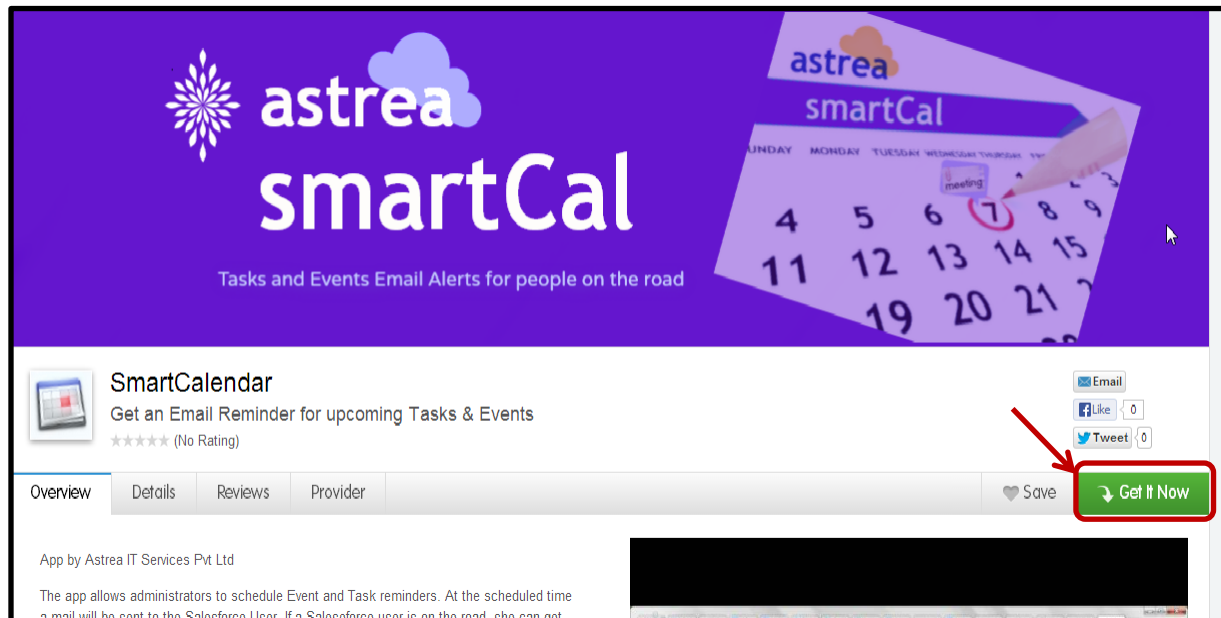


Smart Calendar

INSTALLATION GUIDE

Smart Calendar is available as a free app in AppExchange. This guide will walk you through installing Smart Calendar into your Salesforce Org.

1. Click on the “Get IT Now” on the product listing of AppExchange.



2. Answer the question's asked for installing the App.

The screenshot shows the Salesforce AppExchange page for the 'astrea smartCal' app. The header features the app's logo and a description: 'Tasks and Events Email Alerts for people on the road'. Below the header, there's a section for 'SmartCalendar' with a description 'Get an Email Reminder for upcoming Tasks & Events' and a rating of '★★★★★ (No Rating)'. To the right of the description are social media links for Email, Like, and Tweet. Below this is a navigation bar with tabs for 'Overview', 'Details', 'Reviews', and 'Provider'. A 'Save' button and a 'Get It Now' button are also present. The main content area has a heading 'To get this app, select one of the below options' with a red arrow pointing to the 'Login to the AppExchange' button. The 'Login to the AppExchange' button has the subtext 'Use your Salesforce credentials'. The 'I don't have a login' button has the subtext 'Continue as a guest'.

astrea smartCal

Tasks and Events Email Alerts for people on the road

SmartCalendar

Get an Email Reminder for upcoming Tasks & Events

★★★★★ (No Rating)

