| an OSF Product

OSF Community

PLANNER

Calendar for Partner Community

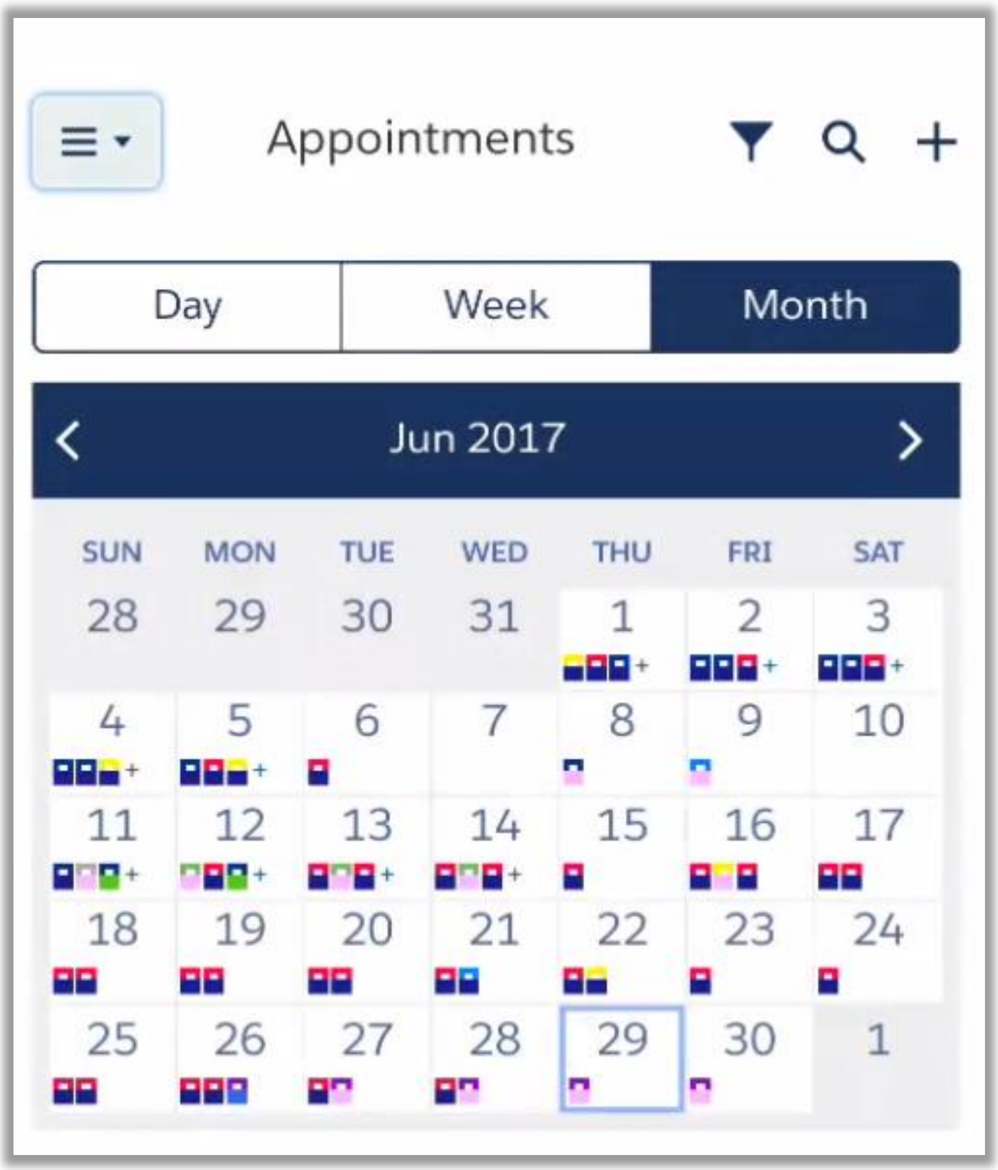
USER GUIDE for MOBILE

Table of Contents

1 Introduction

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

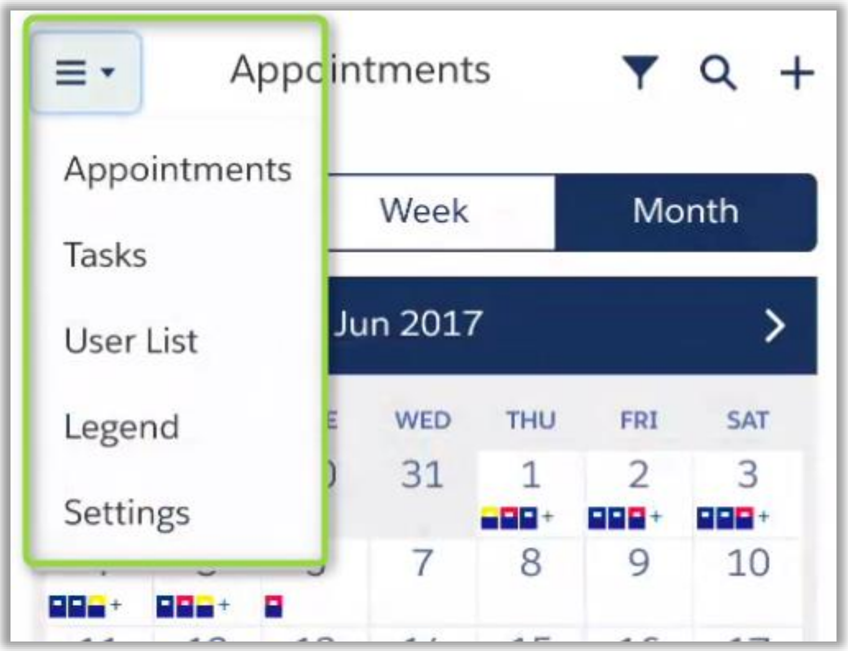
It is now supported on all mobile devices – phone or tablet.



2 Interface

OSF Community PLANNER for Mobile offers a simple, yet innovative user interface.

1. In the top left corner, directly under the Community header, you will find the OSF Community PLANNER hamburger menu. This menu is used to navigate between the app's 3 tabs (Appointments, Tasks, Settings), to open the User Lists section and to display the pop-up for the Legend.



2. Next to the hamburger menu is the tab indicator. This displays the tab that you're currently on – Appointments (Events), Tasks or Settings.

3. Next to the tab label, is a funnel icon. This is used to open filters for each of the Appointments or Tasks tabs. We'll get into that later on.

4. Display all your daily Events or Tasks (depending on the tab you're on) with a simple tap on the Date Picker button.

5. The right-most button from the header (+) is used to create new Appointments (Events) and Tasks.

6. The last element that makes up the header is 3 buttons you can use to switch between calendar views – Month / Week / Day.

