reverification ensures that patients continue to get the right coverage for their prescription medications without any breaks.

Set Up Pharmacy Benefits Verification Flows

Enable your patient service representatives to initiate an electronic verification request on behalf of a care program enrollee. Learn how the salesforce flow updates an electronic verification request status to time out. Understand the prerequisites before making any customizations to this flow.

Einstein Generative AI for Pharmacy Benefits Verification

Harness the power of Einstein generative AI to streamline patient services rep's daily tasks. Pharmacy Benefits Verification uses Einstein generative AI-based flows to generate a call script and a benefits summary.

Use Pharmacy Benefits Verification

Pharmacy Benefits Verification improves patient access and adherence to care by helping representatives to start the patient's medication early. Help caregivers and patients reduce the time and effort required to determine the covered pharmacy benefits. Patient services representatives can assist patients by getting a clear picture of their pharmacy benefits coverage such as co-pay, co-insurance, and other coverage details. They can also generate a concise summary of patient's pharmacy benefit details using Einstein's Generative AI auto-launched flows.

Pharmacy Benefits Verification Data Model

Pharmacy Benefits Verification uses a data model that's FHIR-CARIN and NCPDP aligned to store the data and make the data model interoperable.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Here's the set of objects pharmacy benefits verification requests and responses use, and the level of

access that your users need for those objects.

 **Note** The table covers base objects first, followed by objects specific to this feature.

Object	Purpose	Access
Account	Business Accounts represent organizations involved with your business and Person Accounts represent patients.	<ul style="list-style-type: none"> • Create • Read • Edit
Contact	Represents a contact, which is a person associated with an account.	<ul style="list-style-type: none"> • Create • Read • Edit
Contact Point Address	Represents a contact's billing or shipping address, which is associated with an individual or person account.	<ul style="list-style-type: none"> • Create • Read • Edit
Contact Point Phone	Represents a contact's phone number, which is associated with an individual or person account.	<ul style="list-style-type: none"> • Create • Read • Edit
Member Plan	Represents the details of the insurance coverage for a member or subscriber.	<ul style="list-style-type: none"> • Create • Read • Edit • Delete
Purchaser Plan	Represents the payer plan that a purchaser makes available to its members and members' dependents.	<ul style="list-style-type: none"> • Create • Read • Edit
Medication	Represents detailed information of different medications.	<ul style="list-style-type: none"> • Create • Read • Edit
Medication Request	Represents a request or order for the supply of a medication.	<ul style="list-style-type: none"> • Create

Object	Purpose	Access
		<ul style="list-style-type: none"> • Read • Edit
Healthcare Provider	Represents business-level details of the healthcare organization or the prescriber.	<ul style="list-style-type: none"> • Create • Read • Edit
Healthcare Provider NPI	Represents identifiers from the National Provider Identifier that are assigned to every facility and licensed practitioner in the United States.	<ul style="list-style-type: none"> • Create • Read • Edit • Delete
Identifier	Represents the identifier information for a healthcare provider.	<ul style="list-style-type: none"> • Create • Read • Edit
Code Set	Represents various life sciences defined codes in the context of their systems and versions of those systems. These codes are used in all sorts of digital records.	<ul style="list-style-type: none"> • Create • Read • Edit • Delete
Unit of Measure	Represents the units of measure for products and care program products.	<ul style="list-style-type: none"> • Create • Read • Edit
Care Program	Represents a set of activities, such as a patient therapy, financial assistance, education, wellness, or fitness plan, offered to participants by an employer or insurer.	<ul style="list-style-type: none"> • Create • Read • Edit
Care Program Enrollee	Represents a patient enrolled in a care program.	<ul style="list-style-type: none"> • Create • Read • Edit

Object	Purpose	Access
Care Program Product	Represents the affiliation between a care program and a care program product, care program provider, or both.	<ul style="list-style-type: none"> • Create • Read • Edit
Product	Represents a drug or a medication that's prescribed to a care program enrollee.	<ul style="list-style-type: none"> • Create • Read • Edit
Care Benefit Verify Request	Represents a request for the verification of pharmacy benefits.	<ul style="list-style-type: none"> • Create • Read • Edit • Delete
Coverage Benefit	Represents the pharmacy benefits provided to a patient covered by a purchaser's plan.	<ul style="list-style-type: none"> • Create • Read • Edit
Coverage Benefit Item	Represents a specific service covered by the insurance plan.	<ul style="list-style-type: none"> • Create • Read • Edit
Coverage Benefit Item Limit	Represents the details associated with a specific benefit as it relates to expenditures, limits, coverage levels, eligibility, and exclusion.	<ul style="list-style-type: none"> • Create • Read • Edit

Org Setup for Pharmacy Benefits Verification

Before you use Pharmacy Benefits Verification, you must prepare your org by completing tasks such as assigning permission sets to your users, configuring setup entities, enabling history tracking, and adding picklist values to certain objects.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

[Permission Sets for Pharmacy Benefits Verification Users](#)

To get started with Pharmacy Benefits Verification, assign the appropriate permission sets to your users.

[Field-Level Security Configuration for Pharmacy Benefits Verification](#)

To verify pharmacy benefits, users need access to certain fields that aren't available to them by default.

[Configure Care Limit Type](#)

To use Pharmacy Benefits Verification, you must define care limit types such as co-pay, co-insurance, and many more to determine the pharmacy benefits that are available to a patient.

[Configure Units of Measure](#)

Configure the units of measure for the medications that a healthcare practitioner prescribes to a patient.

[Configure a Code Set](#)

In pharmacy benefits verification, code sets define the metrics that explain the patients' pharmacy benefits coverage status code. For example, covered, not covered, or covered with restrictions.

[Activate Picklist Value for Coverage Benefit](#)

Activate the Pharmacy picklist value for all the pharmacy benefits verification requests.

[Enable History Tracking for Coverage Benefit Line Item](#)

To track the historical changes in pharmacy benefit item limits, enable history tracking for the Applied Limit field in the Coverage Benefit Line Item object.

Permission Sets for Pharmacy Benefits Verification Users

To get started with Pharmacy Benefits Verification, assign the appropriate permission sets to your users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

Permissions

Permission Set	Purpose
Access Patient Support Programs as a Case Agent	Give patient services representatives access to patient support programs console app.
Access Patient Support Program as Program Lead	Give program leads access to patient support programs.

Permission Set	Purpose
Access Patient Support Programs Using Einstein	Expose patient support programs console app powered by Einstein generative AI.
Context Service Admin	Enables the user to perform CRUD operations on context entities/objects.
Context Service Runtime	Enables the user to perform read operation on context entities/objects.
Data Pipelines Base User	Provides foundational permissions to use Salesforce Data Pipelines, including accessing Data Manager and managing data processing engine definitions.
Health Cloud Foundation	Assigns read access to additional Health Cloud platform capabilities.
Health Cloud Starter	Provides access to Health Cloud Starter features.
Manage Pharmacy Benefits Verification	Give users access to the Pharmacy Benefits Verification program and its features.
Prompt Template Manager	Manage prompt templates using Prompt Builder and run them using generative AI features.
Prompt Template User	Run prompt templates using generative AI features.

See Also

[Assign Permission Sets](#)

Field-Level Security Configuration for Pharmacy Benefits Verification

To verify pharmacy benefits, users need access to certain fields that aren't available to them by default.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

You must manually grant your users access to these fields.

Object	Field
Care Benefit Verify Request	Authorized Prescription
	Coverage Benefit

Object	Field
	Original Prescription
	Prescriber
	Provider
	Request Date
	Status
	Status Reason
Coverage Benefit	Care Benefit Verify Request
	Final Coverage Status Code
Medication Request	Fill Duration Unit
	Fill Quantity Unit
	Initial Fill Duration
	Initial Fill Quantity

See Also

[Set Field-Level Security for a Field on All Profiles](#)

Configure Care Limit Type

To use Pharmacy Benefits Verification, you must define care limit types such as co-pay, co-insurance, and many more to determine the pharmacy benefits that are available to a patient.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a care limit type:	Customize Application
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The pharmacy benefits that we see in the verification response have to be set up as new care limit types

Name	Limit Type	Description
CoPay	copay	Amount to be collected from the policyholder to satisfy a per prescription copay.

Name	Limit Type	Description
CoInsurance	coinsurance	Amount to be collected from a policyholder to satisfy a per prescription coinsurance.
Deductibles	deductibles	Amount to be collected from the policyholder before the insurance starts covering costs for covered services.
DeductiblesApplied	deductiblesapplied	Amount of out-of-pocket expenses to be counted towards satisfying the annual deductible, which contributes to reaching the threshold for insurance coverage to begin.
DeductiblesMet	deductiblesmet	Represents the full deductible amount that the policyholder has paid, after which the insurance begins to share in the cost of covered services as per the terms of the plan.
InfusionCoInsurance	infusioncoinsurance	Amount to be collected from the policyholder to satisfy a per infusion therapy coinsurance.
InfusionCoPay	infusioncopay	Amount to be collected from the policyholder to satisfy a per infusion therapy copay.
Ltm	ltm	Represents the maximum amount an insurance policy will pay for covered services over the lifetime of the policyholder. After this limit is reached, the policyholder is responsible for all additional costs.
OopMax	oopmax	Represents the maximum amount a policyholder is required to pay out-of-pocket for covered healthcare services in a plan year. After this limit is reached, the insurance company covers 100% of the costs for

Name	Limit Type	Description
		covered services for the remainder of the plan year.
OopMaxMet	oopmaxmet	Represents the maximum amount a policyholder has paid from out-of-pocket for covered healthcare services in a plan year. After this stage all additional costs for covered services are now fully covered by the insurance for the rest of the plan year.
OutOfPocketApplied	outofpocketapplied	Represents the maximum amount a policyholder is required to pay out-of-pocket for covered healthcare services in a plan year. After this limit is reached, the insurance company covers 100% of the costs for covered services for the remainder of the plan year.
RemainingLtm	remainingltm	Represents the amount of coverage still available under an insurance policy for covered services over the lifetime of the policyholder, after deductibles and previous claims have been accounted for.
Total	total	Represents the amount of coverage provided by the insurance policy for all covered services within a specified period or for the policyholder's lifetime.

- From Setup, in the Quick Find box, enter *Care Limit Type*, and then under Benefits Verification, select **Care Limit Type**.
- Click **New Care Limit Type**.
- Enter the label.
- Enter *CoPay* as the name and *copay* as the limit type.
- In Metric Type, select the unit by which the benefit limit is measured.



Note Select **Money** if the limit is on the amount that is billed. If the limit can't be measured in

terms of money, time, or amount, select **Text** so that the user can type a description.

6. Repeat the steps for all the care limit types listed in the table.



Note In the limit type field, save all the care limit types exactly as is. These limit types are required to initiate the verification request and to view the current benefits in the benefits summary section. Based on the requirements of the organization, admins can additionally customize the benefits summary section and use any limit types from the [Health Information Knowledgebase](#).

Configure Units of Measure

Configure the units of measure for the medications that a healthcare practitioner prescribes to a patient.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a unit of measure type:	Manage Pharmacy Benefits Verification permission set
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To create a unit of measure, you must first configure the picklist value for the Type field. Picklist values for Type aren't provided by default. Based on the requirements of the organization, admins must add picklist values for the field in Object Manager.

1. Configure the picklist value for the Type field on the Unit of Measure object.
 - a. From the object management settings for Unit of Measure object, go to Fields and Relationship.
 - b. Select **Type**.
 - c. In the Picklist Values section, click **New**.
 - d. Add the required values for the picklist, and save your changes.
For instance, add a type value *Weight* for weight-related units of measure, add *Amount* for amount-related units of measure, or add *Volume* for volume-related units of measure.
2. Create Unit of Measure records.
 - a. From the App Launcher, find and select **Unit of Measure**.
 - b. Click **New**.
 - c. Enter a name and *mg* as unit code for the unit of measure.
 - d. Select **Weight** as the type.
 - e. Save your changes.
 - f. Repeat these steps to add *mL*, and *Each* unit code values.

To successfully create an electronic verification request, you must include mg, mL, and Each as the unit of measures.

Configure a Code Set

In pharmacy benefits verification, code sets define the metrics that explain the patients' pharmacy benefits coverage status code. For example, covered, not covered, or covered with restrictions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a code set a record:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

To create code set records, you must first configure the picklist values for the Code Set Type field. Picklist values for the Code Set Type field aren't provided by default. Based on the requirements of the organization, admins must add picklist values for the field in Object Manager.

1. Configure the picklist values for the Code Set Type field on the Code Set object.
 - a. From the object management settings for code set object, go to Fields and Relationships.
 - b. Select **Code Set Type**.
 - c. In the Picklist Values section, click **New**.
 - d. Enter *Coverage Status Code*.
 - e. Save your changes.
2. Create code set records.
 - a. From the App Launcher, find and select **Code Sets**.
 - b. Click **New**.
 - c. Enter a name and code.
For instance, add a code value *Covered*, *Not Covered*, or *Covered with Restrictions* for the Coverage Status Code type code sets.
 - d. In Code Set Type, select **Coverage Status Code**.
 - e. Select **Active**, and save your changes.

Activate Picklist Value for Coverage Benefit

Activate the Pharmacy picklist value for all the pharmacy benefits verification requests.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To edit coverage benefit:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

You must include picklist values for these Salesforce objects and their fields.

1. From the object management settings for coverage benefit object, go to Fields and Relationships.
2. Select **Coverage Type**.
3. In the Inactive Values section, for Pharmacy, click **Activate**.

See Also

[Salesforce Help: Add or Edit Picklist Values](#)

Enable History Tracking for Coverage Benefit Line Item

To track the historical changes in pharmacy benefit item limits, enable history tracking for the Applied Limit field in the Coverage Benefit Line Item object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To enable history tracking:

Customize Application

1. From Setup, in the Object Manager, enter *Coverage Benefit Item Limit*, and select it.
2. On the Fields and Relationships tab, select **Set History Tracking**.
3. Select **Applied Limit**, and save your changes.

See Also

[Field History Tracking](#)

Benefits Verification Requests

Understand the two types of pharmacy benefits verification requests that your representative can create to verify patients' benefits details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Manual Verification Request

In pharmacy benefits verification, a patient services representative can initiate a manual verification request by directly contacting payors to get the patient's coverage details. After they receive the coverage information, the representative can manually enter the response into the benefits summary section of the verification request.

Electronic Verification Request

Reduce the time it takes your representatives to connect with payors by using an electronic benefits verification request. This request automates the verification process through electronic exchange of coverage information with payors through clearing houses.

Manual Verification Request

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REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Electronic Verification Request

Reduce the time it takes your representatives to connect with payors by using an electronic benefits verification request. This request automates the verification process through electronic exchange of coverage information with payors through clearing houses.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Use pharmacy benefits verification to integrate your Salesforce org with clearing houses or payors by using integration with MuleSoft. The integration happens through Patient Services Benefits Application, a MuleSoft outbound application. When your representative initiates an electronic verification request, an FHIR (Fast Healthcare Interoperability Resources) compliant RTPBC (Real-Time Pharmacy Benefit Check) Request is sent to a third-party clearing house through MuleSoft. Similarly, the clearing house sends the FHIR compliant RTPBC Claim Response to Salesforce org through MuleSoft.

Built-In MuleSoft Integration for Electronic Verification

Integrate Health and Life Sciences Cloud with third-party clearing houses by using FHIR-CARIN and NCPDP aligned verification requests, industry-specific APIs, and integration application deployed on MuleSoft. Use this integration to accelerate the end-to-end benefits verification process.

Set Up Electronic Verification Request

Set up electronic verification request for your reps to verify patient's benefits electronically by using External Client app, MuleSoft integration, and Integration Definitions.

Electronic Verification Scenarios

Explore the different scenarios that occur when your representative raises an electronic verification request. Also, understand the different scenarios of failure and their resolution.

Built-In MuleSoft Integration for Electronic Verification

Integrate Health and Life Sciences Cloud with third-party clearing houses by using FHIR-CARIN and NCPDP aligned verification requests, industry-specific APIs, and integration application deployed on MuleSoft. Use this integration to accelerate the end-to-end benefits verification process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Set up and use in-built integration to create seamless user experiences. Life Sciences's comprehensive solution gives you:

- Predefined Integration Procedures, Omnistudio Data Mappers, and Apex classes for sending verification requests and retrieving coverage details from clearing houses.
- Prebuilt integration application, built using the FHIR standards, that enable Health and Life Sciences Cloud to interact with clearing houses and payor systems. These out-of-the-box integration applications help your representatives by reducing the time and cost to go live.
- Use the Patient Services Benefits application for Health and Life Sciences Cloud to integrate your Salesforce org with the clearing houses. With this integration in place, your representatives can send the verification requests electronically in an FHIR-CARIN and NCPDP API format where the verification goes to the clearing house's FHIR endpoint through MuleSoft outbound application.

Set Up Electronic Verification Request

Set up electronic verification request for your reps to verify patient's benefits electronically by using External Client app, MuleSoft integration, and Integration Definitions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Grant Read Access to Integration Provider Definition Object

Pharmacy Benefits Verification uses Data Consumption Framework that enables your patient services reps to access data from external systems without leaving Salesforce while verifying benefits electronically. Grant read access on the Integration Provider Definitions object to your patient services reps profile.

To grant read access to the Integration Provider Definitions object, see [Edit Object Permissions in Profiles](#).

Create an External Client App

Use an external client app to connect your Salesforce org with the external application.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To create an external client app:

Health Cloud Starter (for Life Sciences Cloud) OR
Health Cloud Foundation (for Health Cloud)
permission set

AND

Manage Pharmacy Benefits Verification permission set

To connect your Salesforce org with external third-party clearing houses, [create a local external client app](#).

MuleSoft Direct Integration

To address end-to-end business needs, integrate Salesforce apps with external systems by using

Integration Solutions with MuleSoft Direct.

[Get Started with MuleSoft Direct for Life Sciences Cloud.](#)

! **Important** The third-party clearing house that you're trying to integrate with must be FHIR-compliant, and should expose FHIR endpoints for sending the RTPBC Request Bundle and receiving RTPBC Claim Response.

Create an Integration Definition

Use Integration Definitions to quickly set up integrations with different external endpoints by using a low code interface. Create integration definitions for Apex classes that are used to integrate third-party systems. The Integration Procedures of the provider process call these integration definitions instead of directly pointing to the Apex classes.

REQUIRED EDITIONS

USER PERMISSIONS NEEDED

To create an integration definition:

Health Cloud Starter (for Life Sciences Cloud) OR
Health Cloud Foundation (for Health Cloud)
permission set

AND

Manage Pharmacy Benefits Verification permission set

Before you create an integration definition, make sure you copy the named credential that's auto created after you deploy the Patient Services Benefits application during MuleSoft Direct integration. Find the named credential in the {MuleSoft Application Name}_psp_benefits_verification_api_impl_Life Sciences format.

1. From Setup, in the Quick Find box, enter *Integration Definitions*, and then select **Integration Definitions**.
2. Click **New**.
3. For Type, select **Apex Defined**.
4. For Name, enter *CHAPI*.
5. For Developer Name, enter *CHAPI*.
6. For Apex class, select **lifesciences_psp_pbv_flows.ClearingHouseIntegrationService**.
7. For Attribute Value, enter the named credential that you copied from Setup.

See Also

- [Create an Integration Definition](#)
- [Data Consumption Framework](#)

Electronic Verification Scenarios

Explore the different scenarios that occur when your representative raises an electronic verification request. Also, understand the different scenarios of failure and their resolution.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

When your representative initiates an electronic verification request, an FHIR compliant RTBPC request is sent to the clearing house through MuleSoft. The clearing house sends an acknowledgment as soon as it receives the request. MuleSoft then updates the status of the care benefit verification request to Acknowledged.

The clearing house then connects with various payors and gets the FHIR compliant RTPBC response. This response includes the patient's coverage details such as coverage benefits, coverage benefit items, and coverage benefit item limits. When the clearing house sends the response back to Salesforce through MuleSoft, the status gets updated to Verified, and the relevant benefits summary gets updated with the coverage details.

Different Scenarios for an Electronic Verification Request

Here are the different scenarios and statuses of care benefit verify request that an electronic verification request may go through.

SCENARIO	STATUS	STATUS REASON	Resolution	Can Retry Electronic verification?	Can Retry Manual verification?	Can create a new Electronic request?	Can create a new manual request?
A verification request is created but can't be sent to the clearing house. This can happen due to multiple	Error	Request could not be sent	Check network connection, connectivity with MuleSoft, or connectivity with clearing house.	Yes	Yes	No	No

SCENARIO	STATUS	STATUS REASON	Resolution	Can Retry Electronic verification?	Can Retry Manual verification?	Can create a new Electronic request?	Can create a new manual request?
reasons, such as MuleSoft or clearing house being unresponsive, or a network issue.							
MuleSoft rejects the application due to invalid credentials .	Error	Bad credential	Review your MuleSoft login credentials and ensure the username and password are correct.	Yes	Yes	No	No
The clearing house rejects the application due to invalid credentials .	Error	Bad credential	Review your clearing house login credentials and ensure the username and password are correct.	Yes	Yes	No	No
MuleSoft can't send the request to the	Error	Bad request input	Specify the correct values for the fields highlighted.	Yes	Yes	No	No

SCENARIO	STATUS	STATUS REASON	Resolution	Can Retry Electronic verification?	Can Retry Manual verification?	Can create a new Electronic request?	Can create a new manual request?
clearing house because of the invalid request.			Send in response from the clearing house.				
MuleSoft can't process the response from clearing house.	Error	Response could not be processed	Review all the coverage details, coverage detail items, coverage detail item limit, and care benefit verification requests records.	Yes	Yes	No	No
The clearing house can't process the request and rejects it.	Rejected	Clearing house rejected the request	Contact the clearing house to find out the reason for the rejection.	No	No	Yes	Yes
The clearing house can't send the response within 3 hours of sending	Timed Out	Request timed out	Try contacting the clearing house to check whether the response	No	No	Yes	Yes

SCENARIO	STATUS	STATUS REASON	Resolution	Can Retry Electronic verification?	Can Retry Manual verification?	Can create a new Electronic request?	Can create a new manual request?
the request.			didn't come from payors or there were connectivity issues. You can also customize the request time out in your org.				

See Also

[Get Started with MuleSoft Direct for Life Sciences Cloud](#)

Data Management for Pharmacy Benefits Verification

To help your users get the most out of the Pharmacy Benefits Verification, configure your org with the necessary data. For patients, admins must set up the data that's automatically populated in the guided flow. For pharmacies, purchaser plans, member plans, products, care program, and related objects, admins must set up the data that's further used in creating the verification request.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

[Add a Patient, Identifier, Contact Point Phone, Contact Point Email, and Contact Point Address](#)

In pharmacy benefits verification, patients are represented as a person account. Create a person account to represent the patient, its identifier, contact point phone, contact point email , and contact point address. Identifiers are required for each patient to get their patient ID.

[Add a Practitioner, Identifier, and Healthcare Provider NPI](#)

In the Health and Life Sciences industry, practitioners play a critical role by providing essential healthcare to patients. In a pharmacy benefits verification request, patient services representatives provide the name and an ID of the practitioner who takes care of patients. Pharmacy Benefits Verification uses a numeric ID to specify a practitioner. In the US, this ID is the National Provider Identifier (NPI), but you can substitute the ID used in your country or region.

Add a Payor, Identifier, Contact Point Phone, Contact Point Email and Contact Point Address

In pharmacy benefits verification, payors are represented as a business account. Create a business account to represent the payor, its identifier, contact point phone, contact point email, and contact point address. Identifiers are required for each payor to get their payor ID.

Add a Pharmacy, and Identifier

Pharmacies provide patient access to essential medications and healthcare products. In the pharmacy benefits verification request, agents provide the preferred pharmacy name that the pharmacy benefits must be verified for. Pharmacy Benefits Verification uses a numeric ID to specify a pharmacy.

Add a Purchaser Plan

Create a payer plan that a purchaser makes available to its members and the dependents of the members.

Add a Member Plan and Identifier

Create a member plan to represent the details of the insurance coverage for a member or a subscriber.

Add a Product, Code Set, and Code Set Bundle

Pharmacy Benefits Verification uses Product as a base object to represent the drug or medicine that's prescribed to the patient. Representataives verify the pharmacy benefits for each drug prescribed to the patient.

Addition of Care Program and Related Records

Pharmacy Benefits Verification uses care program as the backbone of its operation. At its core, pharmacy benefits verification uses care programs, care program enrollees, and care program products.

Add a Patient, Identifier, Contact Point Phone, Contact Point Email, and Contact Point Address

In pharmacy benefits verification, patients are represented as a person account. Create a person account to represent the patient, its identifier, contact point phone, contact point email , and contact point address. Identifiers are required for each patient to get their patient ID.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create an account:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)

USER PERMISSIONS NEEDED

	permission set
To create identifier records:	Manage Pharmacy Benefits Verification permission set
To create contact point address, contact point email, and contact point phone records:	Manage Pharmacy Benefits Verification permission set

Before you create a person account, make sure you add Gender and Birthdate fields on the Person Account page layout. And before you create contact point phone, contact point email, and contact point address, make sure you add them to the related list of Person Account page layout.

1. From the App Launcher, find and select **Accounts**.
2. Click **New**.
3. Select **Person Account** as the record type, and click **Next**.
4. Enter the first and last name.
5. Enter the birthdate.
6. Enter the gender.
7. Enter the phone.
8. Save your changes.
9. Create an Identifier.
 - a. In the Identifiers related list, click **New**.
 - b. In ID Value, enter the value specific to your country or region.
 - c. Enter the source system.
 - d. Save your changes.
10. Create a Contact Point Address.
 - a. In the Contact Point Addresses related list, click **New**.
 - b. Enter the name.
 - c. Enter the city.
 - d. Enter the state.
 - e. Enter the country.
 - f. Enter the postal code.
 - g. Save your changes.
11. Create a Contact Point Phone.
 - a. In the Contact Point Phone related list, click **New**.
 - b. Enter the phone type.
 - c. Enter the telephone number.
 - d. Save your changes.
12. Create a Contact Point Email.
 - a. In the Contact Point Email related list, click **New**.
 - b. Enter the email address.
 - c. Select Is Primary if this is a primary contact point email.
 - d. Save your changes.

See Also

[Person Accounts](#)

[Add a Related List to an Object](#)

[Set Up Person Accounts to Represent People in Life Sciences Cloud](#)

Add a Practitioner, Identifier, and Healthcare Provider NPI

In the Health and Life Sciences industry, practitioners play a critical role by providing essential healthcare to patients. In a pharmacy benefits verification request, patient services representatives provide the name and an ID of the practitioner who takes care of patients. Pharmacy Benefits Verification uses a numeric ID to specify a practitioner. In the US, this ID is the National Provider Identifier (NPI), but you can substitute the ID used in your country or region.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create account records:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

To create identifier records:

Manage Pharmacy Benefits Verification permission
set

To create healthcare provider npi records:

Health Cloud Starter (for Life Sciences Cloud) OR
Health Cloud Foundation (for Health Cloud)
permission set

Before you create a person account, make sure you add Email field on the Person Account page layout.

Create a related list of identifiers for person account records. In pharmacy benefits verification, each practitioner record requires an identifier. This identifier populates the practitioner ID field in the verification request. Create a healthcare provider NPI to represent identifiers from the National Provider Identifier that are assigned to each practitioner.

In pharmacy benefits verification, practitioners are represented as person account records.

1. From the App Launcher, find and select **Accounts**.

2. Click **New**.
3. Select **Person Account** as the record type, and click **Next**.
4. Enter the first and last name.
5. Enter the birthdate, email, and phone.
6. Select the gender.
7. Save your changes.
8. In the Identifiers related list, click **New**.
9. In ID Value, enter the practitioner's national provider ID specific to your country or region.
10. Enter the source system.
For example, Infinitus.
11. Save your changes.
12. Create a Healthcare Provider NPI.
 - a. From the App Launcher, find and select **Healthcare Provider NPIs**.
 - b. Click **New**.
 - c. Enter a name.
 - d. Select an NPI Type.
 - e. In Account, select the person account that you created for the practitioner earlier.
 - f. Save your changes.
13. [Create Records for Healthcare Practitioners](#)

See Also

[Person Accounts](#)

Add a Payor, Identifier, Contact Point Phone, Contact Point Email and Contact Point Address

In pharmacy benefits verification, payors are represented as a business account. Create a business account to represent the payor, its identifier, contact point phone, contact point email, and contact point address. Identifiers are required for each payor to get their payor ID.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create account records:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

USER PERMISSIONS NEEDED

To create identifier records:	Manage Pharmacy Benefits Verification permission set
To create contact point address, contact point email, and contact point phone records:	Manage Pharmacy Benefits Verification permission set

Before you create contact point phone, contact point email, and contact point address, make sure you add them to the related list of Account page layout.

1. From the App Launcher, find and select **Accounts**.
2. Click **New**.
3. Select **Business Account** as the record type, and click **Next**.
4. Enter the payor name.
5. Select the type for the payor.
6. Select **Active**.
7. Enter the phone.
8. Save your changes.
9. Create an Identifier.
 - a. In the Identifiers related list, click **New**.
 - b. In ID Value, enter the value specific to your country or region.
 - c. Enter the source system.
 - d. Save your changes.
10. Create a Contact Point Address.
 - a. In the Contact Point Addresses related list, click **New**.
 - b. Enter the name.
 - c. Enter the city.
 - d. Enter the state.
 - e. Enter the country.
 - f. Enter the postal code.
 - g. Save your changes.
11. Create a Contact Point Phone.
 - a. In the Contact Point Phone related list, click **New**.
 - b. Enter the phone type.
 - c. Enter the telephone number.
 - d. Save your changes.
12. Create a Contact Point Email.
 - a. In the Contact Point Email related list, click **New**.
 - b. Enter the email address.
 - c. Select **Is Primary** if this is a primary contact point email.
 - d. Save your changes.

See Also

[Add a Related List to an Object](#)

Add a Pharmacy, and Identifier

Pharmacies provide patient access to essential medications and healthcare products. In the pharmacy benefits verification request, agents provide the preferred pharmacy name that the pharmacy benefits must be verified for. Pharmacy Benefits Verification uses a numeric ID to specify a pharmacy.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create account records:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

To create identifier records:

Manage Pharmacy Benefits Verification permission
set

Create a related list of identifiers for business account records. In pharmacy benefits verification, identifiers are required for each pharmacy record to populate the pharmacy ID in the verification request.

