

Schedule visits

Schedule med rep visits

Version 7.17



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Schedule med rep visits

Schedule visits of your pharmaceutical reps to physicians and pharmacies and build routes on the map using the [*Visit scheduling*] view of the [*Activities*] section.

The [*Visit scheduling*] view has the following functional areas:

1. **Contact list.** The area displays the list of doctors with scheduled visits. To display a list of contacts with a certain system user as owner, specify the owner's full name in the schedule quick filter. The records in the list of contacts can be filtered via the [*Apply filter*] command of the  menu.
2. **Account list.** The list displays pharmacies and hospitals where you can schedule visits. To display a list of accounts with a certain system user as owner, specify the owner's full name in the schedule quick filter. You can filter the records in the accounts list by selecting the [*Apply filter*] option from the  button menu.
3. **Med rep's calendar.** The calendar in the [*Visit scheduling*] view is similar to the standard user calendar. The titles of days in the calendar contain additional buttons that allow the user to build the pharmaceutical rep's daily route.
4. **Route map.** The map that displays the pharmaceutical rep's daily route.

Schedule visits automatically

Use the [*Cyclic tasks*] section in Pharma Creatio to automatically plan medical rep visits to pharmacies and physicians. A cyclic task is an activity that includes multiple visits planned for a certain period of time. You can create cyclic tasks in the [*Cyclic tasks*] section. One cyclic task may schedule multiple visits over a certain period.

Note. After installing the “Pharma Creatio” app, make sure you add the [*Cyclic tasks*] section to the needed workplaces.

1. Add a cyclic task

1. Go to the [*Cyclic tasks*] section.
2. Click the [*New task*] button.
3. On the displayed page, fill in the required fields. On the displayed page, populate the required fields: specify the name of the cyclic task, the start and the end dates, and the owner. The owner must be a contact for which the system user is created.
4. On the [*General information*] tab:
 - a. Add the visit category. Specify the name of the category in the [*Name*] field.
 - b. In the [*Quantity*] field, specify the total number of visits you want to schedule for the selected time frame. The [*Days between visits*] and the [*Visits frequency per month*] field values are populated automatically.

Note. If you change the values in either one of the [*Quantity*], [*Days between visits*] and the [*Visits frequency per month*] fields, the values in the other two fields will be automatically recalculated based on the total task execution period.

- Select the lookup value in the [*Visit rule*] field to specify the rule according to which the visit will be performed. The field is populated from the [*Field sales rules*] lookup.
 - Select the contacts and accounts in the [*Doctors*] and [*Pharmacies*] details.
5. In the [*Products*] tab, specify a list of products, which the medical rep will promote for physicians and pharmacies.

Note. During automatic visit planning, the products specified on the [*Promoted products*] detail will be promoted instead of those specified on the [*Products*] tab of a contact (doctor), or an account (pharmacy) page.

6. Save the cyclic task (Fig. 1).

Fig. 1 Populated cyclic task page

The screenshot shows the 'Product promotion' page in the Creatio system. The page has a sidebar on the left with the following details:

- Name*: Product promotion
- Start date*: 9/26/2021
- End date*: 10/31/2021
- Quantity of scheduled visits: 5
- Available quantity of visits: 220
- Owner*: John Best

The main content area has three tabs: 'GENERAL INFORMATION', 'PRODUCTS', and 'FEED'. The 'PRODUCTS' tab is active, showing a table of visit categories:

Name	Quantity	Days between visits	Visits frequency per month	Visit rule
Doctor visits	1	41	0.7	Visit to the doctor rule
Pharmacy visits	4	8	3.8	Visit to the pharmacy rule

Below the table, there are two expandable sections:

- Doctors**: A list with columns for Full name, Category, and Account. One entry is shown: Brian Keelan, Category A, Account Felini Institutions.
- Pharmacy**: A list with columns for Name, Address, and Category. One entry is shown: Fare Pharma, Address Rigaer St., 64.

Note. We recommend planning your visits quarterly to analyze product promotion results correctly.

