



| an OSF Product

OSF Community **PLANNER**

Calendar for Partner Community

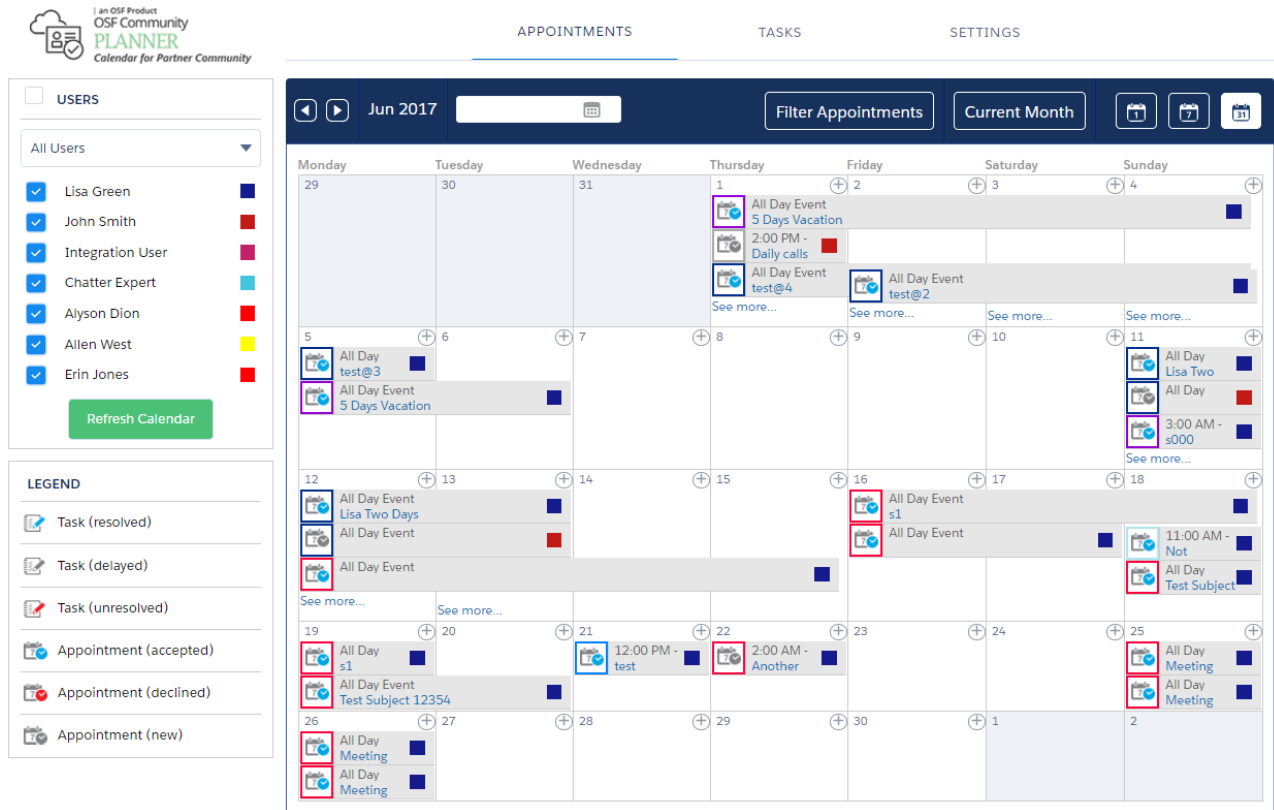
USER GUIDE

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1 Introduction

OSF Community PLANNER is a lightning component for Salesforce Partner Communities that enables organizations to schedule and manage Appointments and Tasks with Partner Community members in an efficient way.



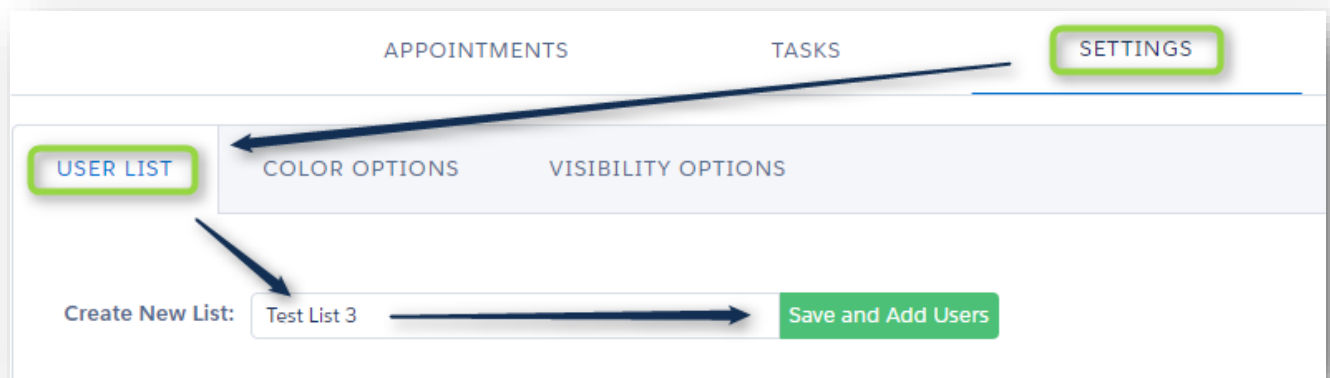
The screenshot displays the OSF Community PLANNER interface. On the left, there is a sidebar with a 'USERS' section containing a list of users: Lisa Green, John Smith, Integration User, Chatter Expert, Alyson Dion, Allen West, and Erin Jones. Below this is a 'LEGEND' section with icons for Task (resolved), Task (delayed), Task (unresolved), Appointment (accepted), Appointment (declined), and Appointment (new). The main area is a calendar for June 2017, showing appointments and tasks for each day. The calendar includes a 'Filter Appointments' button and a 'Current Month' button. The calendar shows various events such as 'All Day Event', '5 Days Vacation', 'Daily calls', and 'Appointment (accepted)'.

2 User Lists

One of the core features of OSF Community PLANNER is the ability to create User Lists.

These User Lists can be customized to showcase specific users, so that only their Appointments and/or Tasks are displayed in the Calendar. This allows for their activities to be easily traced.

In order to create a new User List, go to the Settings tab -> User List, enter the desired name and click "Save and Add Users."

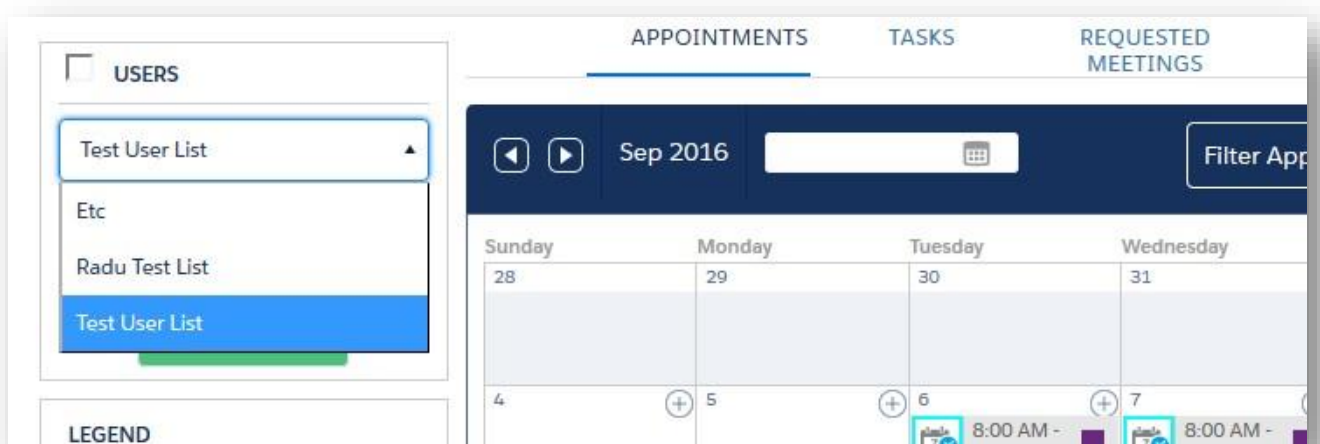


When adding users to a list, you can assign solid color blocks to each entry by using the Color Picker located to the right. This will help you to better distinguish their Appointments and/or Tasks easily in the Calendar.