In pharmacy benefits verification, pharmacies are represented as business account records.

1. Create a pharmacy.
 - a. From the App Launcher, find and select **Accounts**.
 - b. Click **New**.
 - c. Select **Business Account** as the record type, and click **Next**.
 - d. Enter the pharmacy name.
 - e. Select the type for the pharmacy.
 - f. Select **Active**.
 - g. Enter the phone.
 - h. Save your changes.
2. Create an identifier.
 - a. From the App Launcher, find and select **Identifiers**.
 - b. Click **New**.
 - c. In parent record, select **Account**, and enter the account that you created for the pharmacy.
 - d. In ID Value, enter the value specific to your country or region.
 - e. Enter the source system.

- f. Save your changes.

See Also

[Add a Related List to an Object](#)

Add a Purchaser Plan

Create a payer plan that a purchaser makes available to its members and the dependents of the members.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create purchaser plan records:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

Before you create purchaser plans, create business account records for payors.

1. From the App Launcher, find and select **Purchaser Plans**.
2. Click **New**.
3. Enter a name for the purchaser plan.
4. In Payer, select the business account record of the payor.
5. Save your changes.

Add a Member Plan and Identifier

Create a member plan to represent the details of the insurance coverage for a member or a subscriber.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create member plan records:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

Before you create member plans, create person account records for patients.

1. Create a Member Plan.
 - a. From the App Launcher, find and select **Member Plans**.
 - b. Click **New**.
 - c. Enter a name for the member plan.
 - d. In Member, select a patient.
 - e. Enter the member number.
 - f. Enter the group number.
 - g. In Plan, select the purchaser plan that the patient purchased.
 - h. In Payer, select the account for the payer organization.
 - i. Enter the date that the member plan is effective from. If necessary, enter the date that the plan is effective until.
 - j. Select **Active** as the status.
 - k. In Primary/Secondary/Tertiary, select a value to indicate whether this plan is the primary, secondary, or tertiary plan.
 - l. In Relationship to Subscriber, select a value.
 - m. Save your changes.
2. Create an identifier.
 - a. From the App Launcher, find and select **Identifiers**.
 - b. Click **New**.
 - c. In the parent record, select **Member Plan**, and enter the member plan that you created for the patient.
 - d. In ID Value, enter the value specific to your country or region.
 - e. Enter the source system.
 - f. Save your changes.

Add a Product, Code Set, and Code Set Bundle

Pharmacy Benefits Verification uses Product as a base object to represent the drug or medicine that's prescribed to the patient. Representatives verify the pharmacy benefits for each drug prescribed to the patient.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create product records:

Health Cloud Starter (for Life Sciences Cloud)
permission set

OR

Health Cloud Foundation (for Health Cloud)
permission set

To create code set and code set bundle records:

Manage Pharmacy Benefits Verification permission
set

1. Create a Product.

- a. From the App Launcher, find and select **Products**.
- b. Click **New**.
- c. Enter the product name, product code, and a description.
- d. Select **Active**.
- e. Save your changes.

2. Create a Code Set.

- a. From the App Launcher, find and select **Code Sets**.
- b. Click **New**.
- c. Enter the name, source system.
- d. In the code, enter the product code that you created.
- e. Select **Active**.
- f. Save your changes.

3. Create a Code Set Bundle.

- a. From the App Launcher, find and select **Code Set Bundles**.
- b. Click **New**.
- c. Enter the name, source system, and a code.
- d. In code set 1, enter the code set that you created for the product in context.
- e. Save your changes.

See Also

[Code Sets and Code Set Bundles](#)

Addition of Care Program and Related Records

Pharmacy Benefits Verification uses care program as the backbone of its operation. At its core, pharmacy benefits verification uses care programs, care program enrollees, and care program products.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Use care programs to manage a variety of patient-centric programs designed for patient's treatment. Care Program Enrollee represents a patient enrolled in a care program. Care Program Product represents a specific medication associated with the care program.

 **Note** You must associate the care program product with the same care program that the care program enrollee is enrolled to.

Let's look at an example where Charles Green is a patient who has diabetes and is prescribed to use the GlucoMagic medicine. First, create a Diabetes Management care program record. Then, create a care program enrollee record to enroll Charles Green in the Diabetes Management care program. Create a care program product record for GlucoMagic medicine, which is associated with the Diabetes Management care program.

To set up a care program, care program enrollee, and care program product, see [Create a Care Program and Add Related Records](#).

Add Pharmacy Benefits Verification to the Care Program Enrollee Record Page

Enable case managers to verify the pharmacy benefits coverage details by adding the **PharmacyBenefitsVerification** Flexcard to the Care Program Enrollee record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To modify pages: Customize Application

To add flexcards: OmniStudio Admin

AND

OmniStudio User

AND

USER PERMISSIONS NEEDED

OmniStudio User

To use pharmacy benefits verification, [install Omnistudio](#) in your Salesforce org.

1. From the App Launcher, find and select **Care Program Enrollee**.
2. Click a care program enrollee record.
3. Click **Setup**, and select **Edit Page**.
4. Place the Flexcard component at an appropriate spot on the page layout.



Tip We recommend you to create a dedicated tab on your page for this Flexcard and place it inside that tab.

5. Select the Flexcard component that you placed on the page.
6. In the component properties panel, in Flexcard Name, select **PharmacyBenefitsVerification**.
7. Save your work.

See Also

[Understand Flexcards](#)

Pharmacy Benefits Reverification

Use Pharmacy Benefits Reverification to periodically check a patient's eligibility for pharmacy benefits under their health insurance. Reverification ensures that patients continue to get the right coverage for their prescription medications without any breaks.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

With Pharmacy Benefits Reverification, insurance providers can save considerable time and resources when reconfirming pharmacy benefits for patients in care programs, especially at year-end when insurance plans and coverage frequently undergo changes.

Reverifying pharmacy benefits helps control costs for both insurance providers and patients by making sure the coverage is necessary and used correctly. It also prevents potential fraud or misuse of these benefits. Regular reverification helps achieve the goal of providing efficient, cost-effective, and suitable drug therapy to patients.

[How Automation Streamlines Pharmacy Benefits Reverification](#)

With the reverification automation process, your reps can reverify patient benefits as needed. The

automated reverification process significantly reduces manual intervention, ensuring accurate, timely updates and comprehensive communication of patient benefits details between patient services reps and healthcare professionals.

Understand the Reverification Request Generation

Pharmacy Benefits Reverification uses two flows and one data processing engine to generate a new copy of Care Benefits Verify Request records.

Assign Permissions to View Reverification Automation Status

Provide your program leads and patient services reps the permissions to view the automation status of the reverification of the care benefit verify request and care program enrollee record pages.

Set Up an Email Address for Automated Process User

Configure process automation settings by adding an email address to send emails to payors and healthcare professionals from the orchestrator.

Set Field-Level Security for Pharmacy Benefits Reverification

To use the full functionality of the Care Benefit Verify Request Data Processing Engine (DPE), you must provide field-level access to specific fields for the Analytics Cloud Integration user profile.

Enable Data Pipelines for Pharmacy Benefits Reverification

To run the Data Processing Engine for pharmacy benefits reverification, enable Data Pipelines. With Data Pipelines you can query and compute data that's available in your Salesforce org.

Clone and Activate the Care Benefit Verify Requests Data Processing Engine Definition

Before your program leads can use the Initiate Benefit Reverification flow in your org, you must create a clone of the existing Data Processing Engine definition and activate it. The flow uses the cloned definition to copy care benefit verify request records for benefits reverification.

Activate the Payor Benefits Assessment Omniscript

Help payors fill the assessment by activating the Omniscript that includes a list of questions for the payors to get the patient's missing benefits details.

Pharmacy Benefits Reverification Flows

Pharmacy benefits reverification uses flows to initiate electronic or manual verification requests, validate the essential benefits in the payor response, and share a summary of patient's benefits details with the healthcare practitioner.

Add Real-Time Reverification Updates to Record Pages

Configure the PharmacyBenefitsVerificationCareBenefitVerifyRequestOverallStatus Flexcard on the care program enrollee and care benefit verify request record pages to provide an at-a-glance view of the entire benefits reverification process and its detailed steps. Minimize manual intervention by showing real-time updates on relevant record pages.

How Automation Streamlines Pharmacy Benefits Reverification

With the reverification automation process, your reps can reverify patient benefits as needed. The automated reverification process significantly reduces manual intervention, ensuring accurate, timely updates and comprehensive communication of patient benefits details between patient services reps and healthcare professionals.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

When a patient's record is updated and verified, the patient's benefits are automatically reverified. You can check the status of the reverification process on the Care Benefit Verify Request record page and the Care Program Enrolee record page.

If the verification mode is electronic, an email with a benefits summary is sent to the patient's healthcare professional after the verification.

If essential details are missing or the verification mode is manual, the patient's insurance provider receives an email requesting the missing details. After receiving the payor response, the summary of benefits is shared with the patient's healthcare professional.

See Also

[Automate Complex Processes with Orchestrations](#)

[Build a Flow](#)

Understand the Reverification Request Generation

Pharmacy Benefits Reverification uses two flows and one data processing engine to generate a new copy of Care Benefits Verify Request records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

Before your program leads can use the Initiate Benefit Reverification flow in your org, you must clone the existing Data Processing Engine definition and activate it. The flow uses the cloned definition to copy Care Benefit Verify Request records for benefits reverification. To clone the existing flows, refer [Clone and Activate the Care Benefit Verify Requests Data Processing Engine Definition](#) and [Clone, Activate, and Configure Benefit Reverification Flows](#).

Here's an overview of how your cloned Data Processing Engine definition and the flows work together.

Step	Outcome
A program lead runs the Initiate Benefit Reverification flow.	The flow initiates a benefit reverification request based on data provided by the flow user. The user enters the date range and status of the Care Benefit Verify Requests to reverify.
The Initiate Benefit Reverification flow triggers the Care Benefit Verify Requests Data Processing Engine definition.	<p>The definition identifies existing care benefit verify request records within the date range and with the status specified by the Initiate Benefit Reverification flow user. The definition creates a copy of a care benefit verify request if the record isn't referenced as a parent request in any other record.</p> <p>The definition assigns a Copy status to the new record. The Copy status triggers the Copy Care Benefit Verify Request Fields flow.</p>
Records copied by the Data Processing Engine definition trigger the Copy Care Benefit Verify Request Fields flow.	<p>The flow verifies that the care benefit verify requests to copy have a status of Copy, have a Related Care Benefit Verify Request value, and have no Authorized Prescription, Original Prescription, or Coverage Benefit values. For each record that meets these conditions, the flow creates copies of the original record's medication requests, coverage benefit, coverage benefit items, and coverage benefit item limits. It then populates the Authorized Prescription, Original Prescription, and Coverage Benefit fields in the copied record.</p> <ul style="list-style-type: none"> • If the flow succeeds, it updates the status of the new care benefit verify request records to Pending. • If the flow fails, for example because of a network connection issue, it updates the status of the new care benefit verify request records to Error. The error status indicates that the copy process is incomplete because the flow didn't create any records or update the Authorized Prescription, Original Prescription, and Coverage Benefit fields in the copied record.

Step	Outcome
<p>A program lead passes copied care benefit verify request records along to patient services reps for processing. If any records don't get copied, the program lead manually triggers the Copy Care Benefit Verify Request Fields flow for those records.</p>	<p>Program leads can share a list view of the pending care benefit verify request records with patient services reps, or they can assign pending requests directly to patient services reps. To reverify the benefits, patient services reps access the shared list or the pending records assigned to them. Patient services reps can update the pharmacy benefits coverage details for each of these records.</p> <p>To trigger the copy flow manually for care benefit verify request records with a status of Error, change the status from Error to Copy.</p>

Assign Permissions to View Reverification Automation Status

Provide your program leads and patient services reps the permissions to view the automation status of the reverification of the care benefit verify request and care program enrollee record pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

USER PERMISSIONS NEEDED

To manage pharmacy benefits reverification requests:

Manage Pharmacy Benefits Verification permission set

AND

Access Patient Support Programs as a Program Lead permission set

1. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Select the profile associated with program lead.
3. Click **Edit**.
4. Under Administrative Permissions, select **View Orchestrations in Automation App**.
5. Under Standard Object Permissions, provide View All Records access to Flow Orchestration Instance Related Obs.

6. Save your changes.
7. Similarly, provide these permissions to the patient services rep.

Set Up an Email Address for Automated Process User

Configure process automation settings by adding an email address to send emails to payors and healthcare professionals from the orchestrator.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

USER PERMISSIONS NEEDED

To modify organization-wide addresses: **Modify All Data**

Make sure that you [set up organization-wide Email addresses](#) and select the purpose as User Selection, or User Selection and Default No-Reply Address.

1. From Setup, in the Quick Find box, enter *Process Automation Settings*, and then select **Process Automation Settings**.
2. In Automated Process User Email Address, enter the organization-wide email address that you created.
3. Save your changes.

See Also

[Organization-Wide Email Addresses](#)

Set Field-Level Security for Pharmacy Benefits Reverification

To use the full functionality of the Care Benefit Verify Request Data Processing Engine (DPE), you must provide field-level access to specific fields for the Analytics Cloud Integration user profile.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To set field-level security

Manage Profiles and Permission Sets

AND

Customize Application

To use DPE, the Analytics Cloud Integration User profile must be available in your org.

1. In Setup, go to Object Manager.
2. Find and select the Care Benefit Verify Request object, and then click **Fields & Relationships**.
3. For each Care Benefit Verify Request field in the table, update the field-level security by selecting Visible and deselecting Read-Only for the Analytics Cloud Integration User profile.
Then repeat these steps for the Care Program Enrollee object.

Object	Field
Care Benefit Verify Request	Authorized Prescription
	Benefit Category Code
	Billable Period End Date
	Billable Period Start Date
	Care Program Enrollee
	Case
	Created Date
	Member Plan
	Original Prescription
	Payer
	Prescriber
	Priority Code
	Provider
	Related Care Benefit Verify Request
	Requested Date
	Requested By
	Requester
	Status

Object	Field
Care Program Enrollee	Care Program
	Status

- Set the Member Plan object access to Public Read/Write or set up Member Plan object sharing settings for the users that use Pharmacy Benefits Reverification.

See Also

[Salesforce Help: Sharing Settings](#)

Enable Data Pipelines for Pharmacy Benefits Reverification

To run the Data Processing Engine for pharmacy benefits reverification, enable Data Pipelines. With Data Pipelines you can query and compute data that's available in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

USER PERMISSIONS NEEDED

To enable data pipelines

Customize Application

AND

Data Pipelines Base User

- From Setup, in the Quick Find box, enter *Data Pipelines*, and then select **Get Started**.
- Enable data pipelines.

See Also

[Data Processing Engine](#)

Clone and Activate the Care Benefit Verify Requests Data Processing Engine Definition

Before your program leads can use the Initiate Benefit Reverification flow in your org, you must create a clone of the existing Data Processing Engine definition and activate it. The flow uses the cloned definition to copy care benefit verify request records for benefits reverification.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

USER PERMISSIONS NEEDED

To create and save data processing engines:

Customize Application

AND

Data Pipelines Base User

To use Data Processing Engine, the Analytics Cloud Integration User profile must be available in your org.

1. From Setup, in the Quick Find box, enter *Data Processing Engine*, and then select **Data Processing Engine**.
2. Open the Clone Care Benefit Verify Requests definition.
3. Click **Save As**.
4. Leave the default Name and API Name, and then save your work.
Don't change the default Name and API Name. Changing these values prevents status notifications from being sent to the user.
5. Open and activate the definition you created.

Activate the Payor Benefits Assessment Omniscript

Help payors fill the assessment by activating the Omniscript that includes a list of questions for the payors to get the patient's missing benefits details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

USER PERMISSIONS NEEDED

To configure omniscrypt

Omnistudio Admin permission set

Before you activate the Payor Benefits Assessment omniscript, deploy the Benefits Reverification Assessment template. See [Set Up Agentforce for Pharmacy Benefits Reverification](#).

1. From the App Launcher, find and select **Omniscripts**.
2. From the Omniscript list view, select **Payor Benefits Assessment**.
3. Click **Activate**, and then save your changes.

See Also

[Omniscripts](#)

Pharmacy Benefits Reverification Flows

Pharmacy benefits reverification uses flows to initiate electronic or manual verification requests, validate the essential benefits in the payor response, and share a summary of patient's benefits details with the healthcare practitioner.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

[Understanding Pharmacy Benefits Reverification Flows](#)

Automate various tasks in Pharmacy Benefits Reverification using pre-built flows. Customize these flows to run patient support programs according to your requirements.

[Clone, Activate, and Configure Benefit Reverification Flows](#)

Pharmacy Benefits Reverification uses various flows to automate your tasks. Clone and activate the default flows. To send assessments to patients and payors, update the Experience Cloud site URL in the Reverify Benefits orchestrator flow.

Understanding Pharmacy Benefits Reverification Flows

Automate various tasks in Pharmacy Benefits Reverification using pre-built flows. Customize these flows to run patient support programs according to your requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT

Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

Flows in Pharmacy Benefits Reverification

Flow	Description
Initiate Benefit Reverification	Initiates a benefit reverification request based on data provided by the flow user.
Copy Care Benefit Verify Request Fields	Copies the authorized prescription, original prescription, and coverage benefit from a source care benefit verify request to a target care benefit verify request.
Wait for Care Benefit Verify Request Status Change	Waits for a care benefit verify request status change from Pending Confirmation to Ready For Verification.
Process Electronic Benefits Verification	Sends an Electronic Benefit Verification request to a clearing house, waits for the response from MuleSoft, and updates the status of the Care Benefit Verification Request record.
Update Coverage Details	Update the benefits coverage details in the care benefit verify request and related records based on the payor's response.
Validate Essential Care Limit Types	Validates if all the essential care limit types are present in the payor response.
Send Email To Payor	Sends an email to the payor with an assessment URL to get patient's latest benefits details.
Send Benefits Summary Email	Sends a benefits summary email to the healthcare professional with the patient's latest benefit details.
Get Benefits Details using Context Service	Gets the benefits verification details using context service.
Publish Care Benefit Verify Request Status Change Event	Publishes a care benefit verify request status change event when the status of the care benefit verify request record is updated.
Reverify Benefits	Reverifies patient's personal and healthcare details, then proceeds with either an electronic or manual benefits reverification. After validating the payor response, the flow shares the patient's benefits summary with the healthcare professional.

See Also

- [Automate Complex Processes with Orchestrations](#)
- [Build a Flow](#)
- [Agentforce for Pharmacy Benefits Reverification](#)
- [Pharmacy Benefits Reverification Flows](#)

Clone, Activate, and Configure Benefit Reverification Flows

Pharmacy Benefits Reverification uses various flows to automate your tasks. Clone and activate the default flows. To send assessments to patients and payors, update the Experience Cloud site URL in the Reverify Benefits orchestrator flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

USER PERMISSIONS NEEDED

To activate or deactivate a flow: Manage Flows

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
 2. Verify that the Initiate Benefit Reverification flow is active. If it isn't active, activate it.
 3. Clone the Copy Care Benefit Verify Request Fields flow, and then activate it.
-  **Note** In Object Manager, check the care program page layout to make sure that your program leads can see the Reverify Pharmacy Benefits action. If the Reverify Pharmacy Benefits action isn't visible to your users, drag it from Mobile & Lightning Actions to the care program page layout.
4. Similarly, clone and activate all the flows listed.
 - a. Reverify Benefits
 - b. Publish Care Benefit Verify Request Status Change Event
 - c. Process Electronic Benefits Verification
 - d. Update Coverage Details
 - e. Wait for Care Benefit Verify Request Status Change
 5. Update the Experience Cloud Site URL in the Reverify Benefits flow orchestrator.
 - a. From Setup, in the Quick Find box, enter *Life Sciences* for life sciences cloud or *Health Cloud* for health cloud, and then select **Patient Support Program Settings**.
 - b. Copy the Experience Cloud Site URL.
 - c. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
 - d. Select **Reverify Benefits**.
 - e. In flow builder, click **Toggle Toolbox**, and then click the **Assessment URL** variable.
 - f. Under Default Value, paste the Experience Cloud Site URL that you copied.

- g. Click **Done**.
 - h. Save and activate the flow.

See Also

Build a Flow

Automate Complex Processes with Orchestrations

Agentforce for Pharmacy Benefits Reverification

Set Up Agentforce for Pharmacy Benefits Reverification

Pharmacy Benefits Reverification Flows

Add Real-Time Reverification Updates to Record Pages

Configure the PharmacyBenefitsVerificationCareBenefitVerifyRequestOverallStatus Flexcard on the care program enrollee and care benefit verify request record pages to provide an at-a-glance view of the entire benefits reverification process and its detailed steps. Minimize manual intervention by showing real-time updates on relevant record pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

USER PERMISSIONS NEEDED

To modify pages: [Customize Application](#)

To add flexcards:

1

eBenefitVerifyReq

Before you add the PharmacyBenefitsVerificationCareBenefitVerifyRequestOverallStatus Flexcard on the care benefit verify request and care program enrollee record pages, make sure that you [set up Agentforce for pharmacy benefits reverification](#).

When you add the PharmacyBenefitsVerificationCareBenefitVerifyRequestOverallStatus flexcard on the care program enrollee record page, the flexcard by default displays the overall status of the latest benefits verification request created for that care program enrollee. In case, there is no benefits verification

request present, the flexcard card is not displayed.

1. From the App Launcher, find and select **Care Benefit Verify Request**.
2. Click a care benefit verify request record.
3. Click **Setup**, and select **Edit Page**.
4. Place the Flexcard component at an appropriate spot on the page layout.



Tip We recommend you to create a dedicated tab on your page for this Flexcard and place it on that tab.

5. Select the Flexcard component that you placed on the page.
6. In the component properties panel, in Flexcard Name, find and select **PharmacyBenefitsVerificationCareBenefitVerifyRequestOverallStatus**.
7. Click **Add Filter**.
8. Select the **Advanced** filter type.
9. In Field, click **Select**.
10. On the Select Field window, from the dropdown, select **Record**, then select **Related Care Benefit Verify Request**, then select **Care Benefit Verify Request Name**, and then click **Done**.
11. Select **Not Equal** as the operator and keep value as blank, and then click **Done**.
12. Save your changes, and activate the page.
13. Similarly, add **PharmacyBenefitsVerificationCareBenefitVerifyRequestOverallStatus** Flexcard on care program enrollee record page.
Don't add any filters for care program enrollee record page.
14. Save your changes, and activate the page.

See Also

[Understand Flexcards](#)

Set Up Pharmacy Benefits Verification Flows

Enable your patient service representatives to initiate an electronic verification request on behalf of a care program enrollee. Learn how the salesforce flow updates an electronic verification request status to time out. Understand the prerequisites before making any customizations to this flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

[Pharmacy Benefits Verification Flow Template](#)

Pharmacy Benefits Verification ships a flow template that you must clone and activate to update the care benefit verify request status.

[Clone and Activate the Pharmacy Benefits Verification Flow](#)

Streamline the process of updating the status of an electronic benefits verification request by cloning and activating the verification flow by using the Update Care Benefit Verify Request Status flow

template.

Customize the Request Timeout

Each electronic verification request gets timed out after three hours of waiting for a response from the last modified date of a care benefit verification request. You can customize the request timeout based on your business needs.

Pharmacy Benefits Verification Flow Template

Pharmacy Benefits Verification ships a flow template that you must clone and activate to update the care benefit verify request status.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Update Care Benefit Verify Request Status Flow Template

To update the request status to time out, you must clone and activate a new flow using Update Care Benefit Verify Request Status flow template. This flow updates the request status to time out if no response is received from MuleSoft within three hours of the Last Modified Date.

Clone and Activate the Pharmacy Benefits Verification Flow

Streamline the process of updating the status of an electronic benefits verification request by cloning and activating the verification flow by using the Update Care Benefit Verify Request Status flow template.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To open, edit, or create a flow in Flow Builder: Manage Flow

1. From Setup, in the Quick Find box, enter *Flows* and select it.
2. Open the Update Care Benefit Verify Request Status flow template.
3. In the Flow Builder, click **Save as New Flow**.
4. Enter a flow label and a description.
5. Save and activate the new flow.

Customize the Request Timeout

Each electronic verification request gets timed out after three hours of waiting for a response from the last modified date of a care benefit verification request. You can customize the request timeout based on your business needs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To open, edit, or create a flow in Flow Builder: Manage Flow

Create and activate a flow by using the Update Care Benefit Verify Request Status flow template.

1. From Setup, in the Quick Find box, enter *Flows* and select it.
2. Open the flow that you created by using Update Care Benefit Verify Request Status flow template.
3. In the Flow Builder, under the Start element, next to Scheduled Paths, click **Edit**.
4. Under Configure Scheduled Paths, click **Check Timed Out**.
5. Update the offset number and offset options.
6. Click **Save as New Version**, and then click **Activate**.

Einstein Generative AI for Pharmacy Benefits Verification

Harness the power of Einstein generative AI to streamline patient services rep's daily tasks. Pharmacy Benefits Verification uses Einstein generative AI-based flows to generate a call script and a benefits summary.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

Timely care and communication are crucial in a patient's healthcare journey. Life Sciences Cloud's embedded generative AI capabilities help reps to summarize pharmacy benefits faster and easily generate a concise summary that can be easily shared with a single click. Alleviate information search for the list of coverage fields and identify the missing coverage details with an AI-powered call script. Use our built-in prompt templates to improve efficiency, accuracy, and communication in the verification journey, leading to better outcomes.



Warning This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

Turn On Einstein for Patient Support Program

Give your patient services reps access to the Einstein generative AI by turning on Einstein for patient support programs.

Context Definition Understanding and Enablement

Pharmacy Benefits Verification uses Einstein's generative AI to generate a benefits summary and a call script summary. These summaries are generated through an auto-launched flow, which uses context service to fetch the data. Before context service fetches the data, you must turn on context definition.

Workflow of Call Script and Pharmacy Benefits Summary

Pharmacy Benefits Verification includes two flows that use Einstein Generative AI to generate a call script and a pharmacy benefits summary. Understand the process by using Flow Builder, Context Services, Prompt Template, and Embedded AI. Learn how these capabilities work together, the key steps in benefits summary and script generation, and the prerequisites before making any customizations.

Turn On Einstein for Patient Support Program

Give your patient services reps access to the Einstein generative AI by turning on Einstein for patient support programs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To enable Einstein AI

Customize Application AND Access Patient Support Programs Using Einstein (for Life Sciences Cloud)

OR

Customize Application (for Health Cloud)

-
1. Turn On Einstein Generative AI:
 - a. From Setup, in the Quick Find box, find and select **Einstein Setup**.
 - b. Turn on Einstein.
 2. From Setup, in the Quick Find box, enter *Life Sciences* (for Life Sciences Cloud), or *Health Cloud*

(for Health Cloud). Then select **Patient Support Program Settings**.

3. Turn on Einstein for Patient Support Program.

See Also

[Salesforce Help: Set Up Einstein Generative AI](#)

Context Definition Understanding and Enablement

Pharmacy Benefits Verification uses Einstein's generative AI to generate a benefits summary and a call script summary. These summaries are generated through an auto-launched flow, which uses context service to fetch the data. Before context service fetches the data, you must turn on context definition.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

Pharmacy Benefits Verification comes with two predefined context definitions, `PharmacyBenefitsSummary` and `CallScriptForPharmacyBenefits` that enable the efficient retrieval and consumption of data in generating pharmacy benefits and call script summary.

! **Important** You can't edit or remove `PharmacyBenefitsSummary` and `CallScriptForPharmacyBenefits` context definitions. To make any changes, create a copy of these context definitions by clicking **Save as**.

PharmacyBenefitsSummary

The `PharmacyBenefitsSummary` context definition hydrates data for benefits summary generation. The nodes and attributes in this structure are mapped to the Care Benefit Verify Request, Coverage Benefit, Coverage Benefit Item, and Coverage Benefit Item Limit objects.

CallScriptForPharmacyBenefits

The `CallScriptForPharmacyBenefits` context definition hydrates data for call script summary generation. The nodes and attributes in this structure are mapped to the Care Benefit Verify Request, Coverage Benefit, Coverage Benefit Item, and Coverage Benefit Item Limit objects.

Turn On Context Service

To turn on context services, see [Turn On Context Service](#).

See Also

[Salesforce Help: Context Service](#)

Workflow of Call Script and Pharmacy Benefits Summary

Pharmacy Benefits Verification includes two flows that use Einstein Generative AI to generate a call script and a pharmacy benefits summary. Understand the process by using Flow Builder, Context Services, Prompt Template, and Embedded AI. Learn how these capabilities work together, the key steps in benefits summary and script generation, and the prerequisites before making any customizations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

[Capabilities for Call Script and Benefits Summary Generation](#)

Understand the capabilities that are used to generate call script and pharmacy benefits summary.

[Key Steps to Generate Call Script](#)

Explore how the different components fit together to generate the call script. Use Einstein Embedded AI to trigger a Salesforce flow that uses invocable action to map data into a suitable format. Use Context Service to hydrate the data related to call script, and pass the information into process automation tools. Create a prompt template to include specific instructions for generating a call script.

[Key Steps to Generate Pharmacy Benefits Summary](#)

Explore how the different components fit together to generate the benefits summary. Use Einstein Embedded AI to trigger a Salesforce flow that uses invocable action to map data into a suitable format. Use Context Service to hydrate the data related to pharmacy benefits summary, and pass the information into process automation tools. Create a prompt template to include specific instructions for generating a summary.

Capabilities for Call Script and Benefits Summary Generation

Understand the capabilities that are used to generate call script and pharmacy benefits summary.