Overview Details Reviews Provider

Save Get It Now

To get this app, select one of the below options

Login to the AppExchange
Use your Salesforce credentials

I don't have a login
Continue as a guest

The screenshot shows the Salesforce login page. On the left, there's a login form with the Salesforce logo at the top. The form has two input fields: one for the email address 'products@astreait.com' and one for the password, which is masked with dots. Below the password field is a 'Remember User Name' checkbox. A blue 'Log in to Salesforce' button is positioned below the form. Below the button are links for 'Forgot your password?' and 'Sign up for free.'. On the right side of the page, there's a promotional banner for 'GROW SALES WITH THE WORLD'S BEST CRM'. The banner includes a 'Free Demo' button and three white boxes with text: 'Try CRM free for 30 days' with a 'Sign up' link, '5 ways customer service cuts costs' with a 'Free eBook' link, and 'Get leads. Get sales. Get started.' with a 'Watch demo' link. The background of the banner shows a tablet displaying various CRM analytics charts. At the bottom of the page, there's a copyright notice: 'Copyright © 2000-2013 salesforce.com, inc. All rights reserved.'.

salesforce®

products@astreait.com

.....

Remember User Name

Log in to Salesforce

Forgot your password? | Sign up for free.

GROW SALES WITH THE WORLD'S BEST CRM

Free Demo

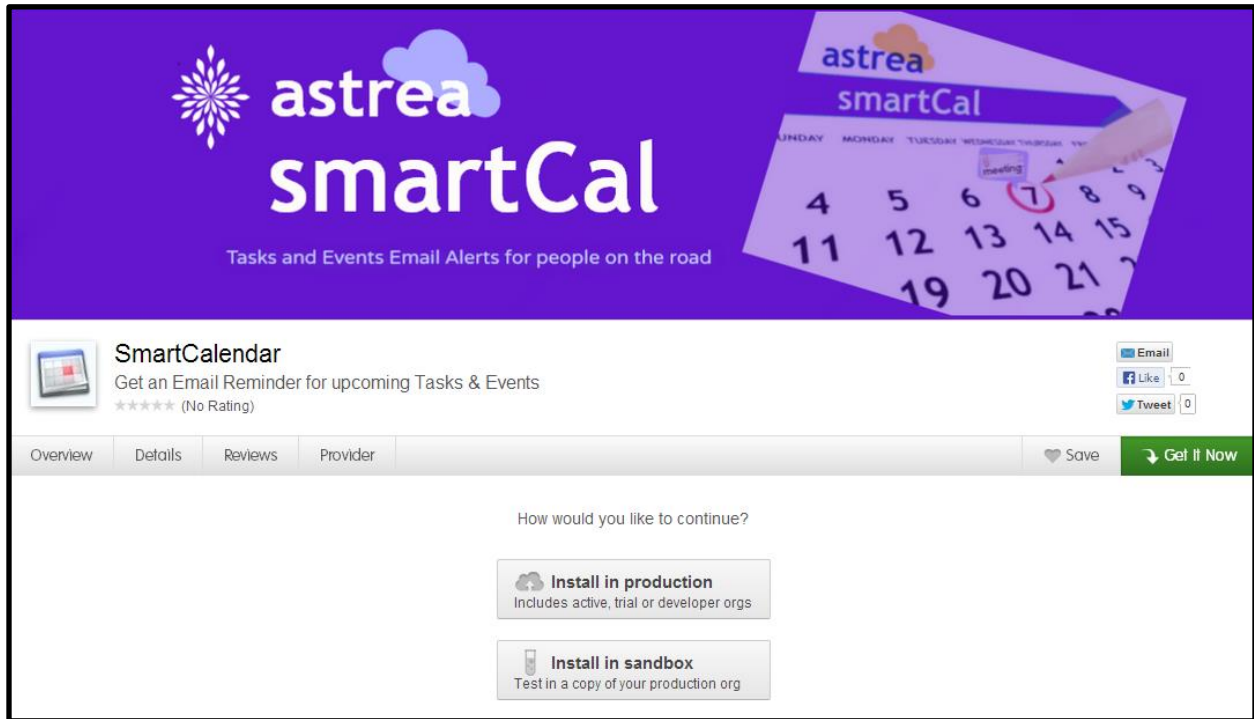
Try CRM free for 30 days
Sign up

5 ways customer service cuts costs
Free eBook

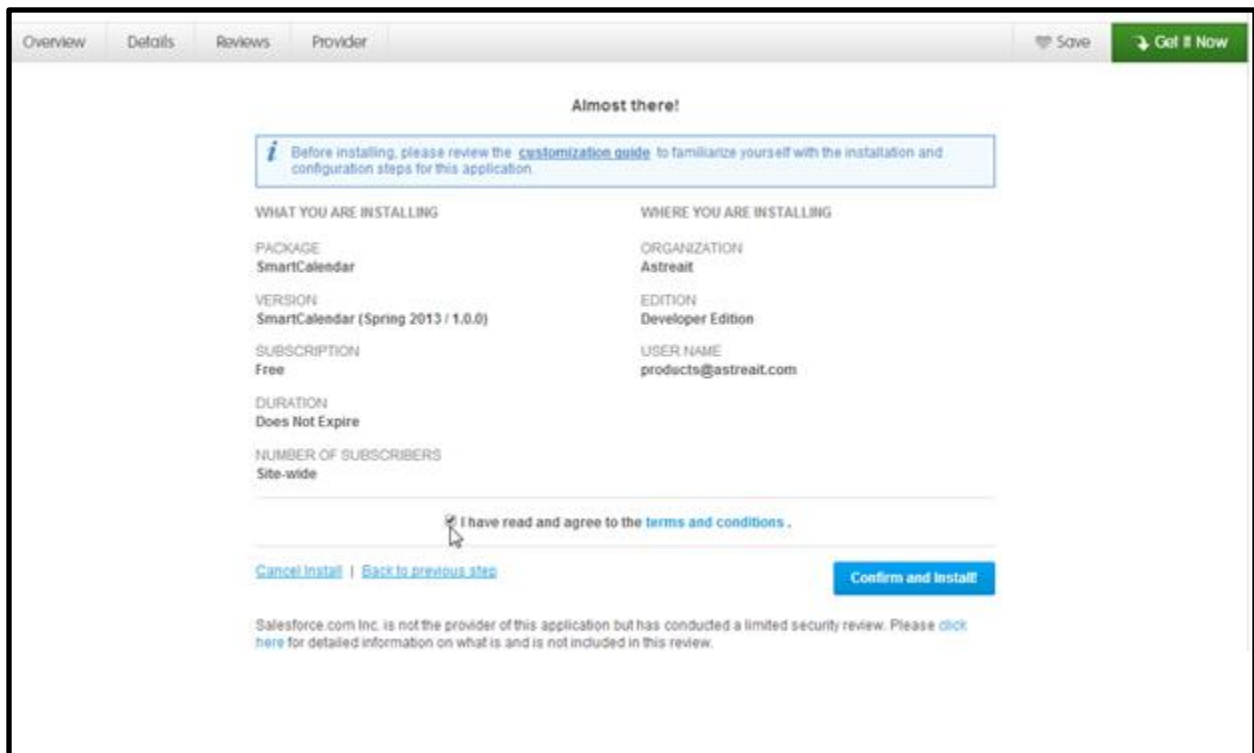
Get leads. Get sales. Get started.
Watch demo

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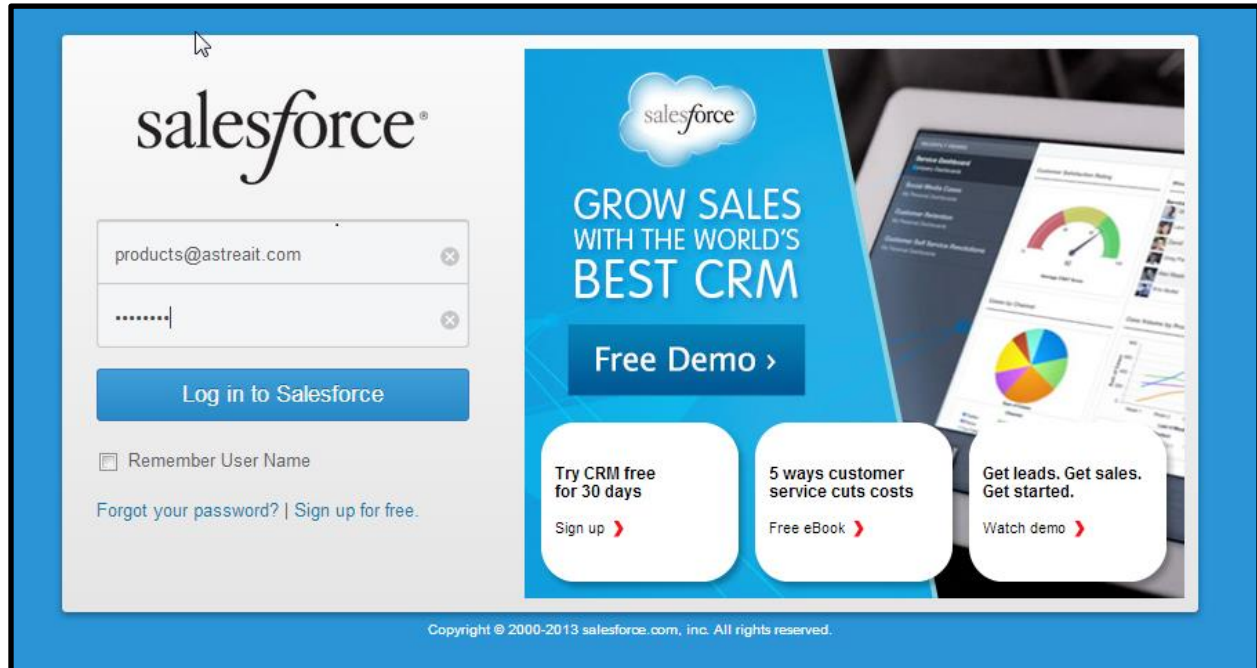
3. As per the requirement install the app either in Sandbox or Production.