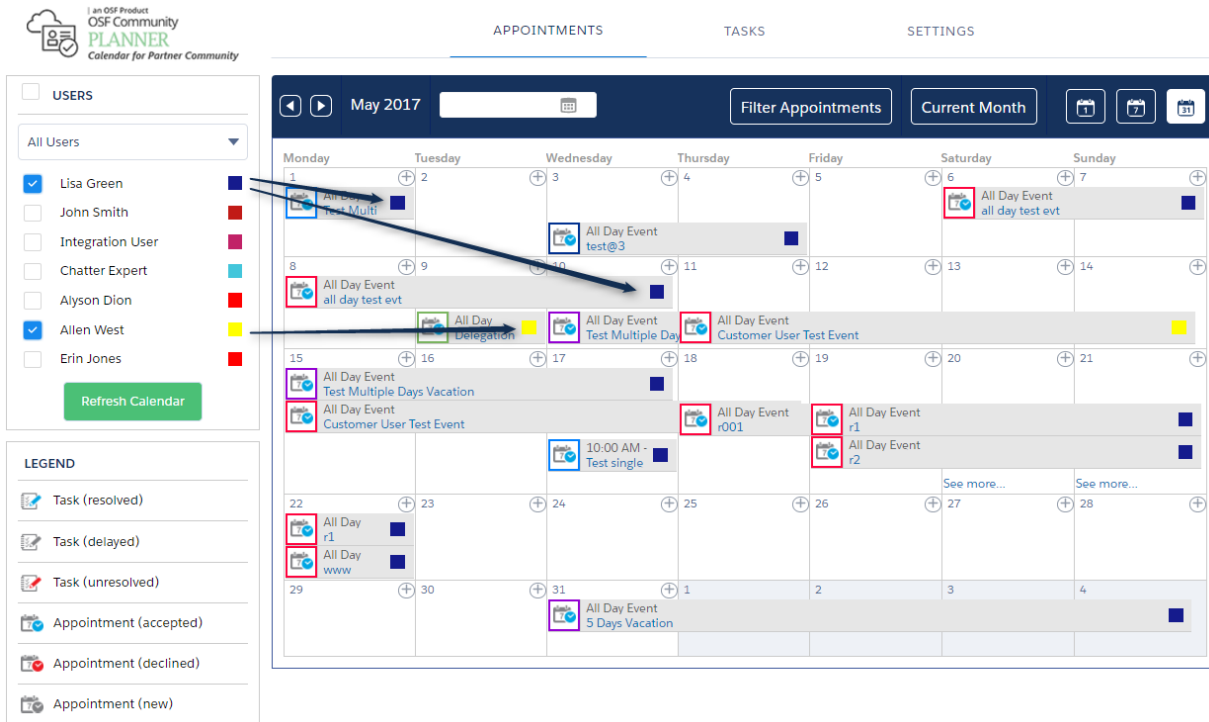
☐	KokuaTest Site Guest User		KokuaTest Profile	
☒	Lisa Green	CEO	System Administrator	
☐	OSF Global	COO	System Administrator Clone	
☐	OSF Partner Community Test Site Guest User		OSF Partner Community Test Profile	
☐	OSF Partner Lightning Site Guest User		OSF Partner Lightning Profile	
☒	Radu Daniel	Channel Sales Team	Standard Platform User	

When you're finished adding users, click the "Save" button at the bottom of the page. After a page refresh, the User List that you have just created will become available for use.

To begin to use a User List, go to either the Appointments or Tasks tab and select the User List that you just created by clicking it from the Users picklist located on the left-hand side.



You will notice that each entry in the Calendar now features a solid color block. These color blocks identify the user that that specific record (Appointment/Task) was assigned to, and matches the definition established for the entry when the list was first created.

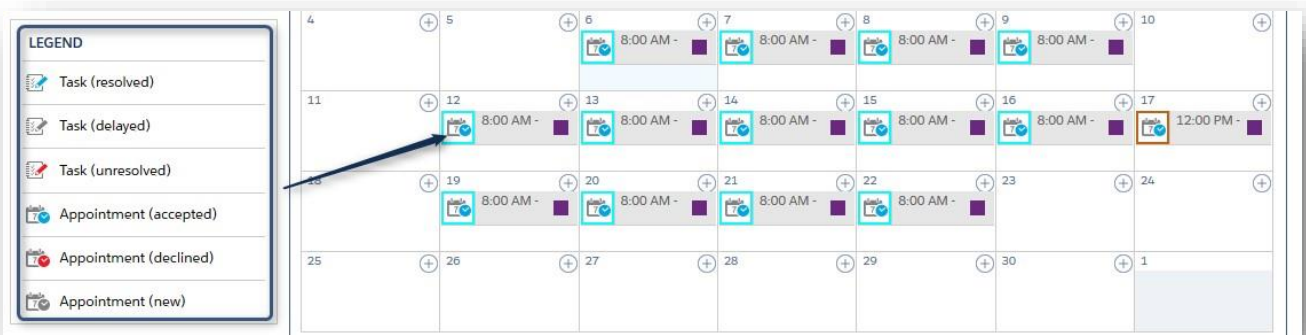


The screenshot shows the OSF Planner interface. On the left, there is a sidebar with a 'USERS' section containing a list of users with checkboxes: Lisa Green (checked), John Smith, Integration User, Chatter Expert, Alyson Dion, Allen West (checked), and Erin Jones. Below this is a 'Refresh Calendar' button. The 'LEGEND' section below the users lists various task and appointment statuses with corresponding icons and colors: Task (resolved) in blue, Task (delayed) in light blue, Task (unresolved) in red, Appointment (accepted) in green, Appointment (declined) in orange, and Appointment (new) in purple. The main calendar area displays a monthly view for May 2017. It features a grid of days with various events represented by colored blocks and icons. Arrows point from the legend to specific events in the calendar, such as 'All Day Event Test Multiple' (blue), 'All Day Event test@3' (blue), 'All Day Event all day test evt' (red), 'All Day Event Delegation' (green), 'All Day Event Test Multiple Day' (purple), 'All Day Event Customer User Test Event' (purple), 'All Day Event r001' (red), 'All Day Event r1' (red), 'All Day Event r2' (red), 'All Day Event r1' (blue), 'All Day Event www' (blue), and 'All Day Event 5 Days Vacation' (purple).

Each user entry has a checkbox associated with it that you can use to interact with. Let's say you want to see only the Appointments for one user. Simply deselect all the other users from this list, and check only the user that you wish to see in the Calendar, then click on the "Refresh Calendar" button.

