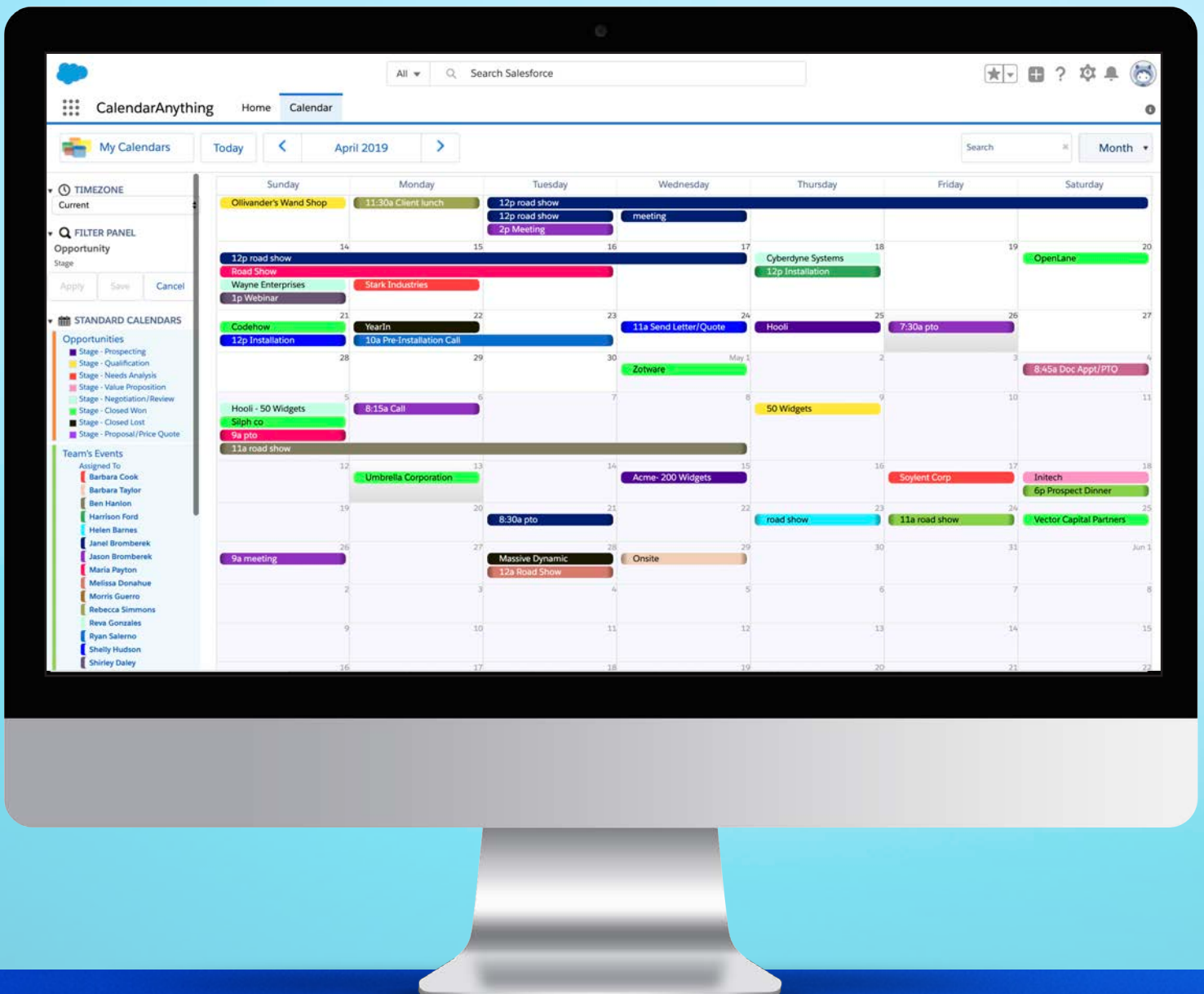
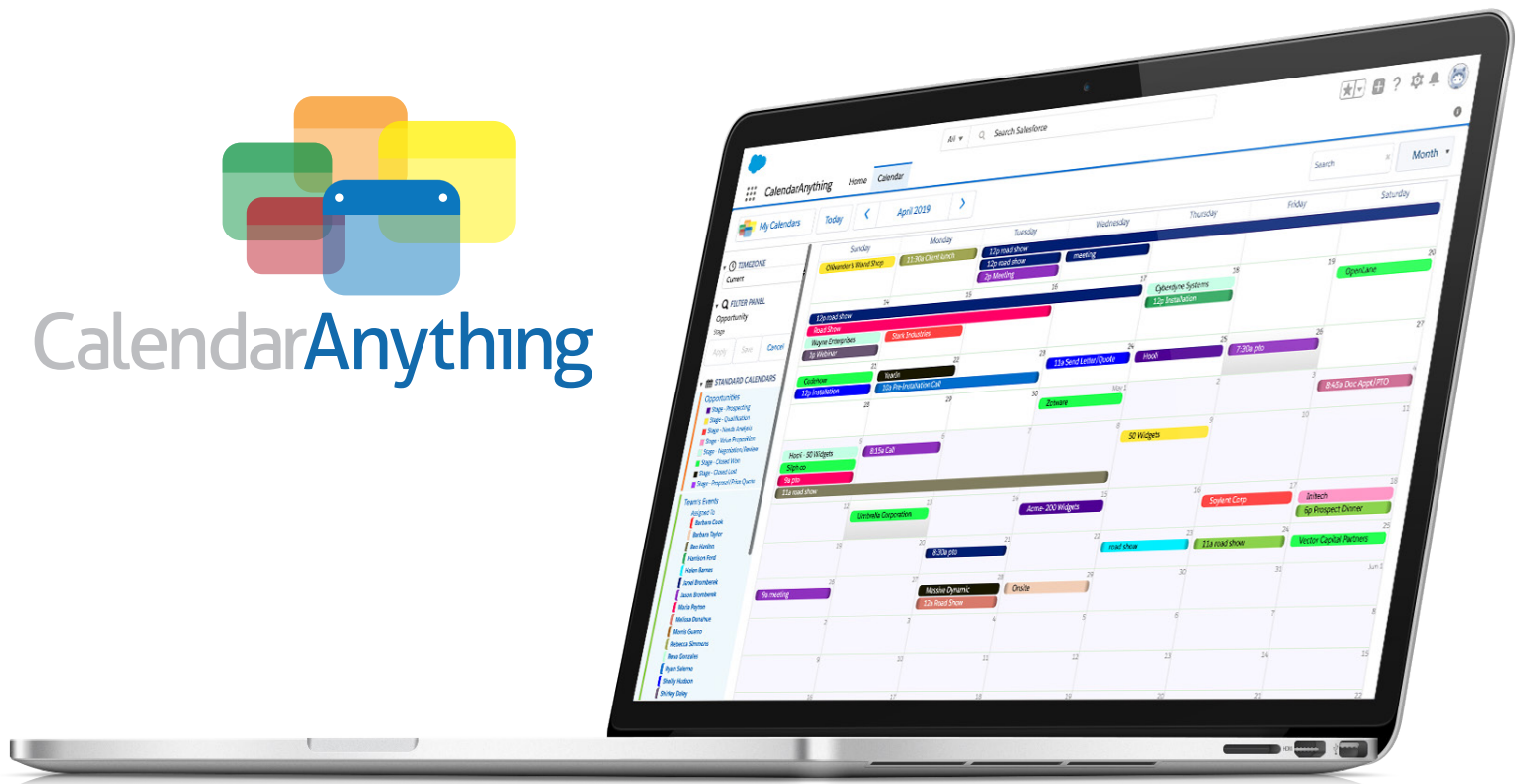




# CalendarAnything





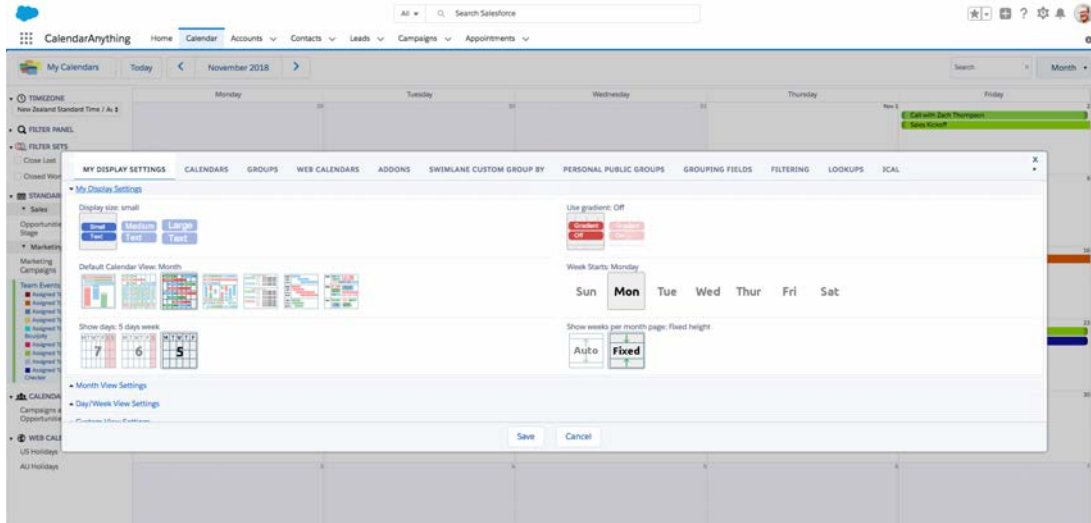
## Table of Contents

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# How do I customize my calendar?

Individual users are able to customize their calendar display settings. Users can specify Week Start Day, Custom View settings, Font Size, etc.