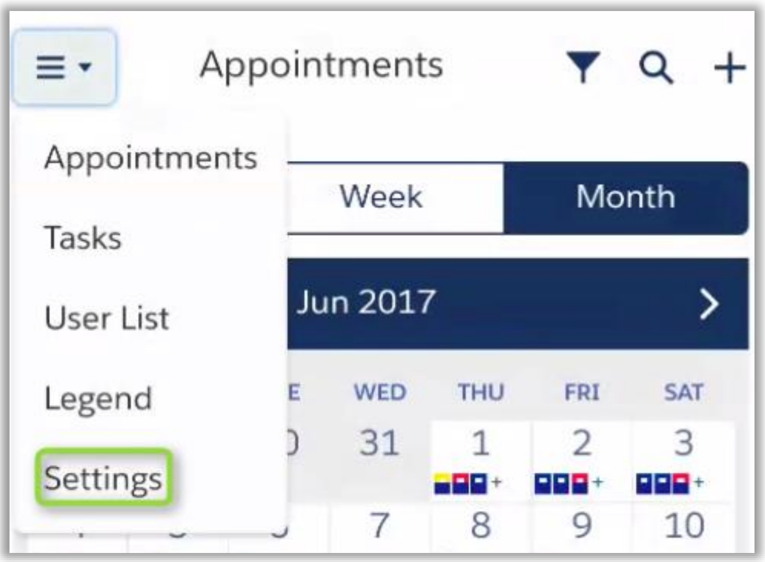
3 User Lists

The main functionality of OSF Community PLANNER is focused on User Lists.

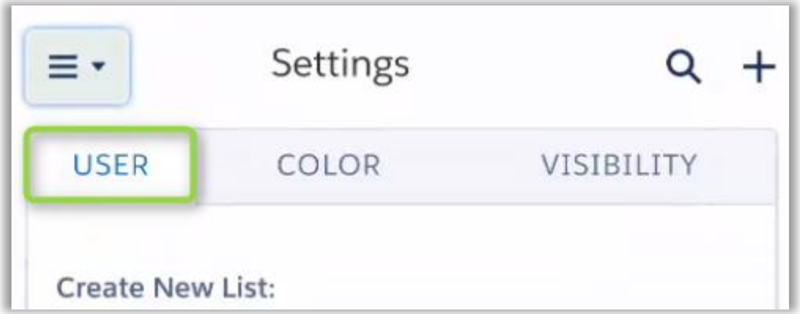
A User List will determine the display of activities (Events / Tasks) in the calendar using the "Assigned To" field. This means that if a User List contains a User, this will determine the User's activities to be displayed.

1. Create a New User List

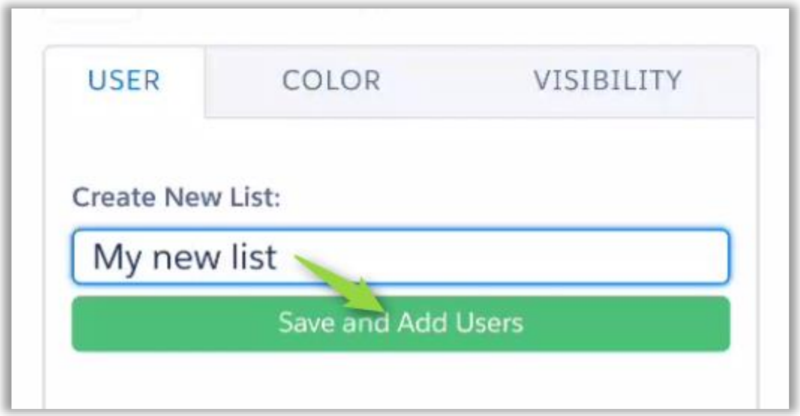
In order to create a new User List, go to the Settings tab.



Tap on the "User" section.

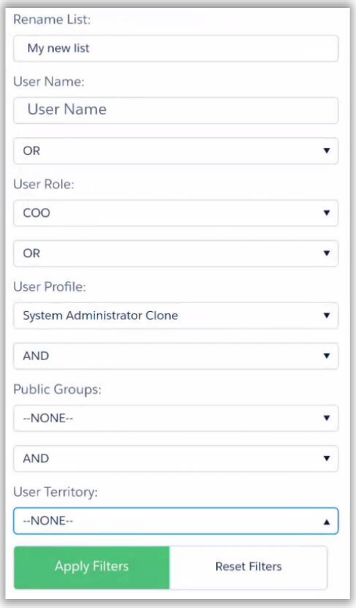


Give your list a name and click the "Save and Add Users" button.



In the next screen, you have the possibility to filter a user based on several criteria:

- Name
- Role
- Profile
- Public Groups
- Territory



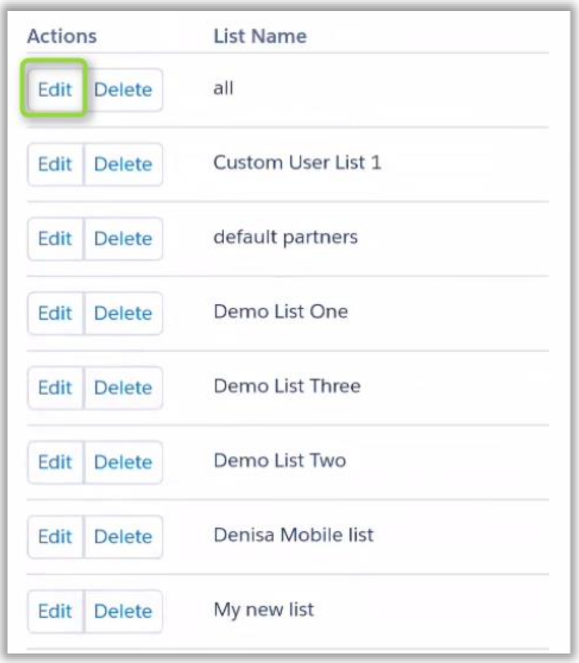
Upon selecting all of the desired criteria, click "Apply Filters" and the resulting list will provide information based on what you've specified.

Select all of the desired users from the list and click "Save."

2. <u>Edit an Existing User List</u>

In order to edit an existing User List, go to the Settings tab and click on "User."

All of the available User Lists will be displayed. Click "Edit" next to the User List you want to edit.