- **Einstein Embedded AI:** Einstein Embedded AI integrates intelligent features directly into Salesforce workflows, providing predictive analytics, automated insights, and personalized recommendations to enhance decision-making and efficiency for all users.
- **Flow Builder:** Flow Builder is a declarative tool for building complex workflows. Elements in a flow can run various actions, such as aggregate data, create or update records, and assign values to resources. See [Flow Builder](#).
- **Invocable Actions:** Use Invocable Actions to create reusable actions or methods that can be invoked from process builders, flows, or even external applications via REST API calls.
- **Context Service:** Use Context Service to retrieve and consume information in tools such as Flows. Context Service comprises context definitions, which are a structured set of data required to execute a

- process. Pharmacy Benefits Verification has predefined context definitions called `PharmacyBenefitsSummary` and `CallScriptForPharmacyBenefits` that are used in benefits summary and call script generation. See [Context Service](#).
- Einstein Generative AI: Einstein Generative AI uses advanced models to generate human-like text and content, enabling dynamic content creation, automated responses, and improved customer interactions within Salesforce.
 - Prompt Template: Prompt Template is a reusable prompt that includes placeholders for specific details about the context in which it's being used. After you fill the placeholders with relevant data, you can use this prompt template to connect with Large Language Models (LLM) to perform specific tasks such as creating a summary or sending an email. See [Create a Prompt Template](#)

 **Warning** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

Key Steps to Generate Call Script

Explore how the different components fit together to generate the call script. Use Einstein Embedded AI to trigger a Salesforce flow that uses invocable action to map data into a suitable format. Use Context Service to hydrate the data related to call script, and pass the information into process automation tools. Create a prompt template to include specific instructions for generating a call script.

Review the key steps in the call script generation process built by using the predefined context definitions, invocable actions, and a screen flow.

1. After initiating the benefits verification request, reps can generate the call script with just a click of a button.
2. On any care program enrollee record page, under Pharmacy Benefits Verification tab, click the **Generate Call Script** to launch a `Generate Call Script` screen flow.
3. To retrieve all the information related to a call script, the flow invokes the `Ls Commercial Context Data Provider` Invocable action, which uses data from the `CallScriptForPharmacyBenefits` context definition. The benefits data that the context service returns is used in subsequent steps.
4. The flow then invokes another invocable action, called `Serialize Apex Records To Stringified JSON` to serialize records returned by apex class into Stringified JSON.
5. At the end, the flow invokes another invocable action, `careProgramCallScriptGeneration` that calls `Summarize Call Script` prompt template. The output from the prompt template is further passed to a Large Language Model (LLM), generates the required text. The final text returned by LLM is shown to users on the screen flow as a call script.

 **Note Info:** By default, the Summarize Call Script prompt template uses OpenAI GPT 4 Turbo model. You can't edit or remove the Summarize Call Script prompt template. To make changes to the template, open the Summarize Call Script prompt template from Setup, and create a copy by clicking **Save as**.

 **Warning** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

See Also

- [Salesforce Help: Standard Prompt Templates](#)
- [Salesforce Help: Changing LLM Configurations](#)

Key Steps to Generate Pharmacy Benefits Summary

Explore how the different components fit together to generate the benefits summary. Use Einstein Embedded AI to trigger a Salesforce flow that uses invocable action to map data into a suitable format. Use Context Service to hydrate the data related to pharmacy benefits summary, and pass the information into process automation tools. Create a prompt template to include specific instructions for generating a summary.

Review the key steps in the benefits summary generation process built by using the predefined context definitions, invocable actions, and a screen flow.

1. After initiating the benefits verification request, reps can generate the pharmacy benefits summary with just a click of a button.
2. On any care program enrollee record page, under Pharmacy Benefits Verification tab, click the **Generate Summary** button to launch a `Generate Benefits Summary` screen flow.
3. To retrieve all the information related to a benefits summary, the flow invokes the `Ls Commercial Context Data Provider` Invocable action which takes data from `PharmacyBenefitsSummary` context definition. The benefits data that the context service returns is used in subsequent steps.
4. The flow then invokes another invocable action, called `Serialize Apex Records To Stringified JSON`, to serialize records returned by apex class into Stringified JSON.
5. The flow then invokes another invocable action, called `careProgramBenefitsSummary`, that calls the `Summarize Patient Pharmacy Benefits` prompt template. The output from the prompt template is further passed to a Large Language Model (LLM), which generates the required text. The final text that the LLM returns appears on the screen flow as a patient pharmacy benefits summary.

 **Note** Info: By default, the Summarize Patient Pharmacy Benefits prompt template uses OpenAI GPT 4 Turbo model. You can't edit or remove the Summarize Patient Pharmacy Benefits prompt template. To make changes to the template, open the Summarize Patient Pharmacy Benefits prompt template from Setup, and create a copy by clicking **Save as**.

 **Warning** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

See Also

- [Salesforce Help: Standard Prompt Templates](#)
- [Salesforce Help: Changing LLM Configurations](#)

Use Pharmacy Benefits Verification

Pharmacy Benefits Verification improves patient access and adherence to care by helping representatives to start the patient's medication early. Help caregivers and patients reduce the time and effort required to determine the covered pharmacy benefits. Patient services representatives can assist patients by getting a clear picture of their pharmacy benefits coverage such as co-pay, co-insurance, and other coverage details. They can also generate a concise summary of patient's pharmacy benefit details using Einstein's Generative AI auto-launched flows.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

Drug manufacturers can use Pharmacy Benefits Verification to provide their patients financial aid and help them understand their coverage. With immediate access to the patient benefits coverage and alternative drug options, healthcare providers can make informed decisions on prescriptions and referrals to financial assistance programs. Pharmacists can deliver accurate medication, avoid delays, understand patient benefits coverage, and offer alternative drugs at the time of drug fulfillment. Ultimately, Pharmacy Benefits Verification enhances patient outcomes by refining medication availability and reinforcing adherence.

Additionally, representatives can use Patient Support Programs console app to centralize all the pharmacy-related tasks in one place. For example, representatives can create a dashboard to check how many patients' pharmacy benefits are yet to be verified.

When representatives initiate benefits verification requests, they can add a member plan directly from a care program enrollee record page without going through to the member plan object.

Representatives can generate a benefits summary and a call script with a single click, by using Einstein Generative AI.

[Patient Support Programs Console App](#)

The Patient Support Programs console app in the Health and Life Sciences cloud acts as a single-stop for all patient services representatives to monitor different aspects of care programs and care program enrollees. Representatives can customize this app according to their needs and access all the functionalities of patient support programs through the app.

[Add Member Plan from Care Program Enrollee Record Page](#)

Create a member plan directly from a care program enrollee record page without going to the Member Plan object record page.

[Pharmacy Benefits Verification Request](#)

You can use a guided flow to initiate a manual or electronic benefits verification request, generate patients' benefits packages, and furnish a concise summary of the benefits related to the medications

prescribed within a care program.

Initiate a Manual or Electronic Verification Request

Initiate a manual or electronic pharmacy benefits verification request to generate patients' benefits packages, and furnish a concise summary of the benefits related to the medications prescribed within a care program.

Benefit Coverage Response

The Benefits Summary section shows the pharmacy benefit coverage response received from payors or clearing houses. The benefit summary section includes the patient's benefits details such as coverage status, co-pay, and co-insurance.

Generate Call Script

Reduce the time patient services reps spend on call with payors to determine the missing fields from the benefits summary. Pharmacy Benefits Verification uses Einstein Generative AI to help patient services reps generate a call script, which they can use to fetch missing coverage information from payors.

Generate Pharmacy Benefits Summary

Pharmacy Benefits Verification includes Einstein Generative AI to generate the pharmacy benefits summary for reps. You can share this benefit summary with patients, prescribers, and practitioners. The summary helps providers recommend appropriate assistance programs to patients, and helps reps make informed decisions, such as enrolling patients in appropriate assistance programs.

Update the Status of a Manual Verification Request

You can mark the status of a manual verification request as Pending, Completed, Error, or Partial, depending on the business use case.

Use Pharmacy Benefits Reverification

Pharmacy Benefits Reverification checks a patient's eligibility for pharmacy benefits, ensuring continuous and correct coverage for their medications. The process helps insurance providers save time and resources by streamlining the reconfirmation of pharmacy benefits for patients in care programs. Reverifying benefits controls costs for both providers and patients by confirming that coverage is necessary and used correctly.

Patient Support Programs Console App

The Patient Support Programs console app in the Health and Life Sciences cloud acts as a single-stop for all patient services representatives to monitor different aspects of care programs and care program enrollees. Representatives can customize this app according to their needs and access all the functionalities of patient support programs through the app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Assign Permissions to Users

To access the Patient Support Programs console app, admins must assign the Access Patient Support Programs as a Case Agent permission set to your patient services representative.

Patient Support Programs Console App for Patient Services Representatives

Representatives can personalize this app by creating custom dashboards and reports related to the patients, and their pharmacy benefits details. They can enhance this personalized space by using custom components, track patients' healthcare journey, and access all the functionalities at a single place.

See Also

[Salesforce Help: Patient Support Programs Console App](#)

Add Member Plan from Care Program Enrollee Record Page

Create a member plan directly from a care program enrollee record page without going to the Member Plan object record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a member plan

Manage Pharmacy Benefits Verification permission set

Make sure your Salesforce admin has created the Pharmacy Benefit Verification tab on the care program enrollee record page.

Follow these easy steps to create a member plan directly from a care program enrollee record page without having to go to the Member Plan object record page.

1. From the App Launcher, find and select **Care Program Enrollee**.
2. Select a care program enrollee.
3. On the Pharmacy Benefits Verification tab, click **Add Member Plan**.

 **Note** The tab name can vary based on the admin setup of your Salesforce org.

4. On click of Add Member Plan, a new tab is opened for adding a new member plan. After you've added a new member plan, click **Save**, close the tab and click **Refresh**.

You can see the newly added member plan associated with the care program enrollee in context.

You can now initiate a pharmacy benefits verification request against this newly added member plan.

Pharmacy Benefits Verification Request

You can use a guided flow to initiate a manual or electronic benefits verification request, generate patients' benefits packages, and furnish a concise summary of the benefits related to the medications prescribed within a care program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Manual Verification Request

With manual verification request, you can connect directly with payors to get the patient's benefits details and manually record the coverage details in the benefits summary section.

Electronic Verification Request

With electronic verification request, the data exchange is automated with third-party clearing houses which then further connect with payors to find out the patient's pharmacy benefit details. The coverage response received in an electronic verification request gets updated in the benefits summary section. You can edit the responses, if necessary. You can also initiate an electronic verification of an existing manual request.

To validate the insurance coverage and determine the coverage summary for each drug that's prescribed to the patient under a care program, go to any care program enrollee record page and click **Pharmacy Benefits Verification**. The page contains a panel that lists the member plans associated with the patient. If the patient is associated with more than one member plan, you can connect with the patient to get details about the member plan that's considered for benefits verification. Depending on the type of verification you want to carry out for the patient, you can verify the coverage benefits against any member plan by clicking the New Electronic Request or New Manual Request buttons.



Initiate a Manual or Electronic Verification Request

Initiate a manual or electronic pharmacy benefits verification request to generate patients' benefits packages, and furnish a concise summary of the benefits related to the medications prescribed within a care program.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To create a verification request:	Manage Pharmacy Benefits Verification permission set
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Before you create the verification request, you must set up the data for patients, member plans, purchaser plans, practitioners, payors, drugs, and pharmacies.

A verification request consists of the data related to the patient's prescriber, drug, and pharmacy. To speed up the request creation process, by default, prescriber, drug, and pharmacy fields are auto-populated with the values used in the last verification request.

 **Warning** Depending on the number of pharmacy, practitioner, or drug records in your Salesforce org, the time to select the values associated with those records can vary.

Regardless of the type of verification request, follow the steps to launch the guided flow.

1. From the App Launcher, find and select **Care Program Enrollee**.
2. Select care program enrollee.
3. Click the **Pharmacy Benefits Verification** tab.
 **Note** The tab name for your Salesforce org can vary based on your admin setup.
4. To launch a guided flow, click **New Manual Request** for a manual verification request, or click **New Electronic Request** for an electronic verification request.
5. Select the name of the patient's practitioner.
6. Under Prescriber Details, select the name of the patient's practitioner.
The National Practitioner ID is automatically populated.
7. Click **Next**.
8. Under Drug Details, select the name of the drug prescribed to the patient's prescribed drug name.
9. Enter the supply duration in days.
10. Enter the quantity.
11. Select the unit of measure.
12. Under Pharmacy Details, select the pharmacy name.
The other details of the pharmacy, such as Pharmacy ID, Phone, Type, and Address are automatically populated.
13. Click **Submit**.
You see a message that confirms the submission of the benefit verification request.
14. Click **Done**.

See Also

- [Add a Pharmacy, and Identifier](#)
- [Addition of Care Program and Related Records](#)
- [Add a Product, Code Set, and Code Set Bundle](#)
- [Create Records for Healthcare Practitioners](#)

Benefit Coverage Response

The Benefits Summary section shows the pharmacy benefit coverage response received from payors or clearing houses. The benefit summary section includes the patient's benefits details such as coverage status, co-pay, and co-insurance.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

You can get a detailed understanding of a patient's pharmacy benefits details such as Coverage Type, Coverage Status Code, and Lifetime Maximum Amount in the Benefits Summary section (1). You can also view previous verification requests by selecting the date from the dropdown (2). You can edit all the fields in the benefits summary by clicking the Edit Benefits button (3). You can also edit a single field by clicking the Edit icon next to the response field. History tracking (4) helps you to check the previous value and editor of each response field. You can also electronically verify an existing manual request by clicking the Electronically Verify This request (5) button.



Transparency regarding the coverage and patients' out-of-pocket costs helps in making informed decisions, such as referring patients to suitable financial assistance programs or alternate medications.

Generate Call Script

Reduce the time patient services reps spend on call with payors to determine the missing fields from the benefits summary. Pharmacy Benefits Verification uses Einstein Generative AI to help patient services reps generate a call script, which they can use to fetch missing coverage information from payors.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To generate call script

Context Service Admin permission set

AND

Context Service Runtime permission set

USER PERMISSIONS NEEDED

AND

Prompt Template Manager permission set

AND

Prompt Template User permission set

AND

Manage Pharmacy Benefits Verification permission set

Before you generate the call script for payors, make sure the verification request is initiated.

With Pharmacy Benefits Verification, patient services reps can generate a call script by using an auto-launched flow. This call script includes a subset of the missing information in the benefits summary that's required to complete the patient's pharmacy benefits verification request.

The call script is divided into four sections. The first section highlights the patient's information. The second section outlines the insurance coverage information, and the third section highlights the information related to the drug that's prescribed to the patient. The fourth section includes the list of all the fields that the coverage information is missing for. You can copy this script with a single click.

 **Important** To customize the Generate Call Script flow according to your business needs, implement the `TransposeContext` interface.

1. From the App Launcher, find and select **Care Program Enrollee**.
2. Select a care program enrollee.
3. On the **Pharmacy Benefits Verification** tab, in the Benefits Summary section, click **Generate Call Script**.



Note The tab name can vary based on the admin setup of your Salesforce org.

The Generate Call Script flow is launched.

4. To accept the disclaimer for Einstein AI usage, click **Got It**.



The call script is generated.

Here's a sample call script.



To copy the call script to the clipboard, click **Copy**.

 **Warning** This tool uses generative AI, which can produce inaccurate or harmful responses. Before

using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

See Also

[Salesforce Help: Einstein Generative AI & Trust](#)

Generate Pharmacy Benefits Summary

Pharmacy Benefits Verification includes Einstein Generative AI to generate the pharmacy benefits summary for reps. You can share this benefit summary with patients, prescribers, and practitioners. The summary helps providers recommend appropriate assistance programs to patients, and helps reps make informed decisions, such as enrolling patients in appropriate assistance programs.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

USER PERMISSIONS NEEDED

To generate pharmacy benefits summary

Context Service Admin permission set

AND

Context Service Runtime permission set

AND

Prompt Template Manager permission set

AND

Prompt Template User permission set

AND

Manage Pharmacy Benefits Verification permission set

Before you generate the pharmacy benefits summary, make sure the verification request is initiated.

With Pharmacy Benefits Verification, reps can generate a concise summary of a patient's pharmacy benefits with a single click.

The summary includes the information related to the patient, insurance coverage, drug, and pharmacy benefits. It also includes additional information, and the next steps that reps must take in the patient's

pharmacy benefits verification journey. You can easily copy the summary with a single click.

! **Important** To customize the Generate Benefit Summary flow according to your business needs, implement the `TransposeContext` interface.

1. From the App Launcher, find and select **Care Program Enrollee**.
2. Select a care program enrollee.
3. On the Pharmacy Benefits Verification tab, in the Benefits Summary section, click **Generate Summary**.

 **Note** The tab name can vary based on the admin setup of your Salesforce org.

The Generate Benefit Summary flow is launched.

4. To accept the disclaimer for Einstein AI usage, click **Got It**.

The benefits summary is generated.

Here's a sample benefit summary.



To copy the benefits summary to the clipboard, click **Copy**. You can share this summary with the patient, healthcare provider, or practitioner.

! **Warning** This tool uses generative AI, which can produce inaccurate or harmful responses. Before using, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

See Also

[Salesforce Help: Einstein Generative AI & Trust](#)

Update the Status of a Manual Verification Request

You can mark the status of a manual verification request as Pending, Completed, Error, or Partial, depending on the business use case.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To update verification requests:

Manage Pharmacy Benefits Verification permission set

1. To access the Care Benefit Verify Request record page, on the care program enrollee records, on the Pharmacy Benefits Verification tab, click the verification request ID link.

2. Next to Status, click the Edit icon.
3. Select the appropriate status.
4. Save your changes.

The request status on the care program enrollee record page is updated.



Note For an electronic verification request, the status of a care benefit verify request records gets updated automatically.

To monitor the progress of all the benefits verification requests, go to the Care Benefit Verify Request list view and filter the records based on the status field. The status field serves as a single source of truth for all the manual and electronic verification requests.

Use Pharmacy Benefits Reverification

Pharmacy Benefits Reverification checks a patient's eligibility for pharmacy benefits, ensuring continuous and correct coverage for their medications. The process helps insurance providers save time and resources by streamlining the reconfirmation of pharmacy benefits for patients in care programs. Reverifying benefits controls costs for both providers and patients by confirming that coverage is necessary and used correctly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

Automating the entire pharmacy benefits reverification process reduces manual work for patient services reps and accelerates the process. This automation makes the reverification process more cost-efficient and less prone to errors, which ensures that patients can access all of their benefits in a timely manner.

Generate Benefits Reverification Requests

Program leads can use a screen flow to initiate a pharmacy benefits reverification request. The flow collects important reverification information and generates a list of new benefits verification records. Patient services reps can use the shared list or the records assigned to them to reverify the pharmacy benefits of care program enrollees.

How Reverification Automation Works

Pharmacy benefits reverification automation saves time and resources of pharmaceutical companies by streamlining patient benefit updates. Automation helps control expenses and prevent fraud for both providers and patients, so that continuous, accurate, and cost-effective pharmacy benefits are provided through electronic and manual verification processes.

Explore Various Scenarios in Reverification Automation

Discover the various scenarios that can occur within each step of the orchestrator, along with next

step.

Generate Benefits Reverification Requests

Program leads can use a screen flow to initiate a pharmacy benefits reverification request. The flow collects important reverification information and generates a list of new benefits verification records. Patient services reps can use the shared list or the records assigned to them to reverify the pharmacy benefits of care program enrollees.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

USER PERMISSIONS NEEDED

To use flows:

Run Flows user permission

AND

Manage Flow user permission

AND

Customize Application user permission

AND

Modify All Data user permission

To use data processing engines:

Data Pipelines Base User permission set

To manage pharmacy benefits reverification requests:

Manage Pharmacy Benefits Verification permission set

AND

Access Patient Support Programs as a Program Lead permission set

-
1. As a program lead, to run the Initiate Benefit Reverification screen flow, use the Reverify Pharmacy Benefits action on the care program record.
 2. Add the required data and click **Next**.

 **Note** If the selected end date is today, only the records that existed before today's date are processed.

A notification appears to indicate that the pharmacy benefits reverification request is complete.

3. Manage new care benefit verify request records.

The records that are ready to reverify have a Pending status.

- a. As a program lead, to send the records to patient services reps for processing, share a list view of the pending records or assign pending requests directly to patient services reps.
- b. As a patient services rep, access the shared list or the pending records assigned to you. Then open a care program enrollee record and click the Benefits Verification tab. To adjust coverage benefits, in the Benefit Summary section, click the **Edit Benefits** action and then edit the coverage benefits.

 **Note** If the screen flow doesn't create the care benefit verify request records you expect based on the date range you specify, extend the end date of the date range by 1 or 2 days. For example, instead of specifying January 10 as the end date, specify January 11 or January 12.

If issues such as network connectivity prevent the pharmacy benefits reverification request from being completed, the new records show an Error status. To fix these records, change the status from Error to Copy. This triggers the Copy Care Benefit Verify Request Fields flow, which creates required records and updates the Authorized Prescription, Original Prescription, and Coverage Benefit fields in the new records.

How Reverification Automation Works

Pharmacy benefits reverification automation saves time and resources of pharmaceutical companies by streamlining patient benefit updates. Automation helps control expenses and prevent fraud for both providers and patients, so that continuous, accurate, and cost-effective pharmacy benefits are provided through electronic and manual verification processes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license. It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

Here are the different stages of reverification automation.

Update Patient Personal and Healthcare Details

Updating a patient's personal and healthcare details is crucial for reverification automation. This orchestration stage helps identify changes in a patient's personal and healthcare details and establishes accurate, continuous pharmacy benefits.

- **Send Email to Patient:** This step waits for you to use Agentforce to send an email containing an

assessment URL to the patient. After you send the email and update the care benefit verify request status to Pending Confirmation, the step is marked as Completed.

- **Wait for Patient Response:** After you send the email to the patient, automation waits for their response. After the patient responds, the Care Benefit Verify Request status is updated to Received Confirmation and the step is marked as Completed.
- **Update Patient Details:** This step waits for you to use Agentforce to update the patient's details based on the responses received. After you update patient details, the care benefit verify request status is updated to Ready For Verification and the step is marked as Completed.

Process Electronic Verification Request

This orchestration stage sends an electronic request to a clearing house to gather a patient's benefit details, validates the response for essential benefits, and then shares the benefits summary with a healthcare professional (HCP).

- **Initiate Electronic Verification Request:** If the verification mode of the care benefit verify request record is electronic, an electronic verification request is sent to a third-party clearing house. The third-party clearing houses then connect with payors to get the latest benefits details such as Copay, Coinsurance, and Life Time Maximum (LTM). The care benefit verify request status is updated to Acknowledged upon acknowledgment from the clearing house. When a valid response is received from the payor, the status is updated to Verified, and the step is marked as Completed.
- **Validate Essential Benefits:** After receiving the response from the clearinghouse, the essential benefits, such as Copay, Coinsurance, and LTM, are verified in the payor's response. If the payer's response includes the essential benefits, the care benefit verification request status is updated to Completed.
- **Send Email to Healthcare Professional:** If all essential benefits are present in the payor's response, a summary of the patient's benefit details is shared with the Healthcare Professional (HCP).

Process Manual Verification Request

If the verification mode of Care Benefit Verify Request is manual, or if the payor's response to an electronic verification request is missing essential benefits, the automation proceeds with the manual verification process.

- **Send Email To Payor:** An email with a secure assessment URL is sent to the payor to confirm the patient's latest benefits details.
- **Wait For Payor Response:** After sending the email to the payor, automation awaits a response from the payor.
- **Validate Essential Benefits:** If all essential benefits are present in the payer response, the care benefit verification request is marked as Completed.
- **Send Email to Healthcare Professional:** If all essential benefits are present in the payor's response, a summary of the patient's benefit details is shared with the Healthcare Professional (HCP).

See Also

[Send Email Through Salesforce](#)

[Configure Care Limit Type](#)[Automate Complex Processes with Orchestrations](#)[Agentforce for Pharmacy Benefits Reverification](#)[Use Agentforce for Pharmacy Benefits Reverification](#)

Explore Various Scenarios in Reverification Automation

Discover the various scenarios that can occur within each step of the orchestrator, along with next step.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with the Health Cloud or Life Sciences Cloud license.

It's also available with these add-on licenses: Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, Einstein GPT Trust, Genie Data Platform Starter, and Einstein GPT Prompt Builder.

Stage Name	Step Name	Scenario	Next Step
Update Patient Personal and Healthcare Details	Send Email	If you don't send an email by using Agentforce within the time frame set by your Salesforce admin, the send email action is timed out.	Reach out to the patient to get their latest personal and healthcare details, and manually reverify their benefits.
	Wait for Patient Response	If the patient doesn't respond to the assessment within the time frame set by your admin, the wait for patient response action is timed out.	Reach out to the patient to get their latest personal and healthcare details, and manually reverify their benefits.
	Update Patient Details	If you don't update the patient details by using Agentforce within the time frame set by your admin, the update patient details action is timed out.	Update the patient's latest personal and healthcare details based on the responses received.
		When there's no change in patient details and the Update Details	Depending on your business use case, either update the care

Stage Name	Step Name	Scenario	Next Step
		button isn't available in Agentforce.	benefit verify request status to Completed, or manually reverify benefits.
		When the patient's insurance details are changed and the Update Details button isn't available in Agentforce.	Create a new verification request based on the latest details received in the patient's responses.
Process Electronic Verification Request	Initiate Electronic Benefits Verification Request	If the automation fails while connecting with the clearing house.	The care benefit verify request status is updated to Error, and the automation proceeds with the manual verification process.
		When the clearing house doesn't respond within the time frame set by your admin, the initiate electronic benefits verification request action is timed out.	The care benefit verify request status is updated to Timed Out, and the automation proceeds with the manual verification process.
		When the clearing house can't process the request and rejects it.	The care benefit verify request status is updated to Rejected, and the automation proceeds with the manual verification process.
		When MuleSoft can't process the response from the clearing house.	The care benefit verify request status is updated to Error, and the automation proceeds with the manual verification process.
		When MuleSoft can't	The care benefit verify

Stage Name	Step Name	Scenario	Next Step
		send the request to the clearing house because of the invalid credentials or request.	request status is updated to Error. Fix the errors and retry the electronic verification.
		When MuleSoft can't send the request to the clearing house within the time frame set by your admin. This can happen due to invalid credentials or requests.	The care benefit verify request status is updated to Error. Create a new verification request based on the latest details received in the patient's response.
	Validate Essential Benefits	If the essential benefits are missing from the payor's response.	The care benefit verify request status is updated to Partial, and the automation proceeds with the manual verification process.
		When there's an error while validating essential benefits.	The care benefit verify request status is updated to Verified. Validate essential benefits in the payor response, and share the patient's benefits summary with the Healthcare Professional (HCP).
	Send Email to Healthcare Professional	When there's an error in sending the benefits summary email to HCP.	Share the patient's benefits summary with the HCP.
Process Manual Verification Request	Send Email to Payor	When there's an error in sending an email with a secure assessment URL to the payor to confirm the patient's latest benefits details.	Connect with the payor to get the latest benefits details, and share the patient's benefits summary with the HCP.
	Validate Essential Benefits	If the essential benefits are missing from the payor's response.	The care benefit verify request status is updated to Partial.

Stage Name	Step Name	Scenario	Next Step
			Connect with the payor to get the latest benefits details, and share the patient's benefits summary with the HCP.
		When there's an error while validating essential benefits.	Validate essential benefits in the payor response, and share the patient's benefits summary with the HCP.
	Send Email to Healthcare Professional	When there's an error in sending the benefits summary email to HCP.	Share the patient's benefits summary with the HCP.

See Also

[Electronic Verification Scenarios](#)

[Use Agentforce for Pharmacy Benefits Reverification](#)

[Agentforce for Pharmacy Benefits Reverification](#)

[Automate Complex Processes with Orchestrations](#)

Set Up Provider Relationship Cards

Set up provider relationship cards to quickly and efficiently show users what they need to know about providers and the facilities where they work, all in one place. Identify the information your users look for on each Provider Relationship Card, then use the card setup wizard to connect the various objects that contain that information.

To learn more about provider relationship cards, see [Health Cloud Help: Provider Relationship Cards](#).

Set Up Provider Search for Life Sciences

Powered by the provider data model, Provider Search helps your users find healthcare providers based on criteria such as location, specialty, and whether the provider is accepting new patients. You can even see the location of each provider right in Life Sciences Cloud.

Before you enable Provider Search in Life Sciences Cloud, you must enable Site Management in your org. To learn more, see [Enable Site Management](#).

To learn how to set up Provider Search, see [Health Cloud Help: Provider Search](#).

Administer Life Sciences Cloud

If relevant to your organization's business needs, set up MedTech Commercial features such as sales agreements, account manager targets, and forecast device sales.

Get Started with MedTech Commercial Engagement

Life Sciences Cloud helps teams better engage with their customers by streamlining the end-to-end process, from lead generation to fulfilling orders. Accurate forecasts ensure transparency across your sales and commercial units. Explore a trial org and then learn what's included, what setup we recommend, and how to prepare for your implementation.

Set Up Commercial Excellence Features

Medical device manufacturers can manage their volume and price agreements at the product level with their customers using sales agreements. They can also manage account and product specific forecasts, and create account manager targets.

Set Up Intelligent Sales

Maximize productivity for your sales teams by giving them the tools required to efficiently plan and execute their surgical case visits and cycle counts. Give your teams valuable insight into field inventory and impacted revenue, with visits-based product availability projections.

Get Started with MedTech Commercial Engagement

Life Sciences Cloud helps teams better engage with their customers by streamlining the end-to-end process, from lead generation to fulfilling orders. Accurate forecasts ensure transparency across your sales and commercial units. Explore a trial org and then learn what's included, what setup we recommend, and how to prepare for your implementation.

 <p>Get Oriented</p> <p>What is MedTech Commercial Engagement?</p> <p>Video: Watch a Demo</p> <p>Create a Life Sciences Cloud Trial Org</p>	 <p>Dive In: Learn About Recommended Core Features</p> <p>Leverage Sales Agreements to Manage Your Run-Rate Business</p> <p>Plan Ahead with Account-Based and Advanced Forecasting</p> <p>Strategically Grow Your Business with Account Manager Targets</p> <p>Manage Field Inventories, Surgical Cases, and Cycle Counts with Intelligent Sales</p>	 <p>Go Deeper: Learn About Features for Specific Business Needs</p> <p>Automate Processes with Omnistudio</p> <p>Automate Complex Decision-Making Solutions Using Business Rules Engine</p> <p>Manage Important Documents with Intelligent Document Automation</p>
 <p>Extend Further: Learn About Additional Capabilities & Add-Ons</p> <p>Manage Your Commercial Edge with Rebate Management</p>	 <p>Get Ready for Your Implementation</p> <p>Assign Permission Sets for Intelligent Sales</p> <p>Extend Field Inventory Processes with Sample Flows</p>	 <p>Know Your Resources & Get Help</p> <p>Trailhead: Life Sciences Cloud for MedTech</p> <p>Trailhead: Surgical Case Visit and Field Inventory Management</p> <p>Life Sciences Cloud Developer Guide</p> <p>Trailblazer Community: Life Sciences Trailblazer Group</p>

Set Up Commercial Excellence Features

Medical device manufacturers can manage their volume and price agreements at the product level with their customers using sales agreements. They can also manage account and product specific forecasts, and create account manager targets.