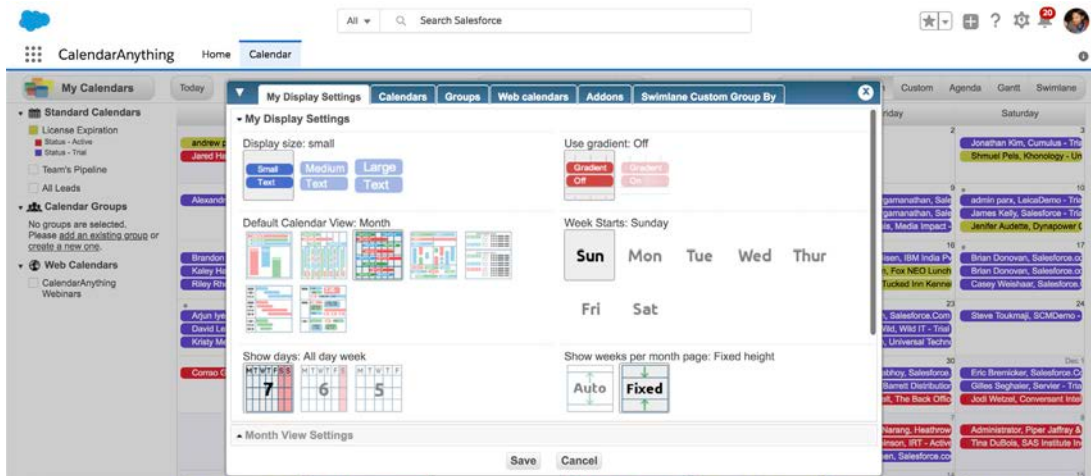
To access the custom display settings, click the My Calendars button and select the Display Settings option.



Here the user can customize:

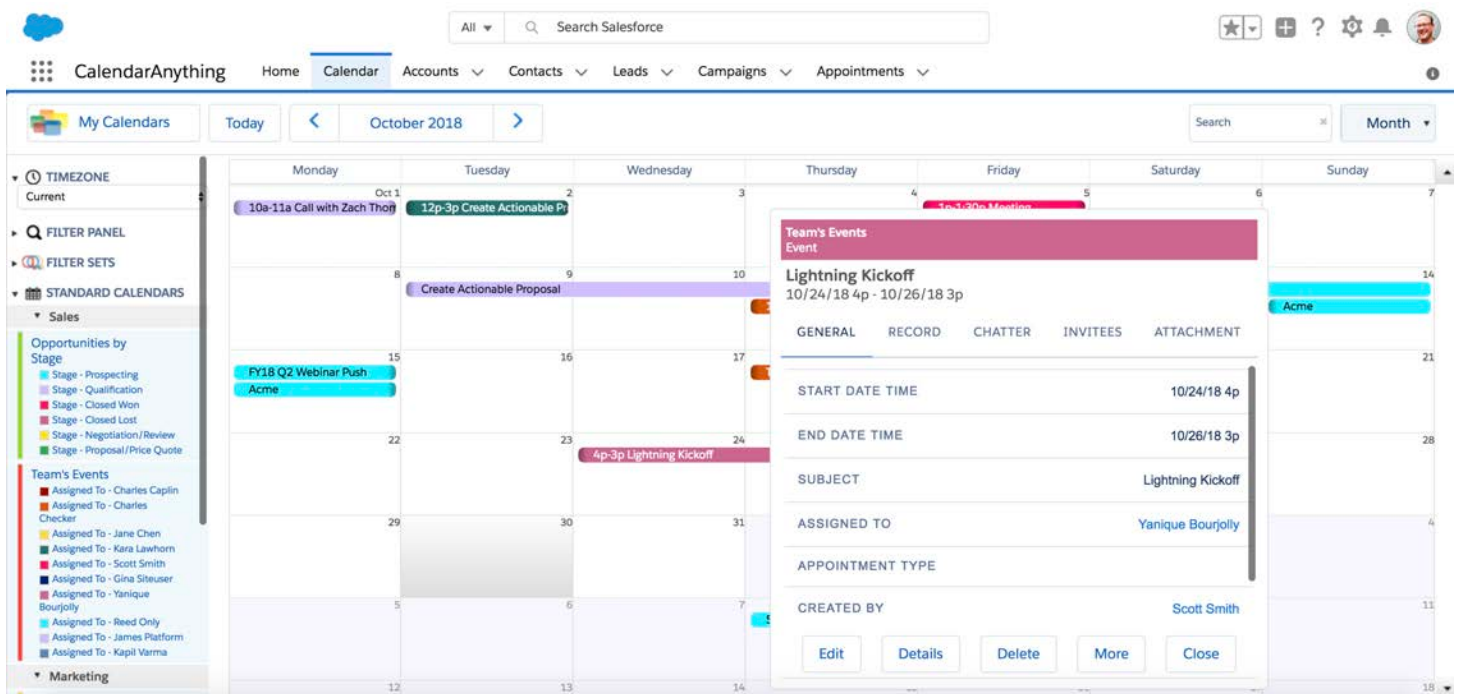
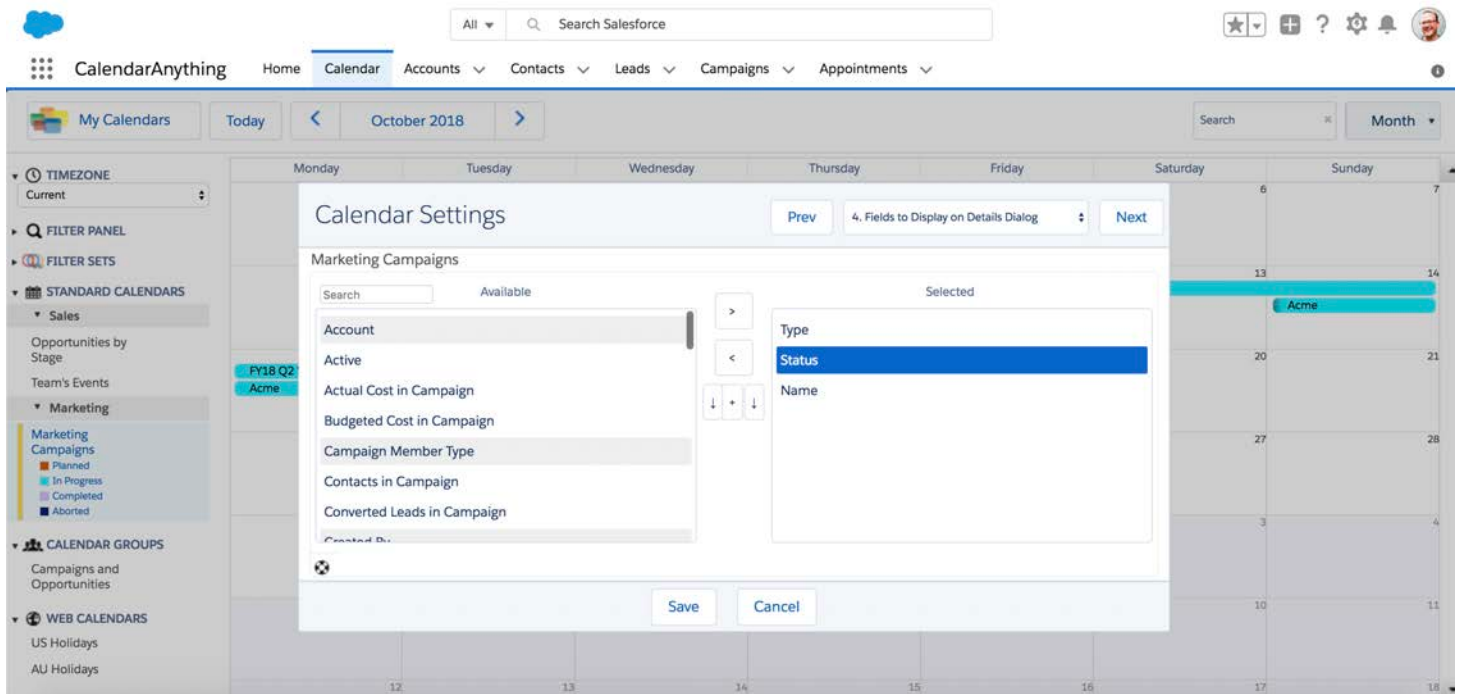
- Font Size
- Entry Label Gradient: Toggle On/Off
- Default Calendar View: specifies whether the calendar will always load in Day, Week, Month, Custom, Agenda, Gantt or Swimlane views.
- Week Start Day: applicable to 7 days Week, Month and Custom views.
- Show Days: specifies whether the Month, Week, Day or Swimlane views will show 5 days, 6 days, or 7 days.
- Row Height: Automatic allows for vertical scroll and will display all records in a given month, Fixed row height is similar to older versions and limits the number of records displayed on each row

Not all tabs in display settings are available to all users. Non system admin will only see following tabs\*.