3 Legend

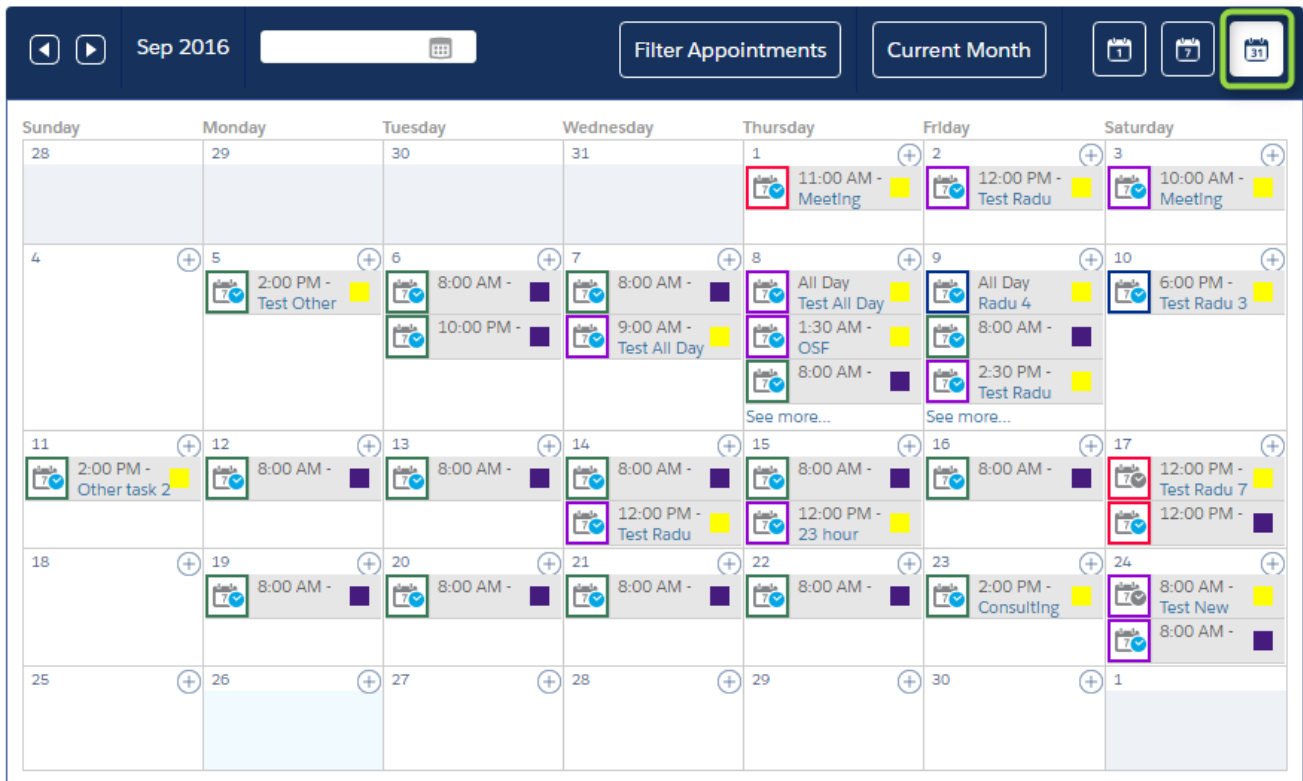
Track progress on Appointments and Tasks following the legend located to the left-hand side of the calendar.



This close-up screenshot focuses on the legend and the calendar grid. The legend on the left lists six categories: Task (resolved) with a blue icon, Task (delayed) with a light blue icon, Task (unresolved) with a red icon, Appointment (accepted) with a green icon, Appointment (declined) with an orange icon, and Appointment (new) with a purple icon. The calendar grid on the right shows a monthly view with days 4 through 31. Various events are represented by colored blocks and icons. An arrow points from the 'Appointment (accepted)' icon in the legend to a specific event in the calendar grid.

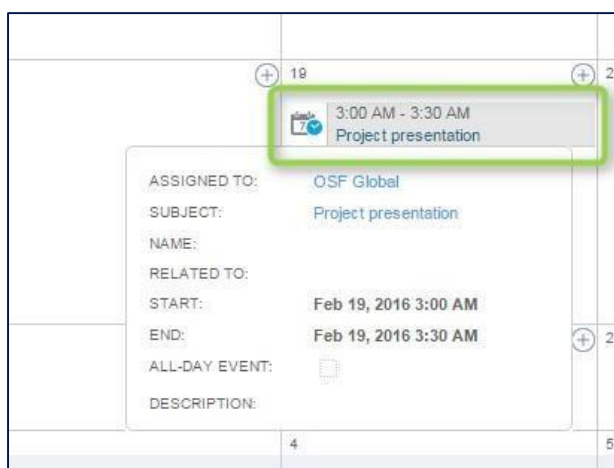
4 Appointments

1. Month View

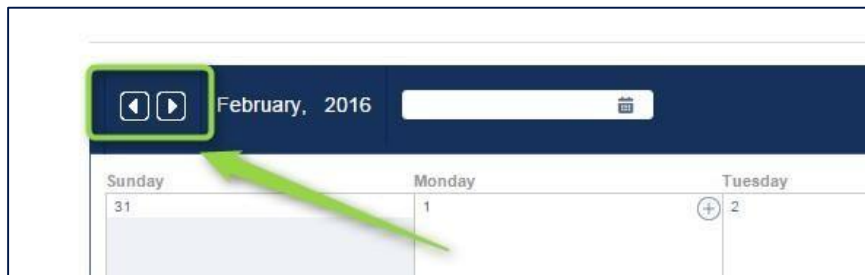


Additional details on each appointment will be displayed after simply hovering over it on the calendar.

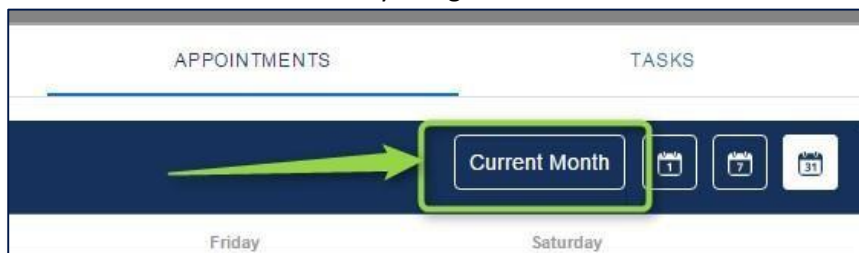
Important: Be advised that hover details will only appear for appointments that are owned by the user who is currently logged in.



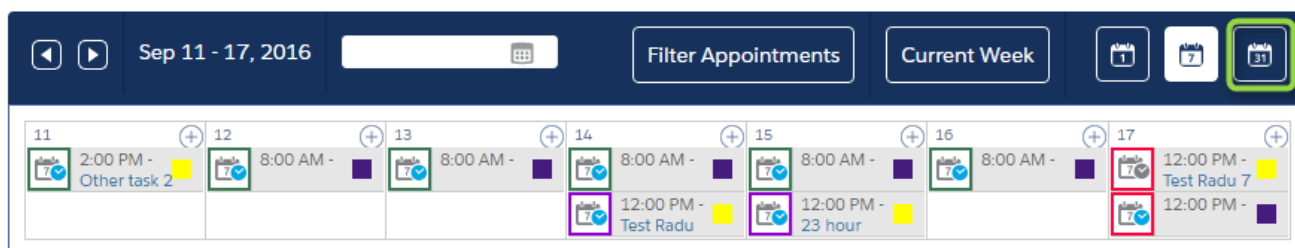
Navigate back and forward through the months of the year to view your appointments by using the "Previous Month" and "Next Month" buttons.



