

# CT Pharma Spring '19 Release Notes



## Activity Sync (Generally Available)

Sync your Work Activities with your Private Calendar, Salesforce Tasks & Events. Specify the criteria to make sure that you have enough information to make a decision and schedule an appointment at the right time.

**Where:** This feature is generally available in both Classic and Lightning Experience.

**Why:** New criteria fields let you be more specific about type of activities you wish to see in your Personal or Email Calendars from Pharma Calendar and clarify the flow of Activities that should be created via the mailbox.

**How:** New fields **Standard object record criteria** and **Custom object record criteria** are available for admins as soon as the new release version is deployed.

You can setup Activity Sync by clicking the **Setup** → **Custom Metadata Types** → **Activity Sync** → **Manage Records**. Enter **Standard object record criteria** and **Custom object record criteria** queries for filtering.

**Activity Sync** [Edit Layout](#) | [Help for this Page](#)

[Back to List: Activity Sync](#)

**Activity Sync Detail** [Edit](#) [Delete](#) [Clone](#)

Label	Activity -> Event	Sync Type	Custom -> Standard
Namespace Prefix	CTPHARMA	Active	<input checked="" type="checkbox"/>
Activity Sync Name	Activity_Event	Protected Component	<input type="checkbox"/>

▼ Details

Standard Object	Event	Activity Record Type	Timeoff
Standard Activity Type	Other		
Standard object record criteria	Custom object record criteria		

▼ Additional fields mapping

Fields to update	Event.Description	Field values	CTPHARMA__Activity__c.CTPHARMA__Objective__c
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**Important:** Once the **Standard object record criteria** is set, **Standard Activity Type** field can no longer not be used as a filter.

## Planning Calendar

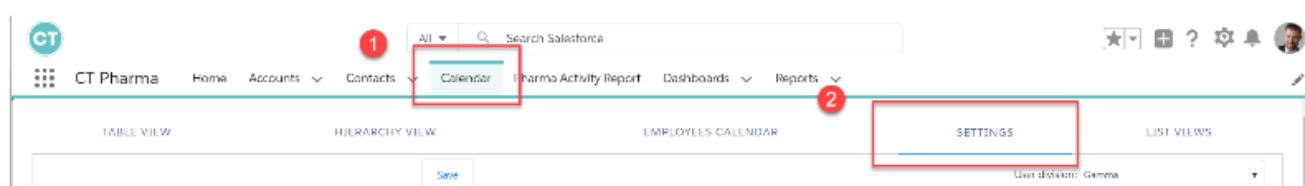
### Default DURATION (permission setup required)

**Where:** This feature is generally available in both Classic and Lightning Experience.

**Why:** Improve your activities planning with Default duration for each record type. Now you can set the default duration for 1:1 Visits, Audit Calls, Conferences and Events aligned with your corporate best practices and company rules.

**How:** Admin should give an **Edit** permission for the **Duration** (CTPHARMA\_\_Duration\_\_c) field on the **Planning Calendar Settings** (CTPHARMA\_\_CalendarSettings\_\_c) object.

1. Open the **Settings** subtab on the **Pharma Calendar** tab.



2. Scroll the Page to the **Customize Events** section, enter the **Duration** (in minutes, min = 30 minutes, max = 480 minutes) per each Record Type and click **Save** button.

RECORDTYPE NAME	TITLE FIELD	ICON URL	PREVIEW	DURATION	OPEN IN
1:1 Visit	Record ID ▼			30	ActivityRep. ▼
Joint Visit	Record ID ▼			30	ActivityRep. ▼
Pharma Event	Record ID ▼			30	ActivityRep. ▼
Timeoff	Record ID ▼			30	ActivityRep. ▼

