

TikaDiscover

CRM Integration Guide

Salesforce • HCP Profile Sync

Executive Summary

DocNexus integrates directly with Salesforce CRM to deliver real-time, AI-enriched HCP (Healthcare Professional) profile data into the workflows your commercial, medical affairs, and market access teams already use. This document covers the full integration architecture, data field mapping, sync logic, access controls, and implementation guide for enterprise deployment.

Key Capabilities at a Glance

- Bi-directional HCP profile sync between DocNexus and Salesforce
- Real-time prescriber activity, diagnosis and procedure volume insights, and affiliation data
- AI-powered HCP scoring surfaced natively in Salesforce Account/Contact records
- Role-based field visibility aligned to Commercial, Medical Affairs, and Market Access personas
- Compliance-ready audit trail with SOC 2-aligned data handling

1. Integration Architecture

1.1 Overview

The DocNexus-Salesforce integration is built on a secure, event-driven middleware layer that synchronizes HCP profile data between DocNexus's proprietary intelligence database and your Salesforce org. The integration supports both initial bulk load and ongoing incremental updates via REST and streaming APIs.

Component	DocNexus Layer	Salesforce Layer
Data Source	DocNexus Intelligence DB (Claims, Rx, Procedure Data)	Salesforce CRM (Accounts, Contacts, Custom Objects)
Sync Mechanism	DocNexus Sync Agent (AWS Lambda / GCP Cloud Run)	Salesforce REST API + Bulk API 2.0

Component	DocNexus Layer	Salesforce Layer
Auth	OAuth 2.0 + JWT (Clerk/Cognito)	Connected App w/ Named Credentials
Frequency	Real-time event stream + nightly full refresh	Webhook + scheduled Apex batch jobs

1.2 Data Flow

The following describes the end-to-end data flow from source claims data to Salesforce HCP records:

- DocNexus ingests pharmacy and medical claims from proprietary data partnerships, refreshed on a rolling 24-hour cycle.
- Claims data is processed through the DocNexus analytics pipeline to compute prescriber-level metrics (TRx, NBRx, market share, patient segment distribution, ICD-10 diagnosis volume, and CPT/HCPCS procedure volume).
- Enriched HCP profiles are assembled in the DocNexus Provider Master, cross-referenced against the DocNexus US Provider dataset (NPI-keyed).
- The DocNexus Sync Agent publishes change events to an internal message queue whenever HCP profiles are updated.
- A Salesforce Connected App consumes these events and upserts records using the NPI number as the external ID.
- Field-level security and sharing rules applied at the Salesforce layer enforce persona-based access.

2. HCP Profile Field Mapping

2.1 Core Identity Fields

These fields are synced to both the Salesforce Contact and Account objects and are available to all licensed users.

DocNexus Field	Salesforce Field	Notes
npi	DocNexus_NPI__c (External ID)	10-digit NPI; primary join key
first_name / last_name	FirstName / LastName	Standard Contact fields
primary_specialty	DocNexus_Primary_Specialty__c	NUCC taxonomy-mapped
secondary_specialty	DocNexus_Secondary_Specialty__c	Up to 3 specialties
primary_address	MailingStreet / City / State / Zip	Primary practice location
phone	Phone	Practice main line
email	Email	Verified where available
hospital_affiliation	DocNexus_Hospital_Affiliation__c	Top affiliated institution

DocNexus Field	Salesforce Field	Notes
gender	DocNexus_Gender__c	Self-reported where available

2.2 Prescribing Intelligence Fields

Available to Commercial and Market Access personas. Populated from pharmacy and medical claims analytics via the DocNexus intelligence pipeline.

DocNexus Field	Salesforce Field	Persona Access
rx_volume_12m	DocNexus_Rx_Volume_12M__c	Commercial, Market Access
trx_12m	DocNexus_TRx_12M__c	Commercial, Market Access
nbrx_12m	DocNexus_NBRx_12M__c	Commercial, Market Access
icd10_diagnosis_volume	DocNexus_ICD10_Dx_Volume__c	Medical Affairs, Market Access
top_diagnoses_icd10	DocNexus_Top_Diagnoses__c	Medical Affairs, Market Access
cpt_hcpcs_procedure_volume	DocNexus_Procedure_Volume__c	Medical Affairs, Market Access
top_procedures_cpt	DocNexus_Top_Procedures__c	Medical Affairs, Market Access
avg_patient_age	DocNexus_Avg_Patient_Age__c	Medical Affairs
payer_mix_commercial_pct	DocNexus_Payer_Mix_Commercial__c	Market Access
payer_mix_medicare_pct	DocNexus_Payer_Mix_Medicare__c	Market Access
payer_mix_medicaid_pct	DocNexus_Payer_Mix_Medicaid__c	Market Access

3. Sync Configuration

3.1 Sync Modes

DocNexus supports three sync modes configurable per Salesforce org:

Mode	Description
Full Refresh (Nightly)	Complete re-sync of all HCP records in scope. Runs at 2:00 AM client local time. Recommended for initial load and weekly validation runs.
Incremental Sync (Real-time)	Event-driven updates triggered whenever a DocNexus HCP profile changes. Typical latency: <5 minutes. Recommended for production.

Mode	Description
Manual Trigger	Ad-hoc sync for specific NPIs or territories, initiated via the DocNexus Admin Panel or Salesforce Flow.