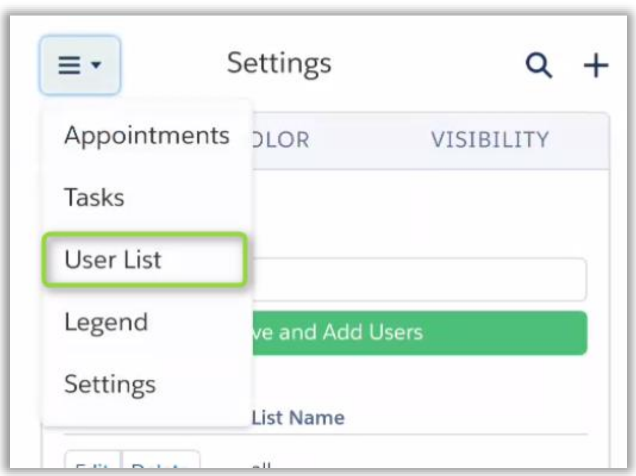


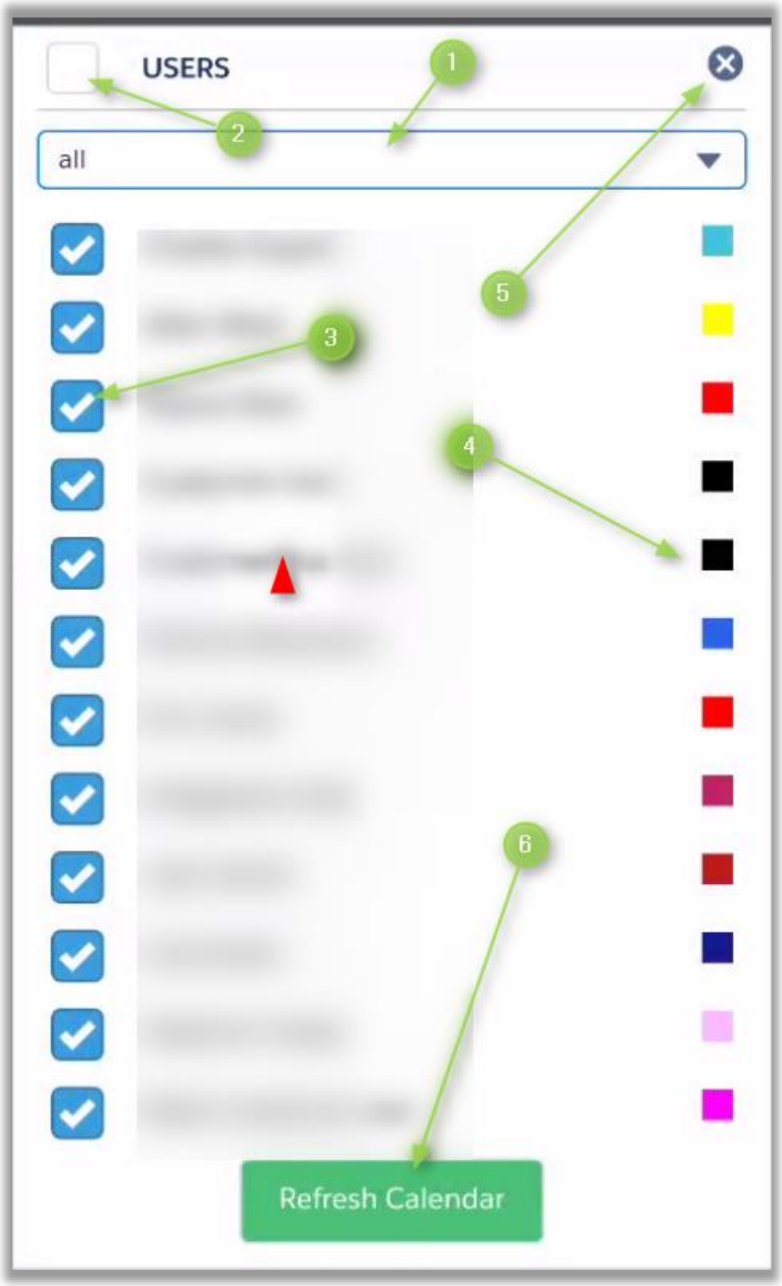
Add/Remove users and click "Save."

3. <u>User Lists in the Calendar</u>

Let's take a closer look at how User Lists work.

As explained in Section 2, User Lists can be accessed by tapping on the "Users" option from the Hamburger Menu picklist.





In the User List pop-up, the following elements are available:

1. User List picklist - All default and custom User Lists (each user will have his/her own lists) will be displayed here.
2. Users (Select All) button – Selects all users from a list when tapped.
3. User checkbox before each User – Enables/disables the user from the list.
4. Color of the selected user (can be set in Community PLANNER for desktop)
5. Close button

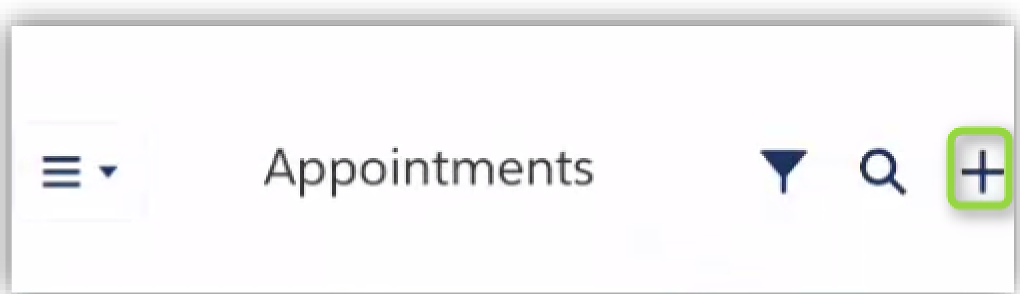
6. Refresh Calendar button – Applies the selected User List to the calendar, with all selected users.

After applying a User List, all ACTIVE users from that list will have their Appointments/Tasks displayed.

4 Appointments

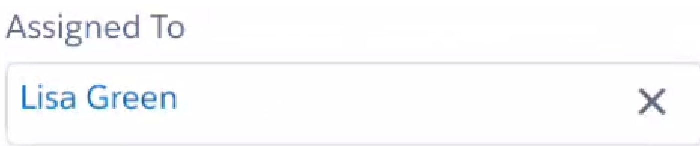
1. Create a New Appointment

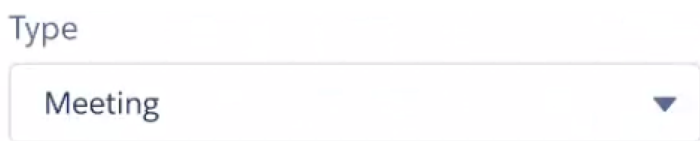
To create a new Appointment, simply tap on the (+) button from the Appointments tab.

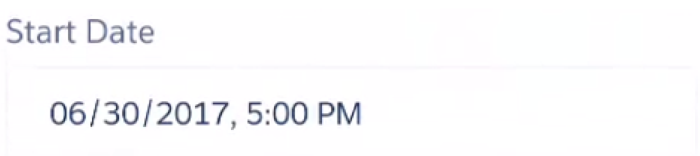


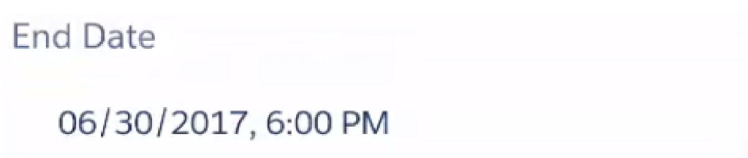
This will open the Create Event page. Creating an event works pretty much same as in Salesforce, however, some fields require special attention, as they determine the way they are displayed in the OSF Community PLANNER.