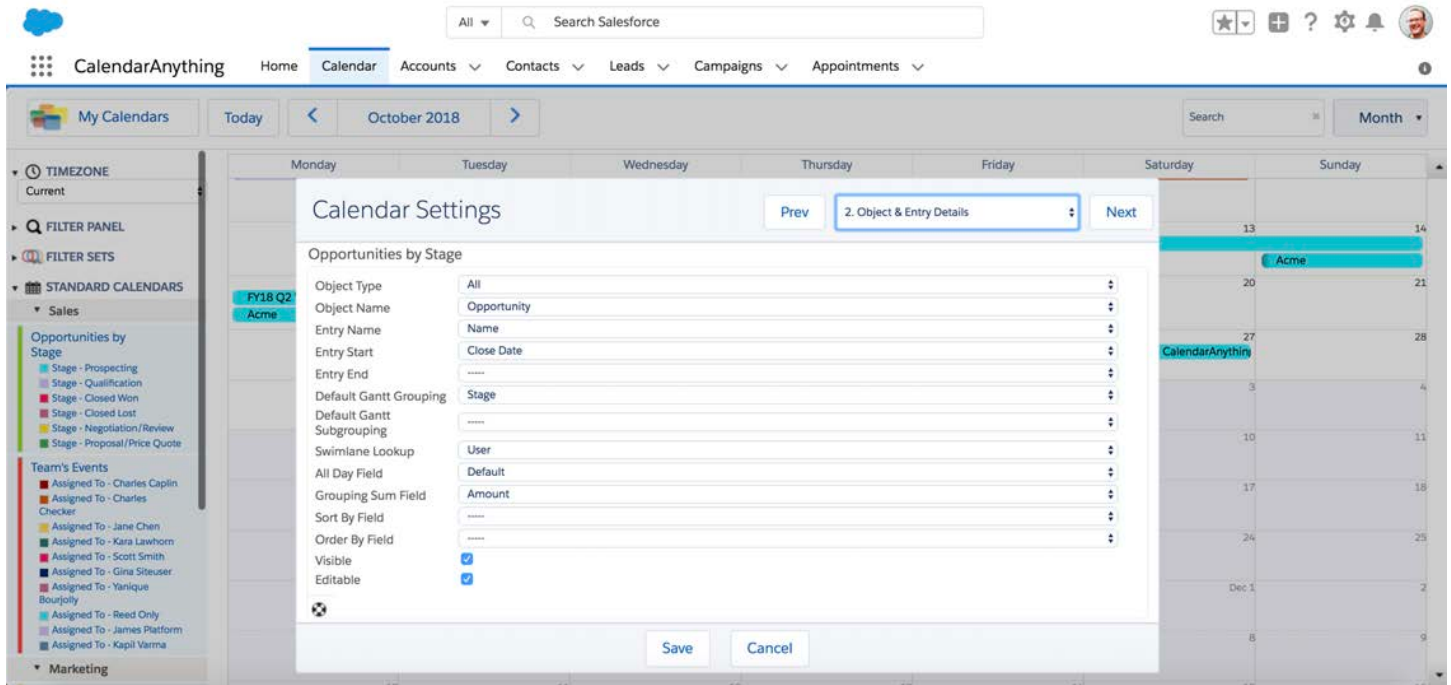
# How do I add a field on details dialog?

In Step 4 of the calendar setup, you can specify the 'Fields to Display On Details Dialog'. Move desired fields from Available to Selected to display. You also have the ability to display additional related fields from other connected objects by selecting the plus button in the center:

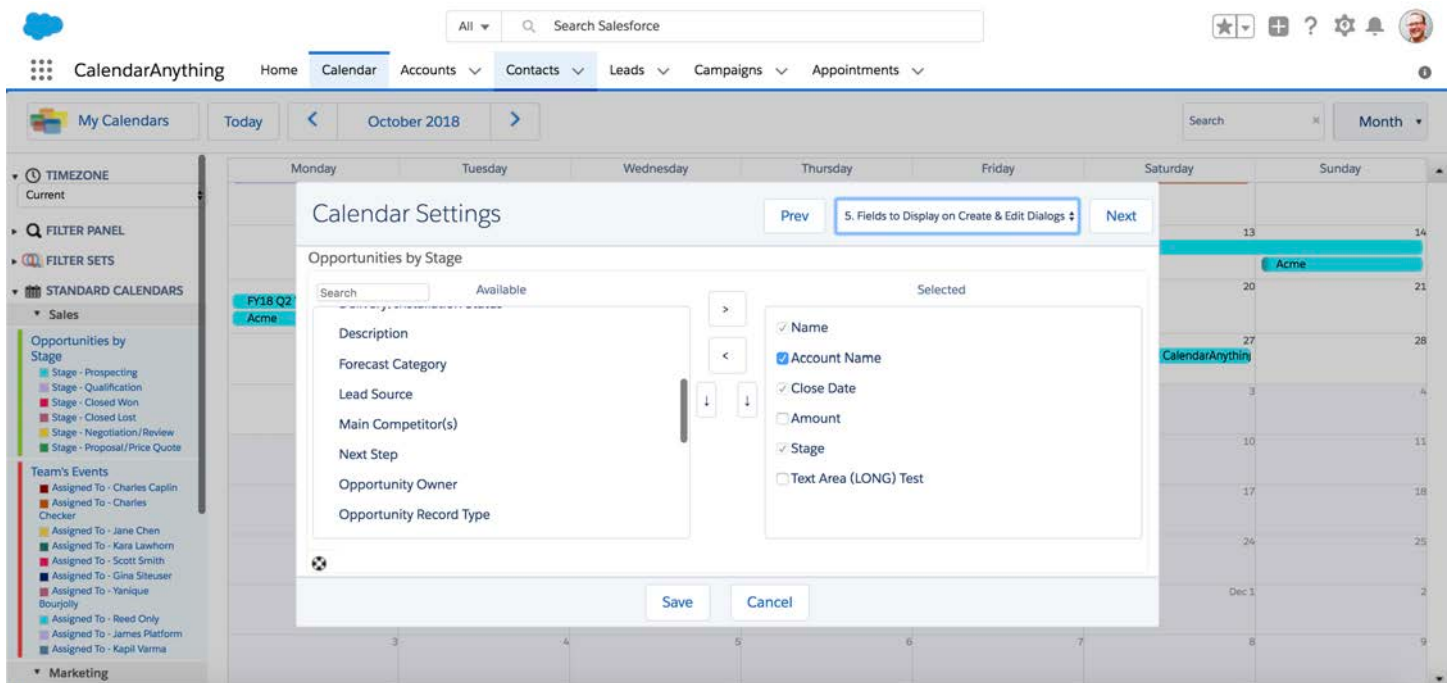


# How do I create and edit an entry?

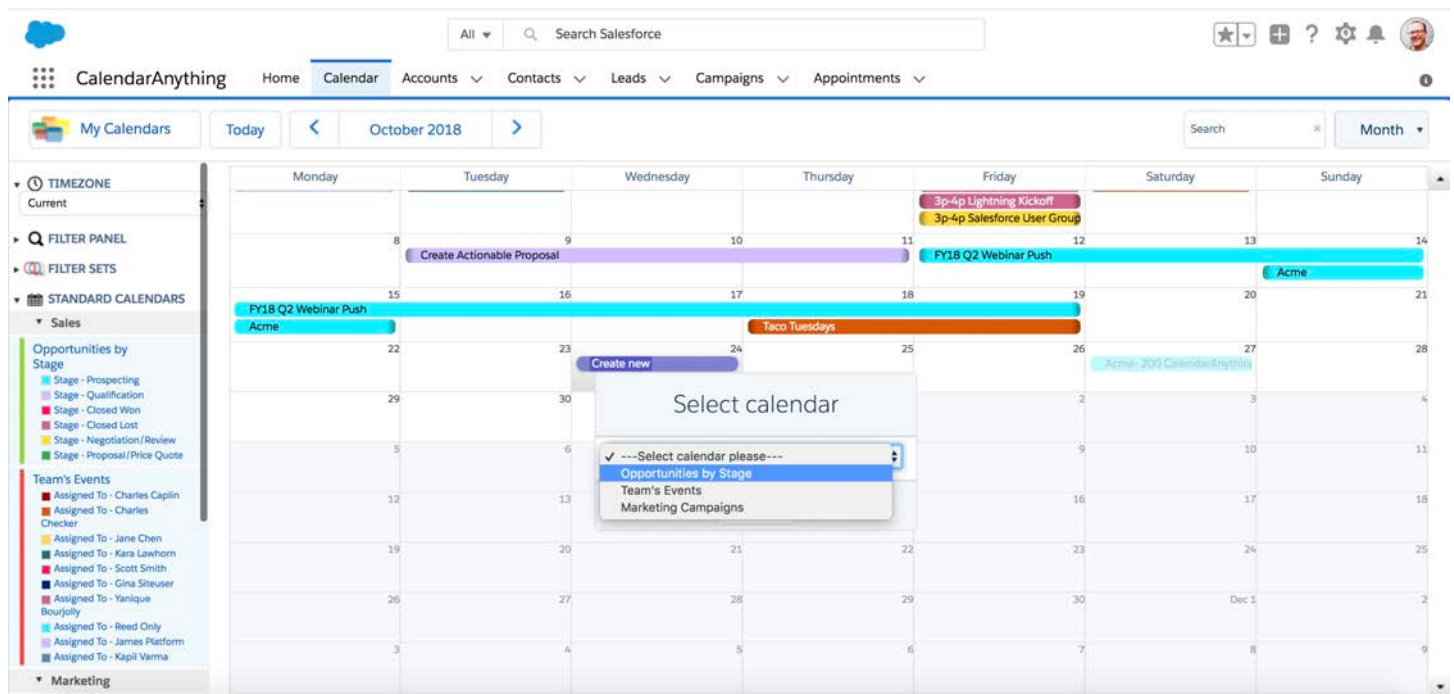
Users have the ability to create new Salesforce records and edit existing ones straight on the CalendarAnything UI. To enable this feature the Editable checkbox needs to first be selected in Step 2 of the Calendar setup.



