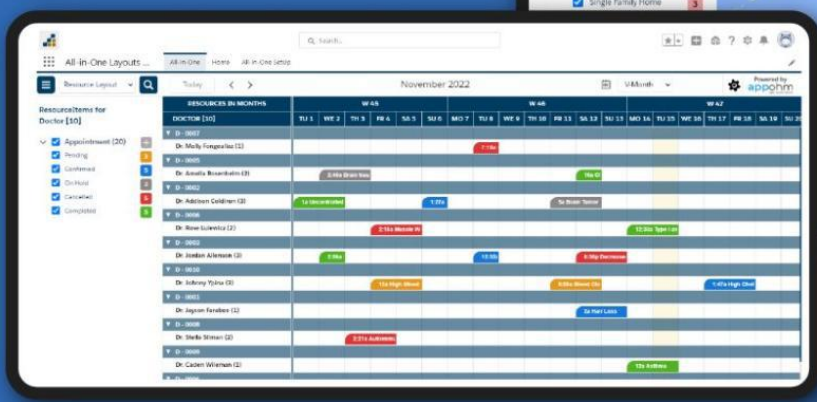
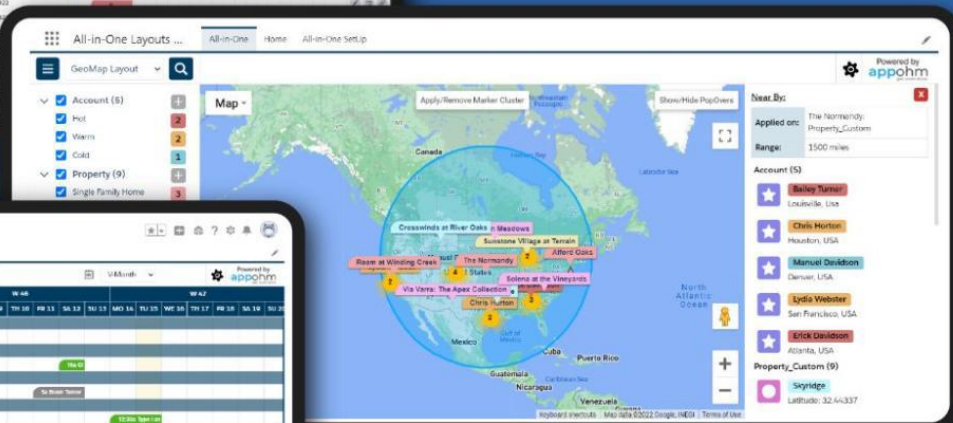




End User Guide

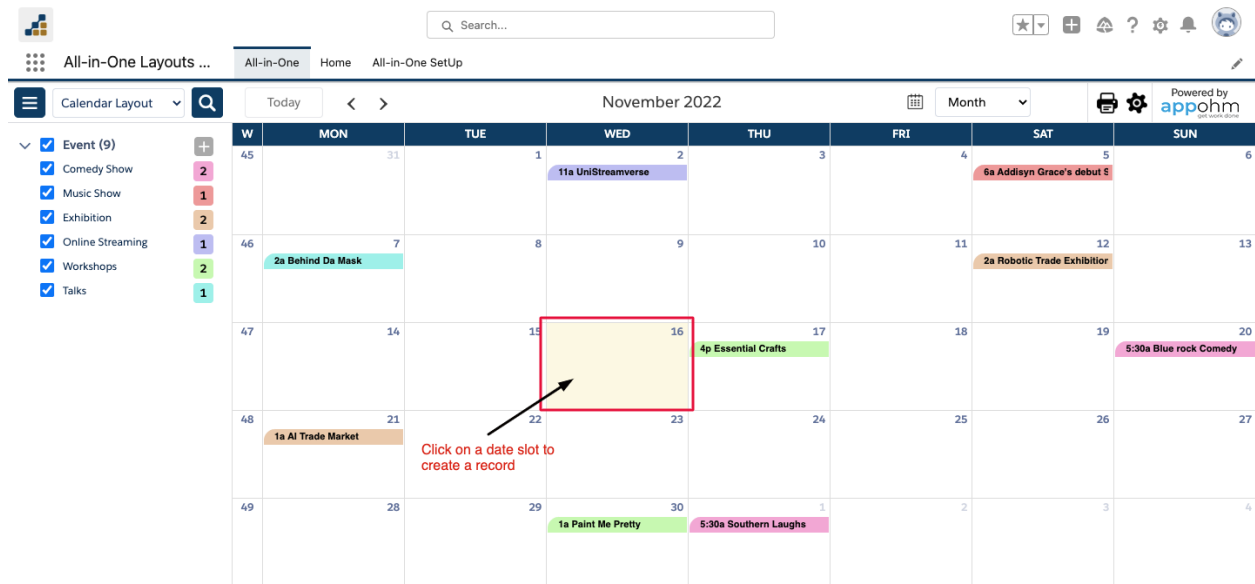
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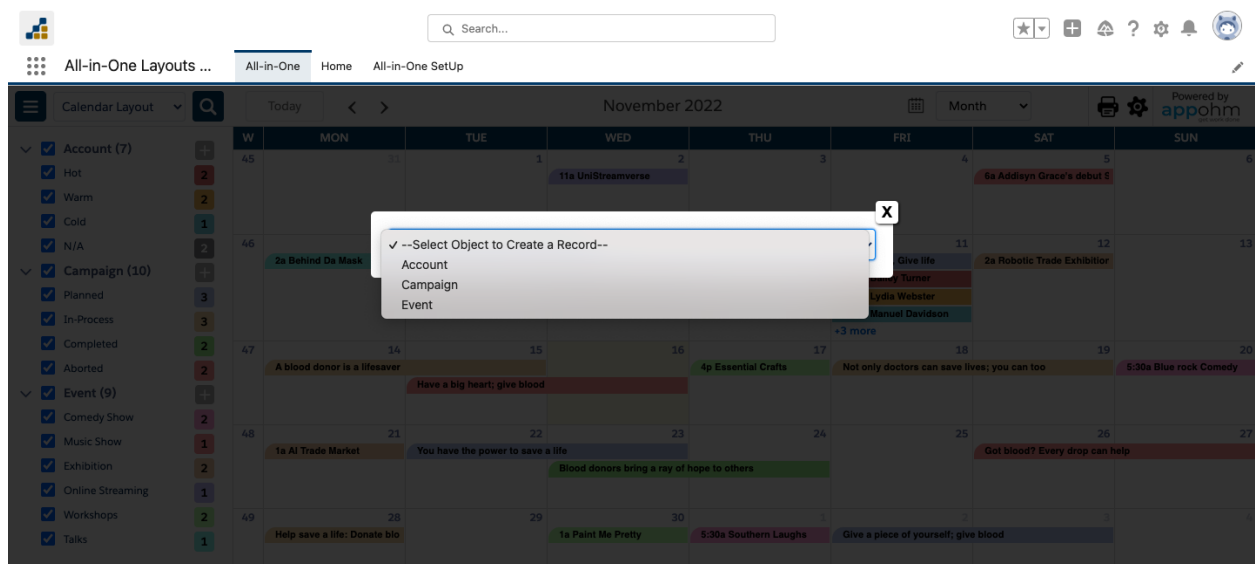
How to create and edit the records on layouts?

Users have the ability to create or edit existing records right from the layouts in the All-in-One app.

To create a new record click on a date (or select a date range) on any Layout(Calendar/Planner/Resource).



From the dropdown select the sObject of your choice.



Fill out the fields (those in red are required in order to save the entry) and 'Save' your new Salesforce record.

The screenshot shows the 'New Campaign' form in the appohm interface. The form is a modal window with the following fields:

- Name:** Ad Campaign
- Start Date:** 11/16/2022
- End Date:** 11/18/2022
- Type:** Webinar
- Status:** Planned
- Active:** ☒

At the bottom right of the form are 'Cancel' and 'Save' buttons. The background shows a calendar view for November 2022.

To edit an existing record, select the record of interest and then click the 'Edit' button.

The screenshot shows the appohm interface with a calendar view for November 2022. A campaign record is selected, and its details are displayed in a modal window titled 'Campaign Details'.