Return to the current month by using the “Current Month” button.



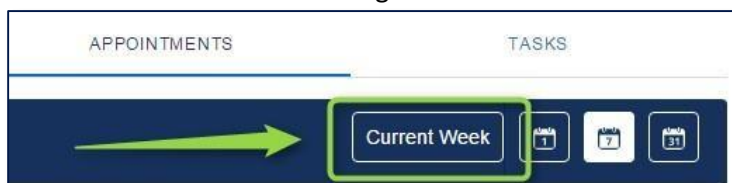
2. Week View



Navigate between the weeks of a month by using the “Previous Week” and “Next Week” buttons. This allows you to view the appointments and tasks that you have planned for a specific week.

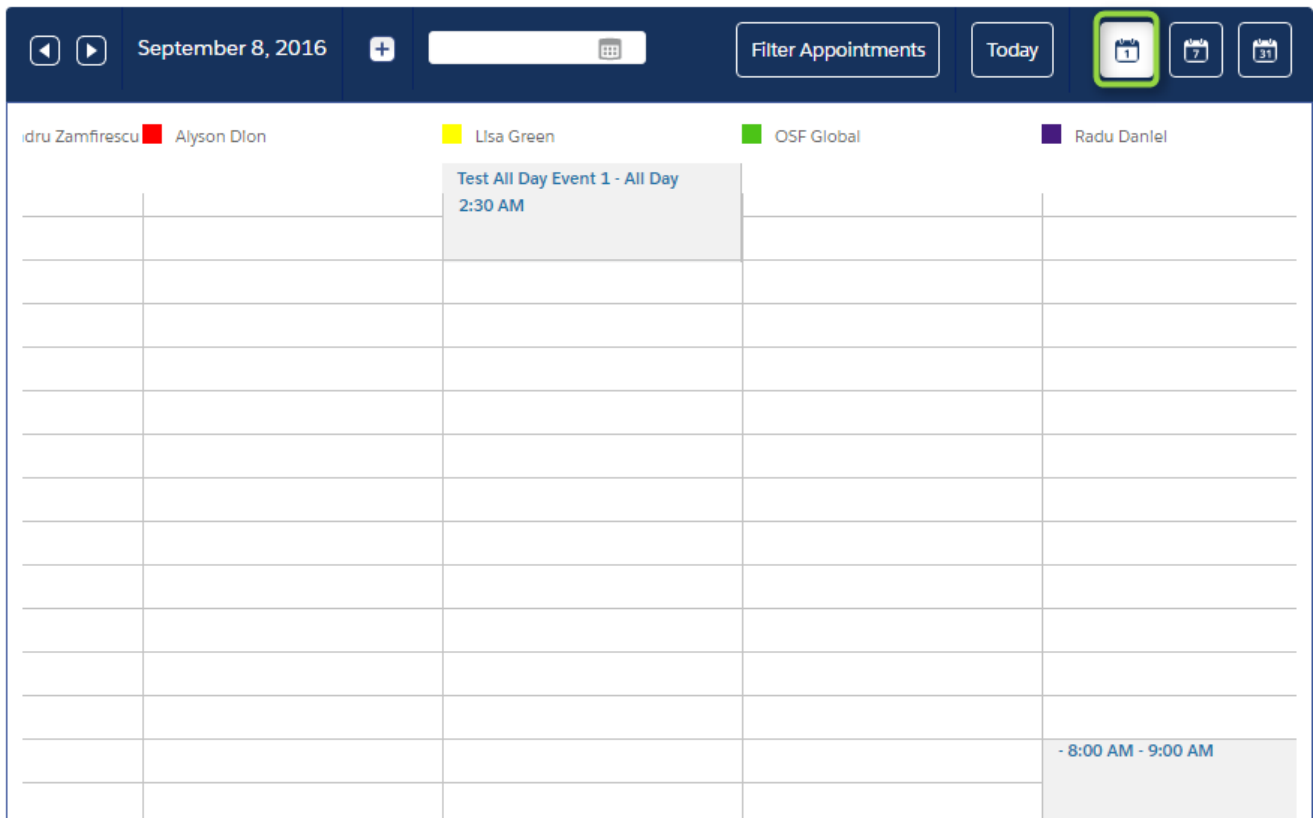


Return to the current week using the “Current Week” button.



3. Day View

Day view can be accessed either by clicking the “Day View” button from the upper right corner of the calendar, or by clicking the date number from the day cell of the specific date from the Month or Week views.



Note: In order to view all of the appointments planned for a single day, scroll down through the page where the appointments are listed.

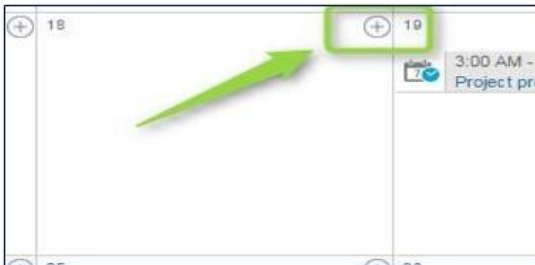
Navigate between the days of each week by using the “Previous Day” and “Next Day” buttons to view the appointments and tasks you have planned for that day.



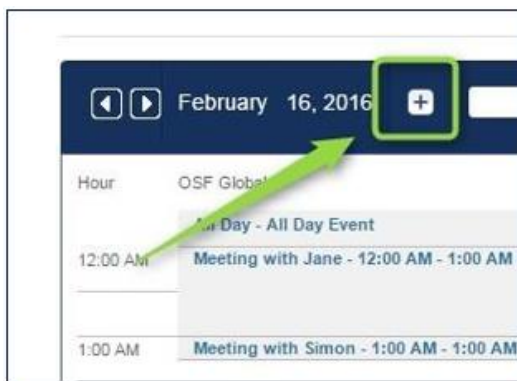
4. Add New Appointment

Add a new appointment by using *the* “Create New Appointment” buttons from each view of the calendar