4. Check the checkbox for **Terms and Condition** and proceed by clicking on **Confirm and Install** button.



5. Enter your credentials again for confirmation.



6. Click on 'Continue' to proceed with the installation.

The image is a screenshot of the Salesforce Package Installation Details page. The page has a top navigation bar with links to Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Cases, Solutions, Products, Reports, Dashboards, and Astrea Clone Rule. Below the navigation bar, there is a left sidebar with a search bar and a list of links: Force.com Home, System Overview, Personal Setup (My Personal Information, Email, Import, Desktop Integration, My Chatter Settings, My Social Accounts and Contacts), App Setup (Customize, Create, Develop, Deploy, Schema Builder, Canvas App Previewer, Installed Packages, AppExchange Marketplace, Critical Updates), and Administration Setup (Manage Users). The main content area is titled 'Package Installation Details' and contains the following information:

- Package Name:** SmartCalendar
- Version Name:** Spring 2013
- Version Number:** 1.0
- Publisher:** Astrea IT Services
- Description:**

Below this information, there is a 'Continue' button with a red arrow pointing to it, and a 'Cancel' button. Below the buttons, there is a section titled 'Package Components' which contains two tables:

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Astrea Task & Event Reminder		Custom Object	This is a brand new component.

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Task or Event Reminder	Astrea_Task_Reminder__c	Custom Field	This is a brand new component.
Create	Send Reminder to 'Related Contact'	Astrea_Task_Reminder__c	Custom Field	This is a brand new component.
Create	Time for Event Scheduling	Astrea_Task_Reminder__c	Custom Field	This is a brand new component.
Create	Send Reminder to 'Related Attendees'	Astrea_Task_Reminder__c	Custom Field	This is a brand new component.
Create	Type of Event	Astrea_Task_Reminder__c	Custom Field	This is a brand new component.
Create	Event Scheduled Job Id	Astrea_Task_Reminder__c	Custom Field	This is a brand new component.
Create	Task Scheduled Job Id	Astrea_Task_Reminder__c	Custom Field	This is a brand new component.
Create	Time for Task Scheduling	Astrea_Task_Reminder__c	Custom Field	This is a brand new component.
Create	Send Reminder On	Astrea_Task_Reminder__c	Custom Field	This is a brand new comp

At the bottom right of the page, there is a 'Chat' button.