Campaign Details:

- Title:** Have a big heart; give blood
- Start Date:** 2022-11-15
- End Date:** 2022-11-16
- Address:** 4891 Ashford Dunwoody Rd NE, Atlanta, GA 30338, United States
- Organized By:** LifeSouth Community Blood Centers
- Status:** Aborted

A red arrow points to the 'Edit record from layout' button in the top right corner of the modal.

From there the edit pop-up will appear, make all the required changes and then select 'Save'

The screenshot displays the appohm software interface. At the top, there is a navigation bar with a logo, a search bar, and several utility icons. Below this is a sidebar with a 'Calendar Layout' dropdown and a list of campaign status filters: Campaign (10), Planned (3), In-Process (3), Completed (2), and Aborted (2). The main area shows a calendar for November 2022. A pop-up window titled 'Edit record details' is open, containing the following fields:

- Name: Have a big heart: give blood
- Start Date: 11/15/2022
- End Date: 11/18/2022
- Type: Referral Program (dropdown)
- Status: Aborted (dropdown)
- Active: ☒
- Parent Campaign ID: Blood donors bring a ray of ho... (with a close icon)
- Owner ID: User User (with a close icon)

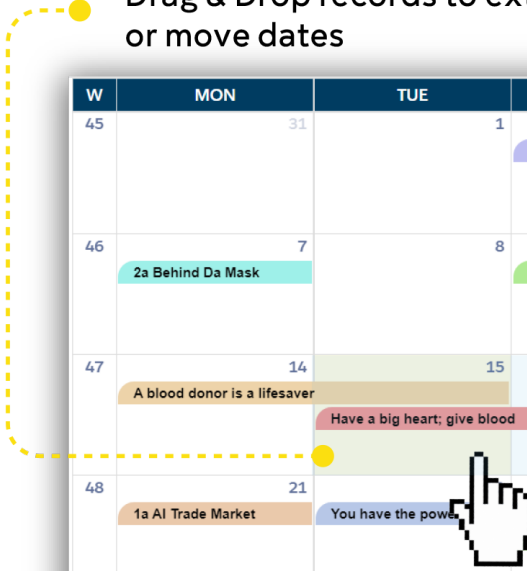
At the bottom right of the pop-up are 'Cancel' and 'Save' buttons. The background calendar shows dates from 45 to 49, with a 'SAT' column and a 'SUN' column.

How to Drag & Drop an event?

Users have the ability to change the date field/s of your Salesforce records from the All-in-One interface by dragging and dropping when start/end configured fields are not system fields (Not updatable by apex).

You have the ability to change the date field/s of your Salesforce records straight on the All-in-One interface by dragging and dropping them with your cursor.

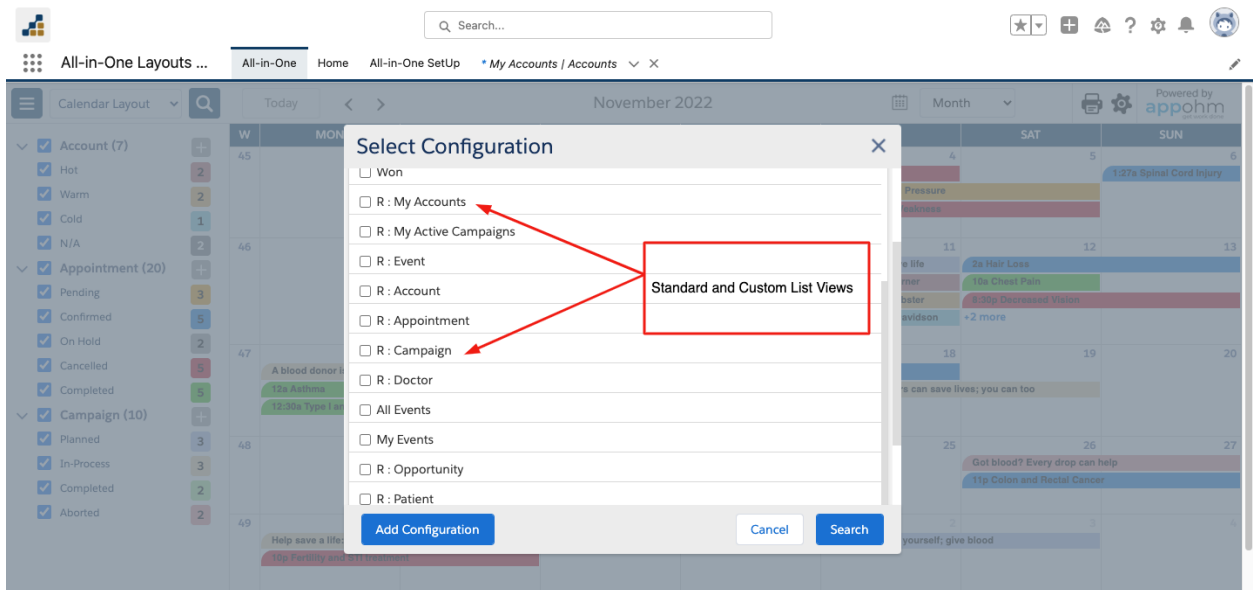
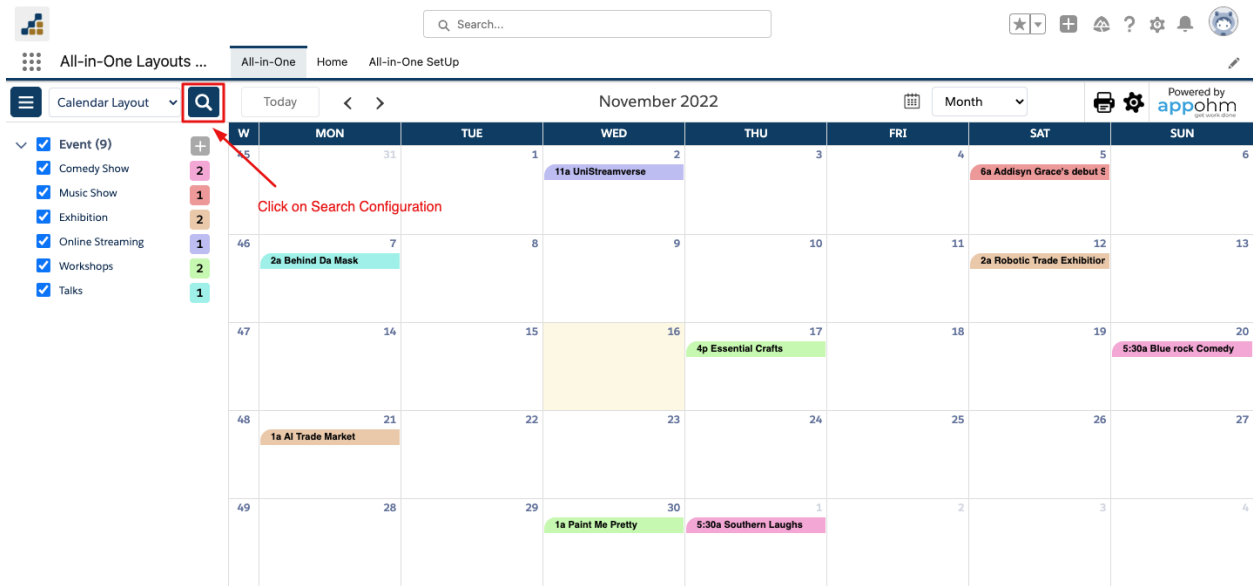
Drag & Drop records to extend or move dates