Month & Week View

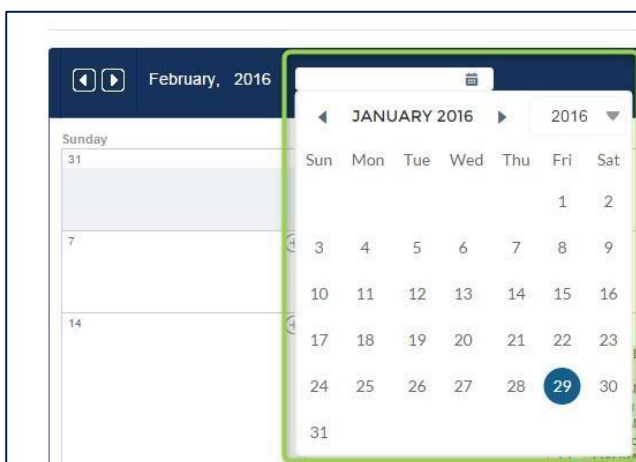


Day View



5. Date Picker for Appointments

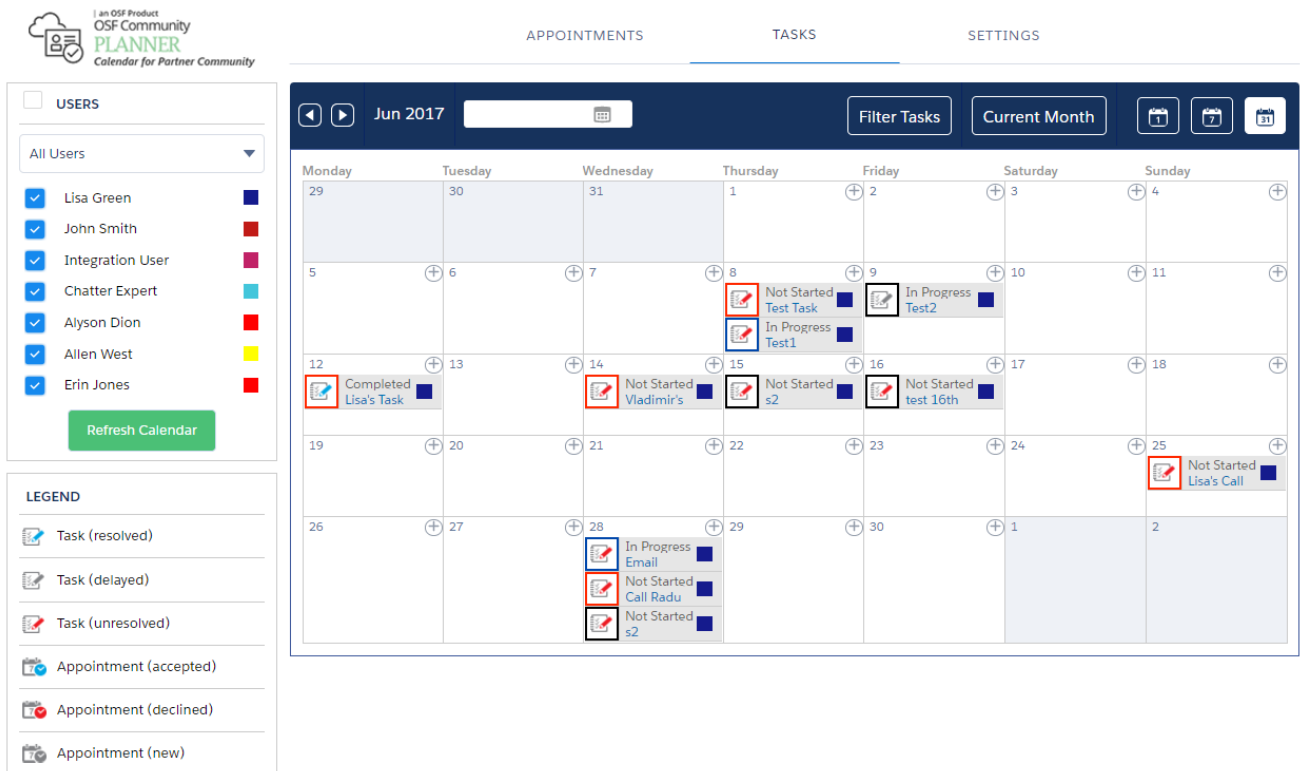
By using the day picker, select the day for which you would like to view your appointments.



- When on the month view, pick a day from the day picker to be redirected to the month in which the selected day is found.
- When on the week view, pick a day from the day picker to be redirected to the week in which the selected day is found.
- When on the day view, pick a day from day picker to be redirected to the selected day.

5 Tasks

1. Month View



OSF Product Community PLANNER
Calendar for Partner Community

APPOINTMENTS TASKS SETTINGS

Jun 2017 Filter Tasks Current Month

USERS

All Users

- ☒ Lisa Green
- ☒ John Smith
- ☒ Integration User
- ☒ Chatter Expert
- ☒ Alyson Dion
- ☒ Allen West
- ☒ Erin Jones

Refresh Calendar

LEGEND

- Task (resolved)
- Task (delayed)
- Task (unresolved)
- Appointment (accepted)
- Appointment (declined)
- Appointment (new)

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

29 30 31 1 2 3 4

5 6 7 8 9 10 11

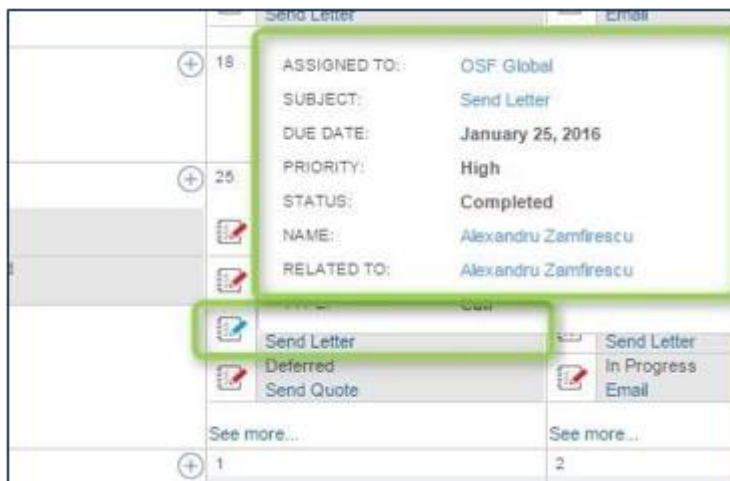
12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 1 2

Not Started Test Task
In Progress Test2
In Progress Test1
Completed Lisa's Task
Not Started Vladimir's
Not Started s2
Not Started test 16th
Not Started Lisa's Call
In Progress Email
Not Started Call Radu
Not Started s2

More details for each task will be displayed when hovering over its name.



Send Letter Email

ASSIGNED TO: OSF Global

SUBJECT: Send Letter

DUE DATE: January 25, 2016

PRIORITY: High

STATUS: Completed

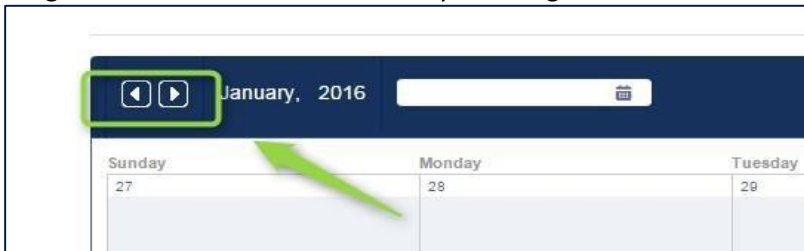
NAME: Alexandru Zamfirescu

RELATED TO: Alexandru Zamfirescu

Send Letter Deferred Send Quote Send Letter In Progress Email

See more... See more...

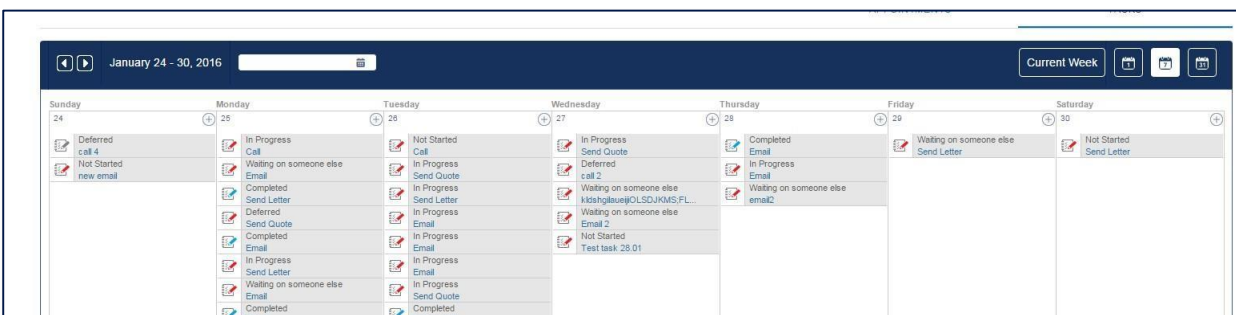
Navigate between the months of the year using the “Previous Month” and “Next Month” buttons, to view your tasks.



