



| an OSF Product

OSF Community PLANNER

Calendar for Partner Community

INSTALLATION GUIDE

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1 Introduction

OSF Community PLANNER is a lightning component for Salesforce Partner Communities built with Napili, that enables you to schedule and manage Appointments and Tasks with Community members in an efficient manner.

2 Pre-Requisites for Component Installation

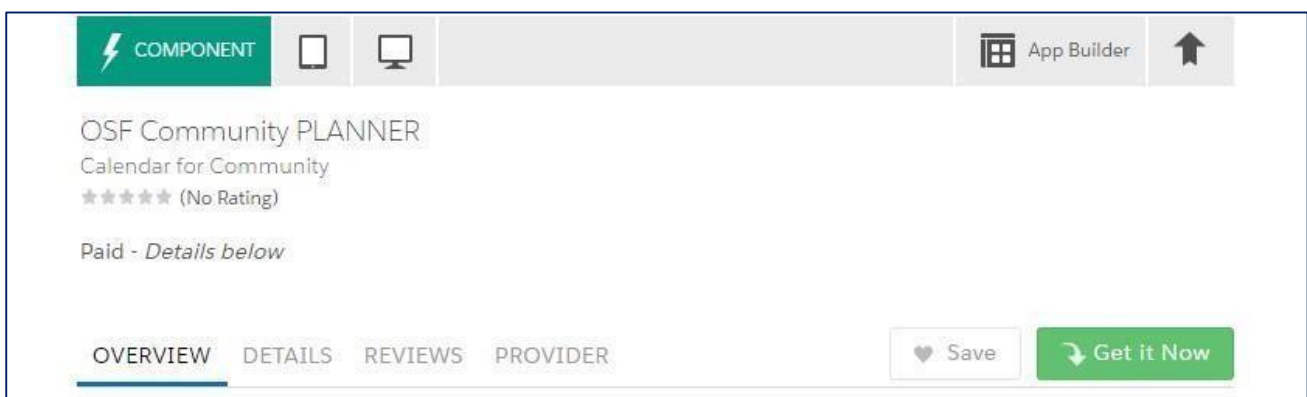
To install and set up the OSF Community PLANNER component, you must be logged in as a System Administrator within your Salesforce.com organization.

In order to use the component, a Partner Community built with the Napili template must be enabled.

The component can be installed in Enterprise, Unlimited, Developer and Performance Salesforce editions.

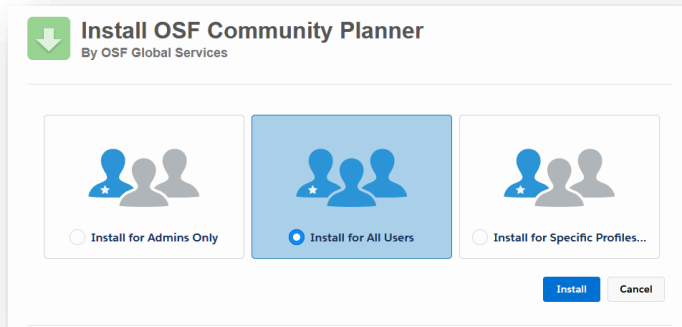
3 Installation Flow

- Access OSF Community PLANNER on AppExchange:
<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000000qzb2EAA>.
- Click the “Get it Now” button from the AppExchange page and log in to AppExchange with your Salesforce credentials.



- Choose where you want to install the component, either in Production or Sandbox.
- To begin the installation, check “I have read and agree to the terms and conditions.” and click “Confirm and Install”

- You will be asked to choose the security level for the component. Select “Install for All Users” and click “Install” to continue with the installation.



- After the installation process is finished, you will see an “Installation Complete!” screen. Click the “Done” button.

4 Profiles Setup



Important: All of the following steps are vital for the correct functioning of OSF Community PLANNER, so make sure to follow them in order to ensure the proper configuration of this product.

1. First, we need to make the Type field accessible for both Events and Tasks.

- Go to Setup > Event Fields.
- Scroll down to the “Type” field and click on it.

Edit	<u>Start</u>	StartDateTime	Date/Time
Replace Edit	<u>Subject</u>	Subject	Picklist
Edit	<u>Time</u>	ActivityDateTime	Date/Time
Replace Edit	<u>Type</u>	Type	Picklist

- Click on the “Set Field-Level Security” button.
- Give “Visible” access to any Profile that will use the OSF Community PLANNER.
- Additionally, check that all of the following fields (if available for related activity type) are set as Visible for the required Profiles: **Assigned To, Status, Completed Date, Due Date, Name, Subject, Related To, Start and End.**

- Go to Setup > Task Fields and perform the same steps

2. Next, we need to set proper access for Custom Objects from within the OSF Community PLANNER managed package. Go to Setup > Profiles and perform the following changes for all of the profiles that will be used with the OSF Community PLANNER.

- On the Profile page, scroll to the Custom Object Permissions.
- Give full access to the following: Event Type Colors, Users Lists, and Users Lists Colors.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Event Type Colors	✓	✓	✓	✓	✓	✓
Users Lists	✓	✓	✓	✓	✓	✓
Users Lists Colors	✓	✓	✓	✓	✓	✓

3. The next thing that needs to be done is to set the Field-Level Security for the Custom Objects we set permissions for earlier.

- On the Profile page, scroll to the Custom Object Permissions.
- Click “View” and set Read/Edit access for all fields from the following objects: Event Type Color, Users Lists, and Users Lists Colors.

Custom Field-Level Security	
Event Type Color	[<u>View</u>]
Users List	[<u>View</u>]
Users Lists Colors	[<u>View</u>]
Knowledge	[<u>View</u>]
License	[<u>View</u>]

4. Users will need the “Edit Events” and “Edit Tasks” Permissions to properly create and edit Events/Tasks.

- On the Profile page, scroll to the Administrative Permissions.
- Check “Edit Events” and “Edit Tasks”.