REQUIRED EDITIONS

Available in: Lightning Experience

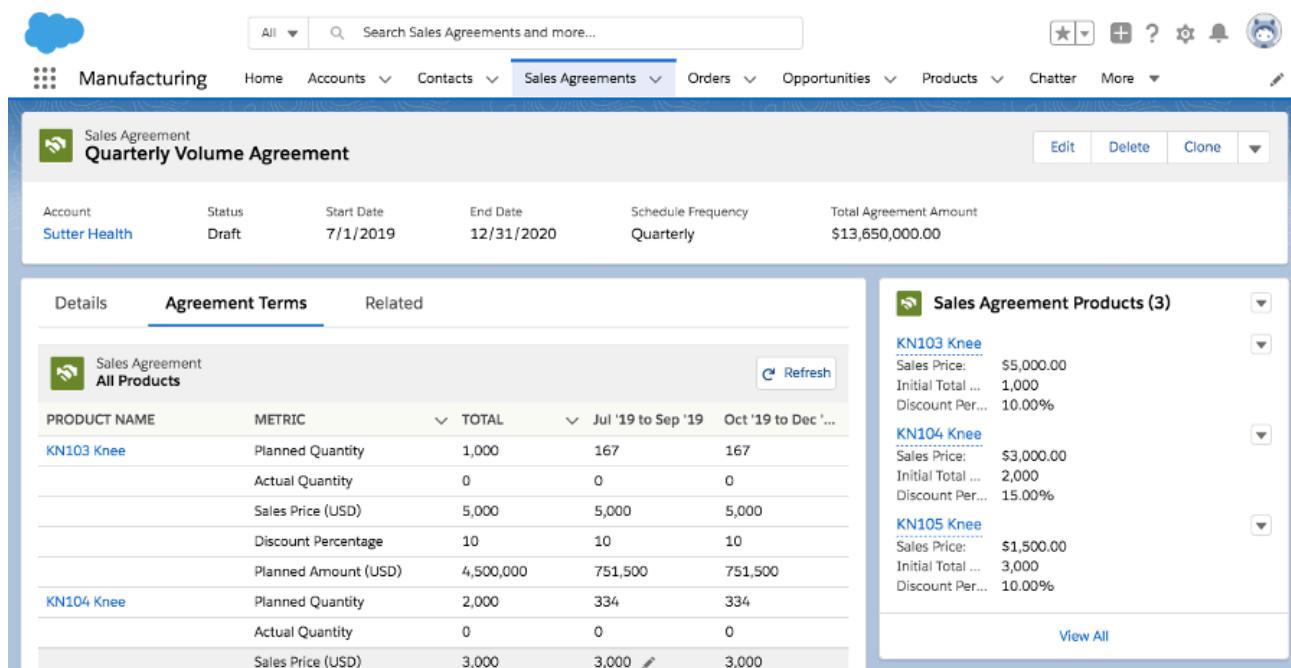
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Sales Agreements

Create sales agreements at the account level. Include multiple products within a single sales agreement and specify planned sales quantities, prices and discounts. Review planned revenue associated with the agreement and also specify a schedule frequency for the agreement such as One Time, Monthly, Quarterly or Yearly to align with the business objective.

Over time, you can compare planned quantities to actual quantities as orders are booked and use this insight to monitor and enforce compliance to the agreement.

To make sales agreements available to your users, see [Manage Long-Term Business with Sales Agreements](#).



The screenshot shows the Salesforce Manufacturing cloud interface. At the top, there's a navigation bar with icons for Home, Accounts, Contacts, Sales Agreements (which is the active tab), Orders, Opportunities, Products, Chatter, More, and a search bar. Below the navigation bar, the main content area displays a Sales Agreement record titled "Quarterly Volume Agreement". The record summary includes fields for Account (Sutter Health), Status (Draft), Start Date (7/1/2019), End Date (12/31/2020), Schedule Frequency (Quarterly), and Total Agreement Amount (\$13,650,000.00). The "Agreement Terms" tab is selected, showing a table for "Sales Agreement All Products". This table lists products KN103 Knee, KN104 Knee, and KN105 Knee with their respective metrics: Planned Quantity, Actual Quantity, Sales Price (USD), Discount Percentage, and Planned Amount (USD). To the right of the table is a sidebar titled "Sales Agreement Products (3)" which provides detailed information for each product, including Sales Price, Initial Total, and Discount Percentage. A "View All" button is located at the bottom right of the sidebar.

PRODUCT NAME	METRIC	TOTAL	Jul '19 to Sep '19	Oct '19 to Dec '19
KN103 Knee	Planned Quantity	1,000	167	167
	Actual Quantity	0	0	0
	Sales Price (USD)	5,000	5,000	5,000
	Discount Percentage	10	10	10
	Planned Amount (USD)	4,500,000	751,500	751,500
KN104 Knee	Planned Quantity	2,000	334	334
	Actual Quantity	0	0	0
	Sales Price (USD)	3,000	3,000	3,000

This sample sales agreement tracks anticipated shipments of a product at three price levels.

The screenshot shows a product detail page for 'KN103 Knee'. At the top, there's a green header bar with the text 'Sales Agreement Product' and 'KN103 Knee'. Below this, a table displays basic product information:

List Price	Sales Price	Initial Total Quantity	Total Planned Quantity	Discount Percentage
\$5,000.00	\$5,000.00	1,000	1,000	10.00%

Below the table, there are two tabs: 'Related' and 'Details'. The 'Details' tab is selected, showing a detailed breakdown of the product's configuration:

Related	Details
Information	
Name	Product
KN103 Knee	KN103 Knee
Sales Agreement	Pricebook Entry
Quarterly Volume Agreement	KN103 Knee
List Price	Sales Price
\$5,000.00	\$5,000.00
Initial Total Quantity	Discount Percentage
1,000	10.00%
Total Planned Quantity	Total Planned Amount
1,000	\$4,500,000.00
Total Proposed Planned Quantity	Total Proposed Planned Amount

Forecast Device Sales

Improve business predictability and sales performance by creating account level forecasts for multiple products in your portfolio. Create a baseline forecast using market and account growth factors relative to last year's actuals. Specify forecast horizon and forecast bucket granularity such as monthly versus quarterly.

Enable account reps and sales managers to edit forecasts, annotate edits, track changes, and view impact of forecast changes on key metrics such as revenue.

To make forecasting available to your users, see [Create Holistic Forecasts with Advanced Account Forecasting](#).

Product Name	Metric	▼ Total	▼ Feb'19	Mar'19
HP101 Hip	Opportunity Quantity	0	0	0
	Last Year's Orders Quantity	0	0	0
	Current Orders Quantity	100	0	0
	Sales Agreement Planned Quantity	0	0	0
	Forecasted Quantity	100	0	0
HP102 Hip	Opportunity Quantity	0	0	0
	Last Year's Orders Quantity	0	0	0
	Current Orders Quantity	200	0	0
	Sales Agreement Planned Quantity	0	0	0
	Forecasted Quantity	200	0	0

Account Manager Targets

Convert your business growth plans into measurable targets with Account Manager Targets. Create targets for revenue, quantity, and other measure types and allocate specific target percentages to your team members. Strategically distribute targets by products and accounts to meet market demands and organizational requirements. Distribute targets by month, quarter, or year for better visibility and periodic reviews. Update target values at any time and redistribute targets as needed.

To make target managing available to your users, see [Strategically Grow Your Business with Account Manager Targets](#).

[Configure Path Settings for Sales Agreements](#)

Help Intelligent Sales users visualize the status of a sales agreement, so they can plan accordingly.

[Configure Record Conversion for Quotes and Sales Agreements](#)

Before your users can benefit from the time-saving Convert Record flow, there are a few configuration tasks you must complete.

[Use Commercial Excellence](#)

Reduce manual tasks and streamline sales processes by using a screen flow to automate sales agreement and quote record conversion.

Configure Path Settings for Sales Agreements

Help Intelligent Sales users visualize the status of a sales agreement, so they can plan accordingly.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To configure the component: Customize Application

1. From Setup, in the Quick Find box, enter *Path Settings*, and then select **Path Settings**.
2. Click **New Path**.
3. Add the following details:
 - a. Add a path name. The API Reference name is autopopulated. Keep it as is.
 - b. For Object, select **Sales Agreement**.
 - c. For Record Type, Master is autopopulated. Keep it as is.
 - d. For Picklist, select **Status**.
 - e. Click **Next**, **Next**, and then activate your path.
 - f. Click **Finish**.
4. Add the Path to the Sales Agreement record page.
 - a. From the App Launcher, find and select Sales Agreements.
 - b. Select a record and edit the record page.
 - c. Select the standard Path component and drag it to an editable part of the page.
In the properties pane, the path you created is auto-selected.
 - d. Select **Save**, and then click **Activate**.
 - e. Select **Assign as Org Default**.
 - f. In form factor, select **Desktop and Phone**.
 - g. Click **Next** and then click **Save**.

Configure Record Conversion for Quotes and Sales Agreements

Before your users can benefit from the time-saving Convert Record flow, there are a few configuration tasks you must complete.

-  **Note** You can also use record conversion in orgs with Revenue Lifecycle Management and Health Cloud. Make sure that decision tables, pricing procedures, and product catalog management are configured and working in the org.

Assign Permissions and Permission Sets for Record Conversion Users

Assign the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health

Cloud) permission set, and the Context Service Runtime and Manufacturing Sales Agreements permission sets to your users so that they can use record conversion. Users must also be assigned the Manage Flows and Run Flows permissions.

[Verify Context Definition Mapping](#)

Context definitions ensure efficient data mapping at every step of the process. The Convert Record flow uses a custom definition to map field relationships between records.

[Enable Settings for the Convert Record Flow](#)

To use the Convert Record flow, you must enable sales agreements and quotes in your org.

[Verify that the Convert Record Quick Actions are Visible to Users](#)

Quickly launch the Convert Record flow by using a quick action.

[Record Conversion Notifications](#)

Keep your users up to date about the status of their record conversion jobs by using notifications.

Assign Permissions and Permission Sets for Record Conversion Users

Assign the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set, and the Context Service Runtime and Manufacturing Sales Agreements permission sets to your users so that they can use record conversion. Users must also be assigned the Manage Flows and Run Flows permissions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

See Also

[Manage Permission Set Assignments](#)

Verify Context Definition Mapping

Context definitions ensure efficient data mapping at every step of the process. The Convert Record flow uses a custom definition to map field relationships between records.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

The Convert Record flow uses the SalesAgreementQuotesConversion context definition to map data between sales agreement and quote records. For example, let's say that the context definition is configured to map the Product field between the Sales Agreement and Quote objects. When the Convert

Record flow runs, the value of the Product field is copied from the source object record (the quote or sales agreement) and prefilled in the flow screen.

You can clone or extend the SalesAgreementQuotesConversion context definition if you need to include additional data in your record conversion processes. If you clone or extend the context definition, make sure that you activate the context definition before you add it to the flow.

To add custom field mappings to the SalesAgreementQuotesConversion context definition, clone it. Add the custom fields to the clone and activate it. Update the context definition reference in the Convert Record flow to the cloned context definition, and then activate the flow.

See Also

[Context Service](#)

Enable Settings for the Convert Record Flow

To use the Convert Record flow, you must enable sales agreements and quotes in your org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To enable features

Customize Application

1. Enable sales agreements.
 - a. From Setup, in the Quick Find box, enter *Manufacturing*, and then select **Sales Agreements**.
 - b. Turn on Sales Agreements.
2. Enable quotes.
 - a. From Setup, enter *Quote* in the Quick Find box, then select **Quote Settings**.
 - b. Select the option for enabling quotes.

See Also

[Manage Sales Agreements](#)
[Quotes](#)

Verify that the Convert Record Quick Actions are Visible to Users

Quickly launch the Convert Record flow by using a quick action.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

If the convert record quick action isn't visible to your users, add it to the page layouts assigned to them for quotes and sales agreements. If a user has permission to convert records, the quick actions automatically appear in the Quotes and Sales Agreements related lists and you can't remove them.

See Also

[Quick Actions](#)

Record Conversion Notifications

Keep your users up to date about the status of their record conversion jobs by using notifications.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

Verify Notification Delivery Settings

To make sure your users are notified about the status of their conversion jobs, verify or update the notification delivery settings for the object conversion notification type. Enable notifications for desktop, mobile, mobile apps, and any additional apps listed.

See Also

[Manage Notification Delivery Settings](#)

Use Commercial Excellence

Reduce manual tasks and streamline sales processes by using a screen flow to automate sales agreement and quote record conversion.

[Convert a Quote or Sales Agreement](#)

Quickly convert quotes to sales agreements or sales agreements to quotes.

Convert a Quote or Sales Agreement

Quickly convert quotes to sales agreements or sales agreements to quotes.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud or Health Cloud

USER PERMISSIONS NEEDED

To initiate the record conversion:

Manage Flows

AND

Run Flows

To convert a quote to a sales agreement, use the Convert to Sales Agreement quick action on the Quote record page. Or, to convert a sales agreement to a quote, use the Convert to Quote quick action on the Sales Agreement record page. The quick actions launch the Convert Record screen flow. The flow prefills values from fields that are mapped in the SalesAgreementQuotesConversion context definition and that have values on the source objects. Enter missing data or update the values of prefilled fields, and then click Next.

A bell notification lets you know when the record conversion is complete.

See Also

[Verify Context Definition Mapping](#)

Set Up Intelligent Sales

Maximize productivity for your sales teams by giving them the tools required to efficiently plan and execute their surgical case visits and cycle counts. Give your teams valuable insight into field inventory and impacted revenue, with visits-based product availability projections.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

If someone has a product shortfall, they can request a product transfer from a nearby inventory. Reps can also blaze through cycle counts with fewer errors using their mobile devices.

[User Personas for Intelligent Sales](#)

Working with Intelligent Sales incorporates three types of activities. The optimal way to use Intelligent

Sales is to divide and conquer these activity types with different user personas.

The Intelligent Sales Data Model

Intelligent Sales uses many objects to work its magic for your sales teams. But not all user roles interact directly with these objects. Admins interact with them more than sales reps or other field-oriented roles.

Visit Types in Intelligent Sales

Intelligent Sales helps your sales reps and sales operations teams schedule visits for your business. Visits can be either surgical case visits for your reps to sell their products, or cycle count visits for your reps to audit their inventories. Visit types are created using the Work Type object.

Enable Intelligent Sales

Before your users can use Intelligent Sales, you must enable the Intelligent Sales and Visit Inventory Management org prefs in your Salesforce org.

Assign Permission Sets for Intelligent Sales

Assign the Action Plans and Industries Visits permission sets to your users so that they can use Intelligent Sales. Also assign the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set.

Set Up Visit and Inventory Access

Set up the right object permissions so that users access just the visits and inventories they're responsible for. You can use Sharing Settings and custom Apex triggers to set up access.

Use External Data Sources for Expected Quantity in Cycle Counts

Expected quantities in cycle counts are automatically calculated from product item records in Intelligent Sales. However, if you need to use external data sources for these numbers, use our IFetchInventoryCount Apex Interface with your own custom Apex classes and methods.

Configure the Page Layouts and Picklist Values for Product Transfer, Product, and Location

Configure the page layouts of Product Transfer, Product, and Locations, and add picklist values for different location types. You must make these changes before your users start using Intelligent Sales.

Set Up Data for Intelligent Sales

To help your users get the most out of Intelligent Sales, make sure that your Salesforce org is set up with the right data.

Intelligent Sales Sample Flows for Field Inventory Management

Manage your serialized inventories using the Intelligent Sales Sample Flows for Field Inventory Managements. Capture and fulfill product requests and ensure all products are accounted for by performing cycle counts with built-in business processes designed to optimize field inventory management. To ensure that the flows meet your business' unique needs, flows are customizable.

Use Intelligent Sales

Intelligent Sales helps organizations that produce and sell medical devices to make their sales and inventory management processes more efficient. Sales ops teams can use the desktop app to schedule surgical case visits and cycle counts for their sales reps in the field. Sales reps can use the mobile app to schedule and perform their own surgical case visits and cycle counts.

User Personas for Intelligent Sales

Working with Intelligent Sales incorporates three types of activities. The optimal way to use Intelligent Sales is to divide and conquer these activity types with different user personas.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

User Persona	Responsibilities
Data Setup - Salesforce Admin	The Salesforce admin sets up the org with the right data. For instance, they create records for account and inventory locations with the right attributes and a compatible address format.
Visit Planning and Inventory Management - Sales Ops	The sales ops team creates visits with the right resources, the right products, and the right assessment tasks. The team anticipates shortfalls in the visits they create, and proactively requests product transfers when shortfalls happen. Inventory management responsibilities can also be shared with sales reps.
Visit Execution - Sales Reps	The sales reps make site visits to fulfill their surgical case orders and perform visit tasks defined in the visit. They rely solely on the mobile app for these visits.

The Intelligent Sales Data Model

Intelligent Sales uses many objects to work its magic for your sales teams. But not all user roles interact directly with these objects. Admins interact with them more than sales reps or other field-oriented roles.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

The Intelligent Sales data model includes these objects.

Account

Hospitals and providers that your organization deals with.

Patients that your devices are registered for in a surgical visit. If you use the Patient Registration flow in your action plan template, it automatically creates these records for you when the visit is completed. If Person Accounts are enabled for your Salesforce org and the sales rep has access to person accounts, the record created is always a person account record. And if not, it's a business account record.

Action Plan Template

Reusable templates that add assessment tasks to visits.

Address

The address details for your locations.

Assessment Indicator Definition

The data type for the quantities recorded in generic visit key performance indicator records. For cycle counts, the data type must always be Number.

Assessment Task

Tasks sales reps complete during a surgical visit. The visit creation flow creates these records for you.

Contact

The point of contact for your sales reps at a given account location.

Generic Visit Key Performance Indicator

The expected quantities and the counted quantities of a product at an inventory location. As an admin, you create only a template record in this object, leaving all the value-related fields blank. Instance records are created when a cycle count is initiated, and the value-related fields are filled during the cycle count. At the time of execution, instance records for key performance indicators are created for a visit based on the Generic Visit Key Performance Indicator definition record. Actual and expected product values are populated during a visit based on your inventory records in Salesforce.

Generic Visit Task

The cycle count task for a specific product. Generic visit task records act as definition records that the system uses to create instance records for specific visits. At the time of execution, instance records for visit tasks are automatically created for a visit based on the Generic Visit Task definition record.

Generic Visit Task Context

The product item context for a generic visit task. Because these records must be associated with product item records, you need to create separate generic visit task context records for every product at every inventory location. Generic visit task context records act as definition records that the system uses to create instance records for specific visits. At the time of execution,

instance records for visit task context are automatically created for a visit based on the Generic Visit Task Context definition record.

Generic Visit Task Context Relation

The junction object that connects generic visit task records with generic visit task context records. These records act as definition records that the system uses to create instance records for specific visits. At the time of execution, instance records for visit task context relation are automatically created for a visit based on the Generic Visit Task Context Relation definition record.

Location

The locations of different hospitals and your sales reps' inventories.

Order

This object isn't a required part of the Intelligent Sales data model and is only used with the Order Authorization flow. When you use the order authorization flow in your action plan template, an order record is automatically created with billing details, including the product, quantity, and amount.

Product

The products your organization provides.

Product Availability Projection

The information about the projected availability of products related to visits and transfer requests. Don't create or edit any records in this object; its data is managed automatically. Give your users read access to this object so that they can see their inventory projections in the Intelligent Sales app.

Product Fulfillment Location

A combination of records that ties a sales rep to an inventory, an account, and an account location.

A product fulfillment location consists of these references:

- A product
- An account that orders the product
- The location of the account
- The location of the product inventory fulfilling the order
- The sales rep responsible for the inventory and the location

Product Item

A combination of a product, the location of its inventory, and the quantity available at that location. If your product is serialized, the initial quantity for the Product Item record must be zero. Any change to the quantity is automatically handled based on changes in Serialized

Product.

Product Request

The date by which a sales rep needs a transfer to happen. The request transfer flow creates these records for you.

Product Request Line Item

The junction object that connects a product request record and the corresponding product transfer record. The request transfer flow creates these records for you.

Product Required

The products that are added as required for different visits. The visit creation flow creates these records for you.

Product Transfer

Product transfers requested by sales reps when they have shortfalls. The request transfer flow creates these records for you.

Serialized Product

The serial numbers of individual products and the product item records that they're associated with. Each new serialized product that's associated with a product item record automatically increases the Product Item record quantity by one.

Visit

Visits created by sales teams to fulfill product orders from accounts or perform cycle counts for their inventories. The visit creation flow creates these records for you. This data model is centered around the Visits object.

Visited Party

The contacts sales reps visit at accounts. The visit creation flow creates these records for you.

Visitor

The sales reps assigned to different visits. The visit creation flow creates these records for you.

Work Type

The duration-related properties of a visit. For surgical visits, select the Is Used For Inventory Projection checkbox. For cycle count visits, select the Cycle Counting checkbox, and when applicable, the Blind Cycle Counting checkbox.

Visit Types in Intelligent Sales

Intelligent Sales helps your sales reps and sales operations teams schedule visits for your business. Visits can be either surgical case visits for your reps to sell their products, or cycle count visits for your reps to

audit their inventories. Visit types are created using the Work Type object.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Surgical Case Visits

Your sales operations team schedules surgical case visits when they receive an order for your products from a provider. Your reps visit the provider on the day of the procedure to fulfill the order and perform typical actions like registering the patient's details for your organization or authorizing the order for handoff. In some cases, for certain products, sales reps may schedule surgical case visits directly too. Intelligent Sales supports these tasks out of the box with our Patient Registration and Order Authorization flows. If your reps need to perform more tasks during a visit, you can create flows and add them to your action plan templates.

And that's not all. Intelligent Sales gives your reps and sales operations teams visibility into product shortfalls, with estimated revenue impact figures, for their upcoming surgical case visits. If your rep has a shortfall, either the rep or their sales operations contact can easily arrange for a product transfer from a nearby rep or warehouse.

Cycle Count Visits

Cycle count visits are scheduled for inventories to check the numbers available on record against the numbers that are physically present in inventories. Cycle counts can be either planned or ad hoc. Sales operations teams schedule planned counts at regular intervals using their desktops. Sales reps schedule ad hoc counts using their mobile devices.

Intelligent Sales helps your teams through these counts by pulling in the required inventory numbers from your records in Salesforce. The barcode scanner in the mobile app also saves your reps the hassle of manually entering every serial number. And the app automatically adds the scanned serial numbers to its list and tallies the numbers, so reps don't have to keep track of how many products they've counted.

Intelligent Sales also supports blind cycle counts. A blind cycle count is a cycle count where the sales rep isn't aware of the expected inventory count at the location. All you have to do is create a work type that's marked for blind cycle counts.

Enable Intelligent Sales

Before your users can use Intelligent Sales, you must enable the Intelligent Sales and Visit Inventory Management org prefs in your Salesforce org.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To configure settings: Customize Application

1. From Setup, enter *Inventory Settings* in the Quick Find box and select **Inventory Settings**.
2. Set Visit Inventory Management to enabled.
3. Enter *Intelligent Sales Settings* in the Quick Find box and select **Intelligent Sales Settings**.
4. Set Intelligent Sales to enabled.

 **Note** You can create work types to define your visit types from this page. Select work types for inventory projections and cycle counts on this page. It's not necessary to do this now. To learn more, see Set Up Work Types for Visits.

5. Turn on the **Expiring Products Page** and the **Cycle Count Products Page** for the mobile app users.
6. Enter *Visit Calendar Settings* in the Quick Find box and select **Visit Calendar Settings**.
7. Enable Add Visits to Salesforce Calendar.

Your Salesforce org now has access to the Intelligent Sales app and the Visits data model.

Assign Permission Sets for Intelligent Sales

Assign the Action Plans and Industries Visits permission sets to your users so that they can use Intelligent Sales. Also assign the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To assign permission sets:
Assign Permission Sets

AND

View Setup and Configuration

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

Repeat these steps for the other permission sets mentioned earlier.

Set Up Visit and Inventory Access

Set up the right object permissions so that users access just the visits and inventories they're responsible for. You can use Sharing Settings and custom Apex triggers to set up access.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To set default sharing access: Manage Sharing

To edit object permissions: Manage Profiles and Permission Sets

AND

Customize Application

Before you set up view permissions, it's a good idea to create different profiles for the different business functions at your organization.

Here's how you configure object permissions related to visits and product inventories for a sales rep.

1. From Setup, enter *Sharing Settings* in the Quick Find box and select **Sharing Settings**.
2. Click **Edit** for Organization-Wide Defaults.
3. Set Product Fulfillment Location, Product Item, and Visit to **Private**.
4. Save your changes.
5. Enter *Profiles* in the Quick Find box and select **Profiles**.
6. Click the profile you set up for your sales reps.
7. Click **Edit** and go to the Standard Object Permissions section.
8. Select **Read**, **Create**, **Edit**, and **Delete** for Visits, Product Items, and Product Fulfillment Locations.
9. Deselect **View All Records** for Visits, Product Items, and Product Fulfillment Locations.
10. Save your changes.

Now, you can implement appropriate Apex Classes and Triggers in your org to control how visit and inventory access is shared with your users. You can write these classes and triggers in any way that best

suits the needs of your organization. In this article, we've provided some sample Apex classes and triggers to help you get started.

Sample Apex Trigger for Visit and Inventory Access

Implement appropriate Apex Classes and Triggers in your org to control how visit and inventory access is shared with your users. You can write these classes and triggers in any way that best suits your organization's requirements. Here are some sample Apex classes and triggers to help you get started. The Visit trigger provides sharing access to the Visit object and related objects at the time a visit is created or updated. The Visitor trigger provides access to the user who is assigned to a visit. You can use these Apex triggers with profile-based permissions and organization-wide sharing settings to make sure that users access just their visits and inventories.

Sample Apex Trigger for Visit and Inventory Access

Implement appropriate Apex Classes and Triggers in your org to control how visit and inventory access is shared with your users. You can write these classes and triggers in any way that best suits your organization's requirements. Here are some sample Apex classes and triggers to help you get started. The Visit trigger provides sharing access to the Visit object and related objects at the time a visit is created or updated. The Visitor trigger provides access to the user who is assigned to a visit. You can use these Apex triggers with profile-based permissions and organization-wide sharing settings to make sure that users access just their visits and inventories.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To define, edit, delete, set security, and set version Author Apex settings for Apex classes:

To run Apex tests: [View Setup and Configuration](#)

! **Important** The sample code Salesforce provides in this Help article for Apex Triggers and Apex Classes is: (1) made available solely as an example for Customers' reference purposes; and (2) is a Non-SFDC Application under any Main Services Agreement between a Customer and Salesforce. Customers can either choose to use this sample code as provided, or write their own code as appropriate for their own implementation of Salesforce's Services. This sample code is made available "AS-IS" and Salesforce makes no warranty of any kind regarding this sample code (whether express, implied, statutory or otherwise).

To set up Apex triggers, you must create a few utility classes first.

1. Click **Setup** and select **Developer Console**.
2. Create the `VisitAccess` utility class.
 - a. Select **File | New | Apex Class**.
 - b. For the Apex class name, enter `VisitAccess`.
 - c. Delete the auto-generated content and paste the following code.

```
public class VisitAccess {  
  
    static Set<String> accessLevels = new Set<String>{'read', 'edit'};  
  
    public static void insertVisitAccess(Visit visit, User user, String ac  
cessType) {  
        insertVisitAccess(visit, new List<User>{user}, accessType);  
    }  
  
    public static void insertVisitAccess(Visit visit, Id objectId, String  
accessType) {  
        if(isUser(objectId)) {  
            insertVisitAccess(visit, new User(id=objectId), accessType);  
        }  
    }  
  
    public static void insertVisitAccess(Visit visit, List<User> users, St  
ring accessType) {  
        if(visit==null || visit.Id==null || users==null || users.isEmpty  
y()) {  
            return;  
        }  
        List<VisitShare> shareVisitList = new List<VisitShare>();  
        for(User user: users) {  
            if(user==null)  
                continue;  
            VisitShare shareVisit = New VisitShare();  
            shareVisit.ParentId=visit.Id;  
            shareVisit.UserOrGroupID = user.Id;  
            shareVisit.AccessLevel = accessType;  
            shareVisitList.add(shareVisit);  
        }  
        try{  
            Database.insert(shareVisitList);  
        } catch(Exception e) {  
            System.debug('Unexpected exception : ' + e);  
        }  
    }  
}
```

```
public static void updateVisitAccess(Visit visit, List<Id> oldUsers, List<Id> newUsers, String access) {
    if(visit==null) {
        return;
    }
    if(oldUsers!=null) {
        for(Id userId : oldUsers) {
            if(isUser(userId)) {
                deleteVisitAccess(visit, new User(id=userId));
            }
        }
    }
    if(newUsers!=null) {
        for(Id userId : newUsers) {
            if(isUser(userId)) {
                insertVisitAccess(visit, userId, access);
            }
        }
    }
}

public static void updateVisitAccess(Visit oldVisit, Visit updatedVisit, String access) {
    //Comment this condition if for any update visit need to be shared
    if(oldVisit.VisitorId==updatedVisit.VisitorId) {
        return;
    }
    updateVisitAccess(oldVisit, oldVisit!=null?new List<Id>{oldVisit.VisitorId}:new List<Id>(), updatedVisit!=null?new List<Id>{updatedVisit.VisitorId}:new List<Id>(), access);
}

//remove user from oldVisit if user does not have any more access to oldVisit, and link user to newVisit
public static void updateVisitAccess(Visit oldVisit, Visit newVisit, List<User> users, String access) {
    if(users==null || users.isEmpty()) {
        return;
    }
    if(access==null||!accessLevels.contains(access)) {
        access='edit';
    }
    for(User user : users) {
        if(oldVisit!=null)
```

```
        deleteVisitAccess(oldVisit, user);
        if(newVisit!=null)
            insertVisitAccess(newVisit, user, access);
    }
}

//remove user from oldVisit if user does not have any more access to o
ldVisit, and link user to newVisit
public static void updateVisitAccess(Visit oldVisit, Visit newVisit, I
d objectId, String access) {
    if(isUser(objectId)) {
        updateVisitAccess(oldVisit, newVisit, new List<User>{new Use
r(id=objectId)}, access);
    }
}

public static void deleteVisitAccess(Visit visit, List<User> users) {
    List<VisitShare> visitShareList = new List<VisitShare>();
    for(User user : users) {
        if(isUserLinkedToVisit(user, visit))
            continue;
        List<VisitShare> visitShare = [select Id from VisitShare where
ParentId = :visit.Id and UserOrGroupID = :user.Id and RowCause='Manual'];
        if(!visitShare.isEmpty()) {
            visitShareList.add(visitShare.get(0));
        }
    }
    delete visitShareList;
}

public static void deleteVisitAccess(Visit visit, User user) {
    deleteVisitAccess(visit, new List<User>{user});
}

public static void deleteVisitAccess(Visit visit, Id objectId) {
    if(isUser(objectId)) {
        deleteVisitAccess(visit, new User(id=objectId));
    }
}

public static Boolean isUser(Id objId) {
    if(objId==null)
        return false;
```

```

List<User> users = [select Id from User where Id = :objId];
return !users.isEmpty();
}

public static Boolean isUser(Object obj) {
if(obj==null)
    return false;
try {
    User user = (User)obj;
} catch(TypeException e) {
    return false;
}
return true;
}

public static Boolean isUserLinkedToVisit(User user, Visit visit) {
    List<Visit> visits = [select Id from Visit where VisitorId = :user.Id and Id=:visit.Id];
    List<Visitor> visitors = [select Id from Visitor where AssigneeId = :user.Id and VisitId=:visit.Id];
    return !visits.isEmpty() || !visitors.isEmpty();
}
}

```

d. Select **File | Save**.