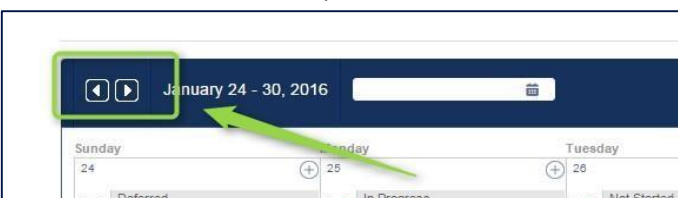
To go back to the current month, use the “Current Month” button.



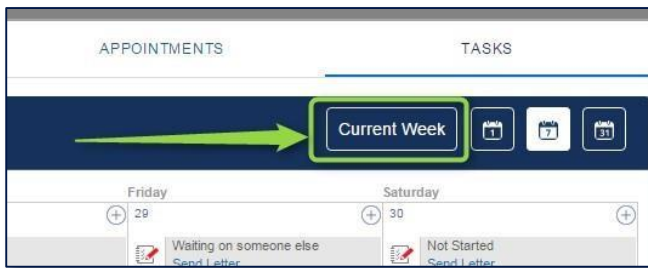
2. Week View



Navigate between the weeks of the month using the “Previous Week” and “Next Week” buttons to view your scheduled tasks for a specific week.



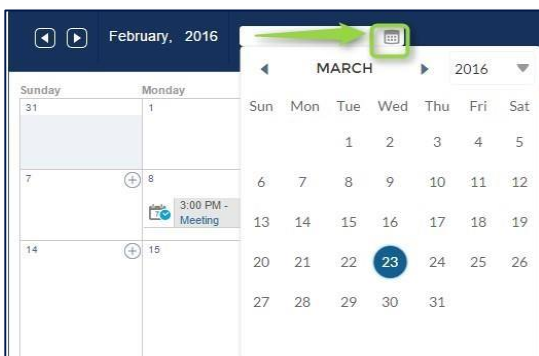
Return to the current week using the “Current Week” button.



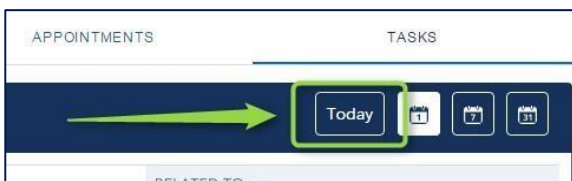
3. Day View



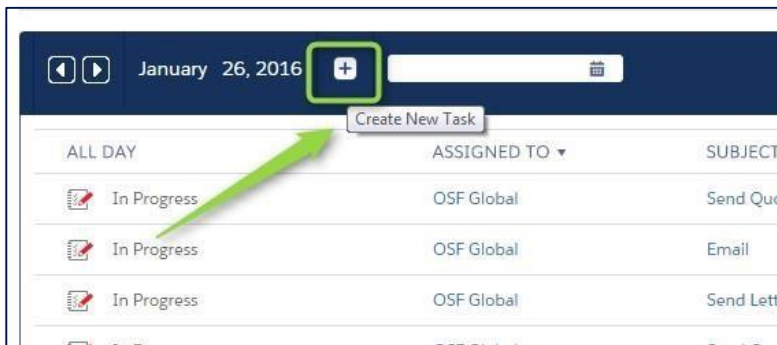
Click on the day picker to view all of the tasks for a specific day.



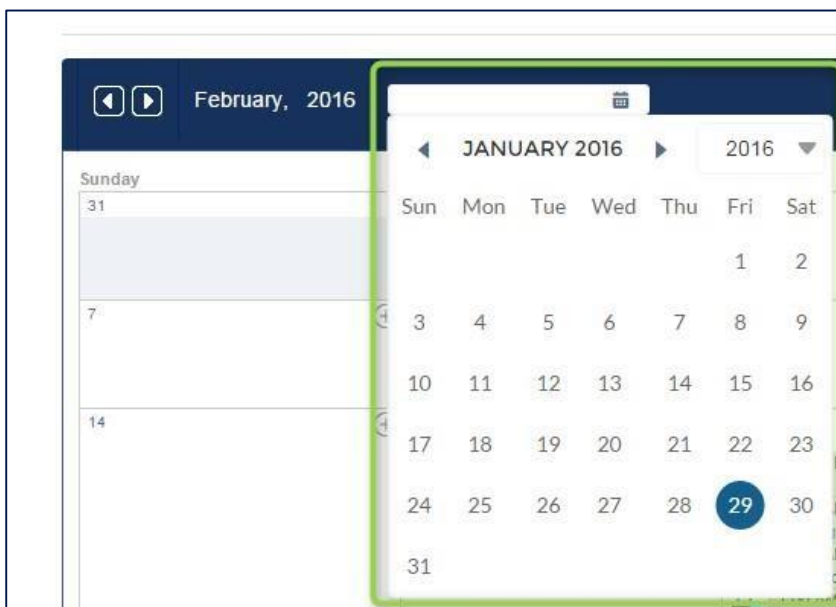
Go back to the current day using the “Today” button.



4. Add New Task



Using the day picker, quickly select the day that you would like to view tasks.



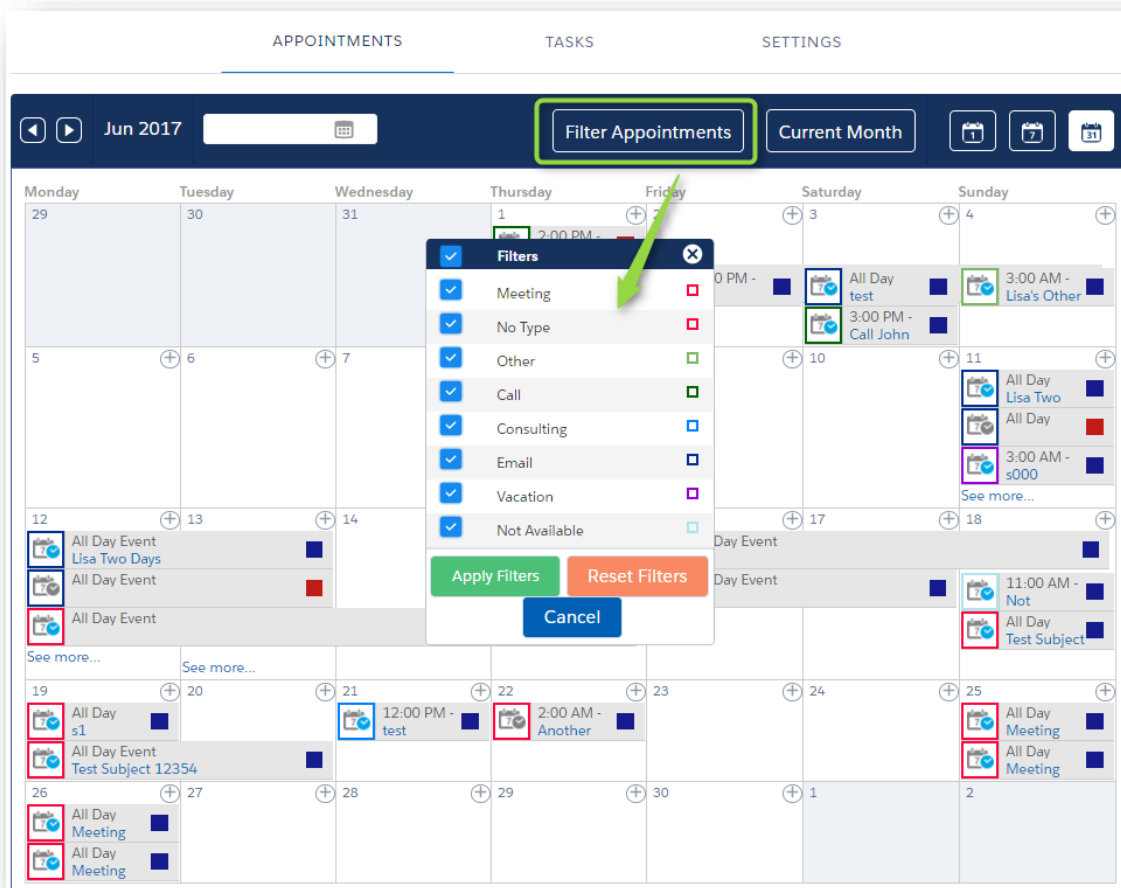
- ❑ When on the month view, select a day from the day picker to be redirected to the month in which the selected day is found.
- ❑ When on the week view, pick a day from day picker to get redirected to the week in which the selected day is found.
- ❑ When on the day view, pick a day from day picker to get redirected to the selected day.