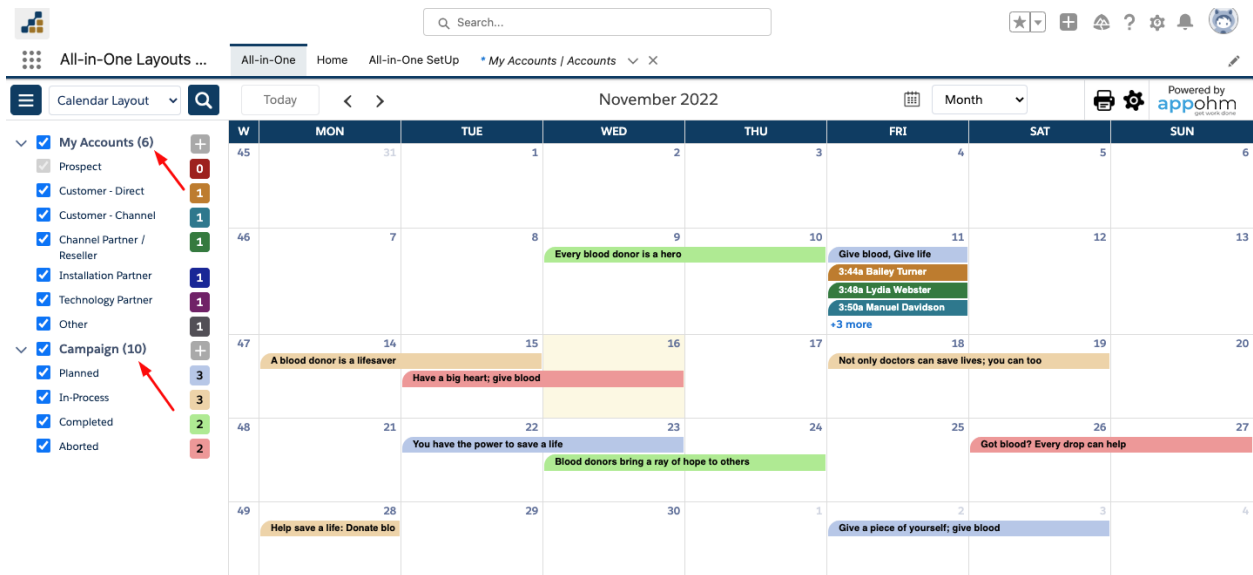
W	MON	TUE	WED	THU	FRI
45	31	1	2	3	
		11a UniStreamverse			
46	7	8	9	10	
2a Behind Da Mask		Every blood donor is a hero		Give blood, Give life	
47	14	15	16	17	
A blood donor is a lifesaver		Have a big heart; give blood		4p Essential Crafts	Not only doctors can s
48	21		23	24	
1a AI Trade Market		You have the power of life	Blood donors bring a ray of hope to others		
49	28	29	30	1	
Help save a life: Donate blo		1a Paint Me Pretty	5:30a Southern Laughs	Give a piece of yourse	

How to Filter the records on Layout?

Users have the ability to filter the records based on Standard and Custom List Views. To Filter the records on Layout, Click on Search Configuration.

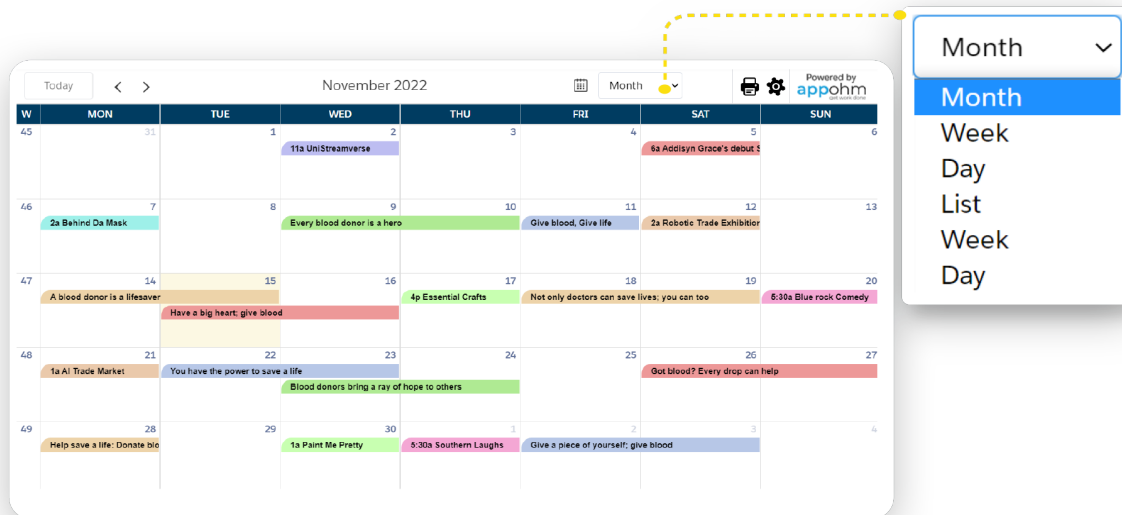


Based on the selection of List Views, records will be displayed on the layouts.

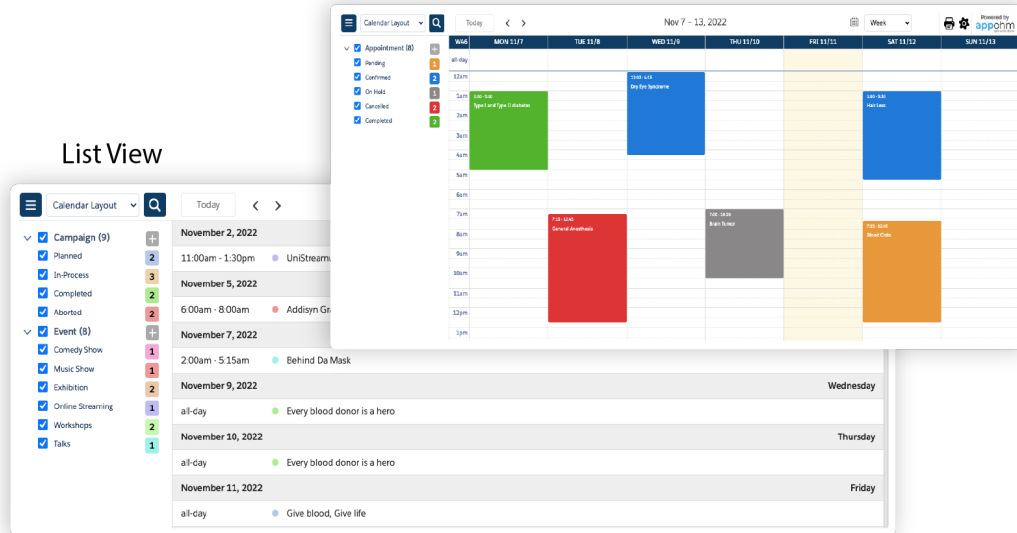


How to navigate among different views of Calendar Layout?

There are several views available on Calendar Layout such as Month, Week, Day, List, Week and Day with Time Slot. Users can switch among various views as required.



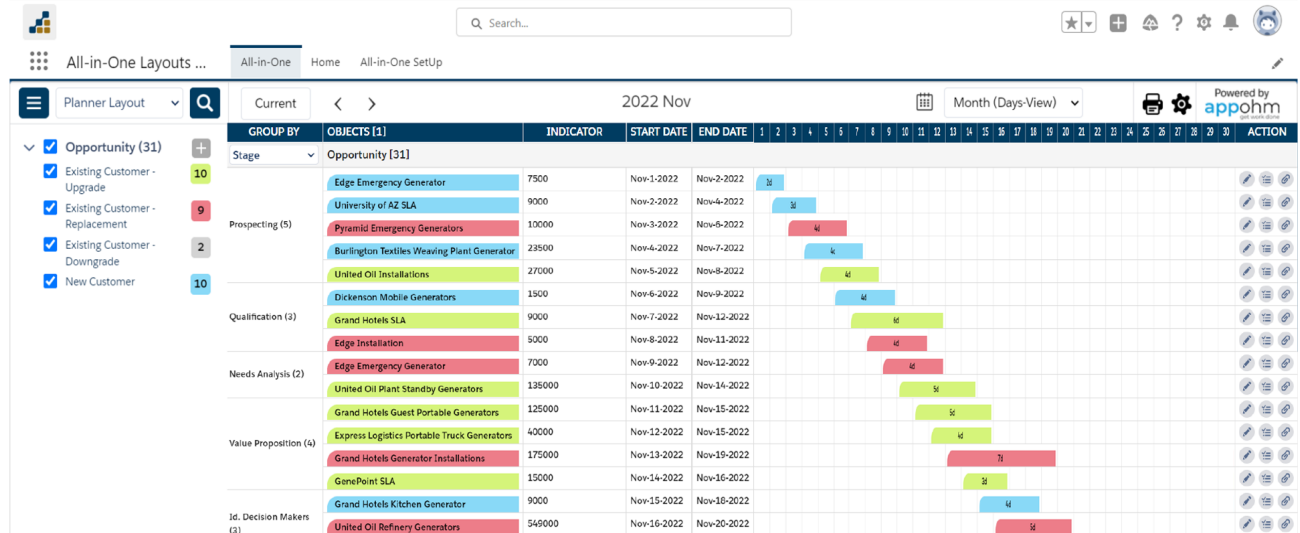
Week with Timeslot



How to use the Planner Layout?