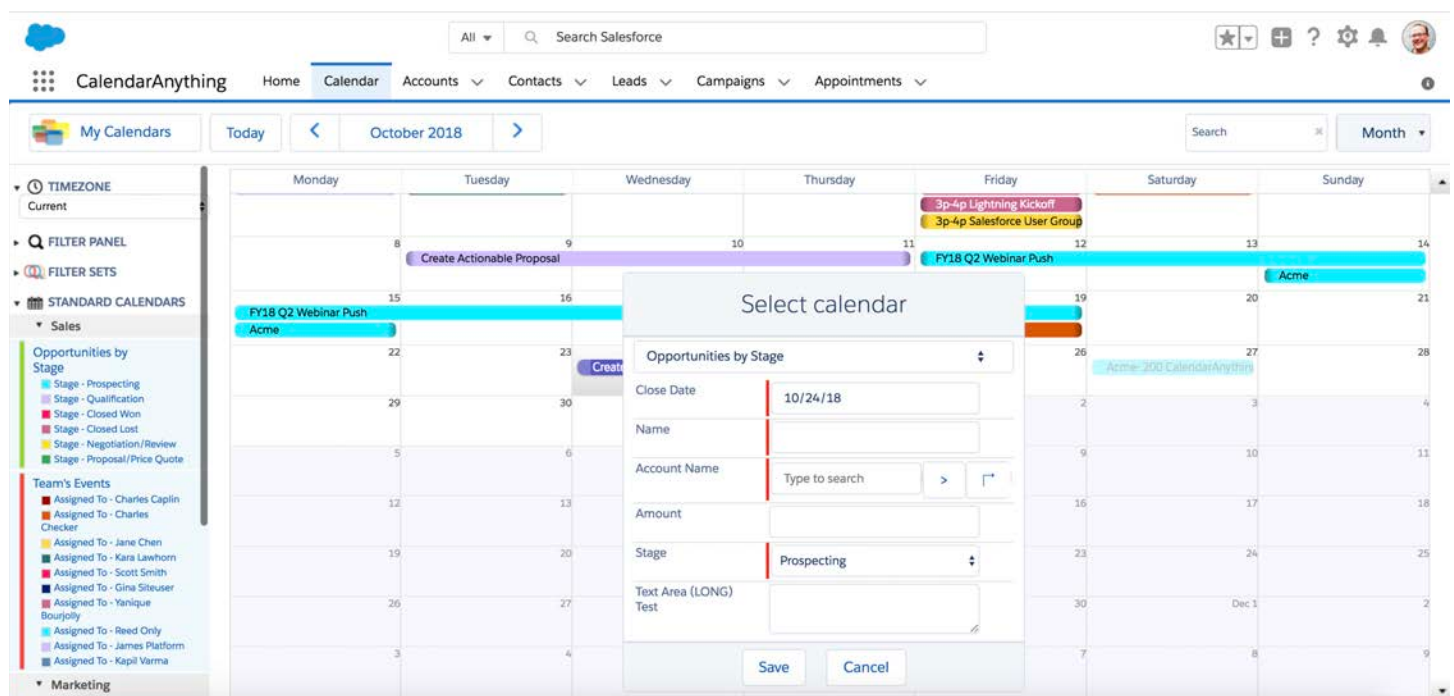
Then select Step 5 'Fields to Display on Create & Edit Dialogs'. From here choose the fields you want your users to fill out when creating a new record or editing an existing one. Some Salesforce objects have required fields, which may not be removed from the "Selected" box. Any validations rules are applicable as well.



To create a new record click on a date (or select a date range) on the calendar UI. From the dropdown select the calendar of choice.



Fill out the fields (those in red are required in order to save the entry) and 'Save' your new Salesforce record.



To edit an existing record, select the record of interest and then click the 'Edit' button.

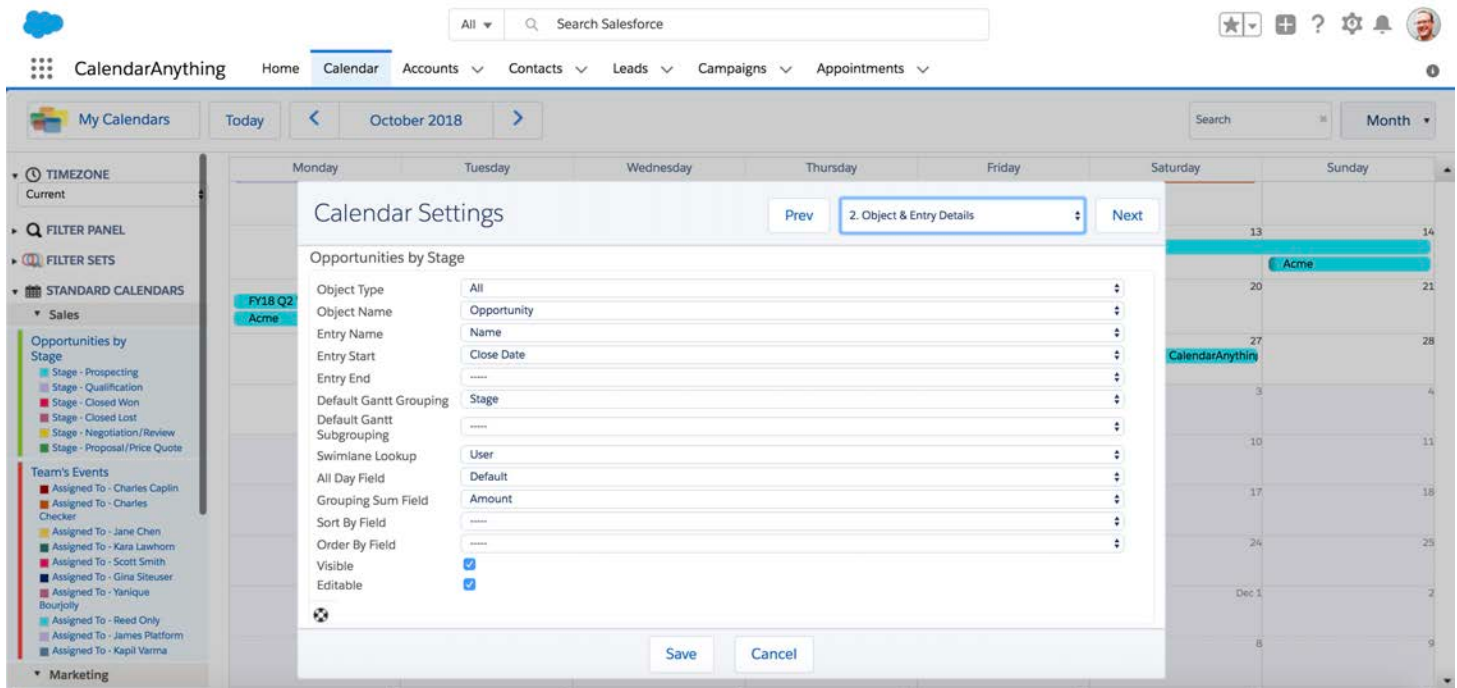
The screenshot shows the CalendarAnything interface with a calendar view for October 2018. A pop-up window titled "Team's Events" is open, displaying details for a "Lightning Kickoff" event. The event is scheduled from 10/24/18 4p to 10/26/18 3p and is assigned to Yanique Bourjolly. The pop-up includes tabs for GENERAL, RECORD, CHATTER, INVITEES, and ATTACHMENT. At the bottom of the pop-up are buttons for Edit, Details, Delete, More, and Close.

From there the edit pop-up will appear and then select 'Save'

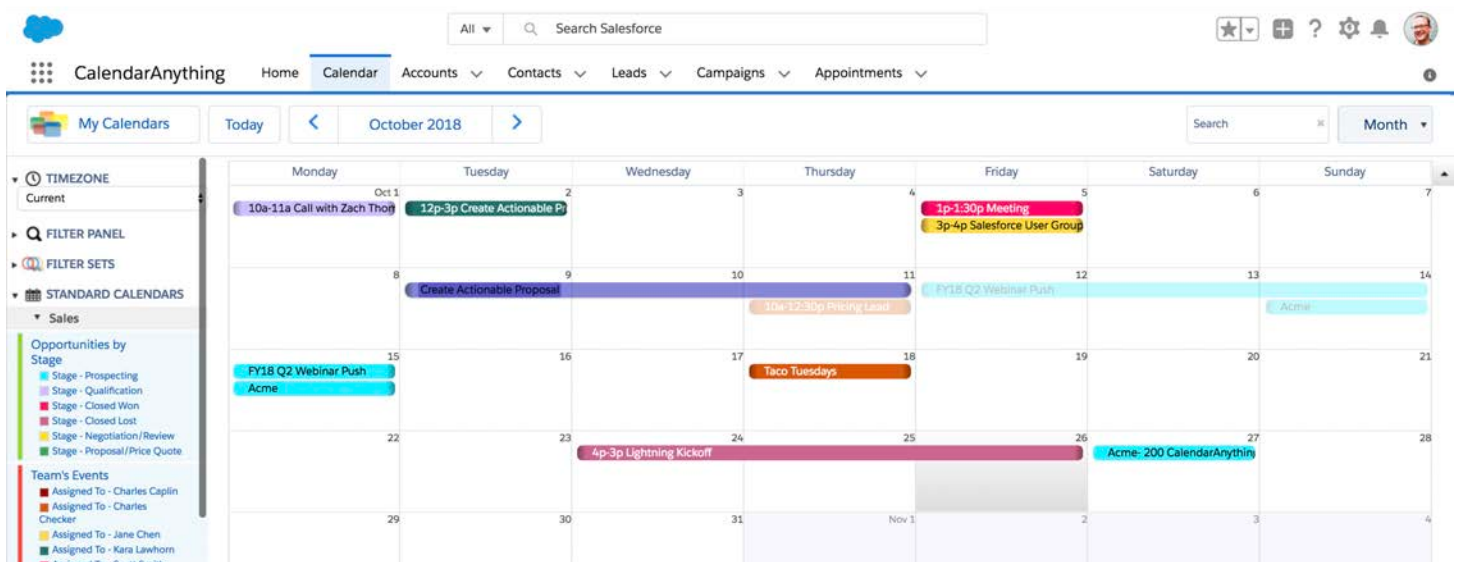
The screenshot shows the CalendarAnything interface with a calendar view for October 2018. A pop-up window titled "Edit" is open, displaying fields for Start Date Time (10/24/2018 4 PM), End Date Time (10/26/2018 3 PM), Assigned To (Yanique Bourjolly), Related To (Acme's), Subject (Lightning Kickoff), and Description. The pop-up includes buttons for Save and Cancel.

# How do I Drag & Drop an event?

Users have the ability to change the date field/s of your Salesforce records from the CalendarAnything interface by dragging and dropping. To enable this feature the Editable checkbox needs to first be selected in Step 2 of the Calendar setup.



You have the ability to change the date field/s of your Salesforce records straight on the CalendarAnything interface by dragging and dropping them with your cursor:



# How do I group in Swimlane view?

Swimlane is a view in CalendarAnything that is similar to the Standard Salesforce Calendar Multi-User Day View, but can show records from any object and be grouped by User or any given field. Users are able to scroll horizontally and vertically to see records.