6 Filtering

You can use the “Filter” button from either the Appointments or Tasks tab.

1. Filter Appointments.

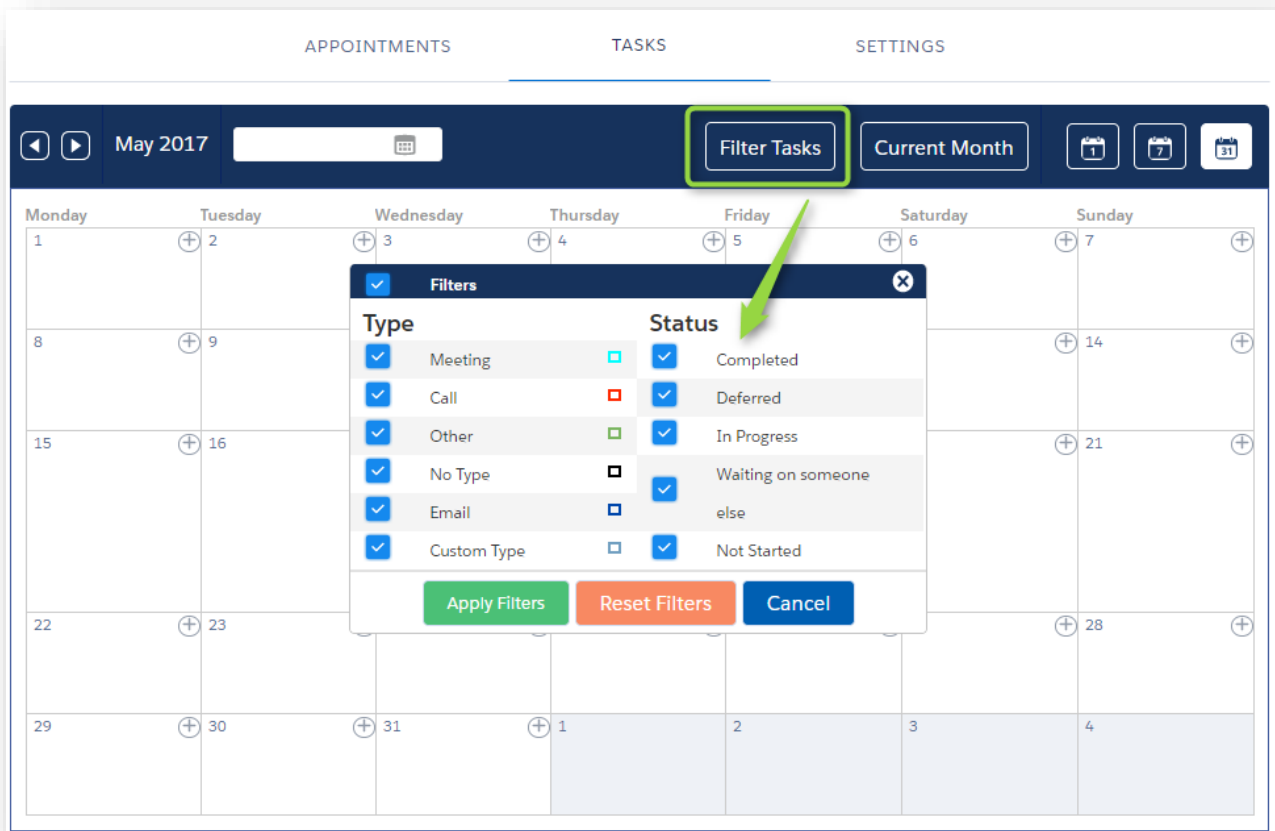
Appointments can be filtered by Type only.



After applying a Type filter, only the Appointments for that specific type will be displayed in the calendar.

2. Filter Tasks

Tasks can be filtered by Type or Status.



After applying a filter Type, only tasks of that type will be displayed in the calendar. Filtering by Status works exactly the same way.

Note: The Type and Status Filters work together, not independently. For example: if you want to see all Completed and In Progress Calls, select Type = Call and Status = Completed, In Progress.

7 Settings

1. Color Borders for Record Types

To help make information easier to read, you can assign a colored border to calendar entries. These colors are determined by record type.

To do this, simply go to the Color Options section from the Settings tab.

APPOINTMENTS TASKS **SETTINGS**

USER LIST **COLOR OPTIONS** VISIBILITY OPTIONS

Set color codes for Appointment and Task types

APPOINTMENT TYPES	
Meeting	<input type="color"/>
No Type	<input type="color"/>
Other	<input type="color"/>
Call	<input type="color"/>
Consulting	<input type="color"/>
Email	<input type="color"/>
Vacation	<input type="color"/>
Not Available	<input type="color"/>

TASK TYPES	
Meeting	<input type="color"/>
Call	<input type="color"/>
Other	<input type="color"/>
No Type	<input type="color"/>
Email	<input type="color"/>
Custom Type	<input type="color"/>

Save

As you can see, each Type value has its own entry that determines the color of its border in the calendar.

Let's say that we want the call type of an appointment to be displayed with a dark green border.

Select the dark green color option from the dropdown for the Task Type for Call, and then click Save.