3.2 Scope Filters

Clients can configure which HCPs are in scope for Salesforce sync using the following filters in the DocNexus Admin Panel:

- Territory / geography (state, zip radius, MSA)
- Specialty (single or multi-select from taxonomy)
- Procedure Code or Diagnosis Volume
- Brand or therapeutic area relevance flag
- Existing Salesforce records only (update-only mode, no new Contact creation)
- Custom NPI list upload

3.3 Conflict Resolution

When a field value exists in both Salesforce and DocNexus, the following conflict resolution rules apply:

Field Category	Conflict Rule
Core Identity Fields (name, address, specialty)	Can be set to Salesforce wins or manual review queue.
Custom Salesforce Fields (rep notes, call plans, activities)	Salesforce always wins. DocNexus never overwrites native CRM activity data.
New HCPs (in DocNexus, not in SFDC)	Creates new Contact + Account in Salesforce per configured scope rules.

4. Persona-Based Access Control

4.1 Salesforce Permission Sets

DocNexus ships four Salesforce Permission Sets that align to the primary buyer personas. Assign via Salesforce Setup > Permission Sets.

Permission Set	Intended Users	Field Access
DocNexus_Commercial	Sales reps, District Managers, National Sales Managers	HCP Score, TRx, NBRx
DocNexus_MedAffairs	Medical Science Liaisons (MSLs), TLLs, Medical Directors	Top Diagnoses, Avg Patient Age, Digital Influence Score, Publications

Permission Set	Intended Users	Field Access
DocNexus_MarketAccess	Market Access, HEOR, Payer Strategy teams	Payer Mix, Prior Auth Rate, Market Share, Formulary coverage
DocNexus_Analytics	RWD/Analytics, Data Science, BI teams	All fields + raw claims metadata, API export enabled
DocNexus_Admin	IT/Salesforce Admins, DocNexus Customer Success	Full field access + sync config, audit log access

4.2 Field-Level Security

AI scoring fields (HCP Score, Segment, Next Best Action) are visible to Commercial and Analytics personas but hidden from Medical Affairs by default to maintain appropriate firewall compliance. Admins can adjust FLS settings per client policy.

Compliance Note

DocNexus intelligence fields derived from claims data are subject to HIPAA safe harbor de-identification. No patient-level data is exposed in Salesforce. All prescriber-level data represents aggregate activity from de-identified claims and is permissible under applicable data use agreements.

5. Implementation Guide

5.1 Prerequisites

- Salesforce Enterprise or Unlimited Edition (API access required)
- DocNexus Enterprise subscription with CRM Integration add-on
- Salesforce System Administrator credentials
- DocNexus Admin Panel access (provisioned by DocNexus Customer Success)
- Named Credential configured in Salesforce for DocNexus Sync API endpoint

5.2 Typical Timeline

Phase	Timeline
Kickoff & Scope Definition	Week 1
Connected App Setup & Credentials Exchange	Week 1
Initial Full Sync (Sandbox)	Week 2

Phase	Timeline
UAT & Field Mapping Validation	Weeks 2–3
Permission Set Assignment & Layout Config	Week 3
Production Go-Live (Full Sync)	Week 4
Real-time Sync Activation	Week 4
Hypercare & Monitoring Review	Weeks 5–6

6. DocNexus Lightning Components

6.1 HCP Intelligence Panel

The DocNexus HCP Intelligence Panel is a Lightning Web Component (LWC) that embeds directly into the Salesforce Contact record page. It surfaces the full DocNexus HCP profile without requiring users to leave Salesforce.

- DocNexus HCP Score with trend indicator and percentile vs. specialty peers
- Top diagnoses by ICD-10 volume and top procedures by CPT/HCPs volume
- CPT / HCPs volume trend chart (12-month rolling, by brand vs. competitor)
- Payer mix donut chart
- Link to full DocNexus HCP profile (opens in DocNexus web app)

6.2 Territory Intelligence Dashboard

A Salesforce Lightning App Page built on DocNexus data, available to District Managers and above. Displays:

- Territory-level HCP universe map with prescribing heat overlay
- Top 25 HCPs by CPT / HCPs / ICD-10 volume with segment breakdown
- Market share waterfall vs. prior quarter
- Payer access barriers by territory (formulary gaps, PA rate estimates)

7. Security & Compliance

7.1 Infrastructure

- DocNexus Sync Agent hosted on AWS (primary) and GCP (DR)
- All data in transit encrypted via TLS 1.2+; at rest via AES-256
- Analytics infrastructure isolated per client tenant
- Penetration test completed October 2025; no critical findings

7.2 Data Governance

- Claims data is HIPAA safe harbor de-identified (45 CFR 164.514(b)) — no patient-level data transmitted to Salesforce
- Prescriber NPI numbers are public identifiers under the NPPES registry
- Data use governed by DocNexus Master Subscription Agreement and applicable DUAs with data suppliers
- Audit log of all sync operations retained for 12 months in DocNexus Admin Panel
- Client data is never used for cross-client model training

8. Support & Contacts

Contact	Details
Customer Success	Your named DocNexus CSM; reach via Slack shared channel or customer-success@docnexus.ai
Integration Support	engineering@docnexus.ai Response SLA: 4 business hours
Escalation Path	CSM → DocNexus Solutions Engineering