Planner Layout is the perfect way to manage marketing campaigns, project plans and schedules over an extended time period.

Users have the ability to manage Campaigns and Events on Planner Layout in yearly, monthly, quarterly and weekly views.



Also, Users can perform actions on data like edit record, attach file and create tasks. In the classic view, it shows a mini-layout on hover of record which can be controlled by admin.

Note: “Need classic mini-layout on hover of Planner Record Display Name” must be enabled from **All-in-One setup**.

Create new task for Opportunity

Name ID: Contact Search

Subject:

Due Date Only:

Priority:

Status:

Assigned To ID: Search

Related To ID: Account Item ID

Description:

Attach multiple files

Click to upload/attach file

View Classic Mini Layout

Opportunity Name: Erik Davidson

Account Name: Erik Davidson

Close Date: 11/6/2022

Stage: Prospecting

Probability (%): 10%

Create Task for Campaign

Attach Files for Campaign

How to visualize Resource with related items?

The app provides a Resource Layout by which Users can visualize resource with related items for the month, week and day. All parent objects can be considered as “**Resource**” and related objects as “**Items**” to view in month, week and day group by type of resource.

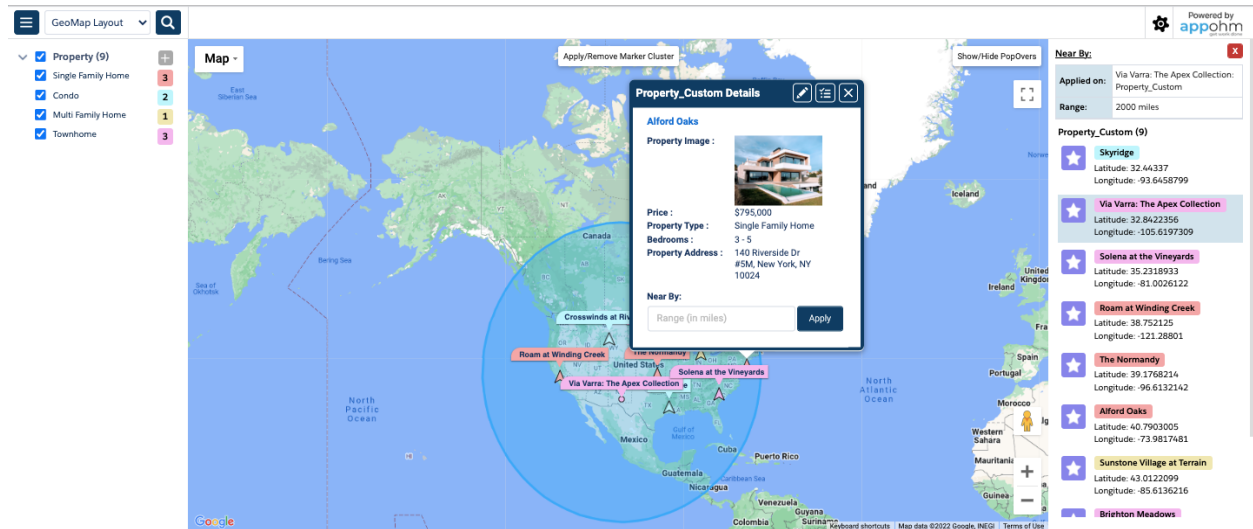
Note: You can select only one sObject from the Search Configuration. Also, “Is Resource” must be enabled from **All-in-One Setup**.

The screenshot displays the Appohm Resource Layout interface. The top navigation bar includes a search bar and various utility icons. The main header shows the date range 'Nov 7 - 13, 2022' and a 'V-Week' view selector. The left sidebar lists filters for 'Appointment (7)', 'Pending (1)', 'Confirmed (2)', 'On Hold (1)', 'Cancelled (2)', and 'Completed (1)'. The central calendar grid shows appointments for various doctors. A pop-up window titled 'Appointment Details' is open, displaying the following information:

- Appointment For:** Dry Eye Syndrome
- Doctor Name:** Dr. Jordan Allenson
- Patient Name:** Milton A. Wise
- Start Time:** 2022-11-08 00:32:00
- End Time:** 2022-11-08 03:45:08

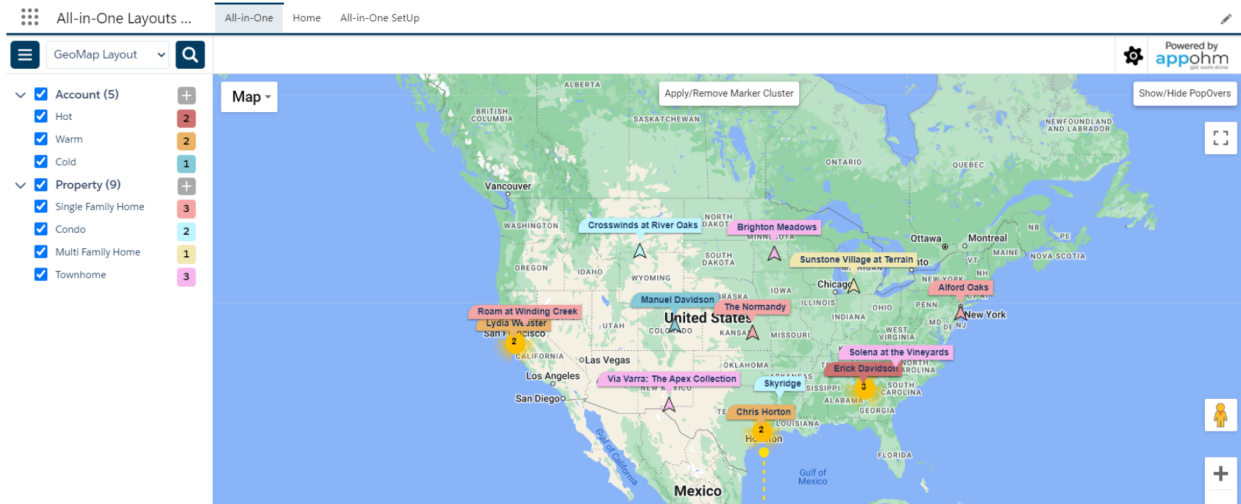
How to apply Nearby Filter in GeoMap Layout?

Users have the ability to visualize nearby records falling in the vicinity of a particular record by defining a mile range.



How to apply Marker Cluster?

GeoMap Layout provides a way to visualize your business, customers and prospects which are geographically clustered with color code to understand their location. To apply/remove marker cluster, just click on the “Apply/Remove Marker Cluster” button at the top of the layout.



Apply Marker Cluster

How to set the Default Zoom Level in GeoMap Layout?

As an Admin, you can set the default zoom level in the All-in-One setup. Zoom level 0 is the most zoomed out zoom level available and each integer step in zoom level halves the X and Y extents of the view and doubles the linear resolution. By default, it is set to 3.