7. Follow Step 1 to 3.

Package Installer

SmartCalendar

Help for this Page

Step 1. Approve Package API AccessStep 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Assets	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Cases	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
Documents	✓	✓	✓	✓
Ideas	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Price Books	✓	✓	✓	✓
Products	✓	✓	✓	✓
Push Topics	✓	✓	✓	✓
Quotes	✓	✓	✓	✓
Solutions	✓	✓	✓	✓

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next

Cancel

8. Select the security level and click next.

Package Installer

SmartCalendar

Help for this Page

Step 2. Choose security levelStep 2 of 3

Select security settings:

☒ Grant access to admins only

Users with your profile get full access (best for limited deployments)

☐ Grant access to all users

All internal custom profiles get full access

☐ Select security settings

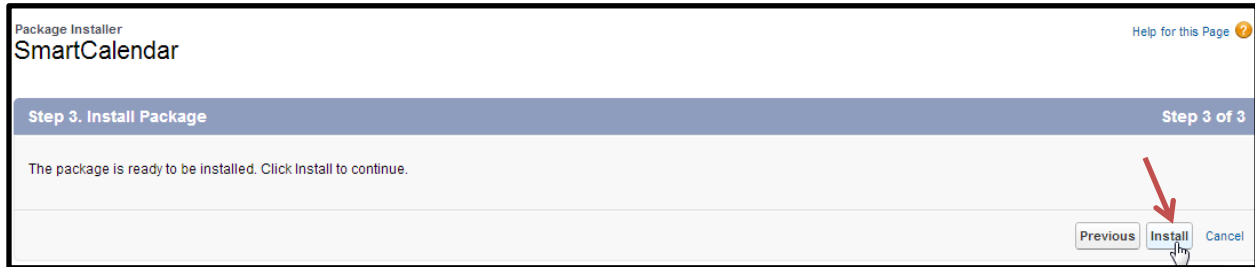
User access set by profile (recommended for most packages)