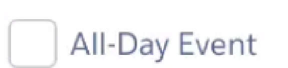
The fields are:

1. 

2. 

3. 

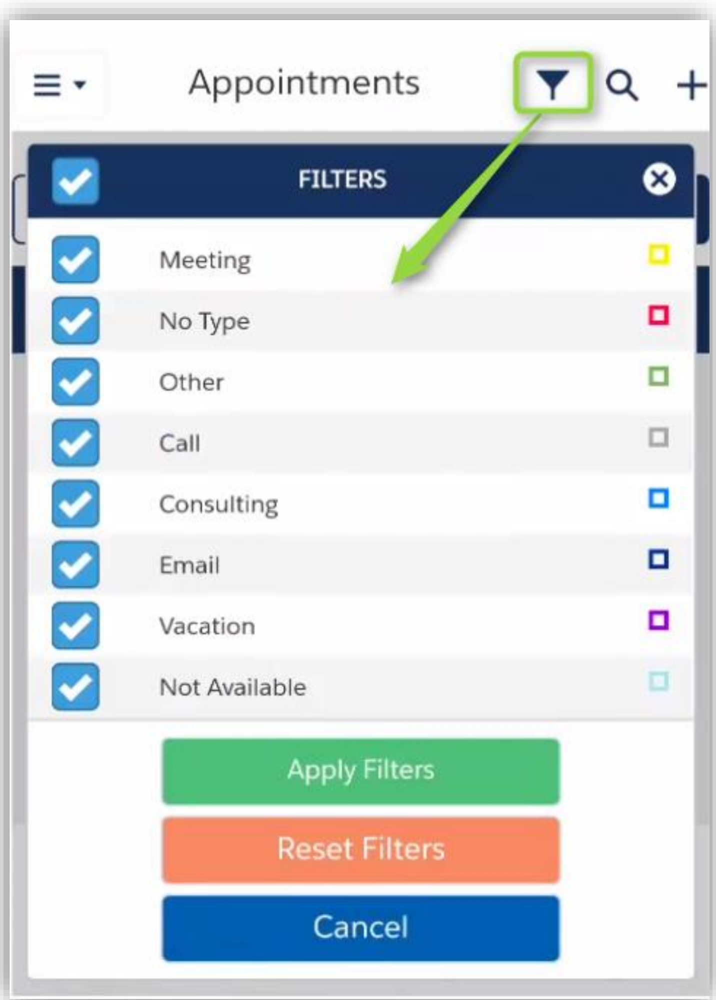
4. 

5. 

2. Filtering

Appointments can be displayed or hidden from the calendar according to their type (Picklist on Event Object.)

In order to open the Filter Events pop-up, tap on the funnel icon from the Appointments tab.



In the Filter Events pop-up, all values from the Type field will be displayed.

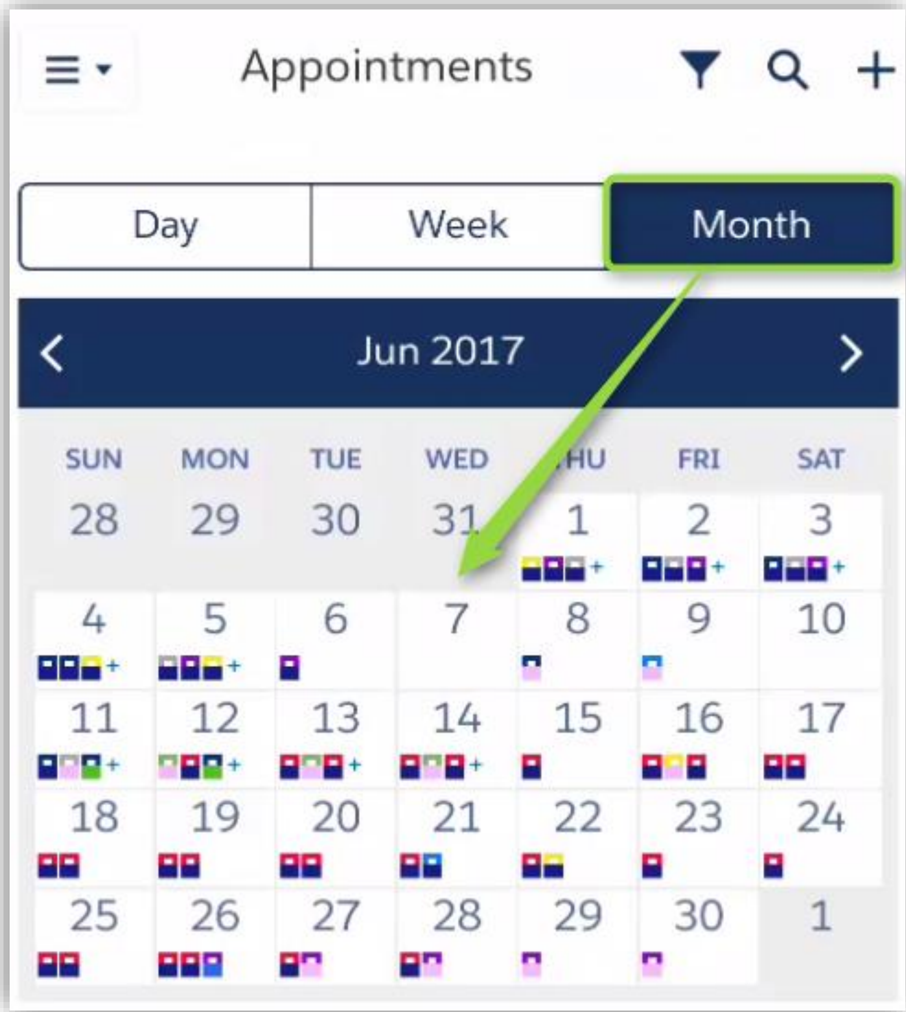
In order to apply the desired filter, enable the type of events that you want to see in the calendar, and disable the types that you want to hide.

After doing so, click "Apply Filter." The result is that only the desired type of events will be displayed. Whenever a filter is applied, it will be applied for all views (Month/Week/Day).