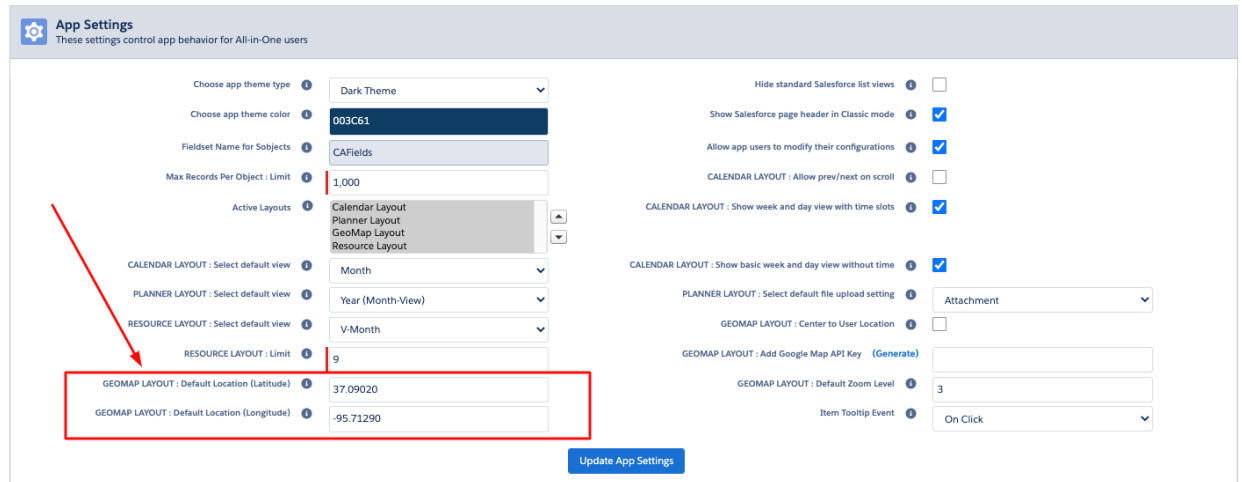
The screenshot displays the 'App Settings' interface for an All-in-One setup. The settings are organized into two columns. The left column includes options for theme type (Dark Theme), theme color (003C61), fieldset name (CAFields), max records per object (1,000), active layouts (Calendar Layout, Planner Layout, GeoMap Layout, Resource Layout), calendar layout default view (Month), planner layout default view (Year (Month-View)), resource layout default view (V-Month), resource layout limit (9), and default location (Latitude: 37.09020, Longitude: -95.71290). The right column includes options for hiding standard Salesforce list views, showing Salesforce page header in Classic mode, allowing app users to modify their configurations, calendar layout options (Allow prev/next on scroll, Show week and day view with time slots, Show basic week and day view without time), planner layout default file upload setting (Attachment), geomap layout center to user location, geomap layout add Google Map API key (Generate), and geomap layout default zoom level (3). The 'Default Zoom Level' is highlighted with a red box and a red arrow. Below the settings is an 'Update App Settings' button.

Setting	Value
Choose app theme type	Dark Theme
Choose app theme color	003C61
Fieldset Name for Subjects	CAFields
Max Records Per Object : Limit	1,000
Active Layouts	Calendar Layout, Planner Layout, GeoMap Layout, Resource Layout
CALENDAR LAYOUT : Select default view	Month
PLANNER LAYOUT : Select default view	Year (Month-View)
RESOURCE LAYOUT : Select default view	V-Month
RESOURCE LAYOUT : Limit	9
GEOMAP LAYOUT : Default Location (Latitude)	37.09020
GEOMAP LAYOUT : Default Location (Longitude)	-95.71290
Hide standard Salesforce list views	☐
Show Salesforce page header in Classic mode	☒
Allow app users to modify their configurations	☒
CALENDAR LAYOUT : Allow prev/next on scroll	☐
CALENDAR LAYOUT : Show week and day view with time slots	☒
CALENDAR LAYOUT : Show basic week and day view without time	☒
PLANNER LAYOUT : Select default file upload setting	Attachment
GEOMAP LAYOUT : Center to User Location	☐
GEOMAP LAYOUT : Add Google Map API Key (Generate)	
GEOMAP LAYOUT : Default Zoom Level	3
Item Tooltip Event	On Click

Update App Settings

How to set the Default Location on GeoMap Layout?

As an Admin, you can set the Longitude and Latitude of the particular location in the All-in-One setup to get the focused location on the map.



App Settings
These settings control app behavior for All-in-One users

Choose app theme type ¹ Dark Theme

Choose app theme color ¹ 003C61

Fieldset Name for Subjects ¹ CAFields

Max Records Per Object : Limit ¹ 1,000

Active Layouts ¹ Calendar Layout
Planner Layout
GeoMap Layout
Resource Layout

CALENDAR LAYOUT : Select default view ¹ Month

PLANNER LAYOUT : Select default view ¹ Year (Month-View)

RESOURCE LAYOUT : Select default view ¹ V-Month

RESOURCE LAYOUT : Limit ¹ 9

GEOMAP LAYOUT : Default Location (Latitude) ¹ 37.09020

GEOMAP LAYOUT : Default Location (Longitude) ¹ -95.71290

Update App Settings

Hide standard Salesforce list views ¹ ☐

Show Salesforce page header in Classic mode ¹ ☒

Allow app users to modify their configurations ¹ ☒

CALENDAR LAYOUT : Allow prev/next on scroll ¹ ☐

CALENDAR LAYOUT : Show week and day view with time slots ¹ ☒

CALENDAR LAYOUT : Show basic week and day view without time ¹ ☒

PLANNER LAYOUT : Select default file upload setting ¹ Attachment

GEOMAP LAYOUT : Center to User Location ¹ ☐

GEOMAP LAYOUT : Add Google Map API Key ¹ (Generate)

GEOMAP LAYOUT : Default Zoom Level ¹ 3

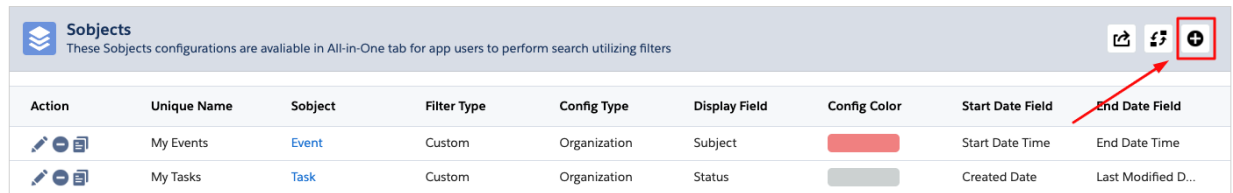
Item Tooltip Event ¹ On Click

How to create multiple Subjects of one object ?

Users can now create multiple configurations for the same object with a Different Unique Name.

To create multiple configurations for the same object -

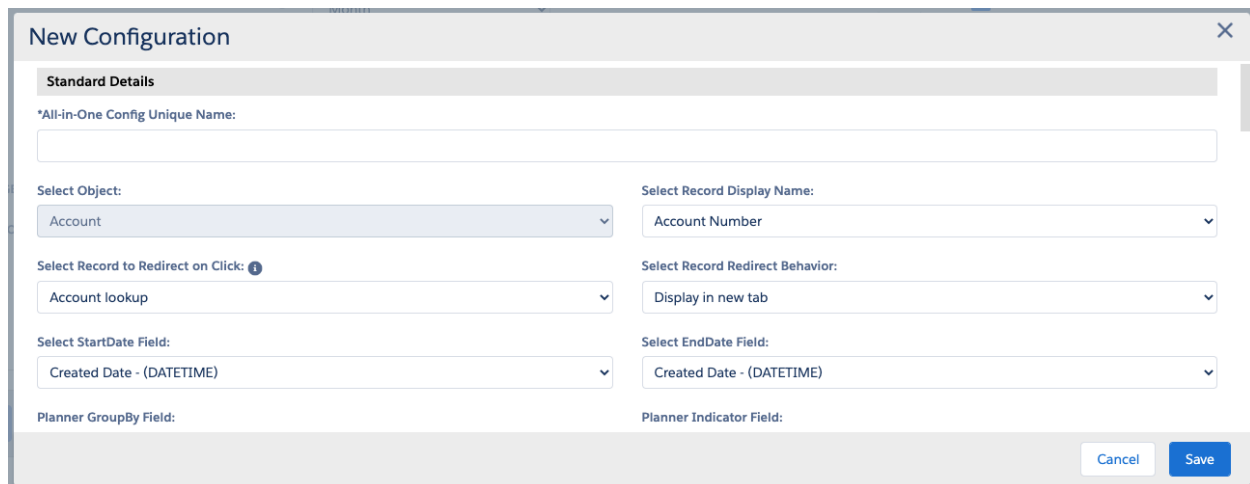
- The process is the same, the user clicks on “Add new configuration” from All in one setup Subjects config.



The screenshot shows a table titled 'Subjects' with the subtitle 'These Subjects configurations are available in All-in-One tab for app users to perform search utilizing filters'. The table has columns: Action, Unique Name, Subject, Filter Type, Config Type, Display Field, Config Color, Start Date Field, and End Date Field. There are two rows of configurations. A red box highlights a plus icon in the top right corner, with a red arrow pointing to it from the 'Add new configuration' button in the text above.