Previous

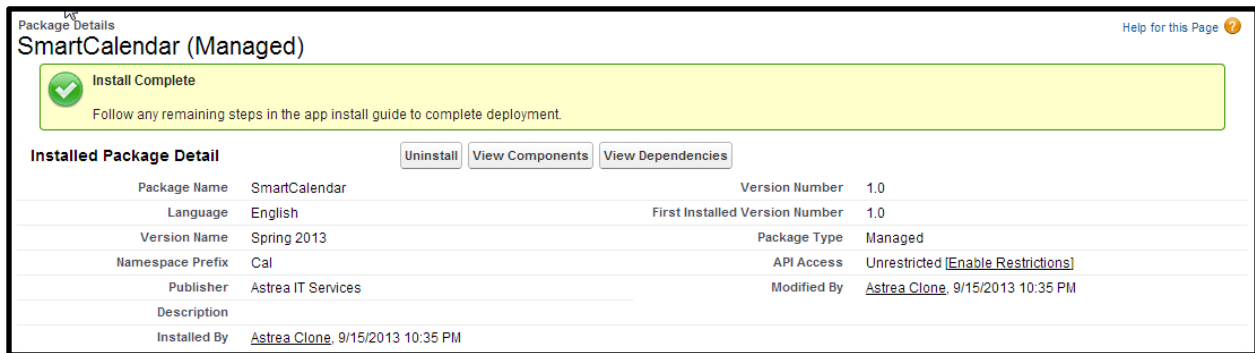
Next

Cancel

9. Click On the 'Install' Button.

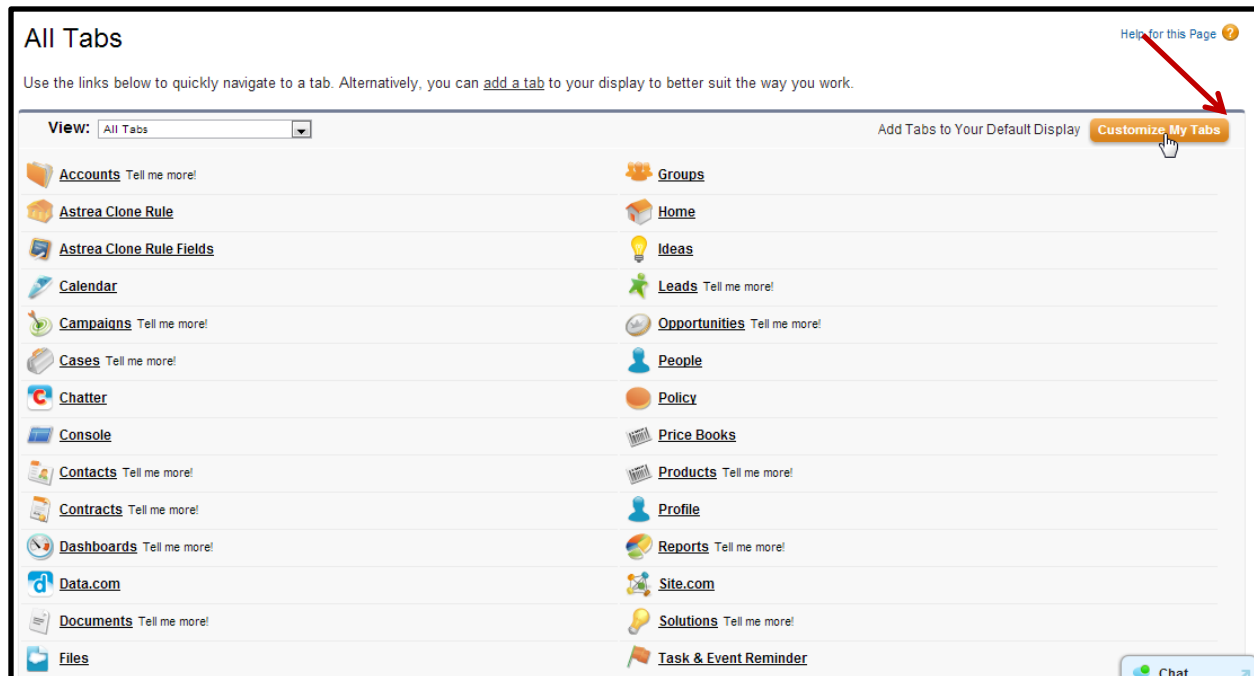


10. A Notification will be shown when installation is completed.

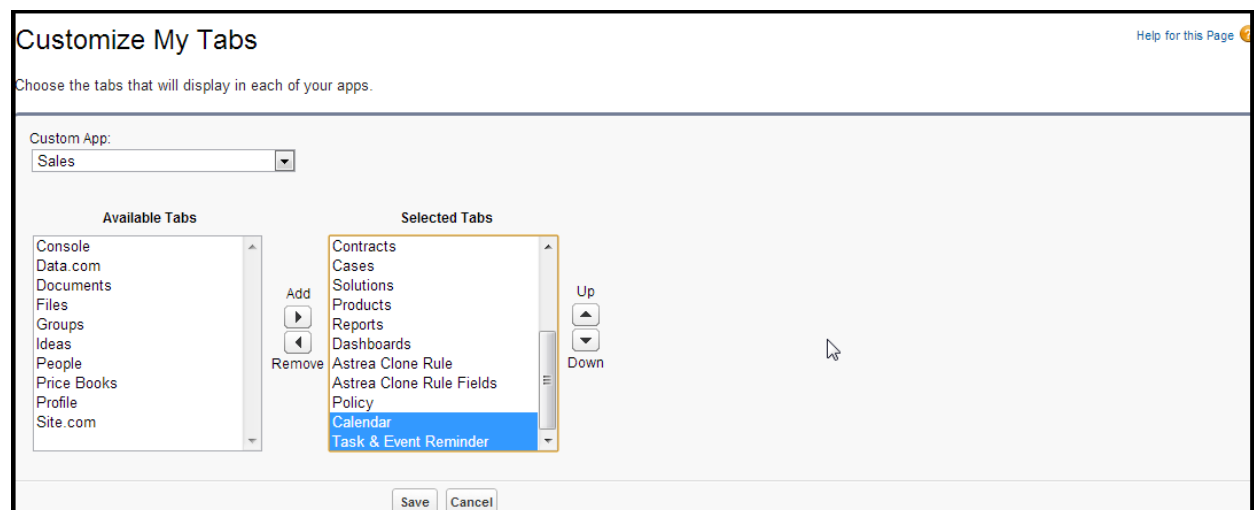


The steps so far are similar to installation steps of any app from AppExchange. The next steps are specific to Smart Calendar.

11. Create Tab(Calendar and Task & Event Reminder) in your application to avail the features of 'SMART CALENDAR



Choose the Tabs Calendar and Task & Event Reminder.