3. Appointments Calendar

Month View

The Month View of the Appointments tab offers an overview of the events going on during the selected month.



a. Navigation

You can navigate back and forth through the months of the year to view your appointments by using the Next / Previous buttons from the calendar header.

b. Color Coding

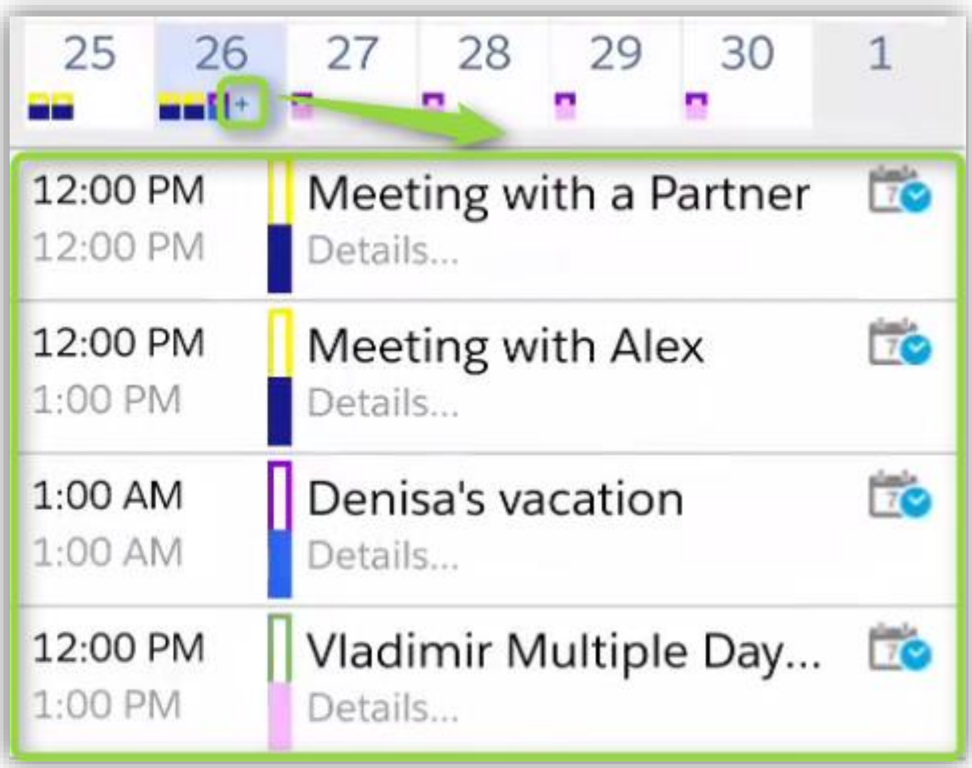
Each appointment is displayed with 2 colors:

- Bottom solid color is for User (color as displayed in User List)
- Top border (color for Type)

c. See all events for specific day

If you want to see all events that occur in a single day directly from the Monthly View, simply tap on the day you want to display events for. A section will be opened under the calendar, containing all the events for the selected day.

Because of the limited mobile layout space, the maximum display of events on each day is 3, however, if a day contains more than 3 events, a + symbol will be displayed next to the event entries.



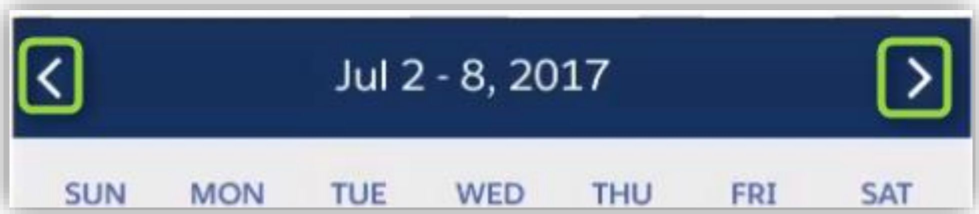
Tapping on Details will open the Event record detail page in mobile layout.

Week View

The Week View in the Appointments tab is an interface that combines a view of the events that occur during the week, with a detailed overview of what's going on each day.

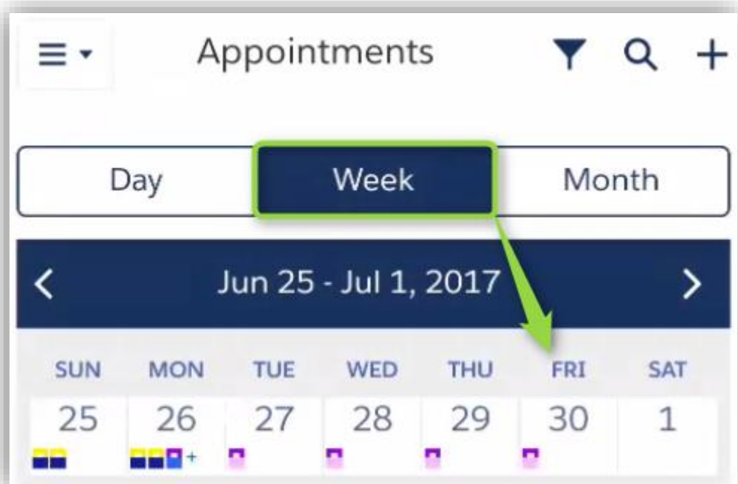
a. Navigation

You can navigate back and forth to see your weekly appointments by using the Next / Previous buttons from the calendar body header.



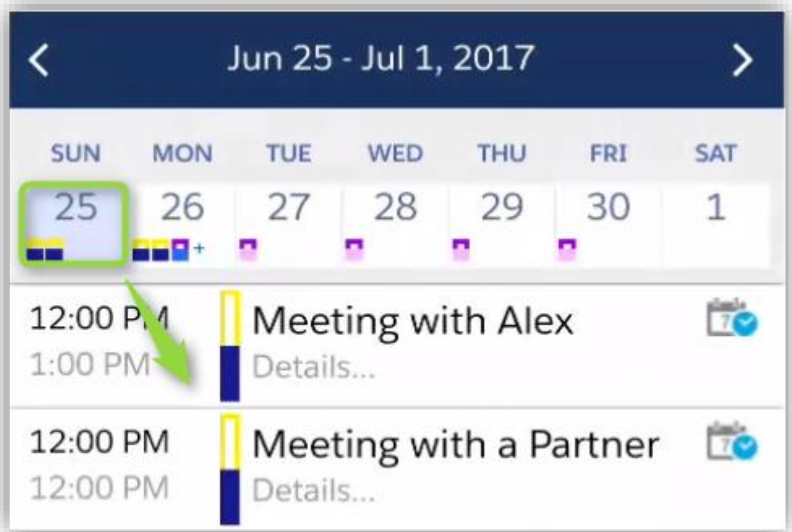
b. Display

The Week View is a section of the monthly calendar view that only contains a one-week period.



c. See all events for specific day

Same as the Monthly View, if you want to see all events that occur in a day from the selected week, just tap on the day you want to display the events for.



Tapping on Details will open the event record detail page in mobile layout.