Action	Unique Name	Subject	Filter Type	Config Type	Display Field	Config Color	Start Date Field	End Date Field
	My Events	Event	Custom	Organization	Subject		Start Date Time	End Date Time
	My Tasks	Task	Custom	Organization	Status		Created Date	Last Modified D...

A modal box to Fill all the details will open.



The 'New Configuration' modal box contains the following fields:

- *All-in-One Config Unique Name: (text input)
- Select Object: (dropdown menu, currently 'Account')
- Select Record Display Name: (dropdown menu, currently 'Account Number')
- Select Record to Redirect on Click: (dropdown menu, currently 'Account lookup')
- Select Record Redirect Behavior: (dropdown menu, currently 'Display in new tab')
- Select StartDate Field: (dropdown menu, currently 'Created Date - (DATETIME)')
- Select EndDate Field: (dropdown menu, currently 'Created Date - (DATETIME)')
- Planner GroupBy Field: (text input)
- Planner Indicator Field: (text input)

Buttons: Cancel, Save

- Along with a Unique name, users can set all the “Standard Details” differently for each Subject configuration.

Users can set all the details distinctively based on the requirements.

- Scroll down to Record filter criteria

There will be two record filter criteria after scrolling

1. List view Filter Criteria

2. Custom Filter

Record Criteria Filter & Sort Details

☒ List View Filter Criteria ☐ Custom Filter

Select ListView Filter: [Dropdown]

Select Sort Field: Account Number

Select Sort Type: --None--

1. **List view Filter criteria**- This dropdown will contain all the list views that have been created for the particular object .

Record Criteria Filter & Sort Details

☒ List View Filter Criteria ☐ Custom Filter

Select ListView Filter: [Dropdown Menu]

Select Sort Field: Account Number

Select Sort Type: --None--

2. **Custom Filter** - Users can create their own custom filter, they can set their criteria by clicking on Create filter.

A user can set the criteria by filling up the 'Filter fields', set 'Filter Operator' as Equals, fill 'Filter Value' and click on build.

Filter Logics

	Filter Field	Filter Operator	Filter Value	Action
1	Search Field	--Select Operator--	Static Filter Value	[Trash Icon]

Created criteria will be visible like a query when clicked on Custom Filter.

* Record Filter Criteria ⓘ

☐ List View Filter Criteria

Select ListView Filter

☒ Custom Filter

Create Filter

Filter Criteria SOQL:

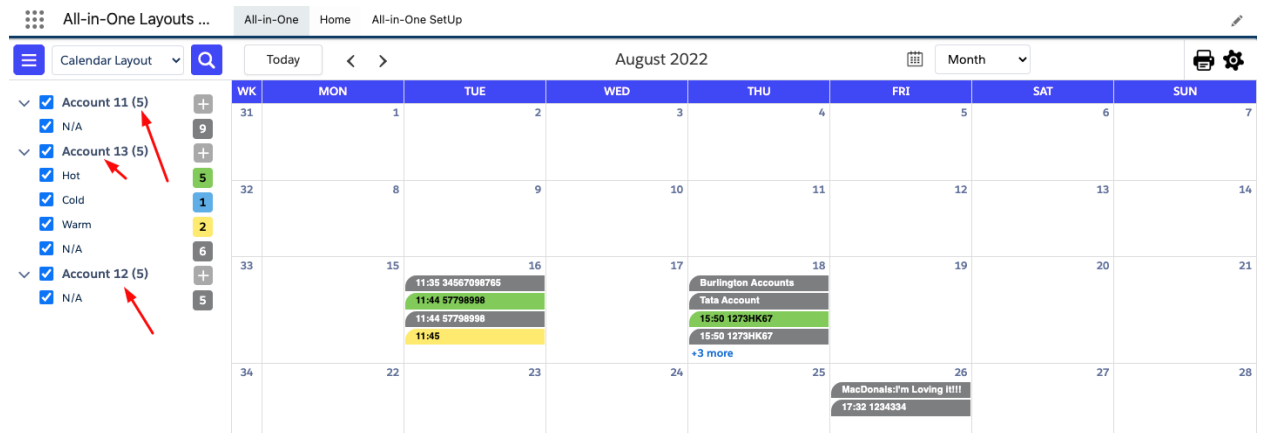
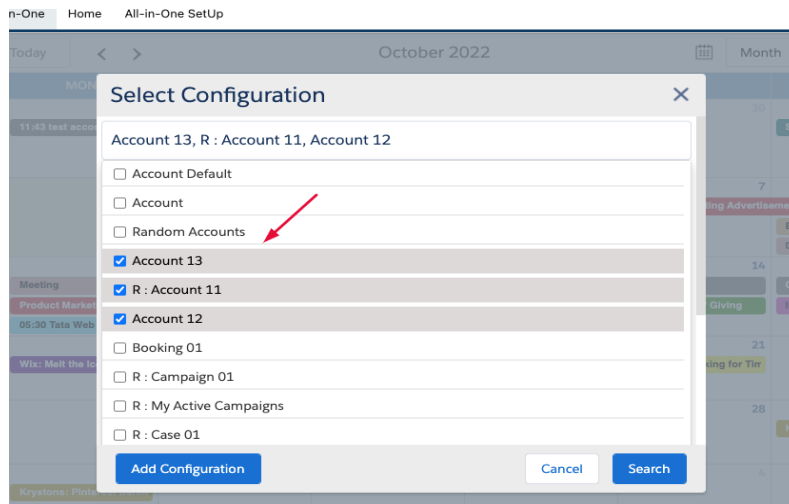
WHERE AccountSource = 'Web'

Fill in all the further details and save the configuration.

Users can view the configurations on the “**Subject configuration**” section.

<

Users can also view the multiple configurations created on the layouts as well. By selecting the Subject configurations from the **Search configuration** panel.



How to see the records on All in one layouts?

The records will be visible when users select configurations from the search panel .

Some of few different configurations created by the users to customize the records of each Objects are mentioned below :-

1. **All Accounts-** Records filtered for All accounts consists of all the records created under Accounts Object.
2. **Web Accounts-** Records filtered for Web Accounts are based on the criteria set using Custom Filter for Accounts Object.

The screenshot shows the 'All-in-One Layouts' interface for October 2021. The search panel on the left has two main sections: 'All Accounts (12)' and 'Web Accounts (2)'. The 'All Accounts (12)' section includes filters for 'Prospect Account Type' (3), 'Customer Channel Account Type' (1), 'Account Rating-hot' (3), 'Account Name- Jane Miller' (1), and 'Account Source-Web' (1). The 'Web Accounts (2)' section includes a filter for 'Web Account' (2). The main area displays a calendar grid with records for each day. Annotations highlight 'Records filtration on the basis of List view' and 'Records filtration on the basis of Custom filter'.

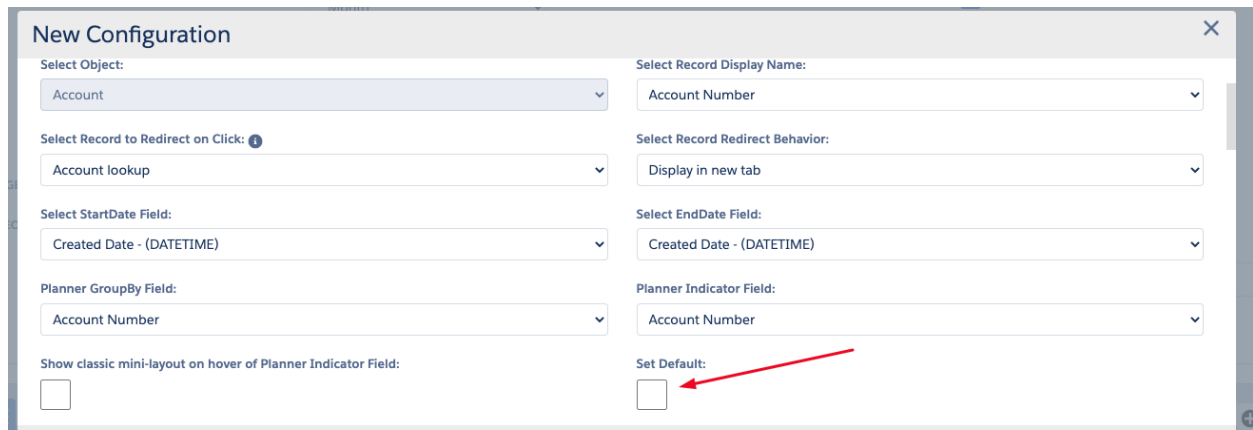
	W	MON	TUE	WED	THU	FRI	SAT	SUN
1						1	2	3
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
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20								
21								
22								
23								
24								

How to Use the functionality of Set Default ?