## Event creation pop-up window improvements (general AVAILABILITY)

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

**Where:** This feature is generally available in both Classic and Lightning Experience.

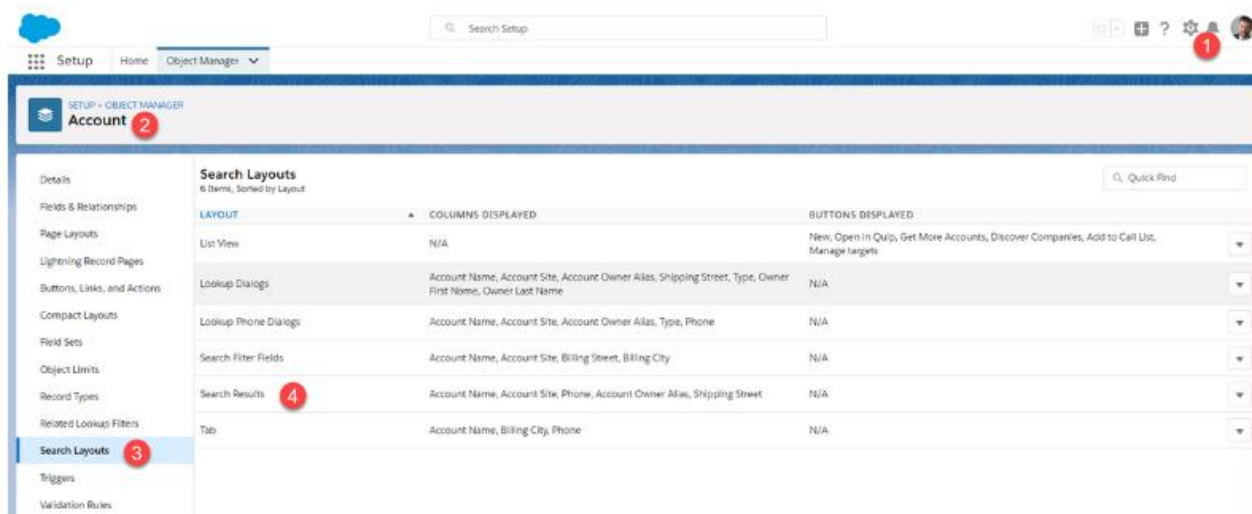
**Why:** New supported fields is an improvement for the existing creation flow.

**How:** Lookup fields and field dependencies will be pulled from standard SF field settings:

1. Open the **Calendar** Tab in the main menu.
2. Select the **Settings** subtab.
3. Scroll down to the **Event Creation Pop-Up Window Setup**.
4. Select the Record Type and select **Show Pop-Up** checkbox.
5. Add dependent fields on the layout if you have them setup in your system.

Lookup window is controlled by **Search Layout** of the selected object:

- Go to **Setup**
- Select the **Object Manager**
- Open the object and find the **Search Layouts**
- Setup the **Search Results**



## Activity Report (Addition Setup Required)

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

**Where:** This feature is generally available in both Classic and Lightning Experience.

**Why:** Activity Page could be customized differently for any Record Type to meet your requirements.

**How:** Update custom settings:

1. Go to **Setup**.
2. Open the **Custom Settings**.
3. Select **Activity Layout Settings** and click **Manage**.
4. **Create** the new record for the specific record type if you want the Page Layout would be created based on the **Field Set**. **Delete** the record for the specific Activity record type, then the page layouts would be inherited from the **standard Salesforce Page Layouts**.

Action	Name	Record ID	Location	Field Set API Name
Edt   Del	ActivityList	a0QE00000003kxym	Organization	CTPHARMA__ActivitiesList
Edt   Del	Joint Visit	a0QGL000000gpfv	Organization	CTPHARMA__OneOneVisit
Edt   Del	Master	a0QGL000000gpeUy	Organization	CTPHARMA__OneOneVisit
Edt   Del	Pharma Event	a0QGL000000gpfv	Organization	CTPHARMA__ActivitiesList
Edt   Del	Timeoff	a0QE00000003kxv6	Organization	CTPHARMA__JointActivitiesList
Edt   Del	Visit	a0QGL000000gpfu	Organization	CTPHARMA__OneOneVisit

Setup > OBJECT MANAGER

## Pharma Activity

Page Layout Assignment

Pharma Activity

« Back to Custom Object: Pharma Activity

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

Help for this Page

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Profiles	Master	1:1 Visit	Joint Visit	Pharma Event
Chatter External User	1:1 Visit Layout	1:1 Visit Layout	1:1 Visit Layout	1:1 Visit Layout
Chatter Free User	1:1 Visit Layout	1:1 Visit Layout	1:1 Visit Layout	1:1 Visit Layout
Chatter Moderator User	1:1 Visit Layout	1:1 Visit Layout	1:1 Visit Layout	1:1 Visit Layout
Contract Manager	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Cross Org Data Proxy User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Force.com - Free User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Gold Partner User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Marketing User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Medical Rep	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Partner Community Login User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Partner Community User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Read Administrator	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Read Only	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout
Silver Partner User	1:1 Visit Layout	1:1 Visit Layout	Joint Visit Layout	Pharma Event Layout

## CT Pharma Control Panel

**Where:** This feature is generally available in both Classic and Lightning Experience.

**Why:** Speed up setup velocity for the package.

**How:** Enable the CT Pharma Control Panel tab to start use the new setup interface.

CT PHARMA

GeneralCalendarActivity ReportDivisionsTriggersBack

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General Settings

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

ACTIVITY SETTINGS

Max days for activity planning

0 - 800

800

Create Related Activity Data records

☒

Share Activity with Joint Visit Users

☒

NEXT ACTIVITY SETTINGS

Create Next Activity

☒

NAME	ACTION

Save

## **Public Classes (General Availability)**

**Where:** This feature is generally available in both Classic and Lightning Experience.

**Why:** Public methods are added to our solution to make your development easier and reuse the existing package logic.

**How:** See the documentation in confluence public portal.