Day View

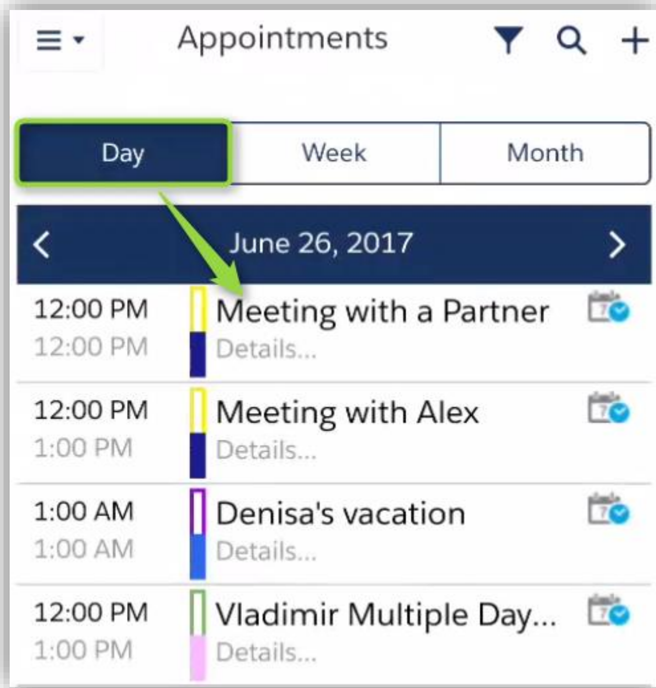
The Appointments tab Day View displays all events that occur in a day. This includes All-Day Events and Multi-Day Events. They will be displayed as a single event entry, on any day included in the interval of the Event.

a. Navigation

You can navigate back and forth to see your daily appointments by using the Next / Previous buttons from the calendar body header.

b. Display

The Day View is similar to the section that appears when tapping on a specific day in the Month View. It displays all events for that current day.



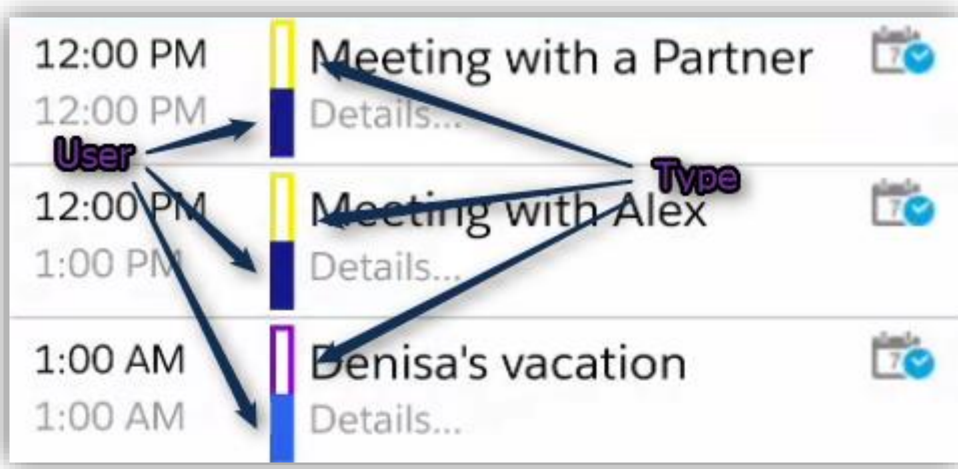
Tapping on Details will open the record detail page for the event in mobile layout.

c. Color Coding

The same color coding rules apply to Day View.

Located to the left of each event entry, two bars are displayed:

- The bottom solid color is the color displayed in the User List .
- The top border color indicates Type.

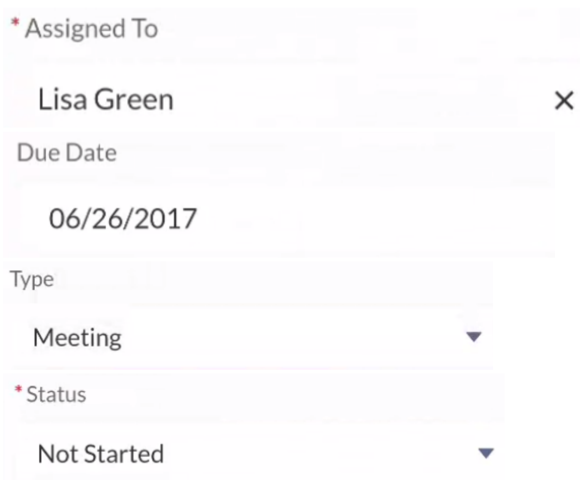


5 Tasks

1. Create a New Task

In order to create a new task, simply tap on the (+) button while on the Tasks tab.

This will open the Create Task page. Creating a task works pretty much the same as in Salesforce, but some fields require special attention, as they will determine the way they are displayed in the OSF Community PLANNER.

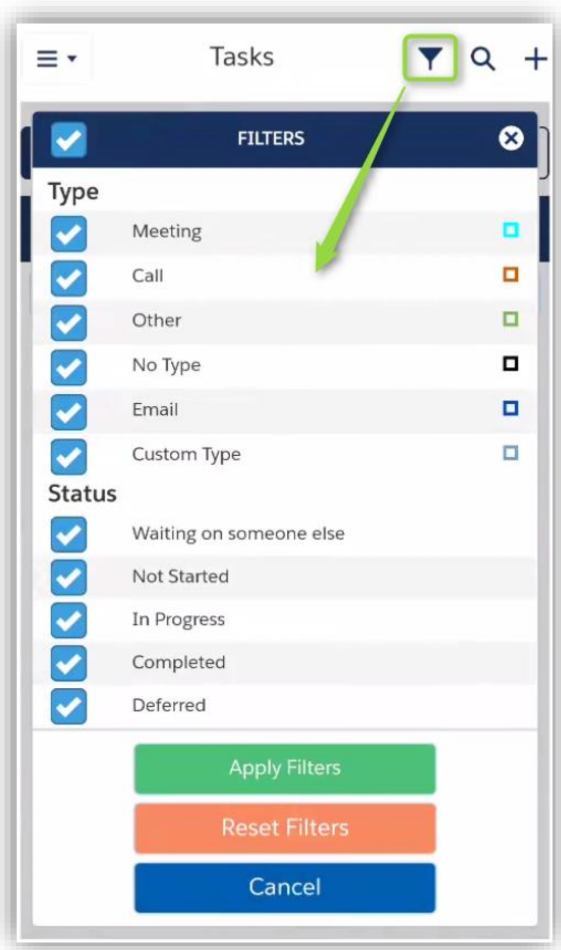


1.
2.
3.
4.

2. Filtering

Tasks can be displayed or hidden from the calendar according to their Type and Status.

In order to open the Filter Tasks pop-up, tap on the funnel icon from the Tasks tab.



In the Filter Tasks pop-up, all values from the Type and Status fields will be displayed.

