15 HOUR

Calendar Anything

CalendarAnything 15-Hour Implementation Support: Designed for Complex Calendaring Needs

SCALABLE. STRATEGIC. READY FOR EXTERNAL AND CROSS-DEPARTMENT DEPLOYMENT.

For organizations with advanced scheduling, resource management, or customer-facing calendar needs, the 15-Hour Implementation Support Package is the ideal starting point with CalendarAnything. This enhanced service package is tailored for teams embedding calendars in Experience Cloud sites or external-facing portals, or for those managing workflows across multiple departments and user groups.

This is more than setup — it's strategic enablement for high-impact calendaring and scheduling.

1.5 HOURS Discovery and strategic planning

We begin with a deep-dive into your business processes to ensure we align CalendarAnything with your broader operational goals.
This session includes:

- **Cross-department use case discovery:** Identify and prioritize the most valuable use cases — from operations and project management to service scheduling and event coordination
- **Salesforce object mapping:** Identify all relevant standard and custom objects across departments
- **Calendar structure planning:** Design your ideal short- and long-term calendar architecture
- **Automation needs review:** Determine if Salesforce Flows will be used for record creation, updates, or deletions via calendar actions
- **Visualization strategy:** Select calendar views that best suit your needs, including Swimlane, Gantt, Kanban, or Agenda
- **Access and permissions planning:** Define user personas and their access levels to ensure data visibility and governance

GOAL Establish a future-ready strategy to ensure scalability, usability, and alignment with real-world processes.

5 HOURS Technical setup and core configuration

Our team gets hands-on, configuring the foundation of your CalendarAnything solution based on your use cases.
This includes:

- **Installation** in your sandbox or production environment
- **Calendar creation** aligned to your documented business workflows
- **Group configuration** for organizing related calendars under functional or departmental umbrellas
- **Display customization:** Configure calendar views with filters, popups, color coding, related object tabs, and more
- **User display settings:** Use CalendarAnything's Settings Visibility Setup to define tailored user experiences
- **Custom navigation elements:** Add custom buttons or tabs as needed
- **Embed calendars** in Salesforce UI, such as home page, record pages, or other critical interface points
- **Advanced filtering:** Configure filter sets and filter panels to enable user-driven visibility controls

GOAL Build a dynamic and intuitive calendaring environment tailored to complex business processes.

5 HOURS Advanced functionality

For clients with external or extended calendaring needs, this portion of the engagement is critical.
Depending on your priorities, we will:

- Configure an external-facing Force.com site
- Deploy CalendarAnything in a Digital Experience/Experience Cloud site
- Create a custom Lightning Container Component with extended CalendarAnything functionality for more customized deployments

GOAL Extend calendar access to customers, partners, or field teams — wherever and however they need it.

2 HOURS Stakeholder training and documentation

We ensure your team is set up not just to use CalendarAnything, but to master it.

Our training includes:

- **Live training for admins and end users:** Tailored walkthroughs based on role (admin, field team, executives, etc.)
- **Recorded sessions** so your team can reference training materials at any time
- **Admin coaching:** Teach your internal resources how to create new calendars, manage views, and evolve filters as your needs change

GOAL Create internal champions who can drive adoption and innovation long after go-live.

.5 HOURS Q&A and wrap-up

This session provides a final opportunity to review everything configured and answer any outstanding questions.

We'll cover:

- **Live walkthrough** of configured calendars
- **Discussion** of advanced or future use cases
- **Next steps:** Including premium support packages, custom development, or additional training options
- **Best practices:** Tips for long-term adoption and evolution

GOAL Ensure clients are comfortable, capable, and excited to scale their use of CalendarAnything.

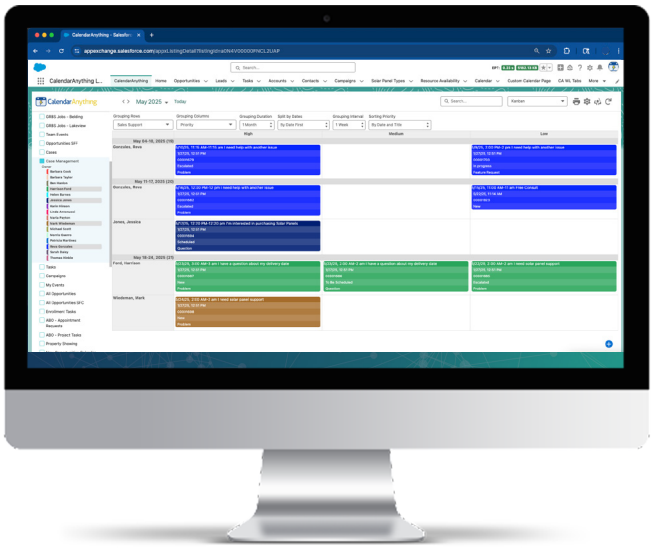
1 HOUR Final QA, support, and knowledge transfer

Before we fully hand off, we conduct one final pass to test and refine your setup.

This includes:

- **Full testing across profiles:** Validate visibility, access, and functionality for all user types
- **Minor tweaks** based on feedback
- **Final wrap-up** call with stakeholders to align on readiness and handoff resources
- **Ongoing recommendations:** Share suggested next steps for enhancement, optimization, and user adoption

GOAL Leave you with a stable, scalable, and high-impact calendaring solution that is ready to go live.



BUILT FOR SCALE, DESIGNED FOR IMPACT

If your organization is managing complex processes, engaging external audiences, or coordinating across multiple teams, the 15-Hour Implementation Support Package ensures CalendarAnything becomes a seamless part of your Salesforce strategy.

For more information, visit: silverlinecrm.com/healthcare

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