If any configuration is marked '**Set default**' **true** then the new list view created by the user will copy all the data of the configuration whose '**set default**' is **true**.

This functionality will be shown in the form of checkbox while creating or editing any Subject configuration.

Users can set any one Subject configuration as Default.



The screenshot shows a 'New Configuration' dialog box with the following fields and options:

- Select Object:** Account
- Select Record to Redirect on Click:** Account lookup
- Select StartDate Field:** Created Date - (DATETIME)
- Planner GroupBy Field:** Account Number
- Show classic mini-layout on hover of Planner Indicator Field:** ☐
- Select Record Display Name:** Account Number
- Select Record Redirect Behavior:** Display in new tab
- Select EndDate Field:** Created Date - (DATETIME)
- Planner Indicator Field:** Account Number
- Set Default:** ☐ (indicated by a red arrow)

Note - Only one Subject configuration can be marked as true for the Set Default checkbox.

How to use multiple active layouts?

Admins can Select Multiple Layouts.

The first selected option will be the default option that will be used on the All-in-One search dropdown.

The screenshot shows the 'App Settings' page for 'Unlimited Version'. The 'Active Layouts' section is highlighted, showing a list of layouts: 'Calendar Layout', 'Planner Layout', 'GeoMap Layout', and 'Resource Layout'. The 'Calendar Layout' is selected as the default view. Red arrows point to the first and second options in the list.

The Steps are -

- Go to All in one setup, you will see a column of Active Layout
- Admin can Move layouts Up/Down according to preference.
- The first selected layout will be the default layout.
- Admin cannot save settings without selecting at least one Layout in this field.

As default, Calendar and Planner layout will be saved if none of the layouts are selected.

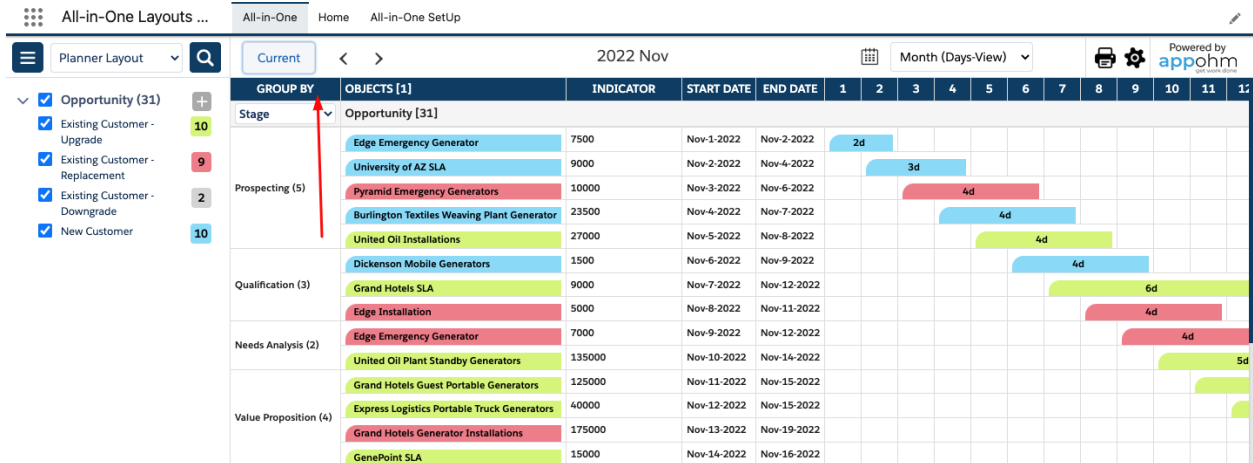
On All in one layouts, in the view dropdown only Calendar and Resource Layout will be visible.

The screenshot displays the 'All-in-One Layouts' interface. On the left, a sidebar menu lists various layout options: 'Calendar Layout' (checked), 'Resource Layout', 'Campaign (10)', 'Planned', 'In-Process', 'Completed', 'Aborted', 'Event (9)', 'Comedy Show', 'Music Show', 'Exhibition', 'Online Streaming', 'Workshops', and 'Talks'. A red arrow points to the 'Calendar Layout' option. The main area shows a calendar for November 2022, with events displayed as colored blocks across the days. The top navigation bar includes a search bar, a view dropdown (set to 'Month'), and a 'Powered by appohm' logo.

W	MON	TUE	WED	THU	FRI	SAT	SUN
45	31	1	2	3	4	5	6
			11a UniStreamverse			6a Addisyn Grace's debut	
46	7	8	9	10	11	12	13
	2a Behind Da Mask		Every blood donor is a hero		Give blood, Give life	2a Robotic Trade Exhibitor	
47	14	15	16	17	18	19	20
	A blood donor is a lifesaver	Have a big heart; give blood		4p Essential Crafts	Not only doctors can save lives; you can too		5:30a Blue rock Comedy
48	21	22	23	24	25	26	27
	1a AI Trade Market	You have the power to save a life	Blood donors bring a ray of hope to others			Got blood? Every drop can help	
49	28	29	30	1	2	3	4
	Help save a life: Donate bio		1a Paint Me Pretty	5:30a Southern Laughs	Give a piece of yourself; give blood		

How to use the Groupby field on Planner Layout?

Introduced a new column with the name GroupBy in Planner layout.



The steps are -

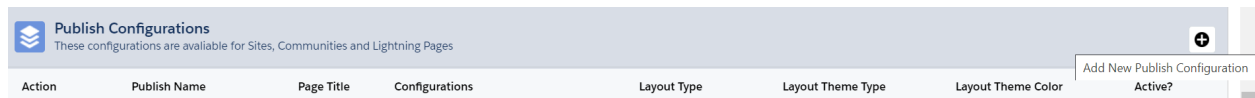
- Go to Planner Layout, Groupby Field will be available at the top of the Records section.
- Click on the Dropdown of the Groupby and select a field on the basis of which user wants the record to be grouped.
- Record Pills will be grouped according to the field type selected in this column.

Admin can also select groupBy field from Subject configuration on All-In-One setup under the Planner Layout details section.

The screenshot shows the 'Planner Layout Details' configuration form. It includes fields for 'Planner GroupBy Field' (set to 'Account > Account Name'), 'Planner Indicator Field' (set to 'Assistant's Name'), 'Show classic mini-layout on hover of Planner Indicator Field' (checkbox), 'Select Sort Field' (set to 'Full Name'), and 'Select Sort Type' (set to '--None--'). A red arrow points to the 'Planner GroupBy Field' dropdown menu.

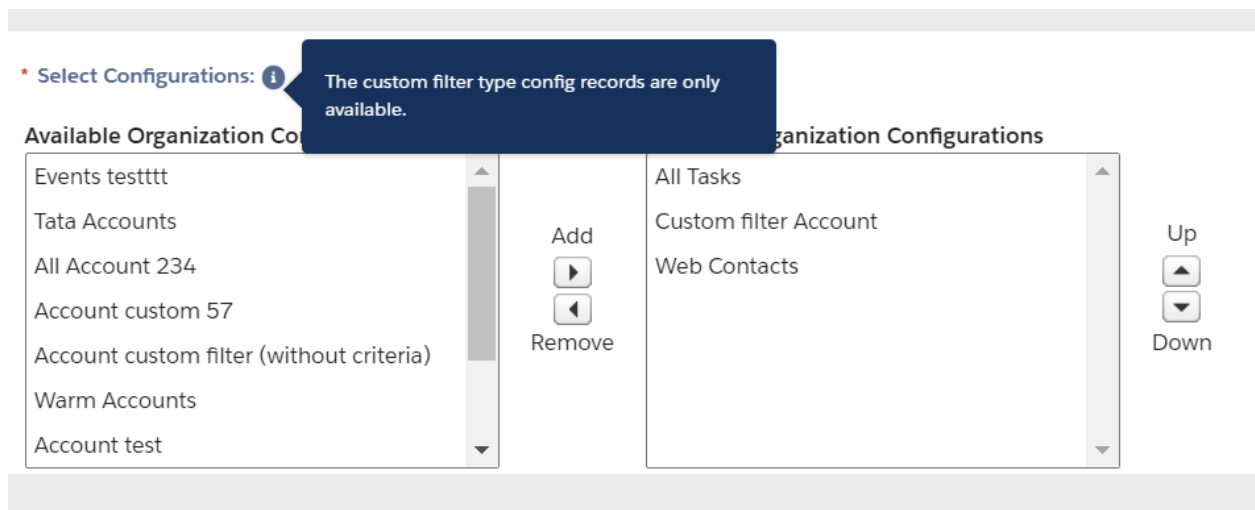
How to use the Custom filter configuration in Publish Configuration?