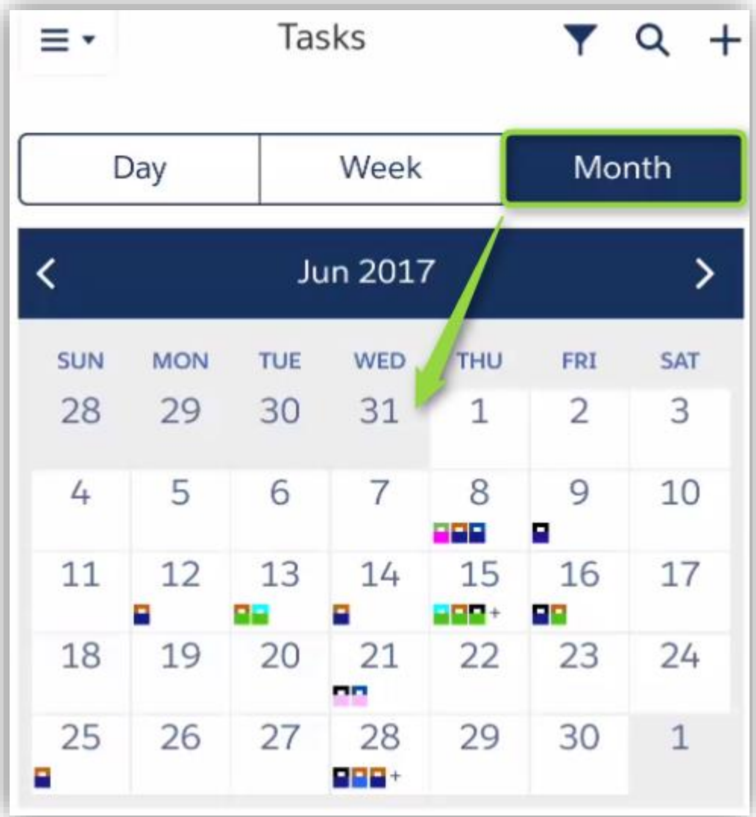
In order to apply the desired filters, enable the types and/or status of tasks that you want to see in the calendar and disable the types and statuses that you want to hide.

Crossfiltering works as well – for example, if you want to only see all calls that are in progress, select Type = Call and Status = In Progress. After doing so, click "Apply Filters." The result is that only the desired types and/or status of tasks will be displayed. Whenever a filter is applied, it will be applied for all views (Month/Week/Day).

3. <u>Tasks Calendar</u>

Month View

The Month View Tasks tab offers an overview of the tasks that have yet to be completed, or have been completed during that ,month.



a. Navigation

You can navigate back and forth through the months of the year to view your Appointments by using the Next / Previous buttons from the calendar body header.

b. Display

Same as the Appointments section, each Task is displayed using 2 colors:

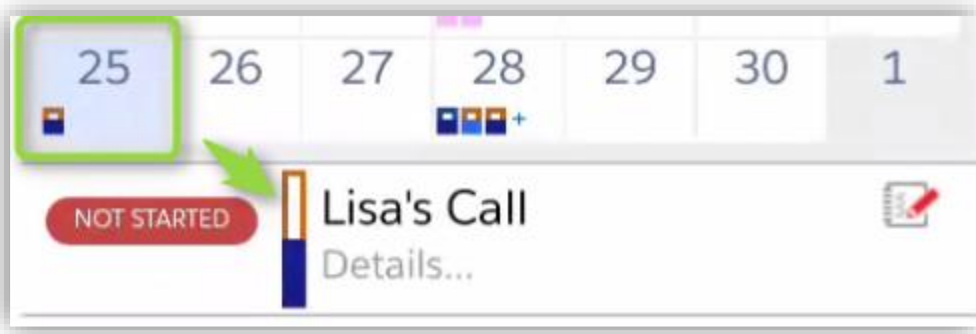
- The bottom solid color for the user as displayed in the User List.
- The top border shows the color for Task Type.

c. Color Coding

The color coding of Tasks in the Monthly View works exactly the same as for Appointments.

d. See all tasks with due date for a specific day.

This is the same as Appointments. If you want to see all of the tasks with a due date in a single day directly from the Month View, just tap on the day you want to display the tasks for. All other rules are the same as those used for Appointments.

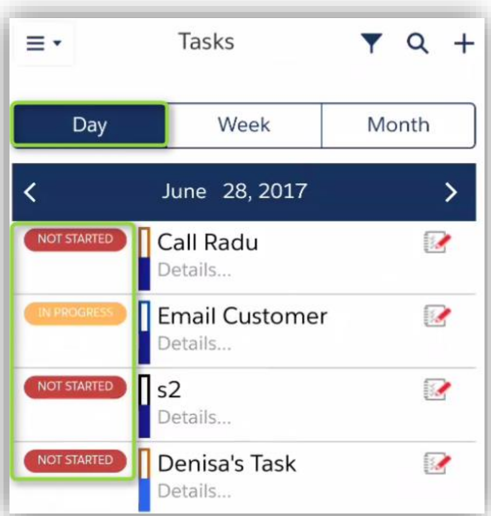


Week View

The Week View for Tasks works exactly the same as the Week View for Appointments.

Day View

The Day View functionality of the Tasks tab is the same as the Appointments Day View, the only difference is in the design – Task Status was added.

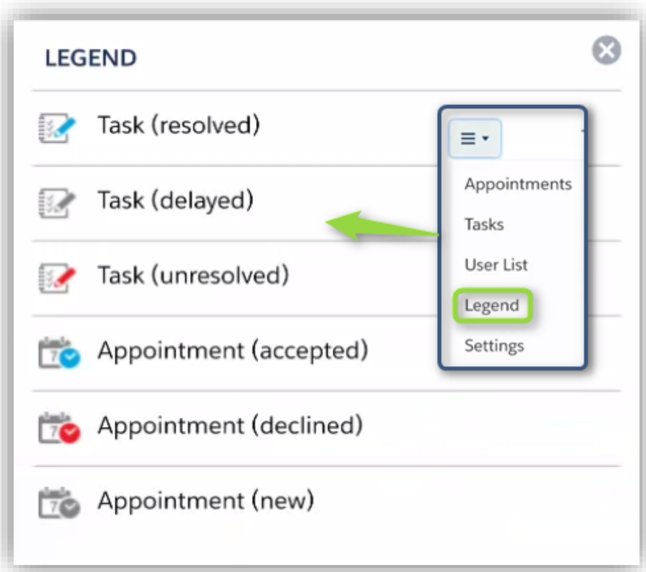


6 Legend

The Legend contains symbols that indicate:

- Events – Approval Status
- Tasks – Completion Status

In order to access this area, simply click on the hamburger menu and select "Legend."



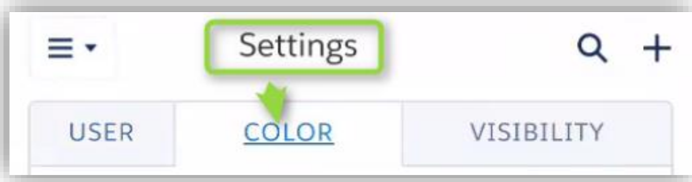
7 Settings

! Important: Apart from User Lists, Settings are only available to Administrators.

1. **Color Settings**

OSF Community PLANNER helps make information easier to read by allowing users to assign a colored border to entries in the calendar. These colors are determined by record type.

In order to accomplish this, go to the Settings Tab and tap on Color.