2. Schedule med rep visits using cyclic tasks

After adding a cyclic task, proceed to schedule visits. To do so:

1. Open the cyclic task created on the previous step. Use the [*Calculate available visits*] command of the [*Actions*] menu on the cyclic task page to calculate available visit slots. As a result, Creatio will populate the [*Available quantity of visits*] field of the cyclic task page (Fig. 2)

Fig. 2 Available visit quantity

The screenshot shows a form for a cyclic task. The fields are as follows:

Name*	Product promotion
Start date*	9/26/2021
End date*	10/31/2021
Quantity of scheduled visits	5
Available quantity of visits	220
Owner*	John Best

2. When the calculation is finished, the [*Schedule visits*] action will become available on the cyclic task page (Fig. 3).

Fig. 3 The [*Schedule visits*] action

The screenshot shows the 'Product promotion' page with the 'ACTIONS' menu open. The 'Schedule visits' option is highlighted by a mouse cursor.

Product promotion

CLOSE ACTIONS ▾

- Unfollow the feed
- Calculate available visits
- Schedule visits

Name*

Product pro

Start date*

3. Run the [*Schedule visits*] action to start the process of automatic visits scheduling in accordance with the configured parameters and physician and medical rep calendars. You will receive a notification when the visits are scheduled. The [*Quantity of scheduled visits*] will display the number of scheduled visits. The visit activities will appear on the [*Activity*] detail of the corresponding contacts and accounts.

Automatic scheduling of visits

The algorithm for automatic visit planning is as follows:

1. Creatio determines the route starting point. The current location of a sales rep responsible for the visit can be a starting point. The location is determined based on the information from the [*Addresses*] detail of the

corresponding contact page. If the contact's address is not specified, the system will use the address from the connected account page.

2. Creatio determines the closest sales outlet to the starting point. The optimal car route is determined within the 200 km radius.
3. Creatio checks the working hours of both the physician (pharmacy) and the medical rep.

Note. When checking the working hours of visit participants, the system analyzes the calendars of the medical rep and the doctor.

4. The system will create the first visit if the schedules of the medical rep and the physician (pharmacy) coincide. If the visit time is outside of the working hours of both parties, the system will look for the next closest location. Further planning and creation of visits is carried out in the same way.

Schedule visits manually

Note. Before scheduling visits, make sure that the rule that applies to the visit corresponds to the needed time period and visit category. Setting up visit rules is performed in the [*Field sales rules*] lookup.

To schedule a visit:

1. In the [*Activities*] section, select the [*Visit scheduling*] view (Fig. 4).

Fig. 4 Selecting the [*Visit scheduling*] view



2. On the opened page, in the calendar filter area select the time period and the employee to schedule visits for.
3. If you plan a physician visit, select that physician's contact and drag it to the calendar area (Fig. 5).

Fig. 5 Adding a visit to the calendar

The screenshot displays the 'Visit scheduling' interface. On the left, a sidebar lists contacts under the 'ACCOUNTS' tab, with 'Morris Lee' (GDC Innovative, Sales) selected. The main area shows a calendar grid for the week of 9/12/2021 to 9/18/2021. A visit for 'Morris Lee' is scheduled for 11:30 AM on the 11th. A map on the right shows the location of the visit, centered on City Hall Park in New York City.

If more than one rule is set up for the period, a rule selection window will open (Fig. 6).

Fig. 6 Selecting a visit rule

The screenshot shows the 'Select: Field sales rules' dialog box. It features a title bar with a close button, a 'VIEW' dropdown, and buttons for 'SELECT', 'CANCEL', 'NEW', and 'ACTIONS'. Below the title bar is a search field with a 'SEARCH' button. The list of rules includes 'Visit to the pharmacy rule' and 'Visit to the doctor rule', with the latter selected.

Note. Visit rules are set up in the [*Field sales rules*] lookup.

As a result, the calendar will contain a new activity with the “Visit” type. The contact that you dragged on the schedule area will be specified in the corresponding visit. The list of actions set up in the [*Field sales rules*] lookup will be added to the visit. The duration of the visit will correspond to the value from the corresponding visit rule. If necessary, you can change the visit duration manually.

4. Pharmacy visits are scheduled in a similar way, by dragging an account to the schedule.

Note. When the calendar of visits has been changed, use the map to view the changes in the pharmaceutical rep's route. Canceled visits are not taken into account when building a route.