5. In order to use Colors in Users Lists, we need to give the Profile access to the Picklist Color field from the “User” Standard Object.

- On the Profile page, scroll to the Standard Field-Level Security section.
- Click on “View” next to the User object.
- Give Read/Edit access to the “Picklist Color” field.

Note that on the User object, field-level security is only supported for custom fields, not standard fields.

Field Name	Field Type	Read Access	Edit Access
Picklist Color	Picklist	✓	✓
Starts with letter	Checkbox	✓	

6. Lastly, don’t forget to assign Licenses to the OSF Community PLANNER Users.

- Go to Setup > Installed Packages.
- Next to OSF Community PLANNER, click on Manage Licenses and assign them to the desired users.

Uninstall	Manage Licenses	OSF Community Planner	OSF Global Services	1.18 (Beta 4)	OSFCalendarLtn	Free	N/A	N/A	N/A	12/05/2017 09:23	☐	1	2	5

Tip: The OSF Community PLANNER package comes with a kit of special Permission Sets designed to give access to the custom objects contained in the package.

After installing the Planner, Go to Setup > Permission Sets and assign permissions to your Salesforce or Partner users with Partner Community or Partner Community Login licenses.

- ☐ [Del | Clone](#) [OSF Community Planner for Partner Community](#)
- ☐ [Del | Clone](#) [OSF Community Planner for Partner Community Login](#)
- ☐ [Del | Clone](#) [OSF Community Planner for Standard Platform User](#)

5 Access Community Builder from Salesforce

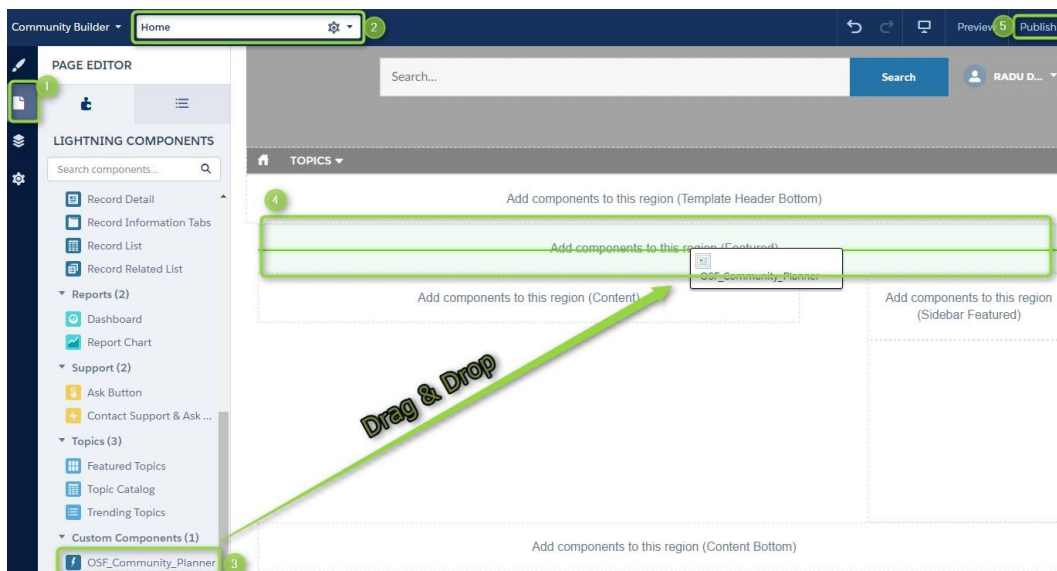
Access the OSF Community PLANNER component in Community Builder

Once logged in to your Salesforce organization, access Community Management and “Go to Community Builder.”

Setup | Customize | Communities | All communities | Your Partner Community | Builder

Manage	Builder	OSF Partner Lightning	This tool enables developers within and across orgs to
Manage	Builder	OSF Partner	This tool enables developers within and across orgs to

6 Add Component from Community Builder



1. From the Community Builder, access the Page Editor (Point 1 from the image above) where the custom OSF_Community_PLANNER lightning component is available.
2. Select the Community page from where the OSF Community PLANNER should be accessible for partners. (Point 2 from the image above)
3. To add the OSF_Community_PLANNER custom component (Point 3 from the image above), just drag and drop it on the Configuration panel (Point 4 from the image above). Please make sure the component is added to a wide section (the support is offered for resolutions greater than 700px).
4. Publish the change (Point 5 from the image above).

7 OSF Community PLANNER in Your Salesforce Community

The OSF Community PLANNER will appear on the page where it was added in the Community Builder and Community users that have Partner Community licenses assigned to them will be able to start using it.

☐

USERS

Search

Test List 1

David Williams

Amy Smith

Lisa Green

Nick Daniel

Jane

Mary

Alexander Hernandez

Chris Wilson

Refresh Calendar

LEGEND

Task (resolved)

Task (delayed)

Task (unresolved)

Appointment (accepted)

Appointment (declined)

Appointment (new)

APPOINTMENTS

TASKS

SETTINGS

◀ ▶

Nov 2016

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Filter Appointments

Current Month

1

7

31

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	1	2	3	4 11:00 AM - Meeting	5
6	7	8	9 All Day 3:00 PM - Meeting	10 All Day	11 All Day	12
13	14	15	16	17	18	19
20	21 9:00 AM - Meeting 10:00 AM - All Day See more...	22 All Day	23 All Day	24 All Day 10:00 AM - All Day	25 All Day	26 All Day
27	28	29	30	1	2	3