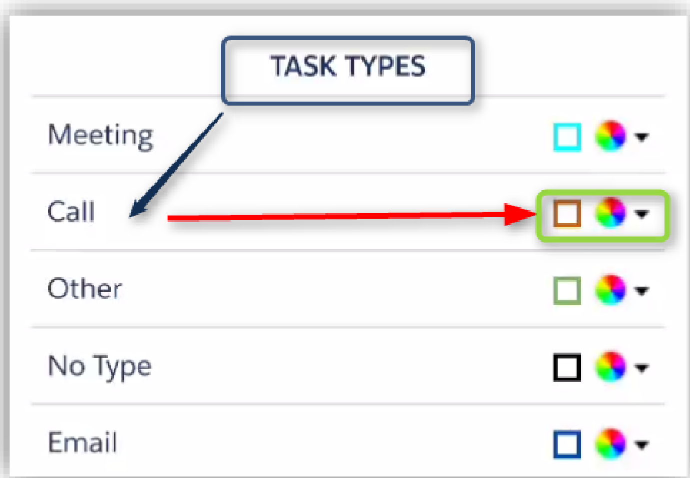


The Color section is divided into 2 categories:

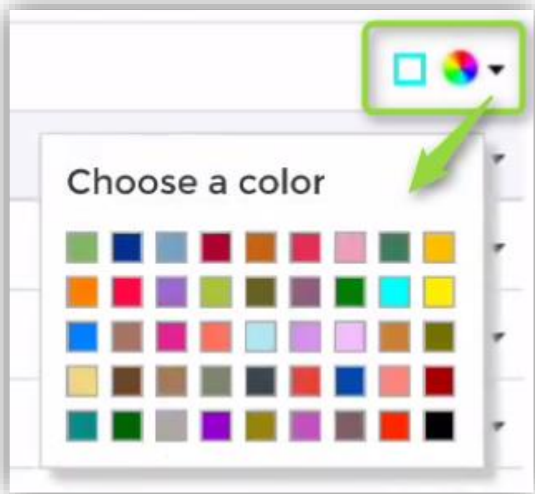
- Appointments Types
- Task Types

By default, each section holds pre-defined and custom values from the "Type" picklist which can be set in Salesforce.

In order to change a color for a certain Activity Type, locate its entry under the Appointments / Task Types section.



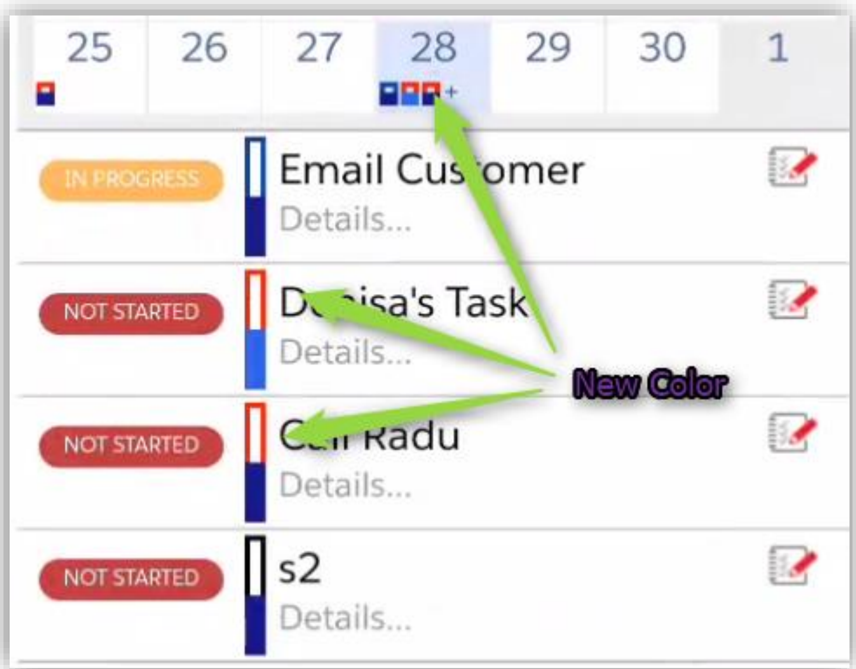
Next, from the available picklist, select the desired color you want to associate that particular type with.



After you select the desired color, tap on the "Save" button at the bottom of the page.

After this change, all Activities (Appointments or Tasks) of that type will be displayed with the newly selected color border.

!Important: This works **separately** for Appointments and Tasks. For example if there is a certain Type (ex. Meeting, Call, etc.) for both Appointments and Tasks, two separate color options will be available.



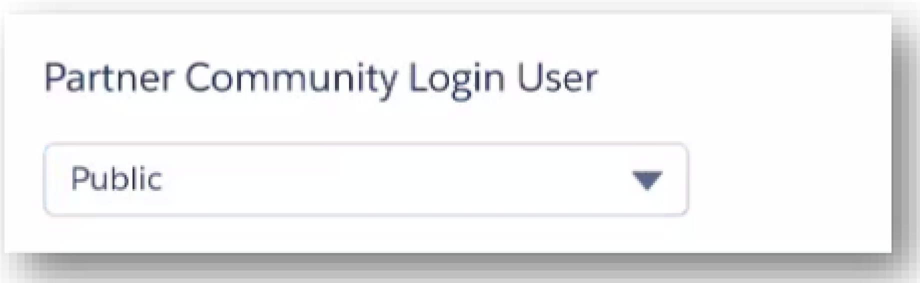
2. Visibility Settings

The Visibility Options section is divided in 2 main features:

Profile Settings

Profile Settings control the visibility of details and hover pop-ups for other users' activities. This feature works for Partner profiles only. Salesforce users and admins are not included.

Setting a Profile Visibility to **Public** will enable record detail access and Subject Visibility for records that the logged in Partner does not own.



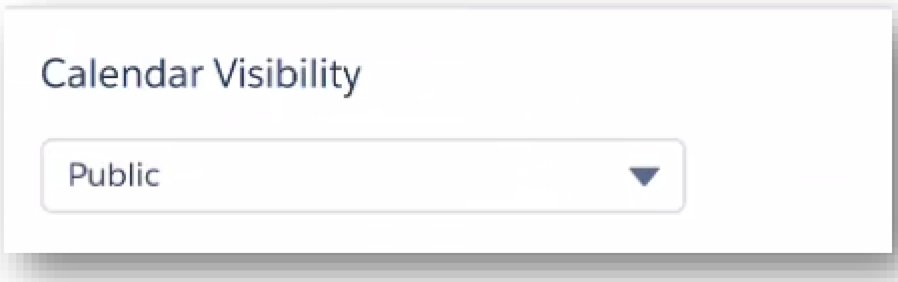
Calendar Visibility

Depending on your needs, the 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 you will need to use in your business, first determine if your Partners need access to each other's activities. If they don't, set the Calendar Visibility to Private and they can use it as a personal calendar.

The Community PLANNER was first intended to be used as a shared calendar.

Its default setting (Public) enables just that and gives Partner Users access to User Lists, enabling them to see activities assigned to other users.



Setting the Calendar Visibility to Private disables access to User Lists and enables Partners to use the Community PLANNER as their own personal calendar – seeing just their activities.