The drop down menu allows you to see data either by the hour or day.

And users can choose from 4 Swimlane 'groupings' options.

### Option 1

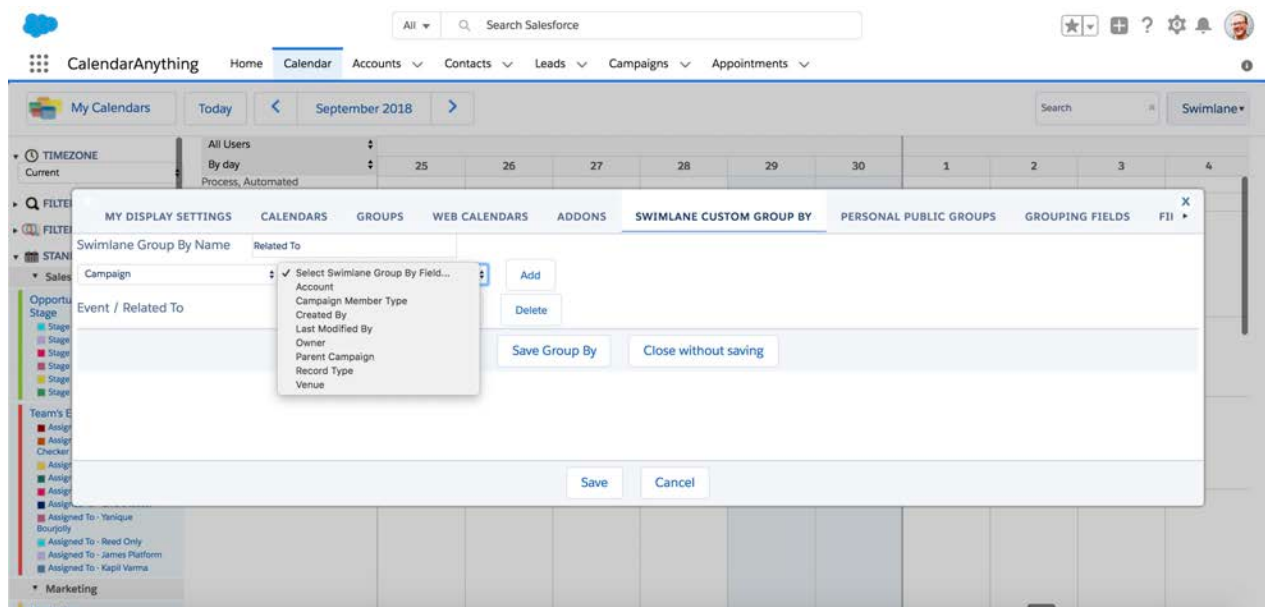
Option 1 will show and allow the user to select a Salesforce User list-view. Visibility to User list views are defined in 3 ways:

- Visible only to logged in user
- Visible to all users (Includes partner and customer portal users)
- Visible to certain groups of users

User can be added to list view but will not see it in CA if list-view it was not shared with him/her.

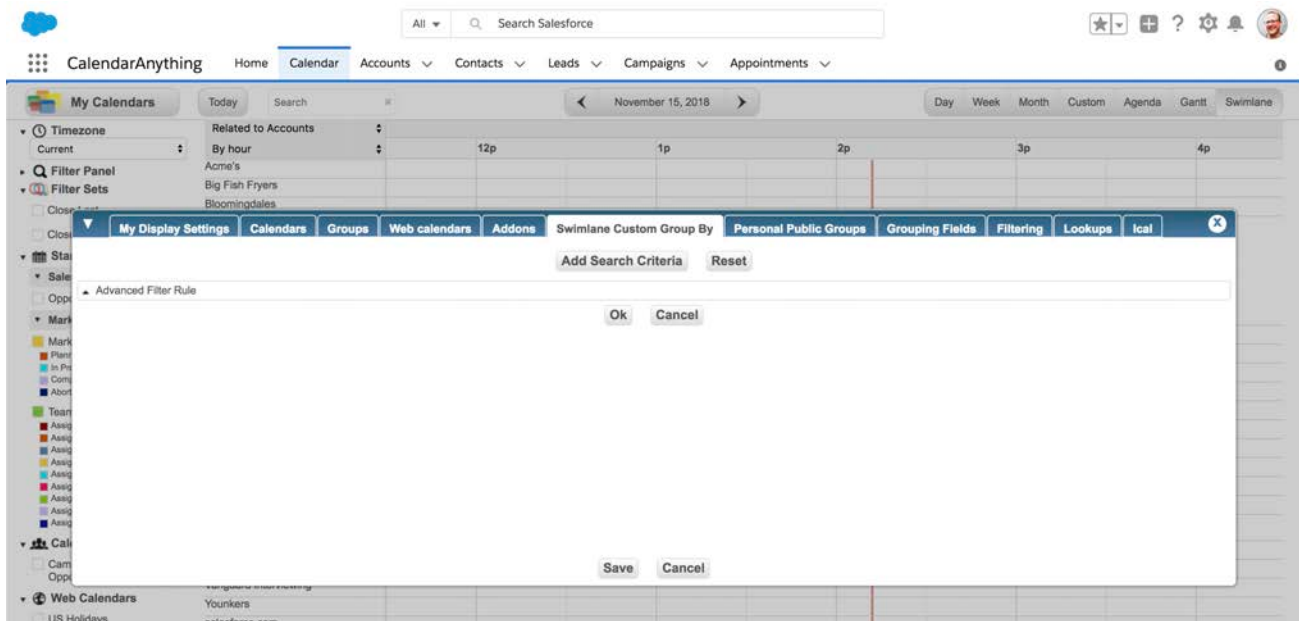
### Option 2 (Admin Only)

Option 2 will allow user to pick the Custom Group By preset. To create Group By presets, go to My Calendars>>Display Settings>>Swimlane Custom Group By>>Add new Group By



Then enter the preset name, specify the Object and Grouping field, and hit Add.

User can also add some filters for the Grouping field values and Title fields. After Group By preset is saved, it can be Cloned, Edited or Deleted.

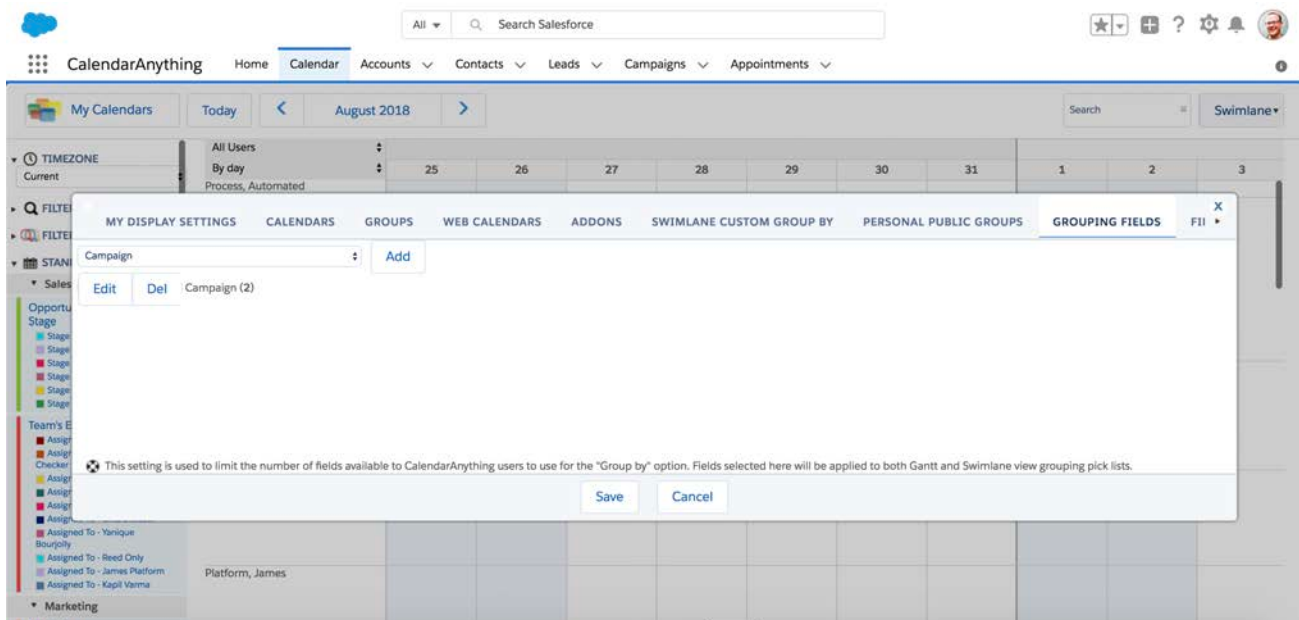


### Option 3

Option 3 will allow users to select the Public Group of Users to group by.