Call	 
Consulting	 
Email	 
Vacation	 
Not Available	 

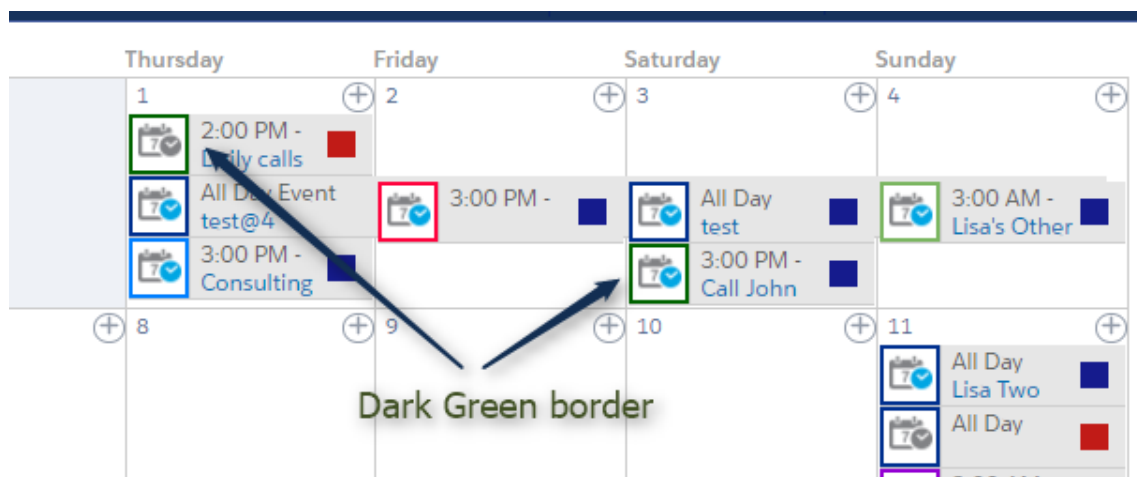
Save

No Typ

Email

Custon

Now, all calls will be displayed with a dark green border in the calendar.



The calendar displays events for Thursday through Sunday. Events include '2:00 PM - Daily calls', 'All Day Event test@4', '3:00 PM - Consulting', '3:00 PM -', 'All Day test', '3:00 PM - Call John', '3:00 AM - Lisa's Other', 'All Day Lisa Two', and 'All Day'. A dark green border is highlighted on the '2:00 PM - Daily calls' event on Thursday and the '3:00 PM - Call John' event on Saturday. An arrow points to the 'Dark Green border' text.

2. Visibility Options

OSF Community PLANNER offers full control over what Partner Users can see. Information related to this can be accessed via the Visibility Settings section under the Settings tab.

! Important: OSF Community PLANNER security settings **do not** override organization-wide default settings and/or sharing models for records. In order for partner users to view activity records in the calendar or drill further into details for each record, they will need to have access to those records in Salesforce.

USER LIST

COLOR OPTIONS

VISIBILITY OPTIONS

PROFILE SETTINGS	
PROFILE	VISIBILITY
Partner Community User Clone	Private ▼
Partner Community User	Public ▼
Partner Community Login User	Private ▼
CALENDAR VISIBILITY	
Calendar Visibility	Public ▼
Save	

The Visibility Options section is divided into 2 main areas:

Profile Settings

Profile Settings control how details are viewed and the pop-ups that appear based on other users' activities.

This feature works for partner profiles only. Salesforce users and admins are not affected.

Setting the visibility of a profile to **public** will provide access to Subject, hover pop-ups and record detail pages for records that are assigned to Users other than the Partner.

Partner Community Login User

Public ▼

7:00 AM - Call with

9

7:00 AM - Call with

16

23

ASSIGNED TO:

SUBJECT:

NAME:

RELATED TO:

START:

END:

ALL-DAY EVENT:

DESCRIPTION:

Allen West

Call with Contact from Dick...

test Ricardo

Dickenson plc

Jul 02, 2017 7:00 AM

Jul 02, 2017 8:00 AM

☐

1:00 AM -

Setting the Profile Visibility to Private will disable all of the above.

Partner Community Login User

Private ▼

7:00 AM -

9

1:00 PM -

16

2

3

4

9

10

11

16

17

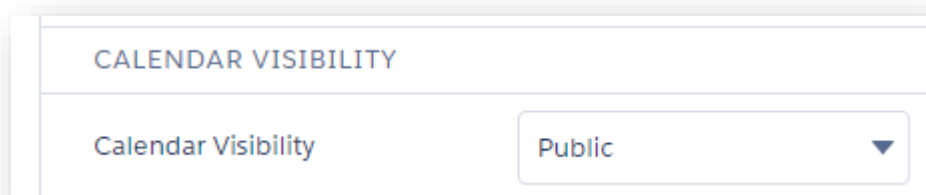
18

Calendar Visibility

Depending on your needs, the OSF Community PLANNER can be used as a shared calendar (Public – default) or as a personal calendar (Private).

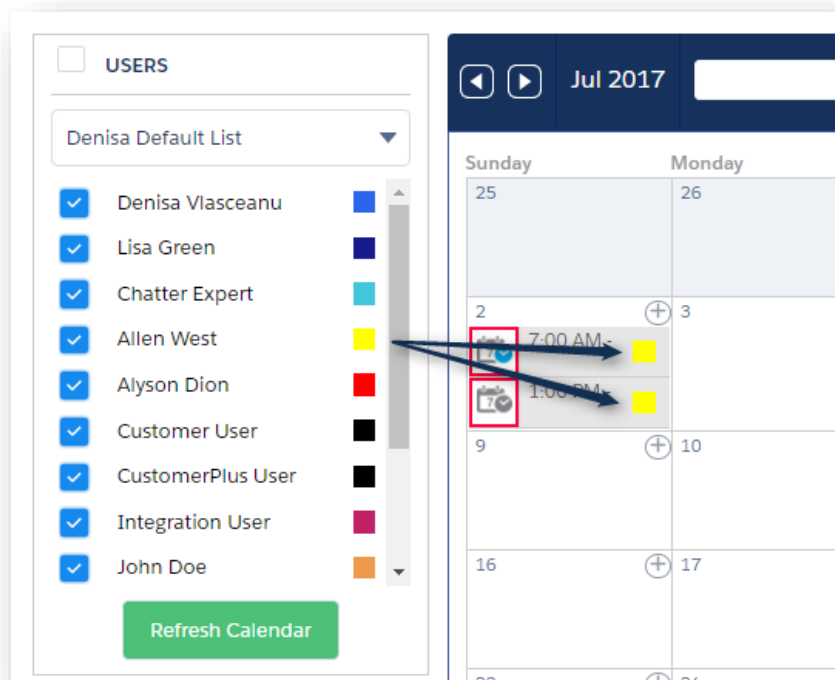
 **Tip:** In order to determine which of these two options are best suited for your business, first determine if your team needs access to each other's activity. If they don't, then set the Calendar Visibility to private and they can use it as a personal calendar.

OSF Community PLANNER was initially intended to be used as a shared calendar. Its default setting (Public) enables just that. It provides Partner Users with access to User Lists, allowing them to see all activities assigned to other users.



CALENDAR VISIBILITY

Calendar Visibility Public ▼



☐ USERS

Denisa Default List ▼

- ☒ Denisa Vlasceanu
- ☒ Lisa Green
- ☒ Chatter Expert
- ☒ Allen West
- ☒ Alyson Dion
- ☒ Customer User
- ☒ CustomerPlus User
- ☒ Integration User
- ☒ John Doe

Refresh Calendar

Jul 2017

Sunday	Monday
25	26
2	3
9	10
16	17
23	24

Setting the Calendar Visibility to private disables access to User Lists so partners can use the OSF Community PLANNER as their own personal calendar – with access to only their activities.

CALENDAR VISIBILITY

Calendar Visibility

Private



An OSF Product
OSF Community
PLANNER
 Calendar for Partner Community

APPOINTMENTS

TASKS

SETTINGS

LEGEND

- Task (resolved)
- Task (delayed)
- Task (unresolved)
- Appointment (accepted)
- Appointment (declined)
- Appointment (new)

Jul 2017

Filter Appointments

Current Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

No Users List

My Activities

6:00 PM - test insert

1:00 AM - external1