

Install the application

Install Pharma Creatio

Version 7.17



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Install Pharma Creatio

4

Install Pharma Creatio

Pharma Creatio functionality is designed to efficiently schedule the med reps' visits to doctors and pharmacies, build routes on the map, manage the visit activities and assist med reps during the visits.


Attention. This function is unavailable for the Oracle DBMS.

Use a mobile device with the Creatio application installed during your visits. After selecting the required visit in the calendar, you will be transferred to the visit page, which will display the visit action list and switches for each action.

During a visit, the system will prompt the required steps. For example, when performing the [*Presentation*] action, the screen will automatically display a presentation of new products, etc.

During a visit, you can add orders based on visit results, create a list of products and their number and write down stock keeping unit (SKU) monitoring results and product facing check results.

You need to install the app from the marketplace to access the field functionality. To do so:

1. Click  in the main Creatio application.
2. Click [*Installed applications*]. The app management page opens.
3. Click [*Add application*] → [*Choose from Marketplace*].
4. Install the “Pharma Creatio” app.

If your Creatio application is deployed on-site, make sure that the application is not restricted from accessing the Internet, before you attempt to install “Pharma Creatio.” To do so:

1. Grant access to the web site <http://marketplace.creatio.com/>.
2. Install the “Pharma Creatio” app: <http://marketplace.creatio.com/app/pharma-creatio>.

Learn more: [Install applications from the Marketplace](#).

Attention. Pharma functionality requires at least 1 Pharma Creatio package license. To access the pharma functionality, all med rep users must be licensed separately.

When the pharma package is installed, several new elements will appear in Creatio:

For example, the [*Contacts*] section will now display the “Doctor” and “Pharmacist” contact types. The contact page will display the [*Specialty*], [*Category*], [*Potential*], [*Loyalty*] fields and the [*Categorization history*] detail. Additionally, the [*Products*] tab with a detail that contains a list of drugs that are promoted via this contact.

The [*Accounts*] section will display new account types — “Pharmacy”, “Pharmacy network,” and the [*Products*] tab with a detail containing a list of products promoted via an account.

The product page [*General information*] tab will display the [*Contacts*] and [*Accounts*] details. The details contain a list of contacts and accounts that promote the product. The product page [*Categorization*] detail will

display a new [*Nosology*] field. This field is used to specify the disease the medicine is subscribed for.

The [*Accounts*] and [*Contacts*] tabs will become available in the [*Visit scheduling*] view of the [*Activities*] section. The [*Contacts*] tab shows the list of physicians. The [*Accounts*] tab shows the list of pharmacies, pharmacy networks and hospitals.

The “Pharma” folder in the [*Lookups*] section will contain the following lookups: [*Doctor potential setup*], [*Doctor loyalty setup*], [*Nosology*], [*Doctor specialties*]. New activity categories will be added: “Doctor visit” and “Pharmacy visit.”. Two new rules will be added in the field sales lookup: “Doctor visit rule” and “Pharmacy visit rule”.