In Publish configurations, only configurations created Custom filter will be available to select. Go to All in one setup, scroll down to Publish configuration and click on create new.



A modal box of details will open, fill all the details and scroll down to select configurations column.

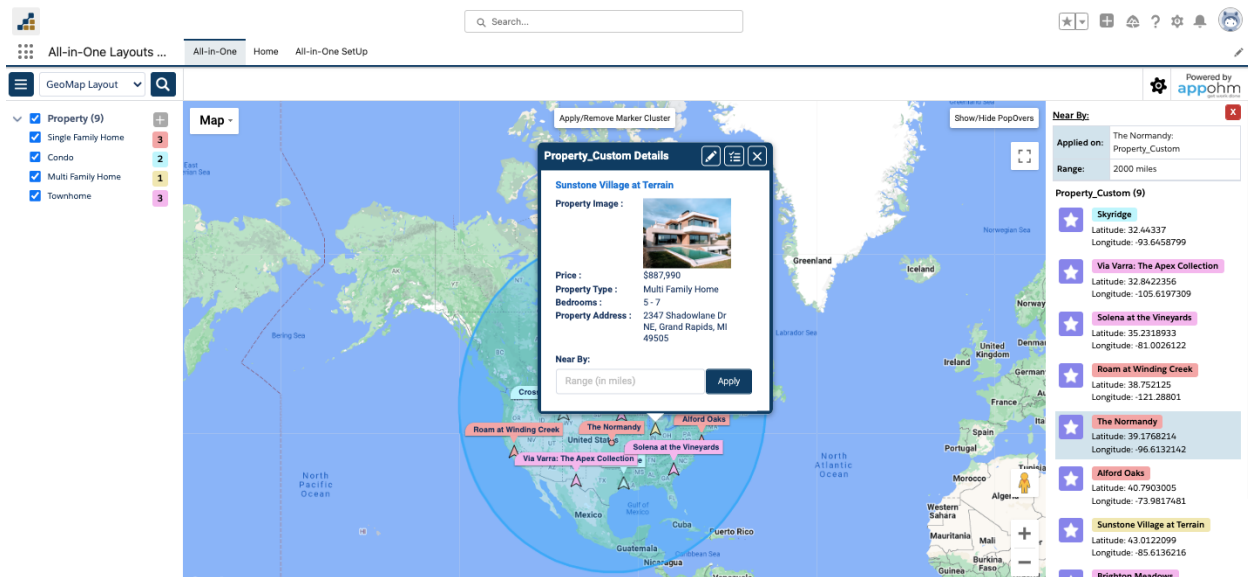
Configurations created through Custom Filter will be only visible to select.



Note: The Publish Configuration section is visible and available only for users with Unlimited Edition license.

How to use Geomap Layout?

GeoMap Layout provides a way to visualize business, customers and prospects which are geographically clustered with color code to understand their location and take effective actions like adding a task. It also reveals the user's real time location to plan its nearby visits. Users can also visualize nearby records falling in the vicinity of a particular record by defining a mile range.



Steps to use GeoMap:

1. Set Geo-Location Field For An Object:

- Map/Set **Geo-Location Field** with the Object Field (Say Billing Address) [GeoMap will show records of the object on this address as PopOver]
- Map/Set **Select GeoMarker PopUp** Field with the field whose value you want to see on PopOver.
- Save.

2. Add an Address in the Mapped Field of Records. (Billing Address according to Example)

GeoMap Layout Details

Select Geo-Location Field: ⓘ

Select GeoMarker PopUp Field:

Billing Address

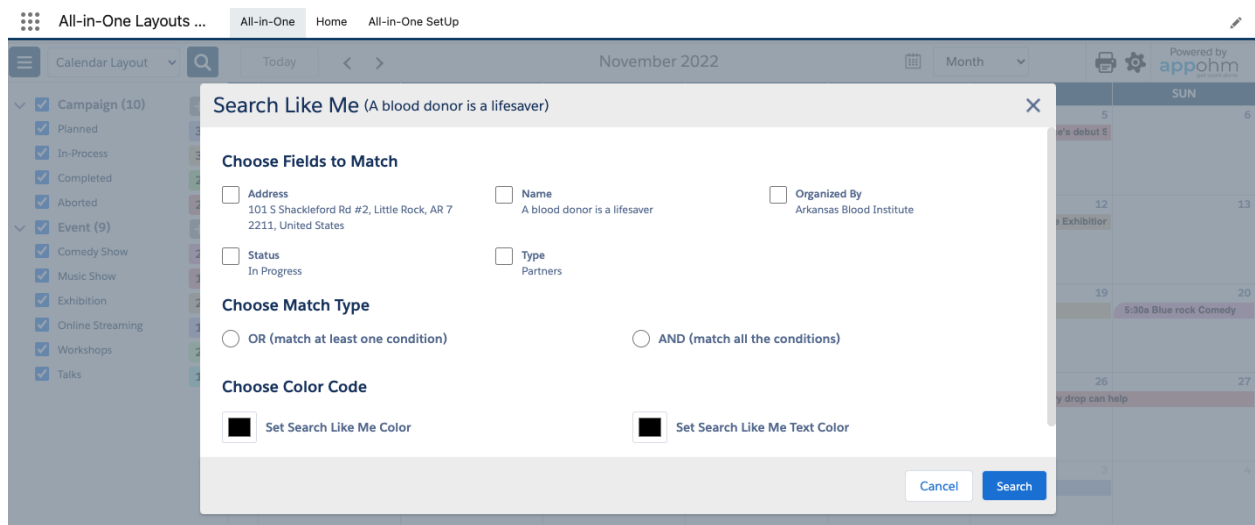
Account Number

[Click Here](#) to setup/activate Data Integration Rules for Standard Fields.

How to use the “Search Like Me” feature?

Introduced a new feature with the name Search Like Me on the Calendar layout where Users can filter the same type of records on layouts and search/view the similar records of any object.

A **“Search Like Me”** icon is added on each record(for all the objects) which is a popup containing a list of all searchable fields like text, checkbox, picklist, date, email, phone, percent, reference, location with the checkbox, etc.



Steps to use -

- Go to Calendar Layout, Select any Subject Configuration and click on the Search button.
- Click on any record present on the layout, a pop-up/tooltip will open, Click on the Search icon.
- Fill all the details and click on Search Button

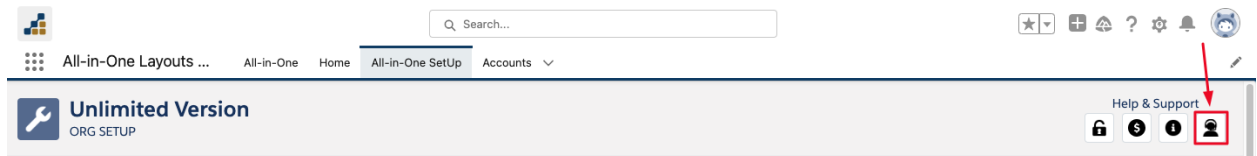
Note 1: *The Search Like Me feature is only available on the Calendar Layout (Month view).*

Note 2: *Search Like Me is not available for fields of type Data and Date/Time.*

Support

For any issue or query, use our support channels shown below -

1. Go to All-in-One Setup Tab and click on “Support” icon. You will be redirected to the [Appohm Support Desk](#) to create a ticket.



Submit a ticket

Requester *

admin@appohm.com

Request For *

Choose...

Subject *

Priority *

Low

Description *

B *i* U ~~ABC~~

- 1
- 2
- 3

Type something

2. Or email to support@appohm.com