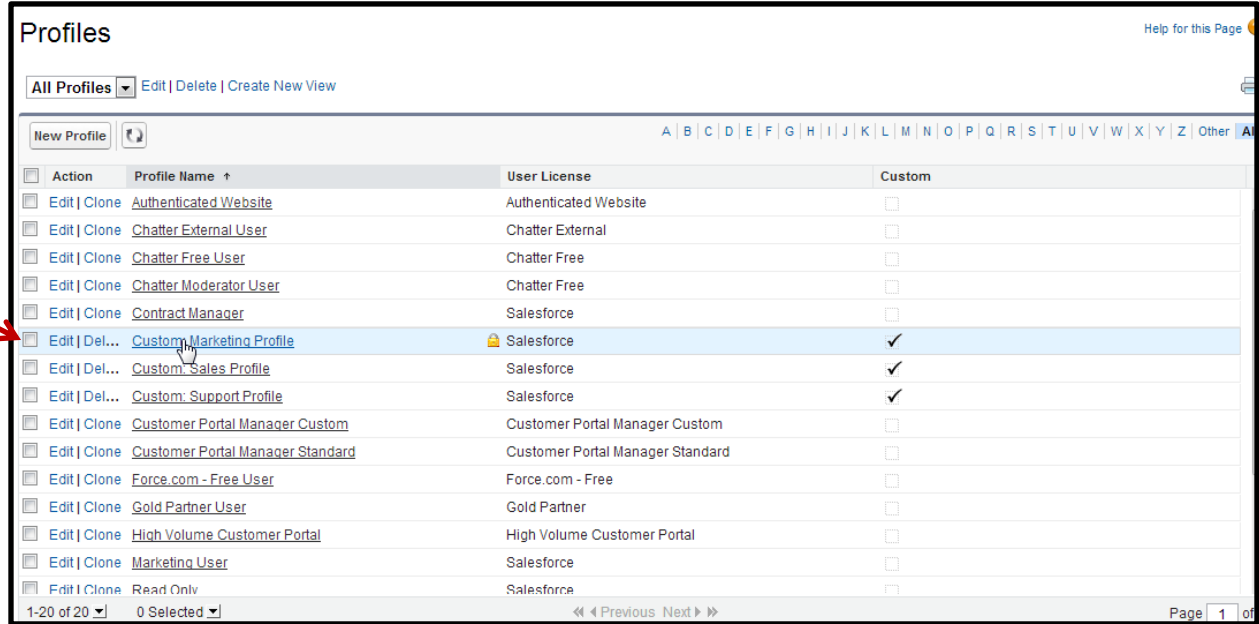


Calendar tab is accessible to all Users while Task & Event Reminder tab is accessible only to System Administrator.

How to give access of Tabs to Profiles.

Step1: Setup->Administration Setup-> Manage Users->Profiles

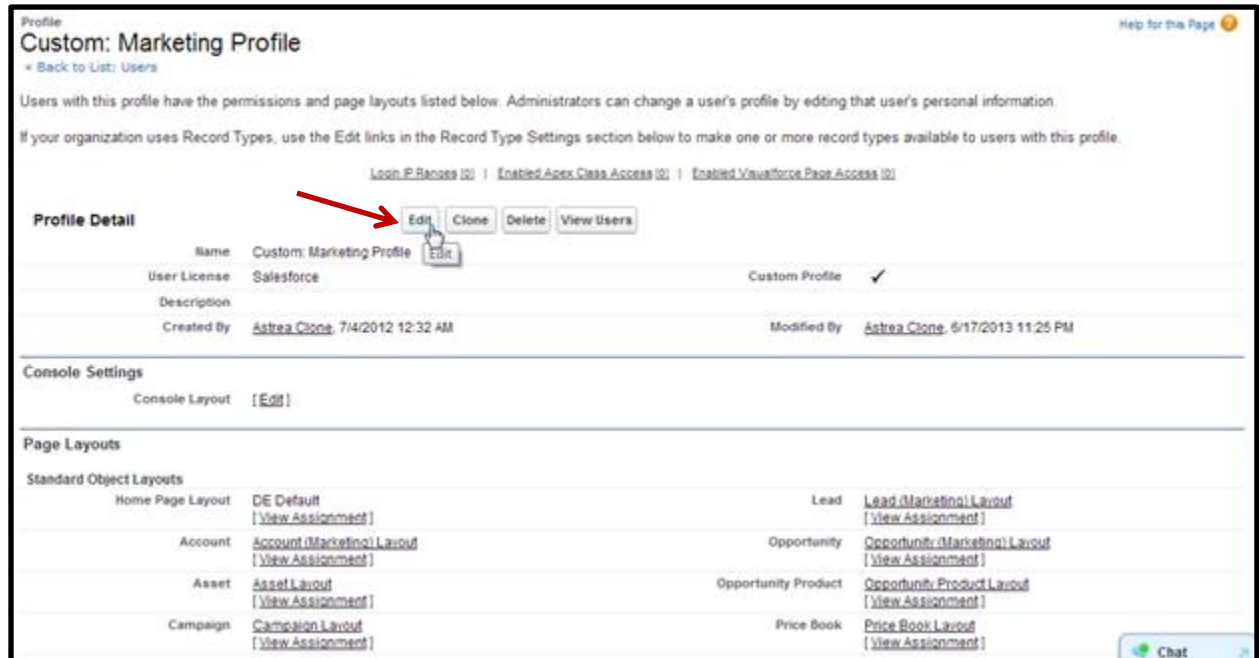
Step2: Select the profile you want to give access.