3. Create the visit trigger.

a. Select **File | New | Apex Trigger**.

b. For the trigger name, enter *VisitTrigger*, and select **Visit** from the sObject picklist.

c. Delete the auto-generated content and paste the following sample.

```

trigger VisitTrigger on Visit (after insert, after update) {
    List<VisitShare> visitShares = new List<VisitShare>();
    for(Visit visit : trigger.new) {
        if(trigger.isUpdate) {
            Visit oldVisit = trigger.oldMap.get(visit.Id);
            VisitAccess.updateVisitAccess(oldVisit, visit, 'edit');
        }
        if(trigger.isInsert) {
            VisitAccess.insertVisitAccess(visit, visit.VisitorId, 'edit');
        }
    }
}

```

d. Select **File | Save**.

4. Create the visitor trigger.

- Select **File | New | Apex Trigger**.
- For the trigger name, enter *VisitorTrigger*, and select **Visitor** from the sObject picklist.
- Delete the auto-generated content and paste the following sample.

```
trigger VisitorTrigger on Visitor (after insert, after update, after delete) {
    if(trigger.isInsert) {
        for(Visitor visitor : trigger.new) {
            VisitAccess.insertVisitAccess(new Visit(id=visitor.VisitId), visitor.AssigeeId, 'edit');
        }
    }

    if(trigger.isUpdate) {
        for(Visitor visitor : trigger.new) {
            Visitor oldVisitor = trigger.oldMap.get(visitor.Id);
            VisitAccess.updateVisitAccess(new Visit(id=oldVisitor.VisitId), new Visit(id=visitor.VisitId), visitor.AssigeeId, 'edit');
        }
    }

    if(trigger.isDelete) {
        for(Visitor visitor : trigger.old) {
            VisitAccess.deleteVisitAccess(new Visit(id=visitor.VisitId), visitor.AssigeeId);
        }
    }
}
```

- Select **File | Save**.

Now, sales reps can see only the visits they're assigned to.

5. Create the **ProductItemAccess** utility class.

- Select **File | New | Apex Class**.
- For the Apex class name, enter *ProductItemAccess*.
- Delete the auto-generated content and paste the following sample.

```
public class ProductItemAccess {

    public static void insertAccess(List<ProductItem> productItems, List<Id> users, String access) {

        if(productItems==null || productItems.isEmpty() || users==null || users.isEmpty()) {
            return;
        }
    }
}
```

```
        }

        productItems = getProductItemsWithId(productItems);
        List<ProductItemShare> shareList = new List<ProductItemShare>();
        for(Id user: users) {
            if(user==null)
                continue;
            for(ProductItem item : productItems) {
                ProductItemShare share = New ProductItemShare();
                share.ParentId=item.Id;
                share.UserOrGroupID = user;
                share.AccessLevel = access;
                shareList.add(share);
            }
        }
    }

    try{
        Database.insert(shareList);
    } catch (Exception e) {
        System.debug(e);
    }
}

public static void deleteAccess(List<ProductItem> productItems, List<Id> users) {
    List<ProductItemShare> shareList = new List<ProductItemShare>();
    for(Id userId : users) {
        for(ProductItem productItem : productItems) {
            List<ProductItemShare> shares = [select Id from ProductItemShare where ParentId = :productItem.Id and UserOrGroupID = :userId and RowCause='Manual'];
            if(!shares.isEmpty()) {
                shareList.addAll(shares);
            }
        }
    }
    delete shareList;
}

public static List<ProductItem> getProducts(ProductFulfillmentLocation fulfillLocation) {
    return [select Id from ProductItem where Product2Id=:fulfillLocation.ProductId and LocationId=:fulfillLocation.FulfillmentLocationId];
}

private static List<ProductItem> getProductsWithId(List<ProductItem>
```

```
m> productItems) {
    List<ProductItem> productItemsWithId = new List<ProductItem>();
    for(ProductItem item : productItems) {
        if(item==null)
            continue;
        if(item.id==null) {
            List<ProductItem> itemList = [select Id from ProductItem w
here Product2Id=:item.Product2Id and LocationId=:item.locationId];
            productItemsWithId.addAll(itemList);
        }
    }
    return productItemsWithId;
}
}
```

d. Select **File | Save**.

6. Create the `ProductFulfillmentLocationAccess` utility class.

a. Select **File | New | Apex Class**.

b. For the Apex class name, enter `ProductFulfillmentLocationAccess`.

c. Delete the auto-generated content and paste the following sample.

```
public class ProductFulfillmentLocationAccess {

    static Set<String> accessLevels = new Set<String>{'read', 'edit'};

    /**
     * Gives access to users on all product fulfillment locations
     */
    public static void insertAccessToAllLocations(ProductFulfillmentLocati
on locationToInsert, String accessType) {
        List<ProductFulfillmentLocation> fulfillLocations = [select Id, Pr
oductId, FulfillmentLocationId from ProductFulfillmentLocation];
        insertAccess(fulfillLocations, getAllResponsibleUsers(), accessTyp
e);
        insertProductItemAccess(new List<ProductFulfillmentLocation>{locat
ionToInsert}, new List<Id>{locationToInsert.UserId}, accessType);
    }

    public static void insertAccess(List<ProductFulfillmentLocation> fulfi
llLocations, List<Id> users, String accessType) {
        if(fulfillLocations==null || fulfillLocations.isEmpty() || user
s==null || users.isEmpty()) {
            return;
        }
    }
}
```

```
        List<ProductFulfillmentLocationShare> shareList = new List<ProductFulfillmentLocationShare>();
        for(Id user: users) {
            if(user==null)
                continue;
            for(ProductFulfillmentLocation location : fulfillLocations) {
                if(location==null || location.Id==null)
                    continue;
                ProductFulfillmentLocationShare share = New ProductFulfillmentLocationShare();
                share.ParentId=location.Id;
                share.UserOrGroupID = user;
                share.AccessLevel = accessType;
                shareList.add(share);
            }
        }
    try{
        Database.insert(shareList);
    } catch (Exception e) {
        System.debug(e);
    }
}

public static void updateAccess(ProductFulfillmentLocation oldLocation, ProductFulfillmentLocation updatedLocation, String access) {
    deleteAccess(oldLocation);
    insertAccessToAllLocations(updatedLocation, access);
}

public static void deleteAccess(List<Id> users) {
    List<ProductFulfillmentLocationShare> shareList = new List<ProductFulfillmentLocationShare>();
    for(Id userId : users) {
        if(isUserLinkedTofulfillLocation(userId))
            continue;
        List<ProductFulfillmentLocationShare> shares = [select Id from ProductFulfillmentLocationShare where UserOrGroupID = :userId and RowCause='Manual'];
        if(!shares.isEmpty()) {
            shareList.addAll(shares);
        }
    }
    delete shareList;
}
```

```
public static void deleteAccess(ProductFulfillmentLocation fulfillLocation) {
    deleteAccess(new List<Id>{fulfillLocation.UserId});
    deleteProductItemAccess(fulfillLocation);
}

public static Boolean isUserLinkedTofulfillLocation(Id userId) {
    List<ProductFulfillmentLocation> fulfillLocations = [select Id from ProductFulfillmentLocation where UserId = :userId];
    return !fulfillLocations.isEmpty();
}

public static void deleteProductItemAccess(ProductFulfillmentLocation fulfillLocation) {
    ProductItemAccess.deleteAccess(ProductItemAccess.getProductItems(fulfillLocation), new List<id>{fulfillLocation.UserId});
}

public static void insertProductItemAccess(List<ProductFulfillmentLocation> fulfillLocations, List<Id> users, String access) {
    List<ProductItem> productItems = new List<ProductItem>();
    for(ProductFulfillmentLocation location : fulfillLocations) {
        productItems.add(new ProductItem(Product2Id=location.ProductId, LocationId=location.FulfillmentLocationId));
    }
    ProductItemAccess.insertAccess(productItems, users, access);
}

public static List<Id> getAllResponsibleUsers() {
    List<Id> users = new List<Id>();
    List<ProductFulfillmentLocation> fulfillLocations = [select UserId from ProductFulfillmentLocation];
    for(ProductFulfillmentLocation location : fulfillLocations) {
        users.add(location.UserId);
    }
    return users;
}
```

d. Select **File | Save**.

Now sales reps can see only the inventories they're responsible for.

Use External Data Sources for Expected Quantity in Cycle Counts

Expected quantities in cycle counts are automatically calculated from product item records in Intelligent Sales. However, if you need to use external data sources for these numbers, use our `IFetchInventoryCount` Apex Interface with your own custom Apex classes and methods.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To define an Apex class: Author Apex

1. In the Developer Console, select **File | New | Apex Class**.
2. Implement this Apex interface in the Apex class:

```
public class UpdateInventory implements healthcloudest.IFetchInventoryCount{  
    //Sample Apex Class to fetch Inventory count from external Inventory Location  
    (Input parameter : visitId)  
    public Map<Id, Integer> getInventoryCount(String visitId) {  
        Map<Id, Integer> sample = new Map<Id, Integer>();  
        //Logic to fetch numbers from external data source  
        //Use Apex code to connect to external API and fetch result  
        //Return Type: Map of Product Item Id against its Count(Integer Value)  
        return sample;  
    }  
}
```

If any record against `ProductItemId` is missing a value, and that product item already has a value for expected quantity in the Intelligent Sales system, then the value in the Intelligent Sales system is used instead.

Configure the Page Layouts and Picklist Values for Product Transfer, Product, and Location

Configure the page layouts of Product Transfer, Product, and Locations, and add picklist values for different location types. You must make these changes before your users start using Intelligent Sales.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To modify page layouts:	Customize Application
-------------------------	-----------------------

1. From Setup, go to Object Manager, find and select **Product Transfer**, and then go to the Page Layouts section.
 - a. Select **Product Transfer Layout**.
 - b. From the Fields menu, move the Expected Pickup Date, Source Location, Destination Location, and Status fields to the Product Transfer Detail section.
 - c. Save your changes.
2. From Object Manager, find and select **Product**, and then go to the Page Layouts section.
 - a. Select **Product Layout**.
 - b. From the Fields menu, move the Serialized field onto the page layout.
 - c. From the Related Lists menu, move the Serialized related list onto the page layout.
 - d. Save your changes.
3. From Object Manager, find and select **Location**, and then go to the Page Layouts section.
 - a. Select **Location Layout**.
 - b. From the Fields menu, move the Inventory Location field to the Information section.
 - c. Save your changes.
4. From Object Manager, return to the Location object to add Location Type picklist values.
 - a. Go to the Fields and Relationships section.
 - b. Select **Location Type**.
 - c. In the Picklist Values section, click **New**.
 - d. Enter location types such as *Site*, *Warehouse*, and *Van*.
 - e. Save your changes.

These objects now have all the attributes necessary to store transfer requests for your sales reps.

Set Up Data for Intelligent Sales

To help your users get the most out of Intelligent Sales, make sure that your Salesforce org is set up with the right data.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Capabilities of Intelligent Sales such as projecting product shortfalls, and creating and executing site visits, among others, help your MedTech sales team only if the right data is in the right object. For instance, make sure that your entries in objects like Location, Product Item, and Product Fulfillment Location have the right attributes.

1. Set Up Work Types for Visits

Use work type records to create visit types. Work types determine the kind of visits that are created using the New Visit Flow on the Intelligent Sales home page. You can create work types for surgical case visits, cycle count visits, or blind cycle count visits. The work type used to create a visit also determines whether that visit is factored into product shortfall projections.

2. Set Up Your Accounts, Contacts, and Locations

The hospital accounts your organization deals with is the first set of information you add to the Intelligent Sales data model. After you add an account, you add contacts your reps meet with when they visit that account. Then you can add the accounts' locations.

3. Set Up Your Products and Inventories

Records in the Product object define your products. Product inventories are stored in the Product Item object. The Product Fulfillment Location object associates sales reps with the inventories they own and accounts they're responsible for.

4. Set Up Visit Tasks and Action Plan Templates for Cycle Counts

Action plan templates define the sets of tasks that your sales reps perform during visits. Our system automatically creates visit tasks for scheduled cycle count visits using the details you define in these action plan templates.

5. Set Up Action Plan Templates for Surgical Case Visits

Action plan templates define the sets of tasks your sales reps perform during visits. Our system automatically creates Assessment Task records for scheduled surgical case visits using the details you define in these action plan templates. Action plan templates created for surgical case visits use flows as visit tasks for your sales reps.

6. Register and Authorize Patient Product Orders Faster with Flows

Salesforce provides two pre-built flows with Intelligent sales to make surgical visits easier. The Patient Registration and Order Authorization flows are both compatible with Intelligent Sales, and helps perform two assessment tasks that are common in surgical visits.

Set Up Work Types for Visits

Use work type records to create visit types. Work types determine the kind of visits that are created using the New Visit Flow on the Intelligent Sales home page. You can create work types for surgical case visits, cycle count visits, or blind cycle count visits. The work type used to create a visit also determines whether that visit is factored into product shortfall projections.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To add a work type: Create on work type

-  **Note** If these fields are not already visible, add the **Is Used For Inventory Projection**, **Cycle Counting**, and **Blind Cycle Counting** fields to the Work Type page layout. Make sure the field-level security for these three fields is set to visible for your users.
1. From Setup, enter *Intelligent Sales Settings* in the Quick Find box and select **Intelligent Sales Settings**.
 2. Click **New Work Type**.
 3. Enter a name, estimated duration, and duration type for the work type.
 4. If you're creating a work type for surgical cases, select **Is Used For Inventory Projection**. If the work type is for cycle counts, leave this checkbox unselected.
 5. If you're creating a work type for cycle counts, select **Cycle Counting**. If the work type is for surgical cases, leave this checkbox unselected.
 6. If you're creating a work type for blind cycle count, select **Blind Cycle Counting** after you select **Cycle Counting**.
 7. Save your work.

Set Up Your Accounts, Contacts, and Locations

The hospital accounts your organization deals with is the first set of information you add to the Intelligent Sales data model. After you add an account, you add contacts your reps meet with when they visit that account. Then you can add the accounts' locations.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To add accounts: Create on account

To add contacts: Create on contact

To add a location to an account: Read on product fulfillment location

1. Add an account.
 - a. From the App Launcher, go to Accounts and click **New**.
 - b. Select **Business** record type and click **Next**.
 - c. Enter the account name and other relevant information.
 - d. Save your changes.

2. Add a contact to your account.
 - a. Go to the Related tab of your account page.
 - b. In the Contacts section, click **New**.
 - c. Enter the contact's name and other relevant information.
 - d. Save your changes.
3. Add a location for your account.

This location is tied to your account in the Product Fulfillment Location object.

 - a. From the App Launcher, go to Locations and click **New**.
 - b. Enter a location name, location type, and other relevant information. To enter a new address, save the location and then edit the location record to add the address. You're required to enter the location in the Parent field of the address record.

 **Note** To also use this account location as a consigned inventory location, select **Inventory Location**.

 - c. Save your changes.

Set Up Your Products and Inventories

Records in the Product object define your products. Product inventories are stored in the Product Item object. The Product Fulfillment Location object associates sales reps with the inventories they own and accounts they're responsible for.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To add a product:	Create on product
To add a standard price:	Create on price book
To add an inventory location:	Create on location
To define an inventory:	Create on product item
To add serial numbers for products:	Create on serialized product
To define a product fulfillment location:	Create on product fulfillment location

1. Add a product.
 - a. From the App Launcher, go to Products and click **New**.
 - b. Enter the name, product code, and description.
 - c. Select **Active** and **Product Family** as appropriate for the product.
 - d. If you expect this product to have serial numbers, then select **Serialized**. If not, don't select it.

 **Note** If a product is serialized, it can't be deserialized as long as any inventory associated with that product has a non-zero quantity

- e. Save your record.
 - f. On the record page for your new product, go to the Related tab and click **Add Standard Price**.
 - g. Make sure that the price book selected is the standard price book and enter the list price.
 - h. Save your changes.
2. Add an inventory location.
 - a. From the App Launcher, go to Locations and click **New**.
 - b. Add a location name, location type, and other relevant information.
 - c. Select **Inventory Location**.
 - d. Save your record.
 - e. On the details page of your location, click **Edit Visitor Address**.
 - f. In the **Visitor Address** field, click **New Address**.
 - g. In the New Address window, select your location in the **Parent** field.
 - h. Enter the location's address accurately, using the Address, City, State/Province, Zip/Postal Code, and Country fields.
 -  **Important** Be sure to enter a value for Zip/Postal Code. If this value is blank, or if the address data isn't accurate, your users can't find nearby inventories to request product transfers from.

 - i. Save the address record.
 - j. Save your changes to the location.
 3. Define an inventory.
 - a. From the App Launcher, go to Product Items and click **New**.
 - b. In the Product Name field, select the product you're creating an inventory for.
 - c. In the Location field, select the location you created for the product's inventory.
 - d. In the Quantity On Hand field, enter a value as follows:
 - If your product is serialized, then enter *0*. This number is automatically updated with each serial number you create for this inventory.
 - If your product isn't serialized, enter the actual quantity available at that inventory.
 - e. Enter a unit of measure for the quantity and save your record.
 -  **Note**

 - If your product is serialized, then the unit of measure must be *Each*.
 - Don't add serial numbers for your products here. Use the Serialized Product object instead.
 4. Add serial numbers for products that are serialized. Skip this step if you didn't select **Serialized** when you created the product record.
 - a. From the App Launcher, go to Serialized Products and click **New**.
 - b. Enter a serial number.
 - c. Select the product item associated with the inventory you want to add this serial number to.
 -  **Note** Leave the Asset field blank.
 - d. Select the product this serial number belongs to. Make sure that the product you select here and the product associated with the product item you selected are the same.
 - e. Enter an expiration date as required and save your record.
 5. Define a product fulfillment location.

- a. From the App Launcher, go to Product Fulfillment Locations and click **New**.
- b. Enter a name for your product fulfillment location.
- c. Select a product in the Product field.
- d. Select the inventory location in the Fulfillment Location field.
- e. In the Responsible User field, select the user in charge of this inventory.
- f. In the Account field, select the account this user is responsible for.
If you're creating a product fulfillment location record to represent a warehouse that doesn't directly supply products to accounts, leave this field blank.
- g. In the Account Location field, select the location of the account that this user visits. If the fulfillment location is a warehouse, leave this field blank.
If you're creating a product fulfillment location record to represent a warehouse that doesn't directly supply products to accounts, leave this field blank.
- h. Save your record.

! **Important** It's critical that you set up all the required product and inventory data accurately. Make sure that your users create visits that are consistent with the records in the Product Item and Product Fulfillment Location objects. Missing data and inconsistent records interfere with the product availability projections and revenue risk estimations.

Set Up Visit Tasks and Action Plan Templates for Cycle Counts

Action plan templates define the sets of tasks that your sales reps perform during visits. Our system automatically creates visit tasks for scheduled cycle count visits using the details you define in these action plan templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To add a generic visit task record:	Create on generic visit task
To add a generic visit task context record:	Create on generic visit task context
To add an assessment indicator definition record:	Create on assessment indicator definition
To add a generic visit key performance indicator record:	Create on generic visit key performance indicator
To add a generic visit task context relation record:	Create on generic visit task context relation
To configure action plans:	Action Plans permission set

USER PERMISSIONS NEEDED

AND

Modify All Data OR Customize Application

1. Create a Generic Visit Task record.

Generic Visit Task records are used as templates for creating Visit Task records when a cycle count is scheduled. You can use the same Generic Visit Task record for all products and all inventories in your organization, or you can use dedicated records for each product in your organization. In either case, only the tasks related to the products selected for a count appear on your rep's list of tasks for that count.

- a. From the App Launcher, find and select **Generic Visit Tasks**.
- b. Click **New**.
- c. Enter a name for the task.
Count Products
- d. Set the status to **Is Defined**.
- e. Leave all other fields blank and save your work.

2. Create a Generic Visit Task Context record.

Generic Visit Task Context records define generic visit tasks in the context of a specific inventory. Create individual Generic Visit Task Context records for each product in each inventory. For instance, if your organization has heart valves at warehouses Zeta and Beta, create Generic Visit Task Context records for heart valves at each warehouse.

- a. From the App Launcher, find and select **Generic Visit Task Contexts**.
- b. Click **New**.
- c. Enter a name for the record. We recommend including the name of the inventory so that it's easier for you to identify it later.
Count Heart Valves at Warehouse Zeta
- d. Set the Context field to Product Item and select a Product Item record.
- e. Set the status to **Is Defined**.
- f. Leave all the other fields blank and save your work.

3. Create an Assessment Indicator Definition record.

Assessment Indicator Definition records define the data type for the values stored in Generic Visit Key Performance Indicator records. We'll talk about Generic Visit Key Performance Indicators in a bit. For now, let's create an Assessment Indicator Definition record and configure it for the Number data type. You can create a single record for your org and reuse it for all the Generic Visit Key Performance Indicator records you create for cycle counts.

- a. From the App Launcher, find and select **Assessment Indicator Definition**.
- b. Click **New**.
- c. Enter a name for the record and select **Number** in the **Assessment Indicator Definition** picklist.

- d. Save your work.
4. Create a Generic Visit Key Performance Indicator record.

The expected quantities of products at inventory locations and the actual quantities counted during cycle counts are stored in Key Performance Indicator (KPI) records. The system creates these KPI records from the templates you define in the Generic Visit Key Performance Indicator object. A Generic Visit Key Performance Indicator record is connected to the Generic Visit Task Context record for which it's storing expected and counted quantities. Create a separate Generic Visit Key Performance Indicator record for each Generic Visit Task Context record.

- a. Go to the **Related** tab on the Generic Visit Task Context record that you created earlier.
 - b. Select **New** next to Generic Visit Key Performance Indicator.
 - c. For the **Visit Task Context** field, select the Generic Visit Task Context record you just came from. This field is auto-populated if you're creating the record from the Related tab of the Generic Visit Task Context record.
 - d. In the **Assessment Indicator Definition** field, select the Assessment Indicator Definition record you created earlier.
 - e. Select a unit of measure and leave the remaining fields blank.
 - f. Save your work.
5. Create a Generic Visit Task Context Relation record.
- A Generic Visit Task Context Relation record connects a Generic Visit Task Context record to its related Generic Visit Task record.
- a. Go to the **Related** tab on the Generic Visit Task Context record that you created earlier.
 - b. Click **New** next to Generic Visit Task Context Relations.
 - c. In the **Visit Task** field, select the Generic Visit Task record you created earlier.
 - d. In the **Visit Task Context** field, select the Generic Visit Task Context record you created earlier. This field is auto-populated if you create this record from the Related tab of the Generic Visit Task Context record.
 - e. Save your work.
6. Create an action plan template.
- An action plan template defines the tasks that reps perform during a visit.
- a. From the App Launcher, find and select **Action Plan Templates**.
 - b. Click **New**.
 - c. Enter a name and select the template owner.
 - d. Make sure that the option that lets users add items to action plans isn't selected.
 - e. In the Action Plan Type field, select **Assessment Execution**.
 - f. In the Target Object field, select **Visit**.
 - g. Save your work.

We're almost done. Just one more step to go!

7. Add your visit tasks to your action plan template and publish it.
- a. In the Items tab of your action plan template, click **New Generic Assessment Task**.



Warning Only add Visit Tasks to your templates for cycle counts.

- b. In the **Generic Assessment Task Type** field, select **Generic Visit Task**.
- c. In the **Generic Assessment Tasks** field, select the Generic Visit Task record you created for the action plan template.

- d. Select the **Is Required** checkbox.
- e. Save your choices.
- f. And finally, click **Publish Template** on the Action Plan Template record.

Set Up Action Plan Templates for Surgical Case Visits

Action plan templates define the sets of tasks your sales reps perform during visits. Our system automatically creates Assessment Task records for scheduled surgical case visits using the details you define in these action plan templates. Action plan templates created for surgical case visits use flows as visit tasks for your sales reps.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To add an action plan template: Create on action plan

To create flows: Manage Flows

To use flows: Run Flows

Before you create an action plan template for a surgical case visit, make sure you have the business flows that your sales reps need for their assessment tasks. You can either build your own flows using the Flow Builder, or you can use the Patient Registration and Order Authorization flows provided with Intelligent Sales. If you create a flow, make sure that this flow accepts `VisitId` and `AssessmentTaskId` as input.

1. Create an action plan template.
 - a. From the App Launcher, find and select **Action Plan Templates**.
 - b. Click **New**.
 - c. Enter a name and description.
 - d. Make sure that **Let users add items to action plans** isn't selected.
 **Note** We recommend not selecting **Let users add items to action plans** to prevent sales reps from adding unauthorized tasks to their action plans.
 - e. In the Action Plan Type field, select **Assessment Execution**.
 - f. In the Target Object field, select **Visit**.
 - g. Save your work.
2. Add task flows in an action plan template and publish it.
 - a. In the Items tab of your action plan template, click **Add Flow**.
 **Warning** Only add task flows to your template. Intelligent Sales doesn't support assessment

task definitions.

- b. In the Task Flow picklist, select a flow to add to your template.
- c. If you want this task to be mandatory during visits, select **Required**.
- d. Save your changes.
- e. Add more task flows as needed.
- f. After you add all task flows for your template, click **Publish Template**.

Register and Authorize Patient Product Orders Faster with Flows

Salesforce provides two pre-built flows with Intelligent sales to make surgical visits easier. The Patient Registration and Order Authorization flows are both compatible with Intelligent Sales, and helps perform two assessment tasks that are common in surgical visits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Patient Registration

This flow helps your reps assign products to the patients they're used for in a visit. During visit execution, this flow creates an account record for the patient and records information about the products used, such as the serial number. If Person Accounts are enabled for your Salesforce org and the sales rep has access to person accounts, the record created is always a person account record. And if not, it's a business account record.

Order Authorization

This flow helps your reps generate an order record when a product is consumed during a visit. It also helps capture the visited party's signature and consent to be billed for the order. This order record also has additional information such as the product consumed, its quantity, serial number, order amount, shipping address, and billing address. It also has a built-in barcode scanner that helps reps enter serial numbers faster.

Intelligent Sales Sample Flows for Field Inventory Management

Manage your serialized inventories using the Intelligent Sales Sample Flows for Field Inventory Managements. Capture and fulfill product requests and ensure all products are accounted for by performing cycle counts with built-in business processes designed to optimize field inventory management. To ensure that the flows meet your business' unique needs, flows are customizable.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

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 and efficiently manage cycle counts. Leverage the full potential of these flows by customizing them as per your unique business needs.

Let's take a quick look at the sample flows and what they can do for your business.

Sample Flow	Description
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.

To learn more about the sample flows and get instructions for deploying them to Salesforce, see

[Accelerator: Intelligent Sales Sample Flows.](#)

Use Intelligent Sales

Intelligent Sales helps organizations that produce and sell medical devices to make their sales and inventory management processes more efficient. Sales ops teams can use the desktop app to schedule surgical case visits and cycle counts for their sales reps in the field. Sales reps can use the mobile app to schedule and perform their own surgical case visits and cycle counts.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

With Intelligent Sales, you get valuable features like visit-based shortfall projections, shortfall-based revenue-risk estimates, and location-based product transfer requests. The barcode scanner in the mobile app helps reps handle serialized products more efficiently during visits and counts. These tools help organizations reduce operational costs by reducing inventory write-off scenarios and projecting product shortfalls for scheduled visits.

Note Intelligent Sales doesn't work offline.

[Introduction to the Intelligent Sales Mobile App](#)

The Intelligent Sales mobile app provides all the power of the desktop app on the go. Schedule and execute visits, and view important details about inventory projections, product transfers, and more—all from your mobile phone.

Shortfall Projections

View shortfall projections for products that are part of the visits you've scheduled on the Intelligent Sales home page on the desktop app. If you're on the mobile app, these projections are on the My Products page.

The Typical Day of a Sales Ops Person Using Intelligent Sales

As a part of sales operations, you're typically involved in supporting your sales reps so that they can perform at their best for your organization. You schedule visits for them based on the product orders your organization receives. You keep a close eye on inventories and if you see that a rep doesn't have enough products for a visit, you arrange for a product transfer from a nearby inventory or another rep. And as part of the regular business operations at your organization, you also schedule planned cycle counts for your reps and their inventories.