To automatically connect a manually created visit to a cyclic task, the following parameters must coincide:

- visit time frame
- promoted product
- physician and/or pharmacy

If the above parameters are the same in the [*Cyclic task*] field of the [*Connected to*] detail of the [*Basic Information*] tab of the manually scheduled visit, the name of the associated cyclic task is displayed.

Configure a personal calendar

When planning visits, weekends and business hours are taken into account. Therefore, it is required to configure calendars prior to planning visit dates. By default, a single basic calendar with the following characteristics is set up in the system:

- Time zone GMT 0, without daylight saving time.
- 5-day workweek (from Monday till Friday).
- 8-hour workday (from 9:00 AM to 6:00 PM), without lunch break.
- Workdays with irregular business hours and holidays are not included.

This calendar is specified as default in the [*Base calendar*] system setting (“BaseCalendar” code). You can modify the standard calendar according to the working schedule of your company, or create a new one and add it to the system setting as the default one. Additionally, you can create personal calendars for pharmacies and doctors who your medical representatives are going to visit. The [*Base calendar*] system setting (“BaseCalendar” code) must be filled in for correct work of calendars. The system will refer to the [*Base calendar*] system setting if a contact’s calendar is not configured.


Example. A process of setting up a contact’s personal calendar with a six-day workweek and a shorter day on Saturday is described below. The lunch break is fixed, its duration is 1 hour.

To create a new calendar:

1. Select “Calendar” in the [*Actions*] menu on the contact page.
2. Confirm adding a new personal calendar by clicking [*Yes*].
The page for setting up the personal calendar of the contact will open. The [*Name*] and [*Time zone*] fields are populated automatically. The [*Name*] field is read-only, but you can change the time zone if necessary.
3. In the [*User*] field, specify the company rep who will perform visits to the contact. Their working hours will be taken into consideration when planning visits.
4. Edit the workweek settings. The default week parameters match the parameters of the base calendar. Set the day type as “Work” for all days from Monday to Friday, “Reduced” for Saturday and “Day off” for Sunday.
5. Set up work time. Set the technical break by separating the work time into two intervals, before and after the

break: 9:00 AM – 1:00 PM and 2:00 PM – 6:00 PM.

6. Specify all holidays on the [*Days off*] tab.

Note. The [*Calendars*] lookup may also be used to configure personal calendars of contacts. The setup sequence is the same. Open the system designer by clicking the  button at the top right corner of the application window.

Build a route for a med rep

Using the map allows you to save your pharmaceutical reps' time when moving around the city.

Med outlet is displayed on the map in accordance with the GPS coordinates specified on the account page. By default, when building routes, Creatio used the last added address of the pharmacy account.

In case of a physician visit, last added address of the corresponding hospital account is used. The address is displayed on the [*Addresses*] detail of the [*Contact info*] tab of the contact page.

Note. You can view the address of the sales outlet on the map and the title of the selected visit by clicking the marker of the visit.

When all the visits are added to the map, build a route.


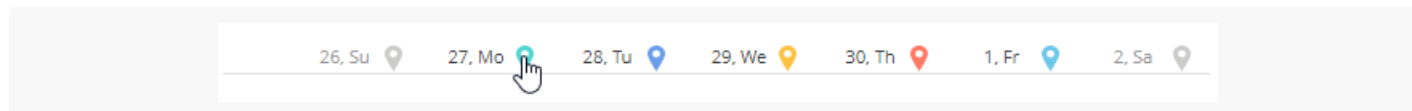

To **view routes for one day**, tap the  button located in the day title of the calendar (Fig. 8).

Fig. 8 Building a route for a med rep



As a result, the map will display all visits for the selected day. The order of visits on the map will correspond to their order in the schedule. The  button in the day title will change its color. The button color will correspond to the color of the route on the map. The route color is different for each day.

You can **view routes for several days** by clicking  for multiple dates.

Note. On the map, the point that the route starts from is your current location (your browser will need permission to share your current location). If your browser privacy settings do not permit sharing location, the first point of the route is the value specified in the “Default city for employees” system setting (“EmployeeCityDef” code).