The screenshot shows the 'Profiles' page in Salesforce. At the top, there's a 'New Profile' button and a list of tabs (A-Z). Below is a table with columns: Action, Profile Name, User License, and Custom. The 'Custom Marketing Profile' is highlighted, and a red arrow points to its 'Edit | Del...' button.

Action	Profile Name	User License	Custom
Edit Clone	Authenticated Website	Authenticated Website	☐
Edit Clone	Chatter External User	Chatter External	☐
Edit Clone	Chatter Free User	Chatter Free	☐
Edit Clone	Chatter Moderator User	Chatter Free	☐
Edit Clone	Contract Manager	Salesforce	☐
Edit Del...	Custom Marketing Profile	Salesforce	☒
Edit Del...	Custom Sales Profile	Salesforce	☒
Edit Del...	Custom Support Profile	Salesforce	☒
Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	☐
Edit Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	☐
Edit Clone	Force.com - Free User	Force.com - Free	☐
Edit Clone	Gold Partner User	Gold Partner	☐
Edit Clone	High Volume Customer Portal	High Volume Customer Portal	☐
Edit Clone	Marketing User	Salesforce	☐
Edit Clone	Read Only	Salesforce	☐

Step3: Click on the profile and proceed by clicking on Edit button.



The screenshot shows the 'Custom: Marketing Profile' page. At the top, there's a 'Back to List: Users' link. Below is a section for 'Profile Detail' with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. A red arrow points to the 'Edit' button. Below this is a table with profile details, followed by 'Console Settings' and 'Page Layouts' sections.

Name	User License	Custom Profile
Custom: Marketing Profile	Salesforce	☒

Created By	Modified By
Astrea Clone, 7/4/2012 12:32 AM	Astrea Clone, 6/17/2013 11:25 PM

Standard Object Layouts	Lead
Home Page Layout: DE Default [View Assignment]	Lead: Lead Marketing Layout [View Assignment]
Account: Account Marketing Layout [View Assignment]	Opportunity: Opportunity Marketing Layout [View Assignment]
Asset: Asset Layout [View Assignment]	Opportunity Product: Opportunity Product Layout [View Assignment]
Campaign: Campaign Layout [View Assignment]	Price Book: Price Book Layout [View Assignment]

Step 4: Task & Event Reminder tab should be Hidden while Calendar Tab should be Default On and Save

Tab Settings

☐ Overwrite users' personal tab customizations

Standard Tab Settings

Home

Default On

Accounts

Default On

Campaigns

Default On

Cases

Default Off

Chatter

Default On

Console

Tab Hidden

Contacts

Default On

Contracts

Default On

Dashboards

Default On

Data.com

Default Off

Documents

Default On

Files

Default On

Forecasts

Tab Hidden

Groups

Default On

Ideas

Tab Hidden

Leads

Default On

Opportunities

Default On

People

Default On

Price Books

Default Off

Products

Default On

Profile

Default On

Reports

Default On

Site.com

Tab Hidden

Solutions

Default On

Custom Tab Settings

Astrea Clone Rule

Default On

Astrea Clone Rule Fields

Default On

Calendar

Default On

Policy

Default On

Task & Event Reminder

Tab Hidden