The Typical Day of a Sales Rep Using Intelligent Sales

As a sales rep, you're mostly on the road, moving product for your organization. Because of your highly mobile work situation, you use Intelligent Sales on a mobile device. Your primary responsibilities are performing surgical case visits and the occasional cycle count. If you don't have enough products for a visit, you request for a product transfer from someone nearby.

Introduction to the Intelligent Sales Mobile App

The Intelligent Sales mobile app provides all the power of the desktop app on the go. Schedule and execute visits, and view important details about inventory projections, product transfers, and more—all from your mobile phone.

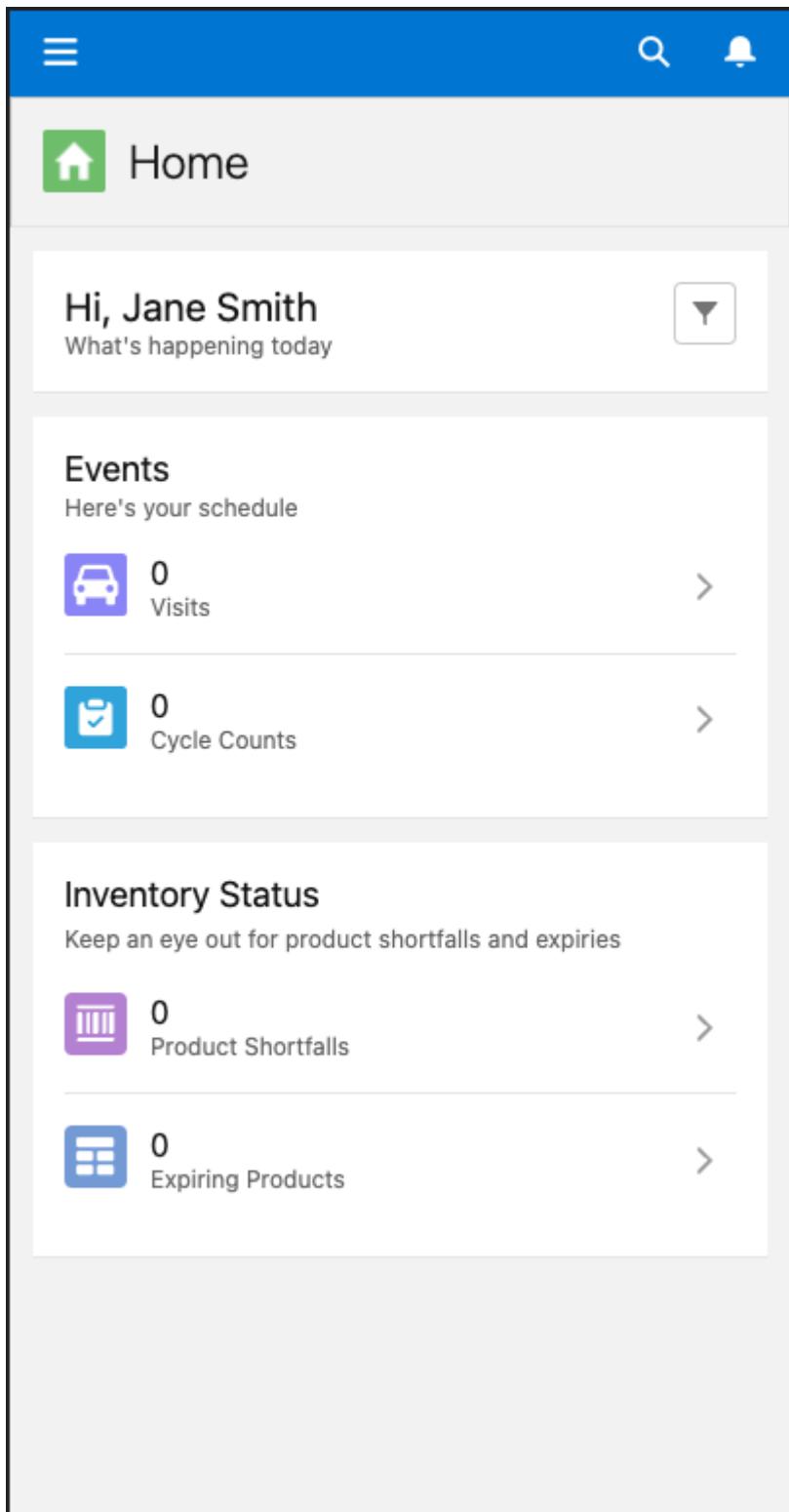
REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

The Intelligent Sales mobile app has seven main pages where you perform your core tasks.

Home Page



The Intelligent Sales home page is where you start your day. The page displays all the important information you need to know, such as:

- The visits you're scheduled for
- The cycle counts you have to perform
- The products you're running short on for your visits
- The products expiring in the near future

You can filter this information based on the time period you prefer. You can filter for the current day, or the next 7, 14, 30, or 90 days. Navigating to an item of interest on this page is as easy as tapping its card.

My Visits

2:43 4G

My Visits

My Visits

Map Satellite

San Jose CALIFORNIA Las Vegas

Los Angeles San Diego

Google Map data ©2020 Google, INEGI Terms of Use

Hi, Maria

You have 2 visits today.

Mrs. Charlotte Ava.
18-08-20 02:00 PM
Planned
900 Hyde Street, San Francisco, CA
All Products Available

Dr. Ken Yamazaki.
18-08-20 06:30 PM
Planned
Los Angeles, CA
All Products Available

My Visits My Products Request Inbox Sent Requests Menu

The My Visits page shows your scheduled visits. Change the filter to see the visits for today, or the visits scheduled for the next 7, 14, 30, or 90 days. If any of these visits have shortfalls, that's also indicated on

this page. And if you set the filter to Today, you also see a map that shows the locations you're scheduled to visit. You can even schedule visits on the go by tapping the + button to launch the visit creation flow.

The My Visits page is also where you begin visit execution. Here's what you can do when you tap a visit card:

- Get directions to the visit location.
- See information about the account you're visiting, such as open cases and open orders.
- View and edit the products assigned to that visit. A caution sign on a product card indicates that you're running short on some product. But you don't have to worry, you can raise a transfer request from here.
- See the tasks that you perform during the visit.
- Start and end the visit.

My Products

The screenshot shows the 'My Products' page from the Administer Life Sciences Cloud app. At the top, there's a header bar with the time (2:43), signal strength (4G), and battery level. Below the header is a user profile picture and three blue icons: a location pin, a magnifying glass, and a bell.

My Products

Product Shortfall Projection
Next 7 days

Products with Shortfall

1

Total Products Products with Shortfall Revenue Risk
1 1 \$60.00

Thermometer
First Shortfall: 8/18/2020
Projected Shortfall: 2
Revenue Risk: \$60.00

[View All](#)

At the bottom, there's a navigation bar with five icons: 'My Visits' (car), 'My Products' (blue folder), 'Request Inbox' (hand), 'Sent Requests' (arrow), and 'Menu' (three horizontal lines). The 'My Products' icon is highlighted with a blue background.

The My Products page shows product information for your scheduled visits. See what sort of product shortfall you're projected to have, what products you're running low on, and by how much. You can also

see what revenue is at risk from that shortfall and when the first shortfall is projected to happen. Just like the My Visits page, you can filter this information for visits scheduled to happen for today, or the next 7, 14, 30, or 90 days.

If you have a shortfall for a product, tap that product card to view the inventory page for that product, and, if necessary, raise a transfer request.

Request Inbox

9:23 4G

Request Inbox

Request Inbox

Waiting

Thermometer

From Richa Shereen

Quantity: 3

Location: ITC Medical Supplies SFO

Requested Date: 2020-08-18

Accepted

Open road ahead
Looks like you don't have any current product transfer commitments.

My Visits My Products Request Inbox Sent Requests Menu

The Request Inbox page shows the transfer requests you receive. The page is sectioned into two parts—Waiting and Accepted. The Waiting section is where you see requests that are waiting for a

response, and the Accepted section has the requests that you accept. But if you reject a request, you can't access it from the mobile app anymore.

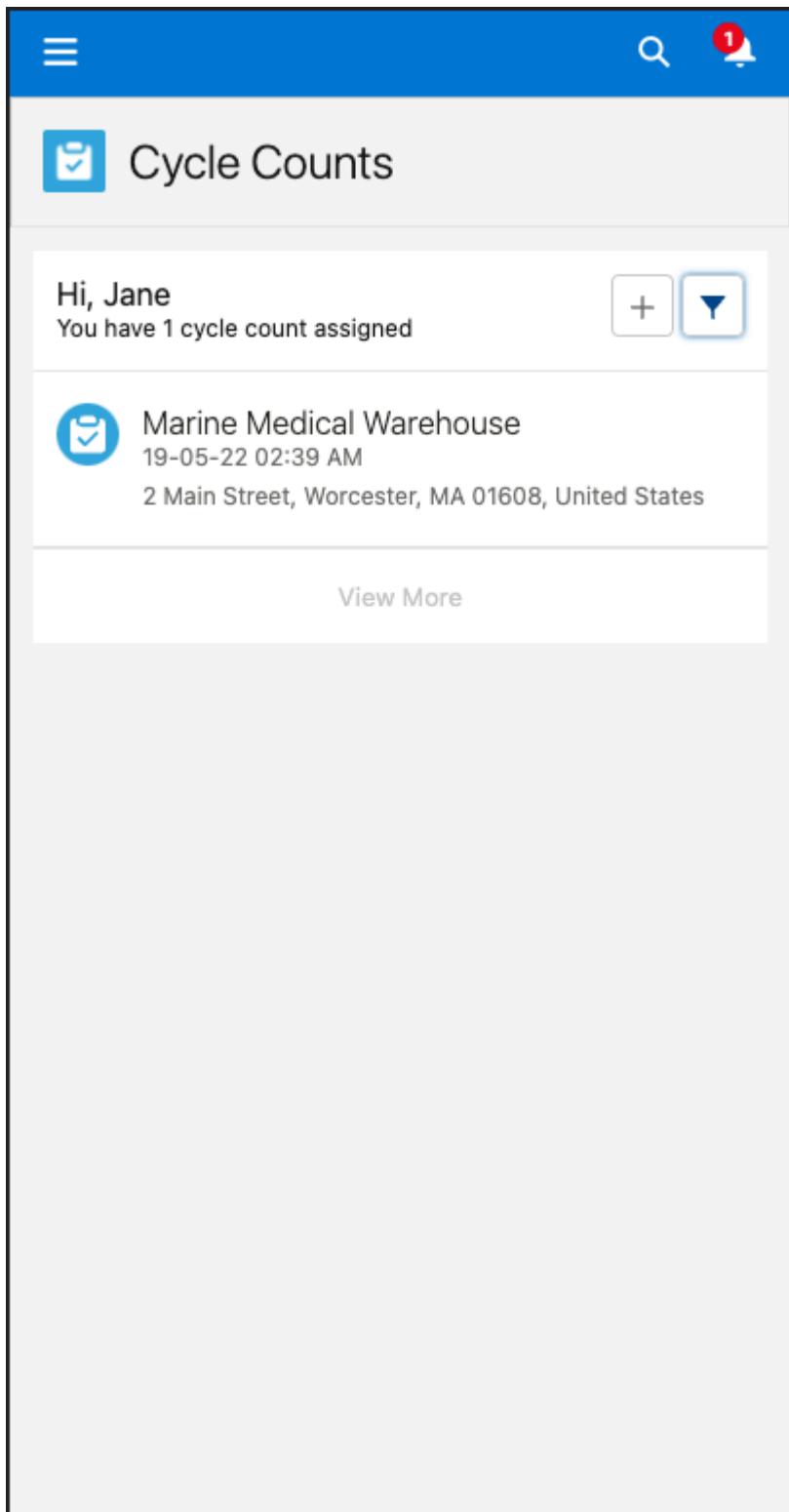
Sent Requests

The screenshot shows the 'Sent Requests' screen of a mobile application. At the top, there is a header bar with the time '3:06', signal strength, battery level, and three icons: a profile picture, a blue square with a white arrow, a magnifying glass, and a bell. Below the header, the title 'Sent Requests' is displayed in bold black text. Underneath the title, there is a section titled 'Accepted' with a red icon of a document with a checkmark. The text 'No bites yet' is followed by the message 'Looks like no one's accepted your outstanding requests.' with a fishhook icon. Below this, there is a section titled 'Waiting' with a thermometer icon. A request for a 'Thermometer' is listed, sent to 'Richa Sheren'. The details are: Quantity: 3, Location: ITC Medical Supplies SFO, Requested Date: 2020-08-18. At the bottom of the screen, there is a navigation bar with five icons: 'My Visits' (car), 'My Products' (box), 'Request Inbox' (hand), 'Sent Requests' (blue square with arrow), and 'Menu' (three horizontal lines). The 'Sent Requests' icon is highlighted in blue.

The Sent Requests page shows the transfer requests you send to other people. The page is sectioned into two parts—Accepted and Waiting. View your accepted requests in the Accepted section. View requests that are still waiting for a response in the Waiting section.

After you receive a product from a request, this page is where you mark the request as received. You can receive products only on the mobile app.

Cycle Counts



View the cycle counts assigned to you on the Cycle Counts page. This page is similar to the My Visits page, with one exception: you don't see a map like you do on the My Visits page. The Cycle Counts page is where you start and end your cycle counts. You can also schedule ad hoc cycle counts on the go from

this page by tapping the + button.

Epiring Products

The screenshot shows the 'Expiring Products' screen. At the top, there is a blue header bar with a menu icon, a search icon, and a bell icon. Below the header, the title 'Expiring Products' is displayed next to a grid icon. A section titled 'Products expiring in the next 7 days' contains two summary statistics: 'Expiring Products' (1) and 'Expiring Quantity' (1). Below this section, a table titled 'Products' lists one item: 'Pacemaker'. The product details include: Expiring Quantity : 1, Inventory Locations : 1, and First Expiration Date : 5/23/2022. The background of the screen is white, and the overall interface is clean and modern.

The Expiring Products page is where you see all the products in your inventory that are expiring in the

near future. The Expiring Products count tells you how many product types are set to expire, and the Expiring Quantity count tells you how many total pieces of product are set to expire. The card for each expiring product tells you what quantity of that product is expiring, how many inventory locations are affected, and when the first expiry is expected to happen. You can filter the products you see by today, or the next 7, 14, 30, or 90 days.

Tapping the card for a product on this page shows you the list of inventories where pieces of that product type are expiring. And tapping an inventory shows you the serial numbers of the expiring product pieces at that inventory, grouped by expiry dates.

Shortfall Projections

View shortfall projections for products that are part of the visits you've scheduled on the Intelligent Sales home page on the desktop app. If you're on the mobile app, these projections are on the My Products page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

You can set filters to see shortfalls for today, the next 7 days, 14 days, 30 days, or 90 days.



In this component, you can see the following:

- The ratio of products that are available and projected to have shortfall.
- The number of different products that have shortfall.
- The revenue risk this shortfall poses.
- The product that has shortfall, the quantity of shortfall, the revenue risk from that product, and the first day you have shortfall for that product.



Note You need read access on the Product Availability Projection object to see shortfall projections.

The Typical Day of a Sales Ops Person Using Intelligent Sales

As a part of sales operations, you're typically involved in supporting your sales reps so that they can perform at their best for your organization. You schedule visits for them based on the product orders your organization receives. You keep a close eye on inventories and if you see that a rep doesn't have enough products for a visit, you arrange for a product transfer from a nearby inventory or another rep. And as part of the regular business operations at your organization, you also schedule planned cycle counts for your reps and their inventories.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

You can perform all of these tasks from the comfort of your desk using the Intelligent Sales desktop app.

Here's How Intelligent Sales Helps You Through the Day

Schedule Visits for Product Orders

When you receive a product order from a provider, create a surgical case visit for it and assign a sales rep to fulfill that visit. You can schedule visits from the Intelligent Sales home page on the desktop app.

Make Up for Shortfalls with Product Transfers

Let's say that you notice a product shortfall for one of the visits you've scheduled. You can request someone within the range of 50 miles (80.47 km) to 5000 miles (8047 km) to transfer some inventory to make up for the shortfall.

Schedule Planned Cycle Counts for Inventories

As part of sales ops, you're responsible for scheduling regular cycle counts for inventories. These cycle counts help reduce discrepancies between your records and actual inventory numbers, which in turn reduces product write-off costs and makes sure your reps have fewer surprises during their visits.

Schedule Visits for Product Orders

When you receive a product order from a provider, create a surgical case visit for it and assign a sales rep to fulfill that visit. You can schedule visits from the Intelligent Sales home page on the desktop app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create visits

“Create” on Visits

“Create” on Visitors

“Create” on Visited Parties

USER PERMISSIONS NEEDED

“Create” on Action Plans

“Create” on Assessment Tasks

“Read” on Accounts

“Read” on Locations

“Read” on Contacts

“Read” on Products

“Read” on Work Types

“Read” on Action Plan Templates

“View All Records” on Product Fulfilment Locations

Run Flows

Manage Users

To edit visits

“Edit” on Visits

“Edit” on Visitors

“Edit” on Visited Parties

“Edit” on Action Plans

“Edit” on Assessment Tasks

“Read” on Accounts

“Read” on Contacts

“Read” on Products

“Read” on Work Types

“Read” on Action Plan Templates

Manage Users

To add users as visitors

Manage Users

 **Note** Before you create a visit, make sure that a matching record exists in the Product Fulfillment

Location object. This record must have the same combination of responsible user, product, account, account location, and inventory location as your visit.

1. On the Intelligent Sales home page, click **New Visit**.
2. In the **Select Visit Type** picklist, select the work type that your admin set up for surgical case visits and click **Next**.
3. Select a visit location from Locations.
4. Select a start time and an end time.
5. Select a priority for the visit and click **Next**.
6. Select a primary visitor from User.
To add a secondary visitor, click **Add Visitor** and select the person.
7. Select an account.
8. Select the primary visited party and click **Next**.
To add more visited parties, click **Add Person to Visit** and select the person.
9. Select a product, enter the quantity you need, and click **Next**.
To add more products, click **Add Product**. Or if you don't want any products, click the **Delete** icon.
10. Select an action plan template.

An action plan template determines what tasks are required for the visit.

11. Save your visit.



Note If Visit Calendar is enabled in your org and you have access to it, you can view your new visit on your Salesforce calendar.

Make Up for Shortfalls with Product Transfers

Let's say that you notice a product shortfall for one of the visits you've scheduled. You can request someone within the range of 50 miles (80.47 km) to 5000 miles (8047 km) to transfer some inventory to make up for the shortfall.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create Transfer Requests

“View All Records” on Product Fulfillment Locations

“View All Records” on Product Availability Projections

USER PERMISSIONS NEEDED

“Create” on Product Transfers

“Create” on Product Requests

“Read” on Products

“Read” on Locations

“Read” on Addresses

Run Flows

Manage Users

To edit Transfer Requests

“View All Records” on Product Fulfillment Locations

“View All Records” on Product Availability Projections

“Edit” on Product Transfers

“Edit” on Product Requests

“Read” on Products

“Read” on Locations

“Read” on Addresses

Manage Users

Before you request a product transfer, make sure your org includes the right data. See [Set Up Data for Intelligent Sales](#) and [Set Up Your Products and Inventories](#). Product transfers require at least two product fulfillment locations.

1. From a visit record, go to the Products tab.
2. Click  for the row with the shortfall, and click **Request Transfer**.
3. Select the location you want to request inventory from and click **Next**.
4. Select a transfer date, enter a quantity, and click **Done**.



Note When you send someone a transfer request, that person receives a Chatter post as a notification. Chatter posts are also added when someone changes the status of a request by accepting, rejecting, or marking the request as received.

Schedule Planned Cycle Counts for Inventories

As part of sales ops, you're responsible for scheduling regular cycle counts for inventories. These cycle counts help reduce discrepancies between your records and actual inventory numbers, which in turn reduces product write-off costs and makes sure your reps have fewer surprises during their visits.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create visits for cycle counts

“Create” on Action Plans

“Create” on Visits

“Create” on Visitors

“Read” on Action Plan Templates

“Read” on Assessment Indicator Definitions

“Read” on Locations

“Read” on Products

“Read” on Work Types

“Read” and “Create” on Generic Visit Tasks

“Read” and “Create” on Generic Visit Task Contexts

“Read” and “Create” on Generic Visit Task Context Relations

“Read” and “Create” on Generic Visit Key Performance Indicators

Run Flows

Manage Users

To edit visits for cycle counts

“Edit” on Action Plans

USER PERMISSIONS NEEDED

“Edit” on Visits

“Edit” on Visitors

“Read” on Action Plan Templates

“Read” on Assessment Indicator Definitions

“Read” on Locations

“Read” on Products

“Read” on Work Types

“Read” and “Edit” on Generic Visit Tasks

“Read” and “Edit” on Generic Visit Task Contexts

“Read” and “Edit” on Generic Visit Task Context Relations

“Read” and “Edit” on Generic Visit Key Performance Indicators

Run Flows

Manage Users

-  **Note** Before you schedule a cycle count visit, make sure that a matching record exists in the Product Fulfillment Location object. This record must have the same combination of responsible user, product, and inventory location you plan to include for the count.

1. From the Intelligent Sales home page, click **New Visit**.
2. In the **Select Visit Type** picklist, select the work type your admin set up for cycle count visits and click **Next**.
When scheduling a blind cycle count, use the work type configured for blind cycle counts. If you don't have one, ask your admin to create one.
3. Select a start time, an end time, and a priority for the counts.
4. Select the inventory's sales rep as the primary visitor from User.
To add a secondary visitor to assist in the count, click **Add Visitor** and select the right person.
5. Select an action plan template for the count and click **Next**.
An action plan template determines what tasks are required for the count.
6. Select the inventory locations for your counts and click **Next**.
7. Select the products to be counted at the selected locations and click **Next**.
If the Action Plan Template Available column doesn't have a tick mark for a product, then that product

- isn't configured for the action plan you selected.
8. After reviewing details on the screen, click **Done**.
And that's it! Based on the number of locations you selected, one or more visits are now scheduled for cycle counts.

The Typical Day of a Sales Rep Using Intelligent Sales

As a sales rep, you're mostly on the road, moving product for your organization. Because of your highly mobile work situation, you use Intelligent Sales on a mobile device. Your primary responsibilities are performing surgical case visits and the occasional cycle count. If you don't have enough products for a visit, you request for a product transfer from someone nearby.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

Sometimes, you schedule visits for yourself if something comes up when you're out on the job. And if you notice something's not right with your inventory, you schedule ad hoc cycle counts instead of waiting for the next planned one. You can do all this from the convenience of your mobile device using Intelligent Sales on the Salesforce mobile app.

Here's How Intelligent Sales Helps You Through the Day

Schedule Visits on the Go

Schedule a surgical case visit while you're on the road from the My Visits page of the mobile app.

Request a Product Transfer on the Mobile App

When you have a shortfall for any product, you can request a sales rep within 50 miles (80.47Km) to transfer inventory to you.

Receive Products from Transfer Requests

After a fellow rep accepts your product transfer request, you receive the inventory from them and close the transfer request.

Perform Visits with the Mobile App

After you reach the account location, start the visit from your mobile app, complete the tasks listed in the action plan, and end the visit.

Schedule Ad Hoc Cycle Counts

When you have a high value visit coming up, you typically want to verify that inventory's accurate. But if you don't have the time to wait until the next planned cycle count comes around, you can always schedule ad hoc cycle counts from the Cycle Counts page on the mobile app.

Perform Cycle Counts with the Mobile App

Complete the cycle counts assigned to you using Intelligent Sales on the Salesforce mobile app. The

Cycle Counts page shows your assigned counts. And you don't have to worry about looking up the latest expected numbers for your products because Intelligent Sales automatically pulls in all that data for you.

Schedule Visits on the Go

Schedule a surgical case visit while you're on the road from the My Visits page of the mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create visits

“Create” on Visits

“Create” on Visitors

“Create” on Visited Parties

“Create” on Action Plans

“Create” on Assessment Tasks

“Read” on Accounts

“Read” on Locations

“Read” on Contacts

“Read” on Products

“Read” on Work Types

“Read” and “View All Records” on Action Plan Templates

“View All Records” on Product Fulfilment Locations

Run Flows

Manage Users

To edit visits

“Edit” on Visits

USER PERMISSIONS NEEDED

“Edit” on Visitors

“Edit” on Visited Parties

“Edit” on Action Plans

“Edit” on Assessment Tasks

“Read” on Accounts

“Read” on Contacts

“Read” on Products

“Read” on Work Types

“Read” on Action Plan Templates

Manage Users

To add users as visitors

Manage Users

-  **Note** Before you create a visit, make sure that a matching record exists in the Product Fulfillment Location object. This record must have the same combination of responsible user, product, account, account location, and inventory location as your visit.

1. On the mobile app, tap + on the My Visits page.
2. Select a visit location from Locations.
3. Select a start time and an end time.
4. For Visit Type, select the work type that your admin set up for surgical case visits.
5. Select a priority for the visit and click **Next**.
6. Select a primary visitor from User.
To add a secondary visitor, click **Add Visitor** and select the right person.
7. Select an account.
8. Select the primary visited party and click **Next**.
To add more visited parties, click **Add Person to Visit**.
9. Select a product, enter the quantity you need, and click **Next**.
To add more products, click **Add Product**. Or if you don't want any products, click the **Delete** icon.
10. Select an action plan template and save your visit.

An action plan template determines what tasks are required for the visit.

-  **Note** If Visit Calendar is enabled in your org and you have access to it, you can view your visit on your Salesforce calendar.

Request a Product Transfer on the Mobile App

When you have a shortfall for any product, you can request a sales rep within 50 miles (80.47Km) to transfer inventory to you.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create Transfer Requests

“View All Records” on Product Fulfillment Locations

“View All Records” on Product Availability Projections

“Create” on Product Transfers

“Create” on Product Requests

“Read” on Products

“Read” on Locations

“Read” on Addresses

Run Flows

Manage Users

To edit Transfer Requests

“View All Records” on Product Fulfillment Locations

“View All Records” on Product Availability Projections

“Edit” on Product Transfers

“Edit” on Product Requests

“Read” on Products

“Read” on Locations

“Read” on Addresses

Manage Users

1. On the Intelligent Sales mobile app, go to My Products and tap the card for the product with a

shortfall.

2. Tap the options icon next to an event card and tap **Request Transfer**.
3. On the next page, filter available locations by location type and tap the **Request Transfer** button for the location to send a request.
4. Select a transfer date, enter the quantity you need, add comments you have, and click **Done**.
5. Tap **Place Request** when you're done.

Receive Products from Transfer Requests

After a fellow rep accepts your product transfer request, you receive the inventory from them and close the transfer request.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To mark Transfer Requests as Received

“Edit” on Product Transfers

“Edit” on Product Requests

“Edit” on Product Items

“Edit” on Serialized Products

“Read” on Products

Run Flows

Manage Users

The status of the transfer request must be Accepted before you can mark it as received.

1. On the Intelligent Sales mobile app, go to Sent Requests.
2. Tap the options icon for the request you want to close and tap **Mark as Received**.
3. On the next page, enter the quantity received, and add or scan the barcodes of the products received. You can scan barcodes by tapping the barcode scanner icon next to serial numbers section header.
 **Note** The quantity received must match the number of serial numbers.
4. Tap **Done**.

Perform Visits with the Mobile App

After you reach the account location, start the visit from your mobile app, complete the tasks listed in the action plan, and end the visit.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To start a visit

Handled through `VisitAccess` and
`VisitorAccess` Apex triggers

To execute a visit task

- “Read”, “Edit”, and “View All Records” on Assessment Tasks
 - Run Flows
 - Other necessary permissions based on the configured task flows
-

To use Patient Registration

- Create on Account
 - Read on Visits
 - Read on Serialized Product
 - Read on Products
 - Run Flows
-

To use Order Authorization

- Create on Order
 - Edit on Serialized Products
 - Edit on Product Items
 - Read on Products
 - Read on Addresses
 - Read on Visits
 - Run Flows
-

To end a visit

- Handled through `VisitAccess` and `VisitorAccess` Apex triggers
 - “Read” and “View All Records” on Assessment Tasks
-

 **Note** Only the primary visitor can initiate a visit task. For this reason, it is recommended that only primary visitors start and end a visit.

1. Go to the My Visit page on the Intelligent Sales mobile app.

2. Tap the visit to start.

3. Tap **Start Visit**.

You can see the time elapsed for this visit on your screen, in the HH:MM format.

4. To progress through the visit, tap a visit task.

Visit tasks are flows configured by your admin. You must complete all tasks marked as required before you can end the visit.

 **Note** If you're using the order authorization flow, you must add a signature from the visited party before you can complete the order.

5. Once all the required tasks are completed, tap **End Visit**.

Schedule Ad Hoc Cycle Counts

When you have a high value visit coming up, you typically want to verify that inventory's accurate. But if you don't have the time to wait until the next planned cycle count comes around, you can always schedule ad hoc cycle counts from the Cycle Counts page on the mobile app.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create visits for cycle counts

- “Create” on Visits
- “Create” on Visitors
- “Create” on Action Plans
- “Read” on Locations
- “Read” on Products
- “Read” on Work Types
- “Read” on Action Plan Templates
- “Read” and “Create” on Generic Visit Tasks
- “Read” and “Create” on Generic Visit Task Contexts
- “Read” and “Create” on Generic Visit Task Context Relations
- “Read” and “Create” on Generic Visit Key Performance Indicators

USER PERMISSIONS NEEDED

- “Read” on Assessment Indicator Definitions
 - Run Flows
 - Manage Users
-

To edit visits for cycle counts

- “Edit” on Visits
 - “Edit” on Visitors
 - “Edit” on Action Plans
 - “Read” on Locations
 - “Read” on Products
 - “Read” on Work Types
 - “Read” on Action Plan Templates
 - “Read” and “Edit” on Generic Visit Tasks
 - “Read” and “Edit” on Generic Visit Task Contexts
 - “Read” and “Edit” on Generic Visit Task Context Relations
 - “Read” and “Edit” on Generic Visit Key Performance Indicators
 - “Read” on Assessment Indicator Definitions
 - Manage Users
-



Note

- Before you schedule a cycle count visit, make sure that a matching record exists in the Product Fulfillment Location object. This record must have the same combination of responsible user, product, and inventory location as your count.
- Make sure that your org has at least one work type configured for cycle counts. Work types are automatically selected when you schedule a cycle count from your mobile device. If your org has multiple work types for cycle counts, then a work type that's configured for blind cycle counts is selected.