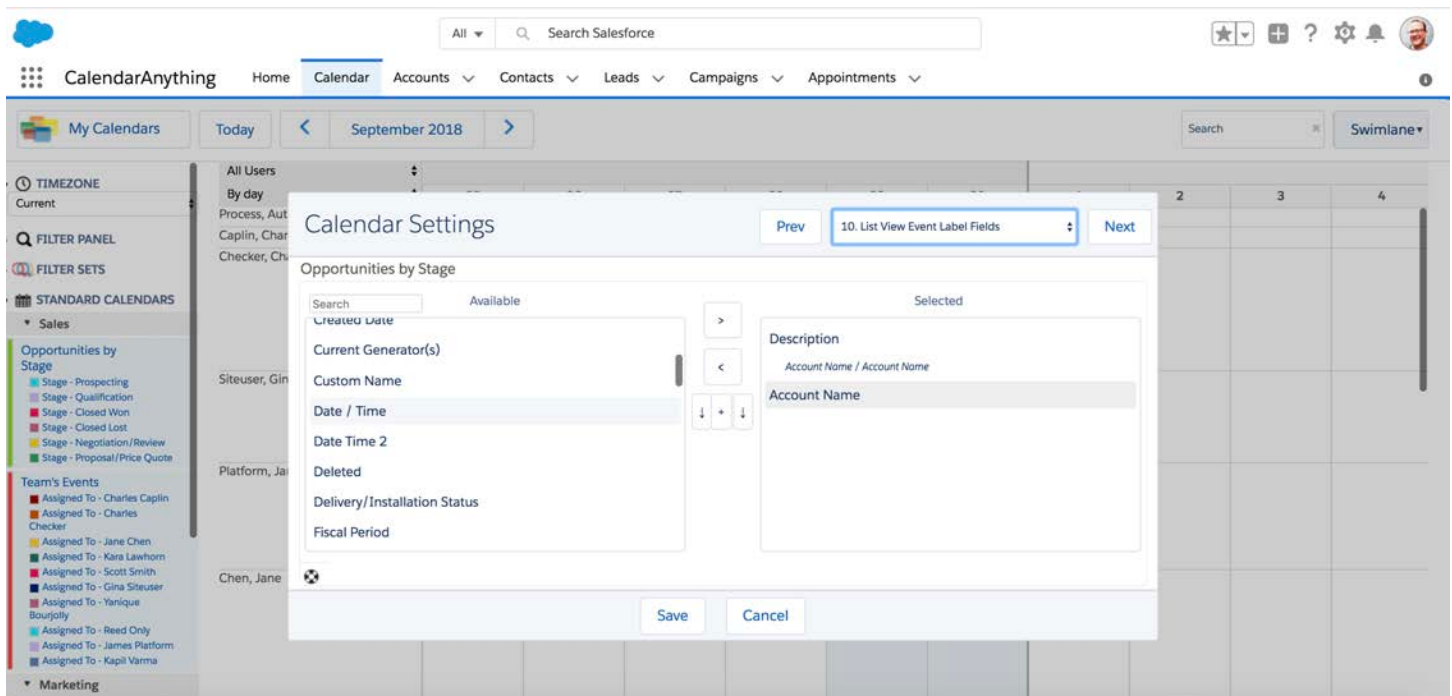
### Option 4 (Admin Only)

Option 4 will allow users to select a group by field. Note: if multiple calendars are enabled only fields that are common between the calendars will be available. User can limit the number of fields available for Group By field from Display Settings >> Grouping fields tab



ALL grouping options are also applicable to Day View with grouping as well as Gantt view grouping.\*

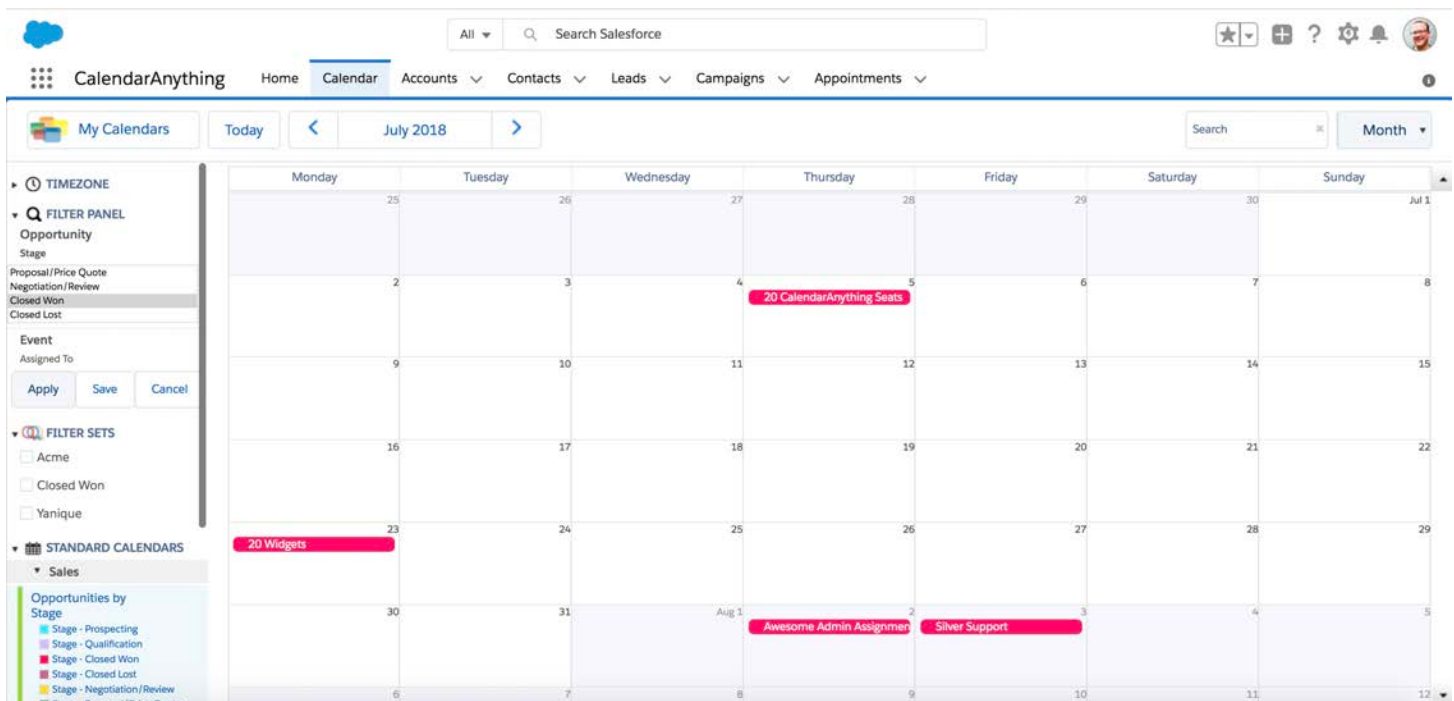
By default Entry label will be displayed for every record. Users can specify additional fields to display in Calendar Settings, Step 10.



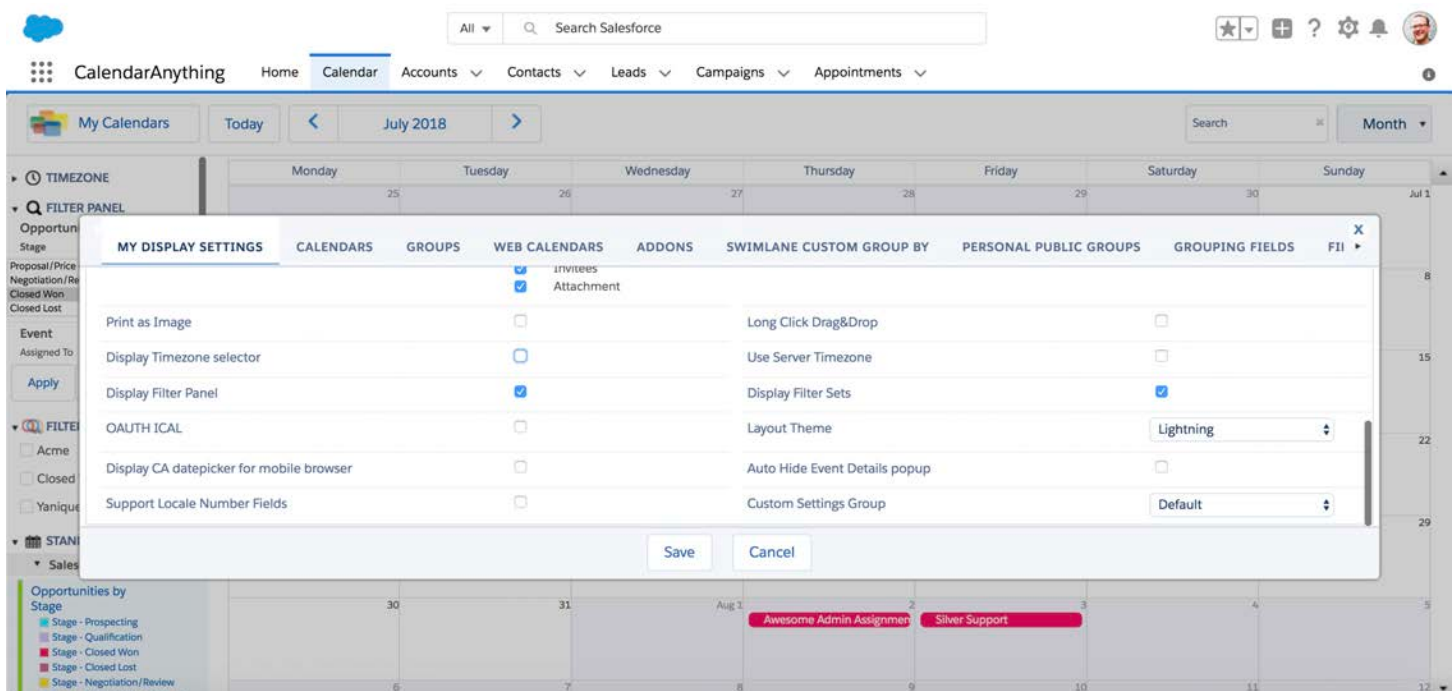
User are able to create a new record by clicking and/or dragging on the grid that would pop up the standard CalendarAnything create dialog. Records can be dragged, copied, cut, pasted, cloned, edited and deleted. If modified, the record will be updated accordingly.