1. On the mobile app, tap + on the Cycle Counts page.
2. Select an action plan template for the count and tap **Next**.
An action plan template determines what tasks are required for the count.
3. Select a location and tap **Next**.
4. Select the products to count at that location and tap **Done**.
A new visit is created for your ad hoc cycle count. The date and time is automatically set to when you created the count from your mobile device.

Perform Cycle Counts with the Mobile App

Complete the cycle counts assigned to you using Intelligent Sales on the Salesforce mobile app. The Cycle Counts page shows your assigned counts. And you don't have to worry about looking up the latest expected numbers for your products because Intelligent Sales automatically pulls in all that data for you.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To start a visit

Handled through `VisitAccess` and
`VisitorAccess` Apex triggers

To execute a visit task

- “Read”, “Edit”, and “View All Records” on Generic Visit Tasks, Generic Visit Task Contexts, Generic Visit Task Context Relations, Generic Visit Key Performance Indicators
 - Run Flows
 - Other necessary permissions based on the custom visit actions flows configured by the admin
-

To end a visit

- Handled through `VisitAccess` and `VisitorAccess` Apex triggers
 - “Read” and “View All Records” on Generic Visit Tasks
-



Note Only the primary visitor can initiate a visit task. So we recommend that only primary visitors start and end a visit.

If you're counting a serialized inventory, simply scan the barcodes of your products and Intelligent Sales counts the serial numbers for you. On the other hand, if you're counting products without serial numbers, you still need to manually count the numbers and enter them into the mobile app.

1. Go to the Cycle Counts page on the Salesforce mobile app.

2. Tap the cycle count you want to start.

3. Tap **Start Visit**.

You can see the time elapsed for this count on your screen in the HH:MM format.

4. Tap the visit task that tells you to count your inventory.

5. On the Cycle Count Products screen, enter the quantity you counted for each product (for products without serial numbers) or tap the Barcode Scanner icon (for products with serial numbers).

If your count only has products without serial numbers, you can skip to step 9.

6. Use the barcode scanner to scan your products.



Tip Make sure to keep your mobile device steady and have only one barcode in the scanner's focus area. If you have too many codes in the focus area, the scanner doesn't recognize them.

7. After you're done scanning barcodes, tap **Done** to see the list of serial numbers you scanned. You can also add serial numbers manually, scan more serial numbers, or remove serial numbers on this screen.

8. When you're sure that you have the required serial numbers for the product you counted, tap **Save**.



Warning Make sure that you've recorded all the serial numbers for the product before saving. You can't make changes to this list after you save it. If you need to make changes, you have to start from scratch.

9. After you've recorded the quantities for every product, tap **Complete Count** and select **Complete**. If your admin has configured any custom flows for visit actions, such as marking lost inventory or transferring products, tap the **Actions** icon to launch that flow. If there aren't any compatible flows configured in your org, the Actions icon doesn't work.

10. After all required tasks are complete, tap **End Visit**.

11. Enter any comments you have and select **Complete Visit** to close the count.

And that's it, you're done! You can find the numbers for the expected quantities and the counted quantities in the Key Performance Indicator records associated with the cycle count visit record.

Administer Life Sciences Cloud

Leverage the power of Agentforce in Life Sciences Cloud. Use the Pharmacy Benefits Reverification agent to accelerate the benefits reverification process by efficiently updating patients' personal, drug, pharmacy, and healthcare provider details. Use the Site Selection Assistance Agent to accelerate the site selection process by quickly searching for sites and investigators and sending feasibility assessments.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

[Agentforce for Pharmacy Benefits Reverification](#)

Patient services programs reps can leverage the power of Agentforce to accelerate the benefits reverification process by efficiently updating patients' personal, drug, pharmacy, and healthcare provider details.

[Agentforce for Site Management](#)

Study managers can use the Agentforce capabilities to search sites and investigators for running feasibility studies to conduct clinical trials. By using Agentforce, they can also summarize the sites and investigators information in the search results, add the appropriate sites to a specific research study, and send feasibility questionnaire to those sites and investigators. Agentforce helps study managers perform the site selection operations without having to update multiple objects and navigate through multiple pages.

Agentforce for Pharmacy Benefits Reverification

Patient services programs reps can leverage the power of Agentforce to accelerate the benefits reverification process by efficiently updating patients' personal, drug, pharmacy, and healthcare provider details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

[Agentforce Topic for Pharmacy Benefits Reverification](#)

Patient services programs (PSP) reps can use Benefits Reverification agent topic to draft and send emails to patients for verifying their personal and healthcare details. The email includes an assessment URL for patients to provide their updated information. After the patient submits the details, reps can summarize and review the response to compare existing and new information.

[Pharmacy Benefits Reverification Flows](#)

Use the prebuilt flows to automate the various tasks within Pharmacy Benefits Reverification. Customize the flows to run patient support programs according to your requirements.

[Set Up Agentforce for Pharmacy Benefits Reverification](#)

Set up Agentforce for Pharmacy Benefits Reverification to get access to the powerful generative AI features.

[Clone the Flow to Update Care Benefit Verify Request Status](#)

Streamline the process of updating the care benefit verify request status by using a clone of the default Update Verification Request Status to Received Confirmation flow.

[Considerations and Limitations for Agentforce for Pharmacy Benefits Reverification](#)

To use Agentforce for Pharmacy Benefits Reverification, consider supported functionality, usage, limitations and allowances, limits, and other issues.

[Use Agentforce for Pharmacy Benefits Reverification](#)

Accelerate pharmacy benefits reverification by automating the process of updating patient data. Update patient details with a single click. Ensure data accuracy and reduce manual effort by using Agentforce to draft and send emails that include a secure assessment link for patients to verify and provide their updated personal, drug, pharmacy, healthcare provider, and insurance details.

See Also

[Salesforce Help: Agentforce and Einstein Generative AI](#)

Agentforce Topic for Pharmacy Benefits Reverification

Patient services programs (PSP) reps can use Benefits Reverification agent topic to draft and send emails to patients for verifying their personal and healthcare details. The email includes an assessment URL for patients to provide their updated information. After the patient submits the details, reps can summarize and review the response to compare existing and new information.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

 **Note** The user interface of this product is available in English only and may not be fully supported in other languages.

The Benefits Reverification agent topic provides these standard out of the box agent actions.

Agent Action Name	Description	Example utterances	Example use case
Draft or Revise Email	Drafts an email to verify patient's personal, drug, pharmacy, healthcare provider, and insurance details associated with the current care benefit verify request. Sends an assessment URL that a patient can use to provide the updated details.	<ul style="list-style-type: none"> Create a draft email for benefits reverification. Generate an email confirming the reverification of benefits. 	When a Patient Services Program (PSP) rep wants to automate the collection of patient information instead of manually gathering the information, they can use this agent action to draft an email with an assessment URL.
Summarize Patient Response for Benefits Reverification	Analyzes the patient's response for benefit reverification email and summarizes the changes to the benefits verification request, including personal, drug, healthcare provider, pharmacy, and insurance details.	<ul style="list-style-type: none"> Provide a summary of the patient's response. Summarize what the patient has shared for benefits reverification. 	To maintain the data accuracy, a PSP rep can review the details provided by the patient before updating it. The PSP rep can use this agent action to summarize the patient's response to the assessment.

If there aren't any changes in patient's insurance details, an Update Details follow-up action becomes available after the Summarize Patient Response for Benefits Reverification action. The Update Details action enables PSP reps to automatically update the benefits verification request and its associated records.

! **Important** The Update Details button isn't shown when there's any change to the patient's insurance details. To update the patient details, a PSP rep can manually create insurance and care benefit verification request records.

See Also

[Salesforce Help: Agent Topics](#)

[Salesforce Help: Agentforce and Einstein Generative AI](#)

[Salesforce Help: Agent Actions](#)

Pharmacy Benefits Reverification Flows

Use the prebuilt flows to automate the various tasks within Pharmacy Benefits Reverification. Customize the flows to run patient support programs according to your requirements.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

Flows in Pharmacy Benefits Reverification

Flow	Description
Update Verification Request Status to Received Confirmation	Updates the status of the care benefit verify request record to Received Confirmation, when the patient completes the assessment for benefits reverification.
Get Details for Benefits Reverification Email	Gets the details for the benefits reverification email and sends it to the associated prompt template as prompt instructions.
Summarize Patient Response	Summarizes the patient's existing and updated personal, drug, healthcare provider, pharmacy, and insurance details.
Update Patient's Personal and Healthcare Details	Updates the benefits verification request and associated records with the patient's latest

Flow	Description
	personal and healthcare details.
Upsert Context Service Data	Updates or inserts context service data.

See Also

[Salesforce Help: Automate Tasks with Flows](#)

Set Up Agentforce for Pharmacy Benefits Reverification

Set up Agentforce for Pharmacy Benefits Reverification to get access to the powerful generative AI features.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

 **Note** The user interface of this product is available in English only and may not be fully supported in other languages.

USER PERMISSIONS NEEDED

To use Agentforce:

Access Patient Support Programs using Einstein

To manage pharmacy benefits reverification requests:

Manage Pharmacy Benefits Verification

AND

Access Patient Support Programs as a Program Lead

Before you set up Agentforce for Benefits Reverification, you must set up the Pharmacy Benefits Verification feature. See [Org Setup for Pharmacy Benefits Verification](#) and [Data Management for Pharmacy Benefits Verification](#).

1. [Enable Context Service](#).
2. [Enable Einstein](#).

See [Set Up Einstein Generative AI](#).

3. [Enable Einstein for Patient Support Program.](#)
4. Enable Agentforce Agents, and add an action and topic.
 - a. From Setup, in the Quick Find box, enter *Agent*, and then select **Agentforce Agents**.
 - b. Turn on Agentforce Agents.
 - c. Turn on Enable the Agentforce (Default) Agent.
 - d. Click **New Agent**.
 - e. In Agentforce Builder, in the Select an agent section, select **Create from a Template**, and then select **Agentforce Employee Agent**.
 - f. Click **Next**, and then click **Next**.
 - g. Enter *Benefits Reverification Agent* as the name.
 - h. Enter a description, role, and company name.
 - i. Click **Next**, and then click **Create**.
 - j. In the Benefits Reverification Agent section, to add a topic, click **New**, and select **Add from asset library**.
 - k. Select **Benefits Reverification**, and click **Finish**.
 - l. Click **Activate**.
5. Create a custom permission set to provide access to the Benefits Reverification Agent.
 - a. In Setup, find and select **Permission Sets**.
 - b. Click **New**.
 - c. Enter *Access Benefits Reverification Agentforce Agent* as the label.
 - d. Save your changes.
 - e. Under Apps, click **Agent Access**, and then click **Edit**.
 - f. From the Available Agents section, add **Benefits Reverification Agent** to the Enabled Agents section.
 - g. Save your changes.
 - h. Click **Permission Set Overview**, and then click **Manage Assignments**.
 - i. Click **Add Assignments**, and select the Patient Services Programs user.
 - j. Save your changes.
6. Enable Discovery Framework, deploy Sample Template, and activate Omniscript.
 - a. From Setup, in the Quick Find box, enter *Discovery Framework*, and then select **General Settings**.
 - b. Turn on Discovery Framework, Enhanced Questions, Import or Export and Sample Templates.
 - c. In Setup, find and select **Discovery Framework Sample Templates**.
 - d. Deploy Benefits Reverification Assessment with Available new Version as v2.
 - e. From the App Launcher, find and select **Omniscripts**.
 - f. From the Omniscript list view, select **Reverify Patient's Personal and Healthcare Details**.
 - g. Click **Activate**, and then save your changes.
7. Enable External User Assessments.
 - a. From Setup, in the Quick Find box, enter *Assessment*, and then select **Assessment Settings**.
 - b. Turn on External User Assessments.
8. [Create an Experience Cloud site](#) for patients to log in as guest users and take the assessment.
9. [Create and assign Guest User permissions for Discovery Framework Access](#).
10. Create sharing rules for the Omni Process object.

See [Create Sharing Rules for Digital Experience Guest Users](#).

11. Set up the Experience Cloud URL for Patient Support Programs.
 - a. From Setup, in the Quick Find box, enter *Life Sciences* (for Life Sciences Cloud), or *Health Cloud* (for Health Cloud). Then select **Patient Support Program Settings**.
 - b. Under the Experience Cloud Site section, click **Edit**, and enter the URL of the Experience Cloud site that you set up earlier.
 - c. Save your changes.
12. [Create and add the Draft Benefits Reverification Email Agent quick action](#).
13. [Create and add the Summarize Patient Response Agent quick action](#).

[Create and Add the Drafts Benefits Reverification Email Agent Quick Action](#)

Create an agent quick action to draft and send emails to patients for benefits reverification, and add the action on the care benefit verify request record page.

[Create and Add the Summarize Patient Response Agent Quick Action](#)

Create an agent quick action to summarize patient response for benefits reverification, and add the agent on the care benefit verify request record page.

See Also

[Salesforce Help: Permission Sets for Pharmacy Benefits Verification Users](#)

[Salesforce Help: Manage Permission Set Assignments](#)

[Salesforce Help: Discovery Framework Assessment Questions](#)

[Salesforce Help: Quick Actions](#)

[Salesforce Help: Lightning App Builder](#)

[Salesforce Help: Page Layouts](#)

[Salesforce Help: Create Object-Specific Quick Actions](#)

Create and Add the Drafts Benefits Reverification Email Agent Quick Action

Create an agent quick action to draft and send emails to patients for benefits reverification, and add the action on the care benefit verify request record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

USER PERMISSIONS NEEDED

To use Agentforce:

Access Patient Support Programs using Einstein

To manage pharmacy benefits reverification requests:

Manage Pharmacy Benefits Verification

USER PERMISSIONS NEEDED

AND

Access Patient Support Programs as a Program Lead

1. Create an agent quick action on the Care Benefit Verify Request object.
 - a. From Setup, in Object Manager, find and select **Care Benefit Verify Request**.
 - b. Click **Button, Links, and Actions**, and then click **New Action**.
 - c. Select **Agent Quick Action** as the action type.
 - d. Enter *Draft Benefits Reverification Email* as the user utterance.
 - e. Enter *Draft Benefits Reverification Email* as the label.
 - f. Save your changes.
2. Add the Draft Benefits Reverification Email agent quick action to the care benefit verify request record page.
 - a. From the App Launcher, find and select **Care Benefit Verify Requests**.
 - b. Select a care benefit verify request record.
 - c. From Setup, click **Edit Page**.
 - d. On the Lighting App Builder page, select the Highlights Panel component, and then click **Add Action** from the properties panel.
When you load the care benefit verify request record page layout for the first time, you must upgrade to dynamic actions by clicking Upgrade Now.
 - e. In the Actions search field, find and select the **Draft Benefits Reverification Email** object-specific quick action, and then click **Add Filter**.
 - f. Make sure that the Record Field filter type is selected.
 - g. Select **Status** as the field, **Equal** as the operator, and **Pending** as the value, and then click **Done**.
 - h. Click **Add Filter**.
 - i. Select the **Advanced** filter type.
 - j. In Field, click **Select**.
 - k. On the Select Field window, from the dropdown, select **Record**, then select **Related Care Benefit Verify Request**, then select **Care Benefit Verify Request Name**, and then click **Done**.
 - l. Select **Not Equal** as the operator and keep value as blank, and then click **Done**.
 - m. For Show components when, select **All filters are true**, and then click **Done**.
 - n. Save your changes, and activate the page.

Create and Add the Summarize Patient Response Agent Quick Action

Create an agent quick action to summarize patient response for benefits reverification, and add the agent on the care benefit verify request record page.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

USER PERMISSIONS NEEDED

To use Agentforce:

Access Patient Support Programs using Einstein

To manage pharmacy benefits reverification requests:

Manage Pharmacy Benefits Verification

AND

Access Patient Support Programs as a Program Lead

1. Create an agent quick action to the Care Benefit Verify Request object.
 - a. From Setup, in Object Manager, find and select **Care Benefit Verify Request**.
 - b. Click **Button, Links, and Actions**, and then click **New Action**.
 - c. Select **Agent Quick Action** as the action type.
 - d. Enter *Summarize Patient Response* as the user utterance.
 - e. Enter *Summarize Patient Response* as the label.
 - f. Save your changes.
2. Add the Summarize Patient Response agent quick action on the Care Benefit Verify Request record page.
 - a. From the App Launcher, find and select **Care Benefit Verify Requests**.
 - b. Select a care benefit verify request record.
 - c. From Setup, click **Edit Page**.
 - d. On the Lighting App Builder page, select the Highlights Panel component, and then click **Add Action** from the properties panel.
 - e. In the Actions search field, find and select **Summarize Patient Response** object-specific quick action, and then click **Add Filter**.
 - f. Make sure that the Record Field filter type is selected.
 - g. Select **Status** as the field, **Equal** as the operator, and **Received Confirmation** as the value, and then click **Done**.
 - h. Click **Add Filter**.
 - i. Select the **Advanced** filter type.
 - j. In Field, click **Select**.
 - k. On the Select Field window, from the dropdown, select **Record**, then select **Related Care Benefit Verify Request**, then select **Care Benefit Verify Request Name**, and then click **Done**.
 - l. Select **Not Equal** as the operator and keep value as blank, and then click **Done**.
 - m. For Show components when, select **All filters are true**, and then click **Done**.
 - n. Save your changes, and activate the page.

Clone the Flow to Update Care Benefit Verify Request Status

Streamline the process of updating the care benefit verify request status by using a clone of the default Update Verification Request Status to Received Confirmation flow.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

USER PERMISSIONS NEEDED

To clone and activate flows:

Manage Flows

AND

Access Patient Support Programs using Einstein

AND

Context Service User

AND

Manage Pharmacy Benefits Verification

AND

Prompt Template User

AND

Health Cloud Starter (For Life Sciences Cloud) permission set OR Health Cloud Foundation (For Health Cloud) permission set

1. From Setup, in the Quick Find box, enter *Flows*, and select **Flows**.
2. Select **Update Verification Request Status to Received Confirmation** flow.
3. Click **Save as New Flow**.
4. Enter a label, API name, and description for the clone.
5. Save your changes, and activate the flow.

Considerations and Limitations for Agentforce for Pharmacy Benefits Reverification

To use Agentforce for Pharmacy Benefits Reverification, consider supported functionality, usage, limitations and allowances, limits, and other issues.

REQUIRED EDITIONS

Available in: **Enterprise**, and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Genie Data platform, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

Feature Language and Locale Support

Agentforce for Life Sciences supports English in this locale.

LOCALE	CODE
English (United States)	en_US

Feature Large Language Model Support

Agentforce for Pharmacy Benefits Reverification supports the models supported on the Salesforce generative AI platform, as described in [Large Language Model Support](#).

Einstein Trust Layer Service Support

Agentforce for Pharmacy Benefits Reverification supports the Trust Layer services provided on the Salesforce generative AI platform, as described in [Einstein Trust Layer](#). Ask your system administrator about which Einstein Trust Layer services are enabled in your org and available for Agentforce for Pharmacy Benefits Reverification.

For Life Sciences features that use AI agents, see [Trust and Agentforce](#).

Billing Considerations for Agentforce for Pharmacy Benefits Reverification

Use of the Draft or Revise Email and Summarize Patient Response for Benefits Reverification actions impacts credit consumption. These actions rely on Einstein Requests, and invoke generative AI through Agentforce to draft emails and to summarize patient responses.

 **Tip** This feature has access to Digital Wallet, a free account management tool that offers near real-time consumption data for enabled products across your active contracts. Access Digital Wallet and start tracking your org's usage. To learn more, see [About Digital Wallet](#).

DIGITAL WALLET CARD	USAGE TYPE	DESCRIPTION	NOTES
Einstein Requests	Standard Einstein Request	Usage is calculated based on the number of calls to the LLM gateway if the gateway uses a Salesforce LLM.	This usage type isn't billed when it's associated with a generative AI action that qualifies as unmetered human context usage. For more information, see Generative AI Usage and Billing .
Flex Credits	Standard Action	<p>Usage is determined by the number of standard agent actions. Each standard agent action includes the processing of up to 10,000 tokens. Tokens are units of data processed by AI models. Actions exceeding this limit are counted as a separate standard action each time the 10,000 token limit is exceeded. For example, processing 20,001 tokens is 3 standard actions.</p> <p>Actions involving lengthy prompts sent to the LLM can be counted as multiple actions where the 10,000 tokens per action limit is exceeded.</p> <p>Standard agent actions are actions that are available out-of-the-box. To check the list of Standard actions, see Standard Action Reference.</p> <p> Note Use of some standard agent actions require that a subscription has been purchased for each user that accesses these actions, such as a subscription to</p>	NA

DIGITAL WALLET CARD	USAGE TYPE	DESCRIPTION	NOTES
		Einstein for Sales Add-on or Einstein for Service Add-on. To determine which subscription is required for such standard actions, see Standard Action Reference at Standard Action Reference . While this requirement is not technically enforced yet, users who don't have the required add-on license will lose access to such actions for which they don't have a license when the requirement is enforced.	

For more information on how usage is billed, refer to your contract or contact your account executive.

See Also

- [Salesforce Help: Data Cloud Billable Usage Types](#)
- [Salesforce Help: Agentforce and Generative AI Usage and Billing](#)
- [Salesforce Help: About Digital Wallet](#)

Use Agentforce for Pharmacy Benefits Reverification

Accelerate pharmacy benefits reverification by automating the process of updating patient data. Update patient details with a single click. Ensure data accuracy and reduce manual effort by using Agentforce to draft and send emails that include a secure assessment link for patients to verify and provide their updated personal, drug, pharmacy, healthcare provider, and insurance details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud or Agentforce for Health Cloud, Flex Credits Metering, Agentforce Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses

 **Note** The user interface of this product is available in English only and may not be fully supported in other languages.

USER PERMISSIONS NEEDED

To use Agentforce:

Access Patient Support Programs using Einstein

To manage pharmacy benefits reverification requests:

Manage Pharmacy Benefits Verification

AND

Access Patient Support Programs as a Case Agent

Before you begin, [Set Up Agentforce for Pharmacy Benefits Reverification](#). Make sure that the program lead has assigned the pending care benefit verification requests to you. See [Use Pharmacy Benefits Reverification](#).

1. Select a care benefit verify request record from the assigned list.



Note To initiate the data updates for pharmacy benefits reverification, each care benefit verification request record must have a Pending status and the related care benefit verification request field must be populated.

2. To draft the benefits reverification email, click the **Draft Benefits Reverification Email** agent quick action or pass any recommended utterance on the Agentforce window.

You can also click the **Draft Benefits Reverification Email** recommended action on the Agentforce window.

3. To copy the email content, click **Copy Draft**. To paste the email draft on the email window, select **Send Email** from the dropdown next to Copy Draft.

4. Verify the recipients details on the email window, and click **Send** to send the email to the patient.

5. Update the care benefit verify request status to Pending Confirmation.

6. To summarize the response from the patient, click **Summarize Patient Response**, or pass any recommended utterance.

After the patient responds to the assessment, the care benefit verify request status is automatically updated to Received Confirmation.

7. Verify the patient's responses. You can update the details with just a click of **Update Details** button. After the patient details are updated, the care benefit verify request status is automatically updated to Ready for Verification.



Note When you update patient details, ensure that you don't pass any update details related utterances.



Important The Update Details button isn't shown when there's any change to the patient's insurance details. To update the patient details, a PSP rep can manually create insurance and care benefit verification request records.

Initiate a manual or electronic verification request for benefits verification.

See Also

[Salesforce Help: Pharmacy Benefits Verification](#)

[Salesforce Help: Use Pharmacy Benefits Reverification](#)

Agentforce for Site Management

Study managers can use the Agentforce capabilities to search sites and investigators for running feasibility studies to conduct clinical trials. By using Agentforce, they can also summarize the sites and investigators information in the search results, add the appropriate sites to a specific research study, and send feasibility questionnaire to those sites and investigators. Agentforce helps study managers perform the site selection operations without having to update multiple objects and navigate through multiple pages.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

[Agentforce Topic for Site Selection](#)

The Site Selection Assistance agent topic helps site feasibility leads and clinical study managers identify suitable sites for running clinical trials. The topic includes eight agent actions.

[Agentforce Actions for Site Selection](#)

Site Management bundles certain standard agent actions with the Site Selection Assistance Agent topic.

[Site Management Flows](#)

Salesforce provides pre-built flows to automate the site selection tasks in the Site Management feature. You can customize these flows to streamline your site selection process.

[Set Up Agentforce for Site Selection](#)

Set up Agentforce for site selection when you configure the site management feature by using the guided setup. This ensures that all required settings and configurations are correctly aligned to enhance the site selection process.

[Optimize the Site Selection Process by Using Agentforce](#)

Use Agentforce to complete the essential site selection tasks from searching sites and investigators through sending feasibility assessments to the sites and investigators. Reduce manual interventions to update various objects and hopping between screens by using the Agentforce capabilities for site management.

Agentforce Topic for Site Selection

The Site Selection Assistance agent topic helps site feasibility leads and clinical study managers identify

suitable sites for running clinical trials. The topic includes eight agent actions.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

 **Note** The user interface of this product is available in English only and may not be fully supported in other languages.

topic	description	Included AGENT ACTIONS
Site Selection Assistance	Helps site feasibility leads and clinical study managers identify sites by using search filters, display site and investigator information, and send feasibility assessments to sites.	<ul style="list-style-type: none">• Get Site Search Filters for Research study• Add Sites Search Results to Study• Add Site and Investigator to Study• Summarize Site• Summarize Investigator• Send Site Feasibility Assessments• Go to Care Program Sites• Get Omniscript IDs From Research Study

See Also

[Salesforce Help: Agent Topics](#)

Agentforce Actions for Site Selection

Site Management bundles certain standard agent actions with the Site Selection Assistance Agent topic.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

 **Note** The user interface of this product is available in English only and may not be fully supported in

other languages.

Agent Action	Description	EXAMPLE UTTERANCES	EXAMPLE usecase
Get Site Search Filters for Research study	Gets the site search filters for a research study using the research study record ID as the input.	<ul style="list-style-type: none"> "Find sites for research study \"Oncology Research Study\"" "Search for sites matching research study \"Oncology Research Study\"" 	A study manager wants to identify clinical trial sites for conducting an Oncology research study.
Add Sites Search Results to Study	Calls the AddSitesToStudy flow to create care program site records from the care site investigator searchable field records and the research study records.	<ul style="list-style-type: none"> "Add care site investigators 1O7VW000001AzEX 0A0,1O7VW000001AzEZ0A0,1O7VW000001AzEa0AK to study \"Oncology Research Study\"" "Include care site investigators 1O7VW000001AzEX 0A0,1O7VW000001AzEZ0A0,1O7VW000001AzEa0AK in study \"Oncology Research Study\"" 	A study manager wants to add the search results to an Oncology research study.
Add Site and Investigator to Study	Creates a care program site record from a healthcare facility, healthcare provider, and research study record.	<ul style="list-style-type: none"> "Add facility \"Cleveland Clinic Sports Medicine\" and investigator \"Dr. Vikram Reddy\" to study \"Oncology Research Study\"", "Connect site \"Cleveland Clinic Sports Medicine\" and investigator \"Dr. 	A study manager wants to add the sites and investigators to an Oncology research study.

Agent Action	description	EXAMPLE UTTERANCES	EXAMPLE usecase
		Vikram Reddy\" to study \"Oncology Research Study\""	
Summarize Site	Summarizes the details of a healthcare facility, such as its location, facilities, specialties, resources, accreditations, performance, and quality compliance in the context of a research study.	<ul style="list-style-type: none"> • Summarize Site \"Cleveland Clinic Sports Medicine\" for research study \"Oncology Research Study\"" • "Provide site information for \"Cleveland Clinic Sports Medicine\" in study \"Oncology Research Study\"" 	A study manager wants to view the critical information on the care program site where an Oncology research study can be conducted.
Summarize Investigator	Summarizes the healthcare provider record for a specific research study.	<ul style="list-style-type: none"> • "Summarize Investigator \"Dr. Vikram Reddy\" for research study \"Oncology Research Study\"" • "Get provider summary for \"Dr. Vikram Reddy\" in research \"Oncology Research Study\"" • "Get provider summary for \"Dr. Vikram Reddy\" in research \"Oncology Research Study\"" 	A study manager wants to view the critical information on the site investigator who can conduct an Oncology research study.
Send Site Feasibility Assessments	Sends the feasibility assessments to the sites using careProgramSiteIds, omniscryptId, and expiryDate as the input.	<ul style="list-style-type: none"> • "Send feasibility assessments for research study \"Oncology Research 	A study manager wants to send feasibility assessments to sites where an Oncology research study can be conducted.

Agent Action	description	EXAMPLE UTTERANCES	EXAMPLE usecase
		<p>Study\""</p> <ul style="list-style-type: none"> • "Start site evaluation for study \"Oncology Research Study\" with feasibility process" • "Send feasibility assessment for research study \"Oncology Research Study\" using process \"Initial Site Feasibility Assessment\" to care program sites 184VW000001AzEX, 184VW000001AzEY with expiry date \"23th May 2025\"" 	
Go to Care Program Sites	Follow-up action to navigate to the care program sites after they're added to a research study.	N/A	N/A
Get Omniscript IDs From Research Study	Calls the OmniFrmRschStdy flow to get all the assessments associated with the care program.	N/A	N/A

See Also

[Salesforce Help: Agent Actions](#)

[Salesforce Help: Life Sciences | Add Site and Investigator to Study](#)

[Salesforce Help: Life Sciences | Add Sites Search Results to Study](#)

[Salesforce Help: Life Sciences | Get Omniscript IDs From Research Study](#)

[Salesforce Help: Life Sciences | Get Site Search Filters for Research Study](#)

[Salesforce Help: Life Sciences | Go to Care Program Sites](#)

[Salesforce Help: Life Sciences | Send Site Feasibility Assessments](#)

[Salesforce Help: Life Sciences | Summarize Investigator](#)

[Salesforce Help: Life Sciences | Summarize Site](#)

Site Management Flows

Salesforce provides pre-built flows to automate the site selection tasks in the Site Management feature. You can customize these flows to streamline your site selection process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

FLOW	description
Get Care Program Sites	Gets the care program sites associated with a research study.
Send Assessments to Care Program Sites in Bulk	Creates and sends site feasibility assessments to care program sites in bulk.
Create and Send Assessments to Sites in Bulk	Creates assessment envelopes and associated envelope items.
Send Assessment Emails in Bulk	Sends emails with assessments in bulk using the assessment envelope IDs as input passed from Create and Send Assessment Envelopes in Bulk flow.
Get Site Search Filters	Gets the filters for searching a site from the research study and care program detail records.
Summarize Site and Investigator	Creates the summary of a site and an investigator in the site and investigator search results page.
Get Omniprocess Records	Gets the Omniprocess records from a research study.