# How do I use Filter sets?

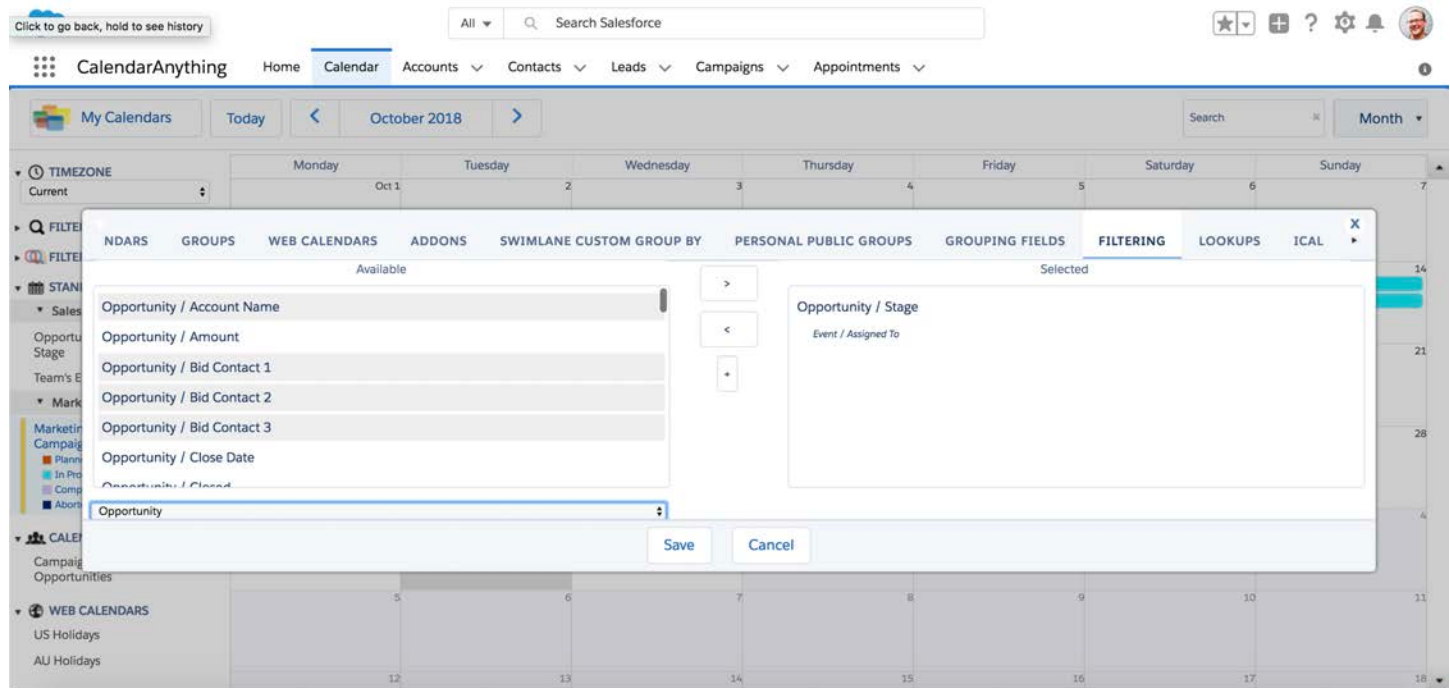
The Filter Panel allows you to pre-define criteria on a temporary basis without having to change the initial calendar setup, you can then save these predefined settings as a Filter Set.



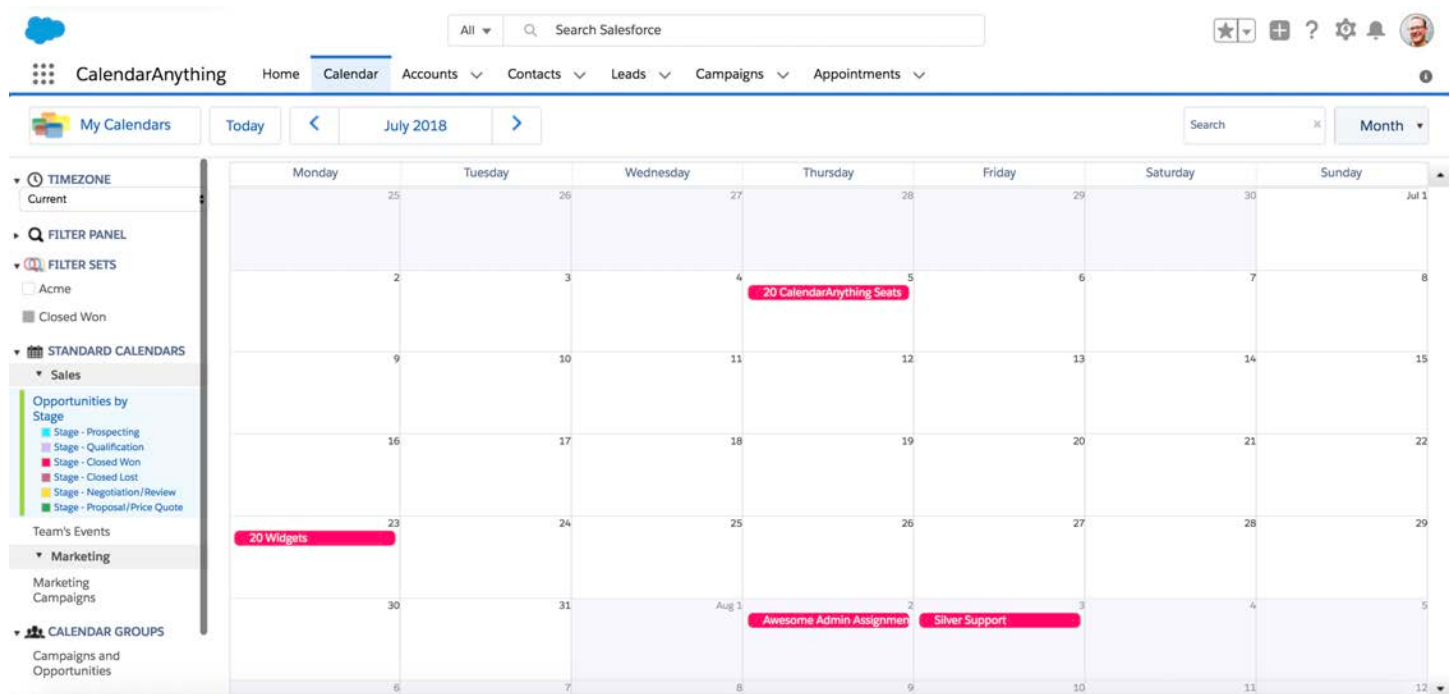
First go to 'My Calendars' >>Display Settings>>Layout Settings and select the 'Display Filter Panel' and the 'Display Filter Sets' checkbox.



Then go to the Filtering tab. From the picklist select the object of interest. Then move the desired field from 'Available' to 'Selected' and click 'Save'



The Filter Panel will now display the field. Users can then save this filter selection and create a Filter Set. Administrators can make these Filter Sets global for all users or users can predefine their own.