Set Up Agentforce for Site Selection

Set up Agentforce for site selection when you configure the site management feature by using the guided setup. This ensures that all required settings and configurations are correctly aligned to enhance the site selection process.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

USER PERMISSIONS NEEDED

To set up Agentforce:

Health Cloud Starter

AND

Study Manager for Site Management

AND

Prompt Template Manager

For more information on how to set up Site Management, see [Site Management](#).

1. From Setup, in the Quick Find box, enter *Site Management Settings* and select it.
2. Turn on Site Management.
3. Start setting up the Site Management feature by enabling person account types, assigning permission set licenses to users, and enabling users to relate a contact to multiple accounts.
4. Set up site investigator search by enabling criteria-based search and filter and data pipeline. Configure data processing engine, default criteria-based search and filter settings, and site investigator scoring.
5. Set up interest tagging by enabling interest tags and topics for objects, creating tag categories and interest tags, and adding the interest tag components to the record pages.
6. Prepare your org for assessments by installing the Omnistudio package, assigning Omnistudio permission sets to the users, enabling discovery framework and Omnistudio metadata, and setting up prefill assessment questions.
7. Enable the Generative AI assessment generation by assigning the required permission set licenses to users, enabling Industries AI, Einstein, and generative AI assessment questions, and configuring usecase for the generative AI questionnaire.
8. Configure site feasibility scoring by updating the Care Program Detail subtype and Data Mapper, and adding the SiteManagementAssessmentDataVisualization flexcard to the research study page.
9. Configure the digital experience for your users by enabling digital experience, setting up the external user assessment feature, assigning the required permission set licenses to users, and updating the Bulk Send Assessment Email Flow with the relevant URL.
10. Configure Einstein for Site Selection Assistance by assigning the required permission set licenses to the users and turning on Einstein, Einstein Bots, and Agentforce.
11. Configure site investigator summarization by turning on summarization and context definitions, activating the required prompt template, and adding the summarization action to the search results page.
12. Configure the Site Selection Assistance agent by turning on Site Selection Assistance topic and actions, creating an Agentforce Employee agent, add topics and actions to the Agentforce Employee agent, and activating prompt template for site search filters.

Create Permission Sets

Create permission sets for the Site Selection Assistance agent that you created, and assign those permission sets to your users.

Create Permission Sets

Create permission sets for the Site Selection Assistance agent that you created, and assign those permission sets to your users.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

USER PERMISSIONS NEEDED

To create permission sets: Manage Users

1. From Setup, in the Quick Find box, enter *Permission Sets* and select it.
2. Click **New**, and enter a label and description for the permission set. The API name for the permission set is created automatically.
3. Save your changes.
4. In the setup page for the permission set, click **Agent Access**.
5. Click **Edit**, and move your agent from the Available Agents to Enabled Agents.
6. Save your changes.
7. Assign the permission set that you created to your users.

Optimize the Site Selection Process by Using Agentforce

Use Agentforce to complete the essential site selection tasks from searching sites and investigators through sending feasibility assessments to the sites and investigators. Reduce manual interventions to update various objects and hopping between screens by using the Agentforce capabilities for site management.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud with Life Sciences Cloud licenses and Agentforce for Life Sciences Cloud, Agentforce for Employee Agent, Einstein GPT Platform, Einstein GPT Copilot, and Einstein GPT Prompt Builder add-on licenses.

 **Note** The user interface of this product is available in English only and may not be fully supported in other languages.

USER PERMISSIONS NEEDED

To use Agentforce:

Prompt Template User

AND

Access Agentforce Default Action

AND

Study Manager for Site Management

AND

Life Sciences Site Management Summarization

1. From the App Launcher, find and select **Research Studies**.
2. Open the research study for which you want to run the feasibility study.
3. Click the Agentforce icon on the top of the page.
4. In the Agentforce window, click **Search Sites & Investigators**.
5. Confirm your the research study that you've selected.
6. To view the search results, click **View Search Results**. To edit the default search filters, click **Edit Filters**.
The search results are displayed in the search results page.
7. To summarize the site information, from the dropdown next to the healthcare facility and the investigator in the search results, select **Summarize Site**.
8. To add the site to the research study, click **Add Site to Study**.
9. To summarize the investigator information, from the dropdown next to the healthcare facility and the investigator in the search results, select **Summarize Investigator**.
10. To add the investigator to the research study, click **Add Investigator to Study**.
11. Confirm your selection.
12. To go to the care program sites page and send feasibility assessments, click **View Care Program Sites**.
13. To send feasibility assessments, in the Care Program Sites page, select the sites, and click **Send Assessment**.
14. On the Agentforce window, select the assessment, and click **Submit**.
15. Select an expiry date and time for the assessment, and click **Submit**.
16. Confirm your selection.

The site investigators receive the links to the feasibility assessments on the Experience Cloud portal.

Administer Life Sciences Cloud

In addition to the solution-oriented features you get with Life Sciences Cloud, you can also design and implement your own solutions to meet the business needs of your organization. Here's a set of Salesforce features you can use to extend your Life Sciences Cloud implementation.

Advanced Patient Card

The Advanced Patient Card uses FlexCards from OmniStudio to deliver greater flexibility and ease of use. To show the card on patient accounts, add the *HealthCloudPtCardPatientCard* FlexCard component to your Account Layout page.

Assessments and Surveys in Life Sciences Cloud

Improve quality of care by gathering information that helps you manage your patients' or members' health more efficiently. Whether it's an industry standard screener or a member feedback survey, you have the information you need.

Electronic Signatures

Reduce turnaround time by managing electronic signatures in Salesforce using Digital Verifications. Set up signature trails for records or workflows that require users to verify key updates.

HLS Accelerators

HLS Accelerators are free automations, components, and solutions that help our Health and Life Sciences customers realize a faster time-to-value. The accelerators remove implementation barriers and reduce overall implementation efforts.

Intelligent Document Automation

Simplify the document management process, reduce manual data entry, and get patients the right care and services faster by managing patient and member forms all in one place, from intake through processing. Patients can upload their own documents on an Experience Cloud site. You can route forms automatically to the right queue for faster review and processing in a digital, HIPAA-compliant workspace.

Intelligent Document Reader for Life Sciences Cloud

Use optical character recognition to automatically extract data with Amazon Textract using your AWS account. Specify the document type that can be associated with the document, upload the document, and map its fields to a Salesforce object's fields. The extracted information can be used to create or update record fields, or to verify data that's already in the org.

Life Events and Milestones in Life Sciences Cloud

With the Events and Milestones component, capture and track significant events in a patient's life that may impact their healthcare.

Product Catalog Management in Life Sciences Cloud

The Product Catalog Management app is available for Life Sciences Cloud users to create and manage products. For example, users in MedTech organizations can use the app to create and manage products such as pacemakers, X-ray machines, syringes, and other medical devices. Users in Pharma organizations can use the app to create and classify drugs and drug samples.

[**View Events Using Enhanced Timeline in Life Sciences Cloud**](#)

The Enhanced Timeline component shows key events relating to a person or a resource in one place, so your users can see information from a single source of truth.

Advanced Patient Card

The Advanced Patient Card uses FlexCards from OmniStudio to deliver greater flexibility and ease of use. To show the card on patient accounts, add the *HealthCloudPtCardPatientCard* FlexCard component to your Account Layout page.

REQUIRED EDITIONS

Available in: Lightning Experience with OmniStudio

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

The Advanced Patient Card retrieves data from standard and custom objects, as long as the object has a reference to the Account object and is supported by an OmniStudio Data Mapper. It can display up to three records for each object.

Modify the Lightning Record Page on the Account object to see the Advanced Patient Card in Life Sciences Cloud.

 **Note** Advanced Patient Card and Patient Card are two different entities. Using Advanced Patient Card has no impact on Patient Card.

1. From Setup, in the Quick Find box, enter *OmniStudio*, select **OmniStudio Settings**, and then disable **Managed Package Runtime** if this setting is not already disabled.
2. Click the Object Manager tab, then click Account.
3. Click Lightning Record Pages.
4. Open the Account record page and click **Edit**.
5. From the Standard components, drag FlexCard to the left side of the page layout.
6. In the FlexCard properties, under FlexCard Name, select *HealthCloudPtCardPatientCard*.
7. Save the record page, and then activate the page if you have not previously activated it.

Assessments and Surveys in Life Sciences Cloud

Improve quality of care by gathering information that helps you manage your patients' or members' health more efficiently. Whether it's an industry standard screener or a member feedback survey, you have the information you need.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud, and Einstein GPT Platform and Einstein GPT Prompt Builder Add-On licenses

To learn more, see [Assessments and Surveys](#).

Electronic Signatures

Reduce turnaround time by managing electronic signatures in Salesforce using Digital Verifications. Set up signature trails for records or workflows that require users to verify key updates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

 **Note** Salesforce's Electronic Signature feature provides 21 CFR Part 11-ready electronic signature functionality. You can set up and use the feature to comply with your own 21 CFR Part 11 compliance requirements.

Help users track when they need to digitally verify records by embedding a Pending Signature component anywhere in your org such as on the Home page, on a record detail page, on a tab, or in a Lightning web component or Salesforce Flow. Users can view a list of electronic signature records that are ready for signing or that are rejected but still open. Users can sign these records on the same device or different devices.

Each electronic signature record includes the signature request date and a link to the related reference record. Users approve or reject the update, add comments, enter their location, and enter their CRM user credentials.

A signature trail is complete when all signatures in the trail have a status of Completed or Rejected. You can add more status values for the signature trail and signature.

Here are examples of when you can use electronic signatures.

- Manage Chain of Custody of Advanced Therapies: A custody item related to a care program enrollee has three custody chain entries. Each custody chain entry has a signature trail. The electronic signature records in this trail appear on the care program enrollee's record page when they're ready for signing.
- Verify Documents: A non-disclosure agreement record is the parent reference record for a signature trail.

[Set Up Electronic Signatures](#)

Set up the Digital Verifications feature to manage electronic signatures in Salesforce rather than in a 3rd-party application.

Create a Signature Trail

Create a signature trail that sets the number of required signatures and determines if designated verifiers must sign the records in a specific order. After you create the trail, configure the signature details.

Define a Signature

After you create a signature trail, define signature details such as the order of designated verifiers and whether designated verifiers belong to a user group or have a specific participant role. You also set the text for the pre- and post-signing reasons.

Add the Pending Signature Component to a Page

Help users track when records are ready for their signature by adding the Digital Verification List component to the Home page or a record page such as the Care Program Enrollee record page. Users can view a list of digital verifications that either require signatures or are rejected but still open.

Use Electronic Signatures

With Digital Verification, you can sign electronic records to verify key record updates such as Chain of Custody events in Advanced Therapy Management. You use your CRM credentials to sign the records on the same device as the other signers or different devices.

Set Up Electronic Signatures

Set up the Digital Verifications feature to manage electronic signatures in Salesforce rather than in a 3rd-party application.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To set up and manage electronic signatures:

Health Cloud Advanced Therapy Orchestration permission set

OR

Chain of Custody User permission set

To create, edit, and activate a decision table:

System Administrator profile

To open, edit, or create a flow in Flow Builder:

Manage Flow

To read, create, update, or delete connected apps:

Customize Application

USER PERMISSIONS NEEDED

AND

Modify All Data OR Manage Connected Apps

To edit the settings:

Customize Application

AND

Manage Auth. Providers

To create, edit, or delete named credentials:

Manage Named Credentials

OR

Customize Applications

1. Add users to a user group or assign them a participant role. Any user in the group or with this role can sign a record that's ready for signing if the group or role is a designated verifier.

See [Set Up User Groups for Care Teams](#) or [Set Up Participant Roles for Therapy Orchestration](#).

2. Create a signature trail.

See [Create a Signature Trail](#).

3. Define signature details such as the designated verifiers.

See [Define a Signature](#).

4. To validate the signers' CRM user credentials, such as username, password, and client Id, create a connected app, an authentication provider, and a named credential.

 **Important** Connected apps creation is restricted as of Spring '26. You can continue to use existing connected apps during and after Spring '26. However, we recommend using [external client apps](#) instead. If you must continue creating connected apps, contact Salesforce Support. See [New connected apps can no longer be created in Spring '26](#) for more details.

- a. Create a connected app to act as an OAuth client that performs the validation.

See [Create a Connected App](#).

- b. Create an authentication provider that stores authentication details such as the consumer key and secret, and authorization endpoints.

See [Configure a Predefined Authentication Provider](#).

- c. Create a named credential that references the authentication provider.

See [Create a Named Credential](#).

 **Note** When creating a named credential for Advanced Therapy Management select New Legacy.

- d. In Setup, go to the Advanced Therapy Management Settings page, and then set the named credential record ID for digital verification.

- e. In Setup, go to the OAuth and OpenID Connect Settings page, and then enable Allow OAuth Username-Password Flows.

5. Configure a decision table that stores digital verification setup information such as the required number of electronic signatures and the verification process type.
See [Decision Table](#).
6. Create digital verification records automatically with a new flow or by overriding a managed flow that creates or updates the related reference records. You can also create a subflow to confirm that all signatures on a trail are complete.
See [Flow Builder](#).
7. Add the Digital Verification List component to the Home page or a record page such as the Care Program Enrollee record page.
See [Add the Pending Signature Component to a Page](#).

Create a Signature Trail

Create a signature trail that sets the number of required signatures and determines if designated verifiers must sign the records in a specific order. After you create the trail, configure the signature details.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create signature trails:

Health Cloud Advanced Therapy Orchestration permission set

OR

Chain of Custody User permission set

1. From the App Launcher, find and select **Digital Verification Setups**, and then click **New**.
2. Enter a name for the signature trail.
3. For the Reference Object API Name, select the object to which this trail applies.
4. For the Verification Process Type, select **Sequential** if the designated verifiers must sign in a specific order or **Parallel** if the designated verifiers don't need to sign in a specific order.
5. For the Verification Type, select the number of required signatures.
6. For Record Action Type, select **Create** to create the signature trail when the reference record is created or select **Edit** to create the signature trail when the reference record is updated.
7. Save your changes.

Define a Signature

After you create a signature trail, define signature details such as the order of designated verifiers and

whether designated verifiers belong to a user group or have a specific participant role. You also set the text for the pre- and post-signing reasons.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To create digital verification setup records:

Health Cloud Advanced Therapy Orchestration permission set

OR

Chain of Custody User permission set

1. From the App Launcher, find and select **Digital Verification Setup Details**, and then click **New**.
2. In Digital Verification Setup, select the signature trail to which this signature belongs.
3. In Designated Verifier, select **Group** or **Participant Role**. Then select a user group or participant role. Any user in the group or with this role can sign the record when it's ready for signing. Leave blank to assign a specific user at runtime.
4. In Pre-Verification, enter the message that verifiers see before they sign.
5. In Post-Verification, enter the message that verifiers see after they sign.
6. In Verifier Rank, select the order of this verifier in the signature trail.
For example, select **First Verifier** if this verifier must sign first. Verifier Rank is required for both the sequential and parallel verification processes.
7. Save your changes.

Add the Pending Signature Component to a Page

Help users track when records are ready for their signature by adding the Digital Verification List component to the Home page or a record page such as the Care Program Enrollee record page. Users can view a list of digital verifications that either require signatures or are rejected but still open.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To update a page in Lightning App Builder: Customize Application

When you add the component to the Home page, users see every signature trail that requires their signatures. On a record page, users see only the signature trails related to the record.

1. In Setup, in the Quick Find box, enter *Lightning App Builder*, then select **Lightning App Builder**.
2. Select the page where you want to add the component, and then click **Edit**.
3. From the Standard list of components, drag the Digital Verification List component onto an editable part of the page.
4. Save your changes.

Use Electronic Signatures

With Digital Verification, you can sign electronic records to verify key record updates such as Chain of Custody events in Advanced Therapy Management. You use your CRM credentials to sign the records on the same device as the other signers or different devices.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

The Pending Signatures section of your Home page or a Care Program Enrollee detail page lists electronic signature records that are ready for you to sign. These records are assigned to you as a verifier either directly or through a user group or participant role. On your Home page, you see every signature trail that requires your signature. On a record page, you see only the signature trails that are related to the record.

You can view electronic signature records on a signature trail that are pending for others or that are rejected but still open. You can also assign a specific user as a designated verifier if one isn't already assigned.

[View and Sign Electronic Signature Records](#)

The Pending Signatures section of a page lists electronic signature records that are ready for you to sign.

View and Sign Electronic Signature Records

The Pending Signatures section of a page lists electronic signature records that are ready for you to sign.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

USER PERMISSIONS NEEDED

To view and sign electronic signatures:

Health Cloud Advanced Therapy Orchestration permission set

OR

Chain of Custody User permission set

Each record includes the signature request date and a link to the reference record.

1. From the Pending for You tab, click the name of the electronic signature record.
2. Select a line item that's marked as ready for signing.
3. In Signing Action, select **Approve** or **Reject**.
Important If you select Reject, the status changes to Rejected - Open, and you must generate a new electronic signature record for the reference record. When you approve the new record, change the status of the original record to Rejected - Closed to mark the signature trail as complete.
4. Enter comments about your signing reason.
5. Enter your location.
6. Enter your login Id and password, which are your CRM credentials. Your credentials represent your digital signature.
7. Click **Authenticate**.
8. Click **Finish**.

HLS Accelerators

HLS Accelerators are free automations, components, and solutions that help our Health and Life Sciences customers realize a faster time-to-value. The accelerators remove implementation barriers and reduce overall implementation efforts.

REQUIRED EDITIONS

Available in: Lightning Experience with OmniStudio

Available in: **Enterprise** and **Unlimited** Editions with Health Cloud or Life Sciences Cloud

Visit the HLS Accelerators website to view the available accelerators. The site groups them by type and by industry vertical. You can view an overview of each accelerator and download it. All accelerators are supplied as-is and are not supported by Salesforce. To learn more, see [HLS Accelerators](#).

Intelligent Document Automation

Simplify the document management process, reduce manual data entry, and get patients the right care and services faster by managing patient and member forms all in one place, from intake through processing. Patients can upload their own documents on an Experience Cloud site. You can route forms automatically to the right queue for faster review and processing in a digital, HIPAA-compliant workspace.

To learn more about Intelligent Document Automation, see [Health Cloud Help: Intelligent Document Automation](#).

Intelligent Document Reader for Life Sciences Cloud

Use optical character recognition to automatically extract data with Amazon Textract using your AWS account. Specify the document type that can be associated with the document, upload the document, and map its fields to a Salesforce object's fields. The extracted information can be used to create or update record fields, or to verify data that's already in the org.

To learn more, see [Intelligent Document Reader](#).

Life Events and Milestones in Life Sciences Cloud

With the Events and Milestones component, capture and track significant events in a patient's life that may impact their healthcare.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions with Life Sciences Cloud

You can create custom life event types, activate or deactivate them, and make them unique. You also can hide sensitive life event types, change the default icons that represent the life event types, and choose the details your users see when they hover over a life event.

From the Life Events page in Setup, follow the guided setup steps to add the Life Events or Business Milestone component to a record page such as the patient's person account page, and then configure

life event types and contextual actions.

Product Catalog Management in Life Sciences Cloud

The Product Catalog Management app is available for Life Sciences Cloud users to create and manage products. For example, users in MedTech organizations can use the app to create and manage products such as pacemakers, X-ray machines, syringes, and other medical devices. Users in Pharma organizations can use the app to create and classify drugs and drug samples.

Revenue Cloud's Product Catalog Management is available as part of the base license for Life Sciences Cloud users. Access the Product Catalog Management app via the App Launcher. From the app's Home page, you can:

- Create and manage product catalogs. Select catalog types such as Sales and Service to make sure your product offerings precisely match your business requirements.
- Create product catalog categories and subcategories. Assign products to categories. Visualize and streamline product organization using category trees.
- Create product classifications and assign products and attributes to them. Use product classifications for consistency across products. A product classification template is a collection of attributes. You can add a single attribute to multiple product classification templates and apply it to multiple products. You can also accelerate product creation by using product classification templates where products inherit attributes. You can override these inherited attributes if needed. You can update a classification template without impacting the product to which the template has previously been applied.
- Create products, and assign price books, product selling model options, and product qualifications to them. Define simple products and configurable and nonconfigurable bundle products. Define relationships within bundles by using product cardinality. Mark products as sellable or nonsellable.
- Define product selling models. Select selling model types such as One Time, Term-Defined, and Evergreen.
- Define attributes. Assign attribute categories, select attribute data types, and assign picklists for picklist datatypes. Make attributes required, optional, hidden or visible, and assign default values. Define product attributes once and use them across multiple products with the help of product classification templates.
- Create attribute categories and assign attributes.
- Create attribute picklists and manage picklist values.
- Define and manage qualification rules and qualification rule procedures.

[Product Catalog Management Data Model and Permissions](#)

To get started with Product Catalog Management in Life Sciences Cloud, assign permission sets to your user profiles based on their required level of access. Here's the set of permissions and objects that you get with Product Catalog Management.

See Also

- [Organize Your Products with Catalogs and Categories](#)
- [Create Product Templates Using Product Classifications](#)
- [Manage Products and Product Bundles](#)

[Manage Dynamic Attributes](#)

[Manage Qualification Rules for Products](#)

Product Catalog Management Data Model and Permissions

To get started with Product Catalog Management in Life Sciences Cloud, assign permission sets to your user profiles based on their required level of access. Here's the set of permissions and objects that you get with Product Catalog Management.

Permissions

Product Catalog Management uses these permission sets.

Permission Set	Permission Set License	Purpose
Product Catalog Management Customer Community User	Product Catalog Management Customer Community User	Provides customer community users with read access to Product Catalog Management features and objects.
Product Catalog Management Designer	Product Catalog Management Designer	Provides access to Product Catalog Management features and objects.
Product Catalog Management Partner Community User	Product Catalog Management Partner Community User	Provides partner community users with read access to Product Catalog Management features and objects.
Product Catalog Management Viewer	Product Catalog Management Viewer	Provides read access to Product Catalog Management features and objects.
Product Catalog Features for Sales Agreements	Manufacturing Sales Agreements Psl	Gives users access to the product catalog management features for Sales Agreements.
ProductCatalogManagementC2CPermSet	Cloud Integration User	Provides read access to Product Catalog Management objects using API.

Data Model

Product Catalog Management uses these objects.

Object	Purpose
Attribute Category	Captures logical grouping of reusable attributes for product definition.
Product Attribute Definition	Defines the relationship between products and their attributes.

Object	Purpose
Product Classification	Stores a template that holds a collection of dynamic attributes, which you can use to quickly define and create multiple products that are similar yet different.
Product Configuration Rule	Sets up the validation, inclusion, and exclusion rules for products in the selling process.
Product Specification Type	Defines customized product terminology unique to an industry through user-provided specifications.

See Also[Product Catalog Management Editions and Permission Sets](#)[Product Catalog Management Standard Objects](#)

View Events Using Enhanced Timeline in Life Sciences Cloud

The Enhanced Timeline component shows key events relating to a person or a resource in one place, so your users can see information from a single source of truth.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions

[How Enhanced Timeline Works in Life Sciences Cloud](#)

A timeline lets users see data from objects as a sequence of events happening over time. You determine what information shows on the timeline by choosing the base (or primary) object and the related objects. You can use standard objects or custom objects.

[Set Up a Enhanced Timeline in Life Sciences Cloud](#)

Configure interactive timelines that provide access to information about patients.

[Add Enhanced Timeline to a Record Page](#)

To let your Life Sciences Cloud users see the Timeline and its data, add it to a Lightning record page.

[Add Enhanced Timeline to Your Experience Cloud Site](#)

To let people use Timeline without logging in to Life Sciences Cloud, add it to your Experience Cloud site.

How Enhanced Timeline Works in Life Sciences Cloud

A timeline lets users see data from objects as a sequence of events happening over time. You determine what information shows on the timeline by choosing the base (or primary) object and the related

objects. You can use standard objects or custom objects.

A user's profile permissions determine access to timelines. You can assign a user multiple timeline configurations.

Before you start configuring a timeline, identify your requirements. At a minimum, decide which objects are required for the timeline and the information you want it to show.

Set Up a Enhanced Timeline in Life Sciences Cloud

Configure interactive timelines that provide access to information about patients.

Companion org users can use the Data Cloud engagement events. To enable and access Data Cloud features from your companion org, see [Access Data Cloud One from a Companion Org](#).

User Permissions Needed	
To access a Timeline:	Industries Service Excellence permission set license or Industries Sales Excellence permission set license
To configure a Timeline:	Read and edit access for objects you're including on the Timeline

1. From Setup, in the Quick Find box, enter *Timeline*, and then select **Timeline**.
2. Turn on **Timeline Configuration**.

 **Note** Enabling Timeline is a one-time task. After you enable Timeline in your org, you can't disable it.

3. Click **New Timeline**.

- a. Enter a name for the timeline.
- b. Enter an API name for the timeline, or accept the name that's automatically generated.
- c. Select an object that serves as the basis for the timeline.

You can base your timeline on any Salesforce object (standard or custom). You can add related objects to the timeline later.

 **Note** If you use a custom object on your timeline, ensure that it displays correctly by making sure it has a custom tab. See [Create a Custom Object Tab](#) for more information.

- d. Click **Save**.
4. On the Global Settings page, turn **Show Age** on to show how old a record of the base or primary object was when an event occurred, along with the date of the event.
5. If you chose to show age along with the timestamp, choose the field to use for calculating age.

To show the age of the patient, select the **Birthdate** field.

6. Click **Next**.
7. On the Timeline Related Objects page, click **Add Related Object**.

- a. Select a related object (standard or custom) that contains information you want to display on the timeline.

You can add up to five related objects per base object. If an object has record types, you can select up to three record types by default. Contact Salesforce Support if you want to increase the record type limit to five.

A related object for a Timeline anchor object must have a direct lookup to the anchor object.

- b. Select the field that associates the related object with the base timeline object, then click **Next**.

If a related object has only one lookup to the base object, then the field is auto-selected and can't be changed.



Note Enhanced Timeline doesn't support encrypted fields. Make sure any field you choose isn't encrypted.

- c. Add conditions for showing records on the timeline. You can add conditions only for indexed fields. Then click **Next**.

For example, you can show tasks that aren't canceled or deferred.

Add Related Object

Set Record Visibility ⓘ

Show records on the timeline only when

All Conditions Are Met (AND)

* Field: Status * Operator: Not Equals * Value: Deferred

+ Add Condition

- d. Select the Title, Subtitle, Timestamp, and Summary Field fields for the timeline events, and select whether to let users create records from the timeline. Then click **Next**.

Every event on a timeline has a title, an optional subtitle, a timestamp, and an optional summary, which are sourced from fields in the related object.

Title

You can use something like a Subject field.

Subtitle

You can use something like a Description field.

Timestamp

Select a field that's likely to have a value. You can only use fields that are indexed, such as Created Date. See [Indexes](#) for information on how to create custom indexes on other fields. The timestamp appears alongside the event on the timeline. Events without a timestamp don't appear on the timeline.

Summary Field

Select a field that contains the summary that you want to show on Timeline. You can select only the string, text, and text area fields. Users, for example contact center agents, can read

the summary to get a quick overview of an event and provide personalized support to customers. To see the Summary Field field, see [Enable Summary](#). If you don't select a field, the summary card doesn't appear on Timeline.

If you select **Let users create records from timeline**, users with the required permissions can click **New** to create a record directly from the timeline.

- e. Select the fields and related lists that you want to show on the timeline, and then click **Add**.

The selected Summary Field field isn't available for selection on the Fields tab.

If a selected field isn't visible on the page layout of the object it belongs to, it will not appear on the Timeline.

 **Note** The Timeline configuration doesn't support derived fields. A derived field in Salesforce is a simple field whose value is derived from the value of one or more fields on the same object.

8. To save the timeline and make it available for use, click **Activate**.

 **Note** To update the timeline configuration, deactivate the timeline, make your updates, and then activate the timeline again. For example, if you enable the Translation Workbench in your org, and you change the language for a user, you must deactivate and reactivate any existing timeline configurations to reflect the translations in the timeline for the user.

9. Preview the timeline you've configured by selecting a base object record in the **View Timeline On** field.

Add Enhanced Timeline to a Record Page

To let your Life Sciences Cloud users see the Timeline and its data, add it to a Lightning record page.

User Permissions Needed	
To access a Timeline:	Industries Service Excellence permission set license or Industries Sales Excellence permission set license
To configure a Timeline:	Read and edit access for objects you're including on the Timeline

1. Go to the record page of the object on which you created a timeline.
2. Select the gear icon on the top-right corner of the page and then click **Edit Page**.
3. Drag the Timeline component to the editable content area.
4. To select the timeline configurations you want to make available to users, click **Select** in the component properties panel.
Only active timeline configurations are available for selection.
5. In the Timeline window, select the required configurations and then click **OK**.
You can select up to 5 timeline configurations.
6. Save and activate your changes.

Add Enhanced Timeline to Your Experience Cloud Site

To let people use Timeline without logging in to Life Sciences Cloud, add it to your Experience Cloud site.

User Permissions Needed	
To access a Timeline:	Industries Service Excellence permission set license or Industries Sales Excellence permission set license
To configure a Timeline:	Read and edit access for objects you're including on the Timeline

1. From Setup, in the Quick Find box, enter *All Sites* and select **All Sites**.
2. Click **Builder** for the site in which you want to add Enhanced Timeline.
You can add Enhanced Timeline to only those sites that support record detail pages.
3. Select the required record page from the Home menu.
4. Drag the **Timeline** component from the Components menu to the relevant content area.
5. In the Timeline properties panel, click **Select....**
6. In the Timeline window, select the required configurations and then click **OK**.
You can select up to five configurations.
7. Publish your changes.