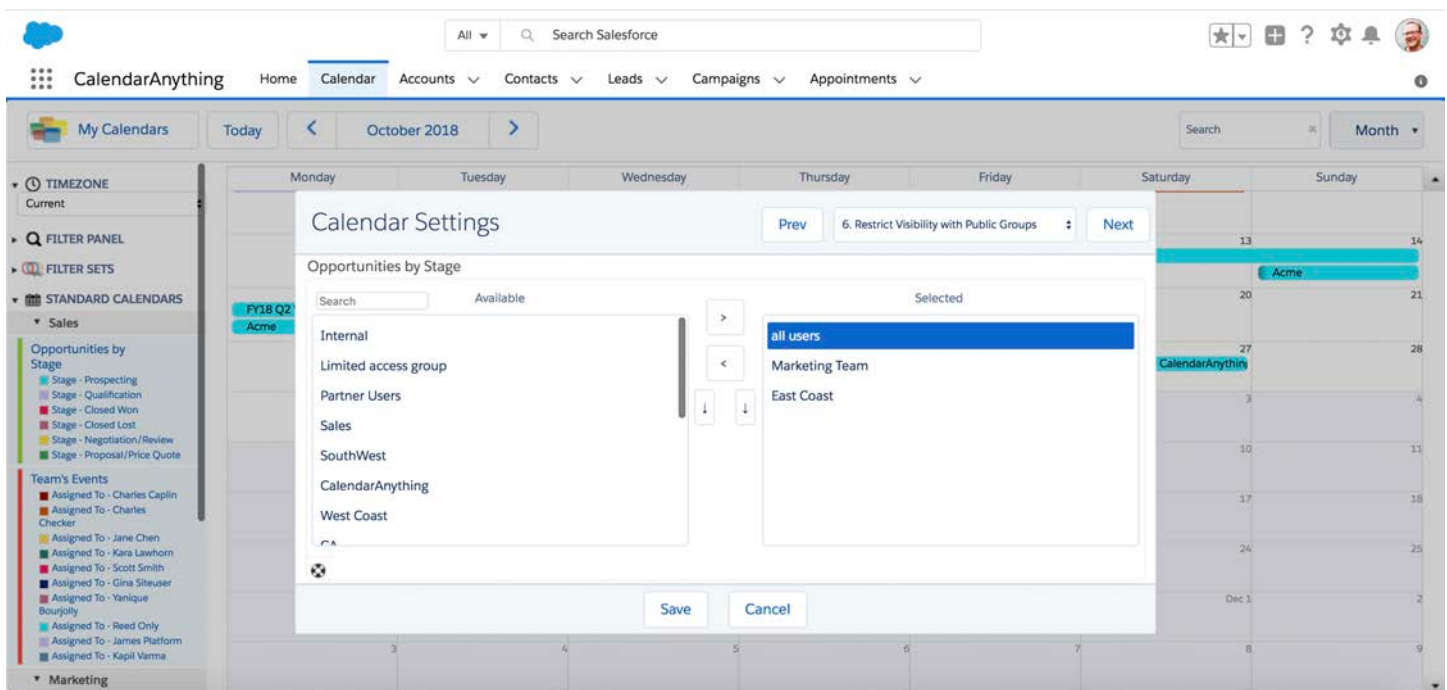


# How do I share a calendar within my organization?

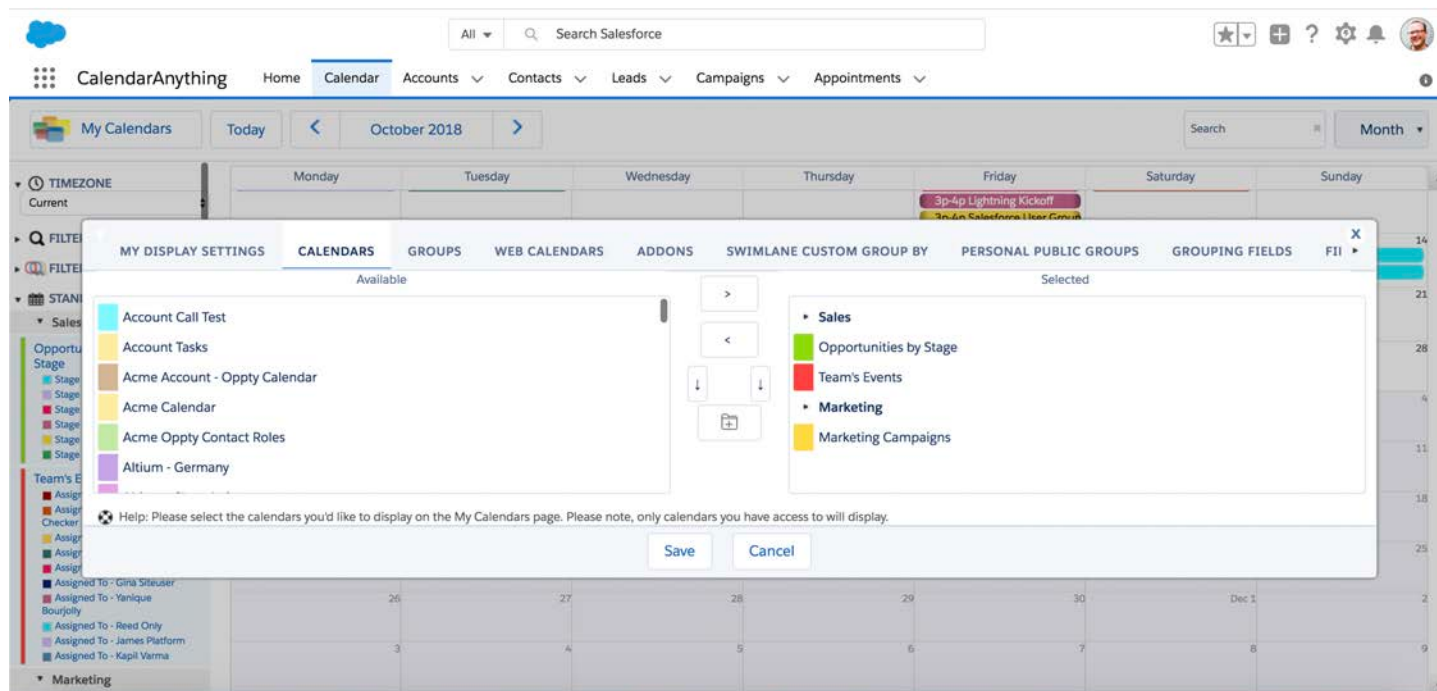
Some organizations decide to designate a “calendar admin” who is responsible for creating calendars to share with the rest of the organization.

CalendarAnything utilizes Salesforce’s ‘Public Groups’ feature to make this possible. Your system administrator will first have to create public groups in Salesforce setup (ex: according to role, hierarchy, etc.).

When creating/editing a calendar, you can then decide which public groups will have visibility to the calendar in Step 6 (Restrict Visibility) of the calendar setup.

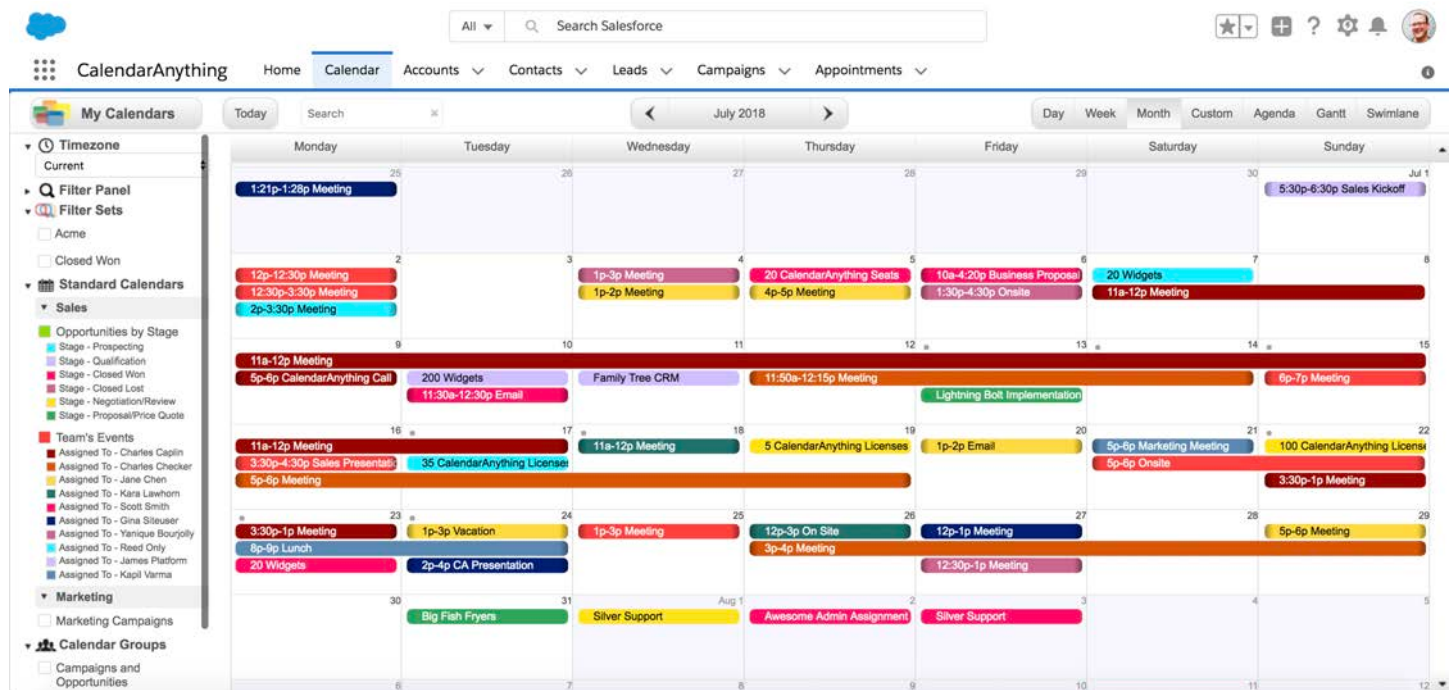


When a user opens CalendarAnything, they can go into their display settings (My Calendars>>Display Settings) and see the calendars they have available to them. (shown below). Users can then move calendars to the 'Selected' section to make them available on the calendar sidebar.

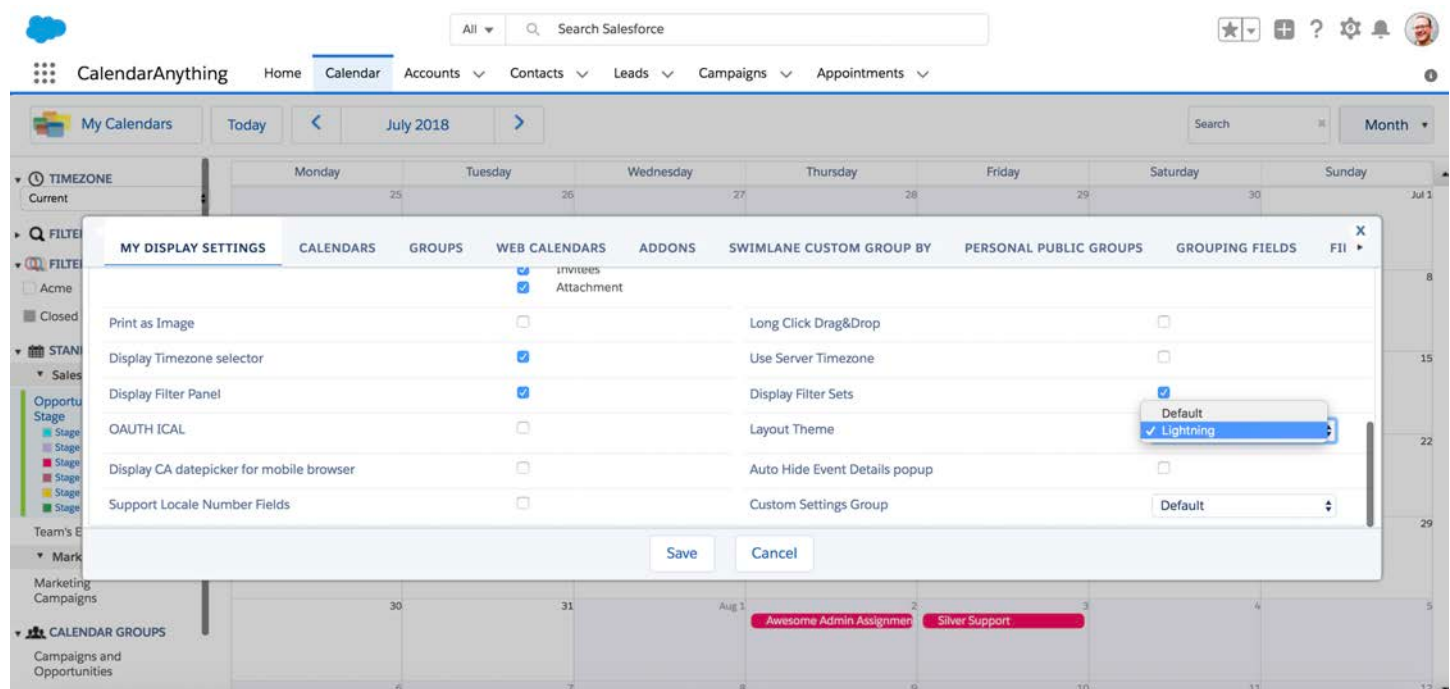


# How do I switch to “Lightning” view?

You can switch the look and feel of your CalendarAnything UI from the default view to a new and improved ‘Lightning’ view:



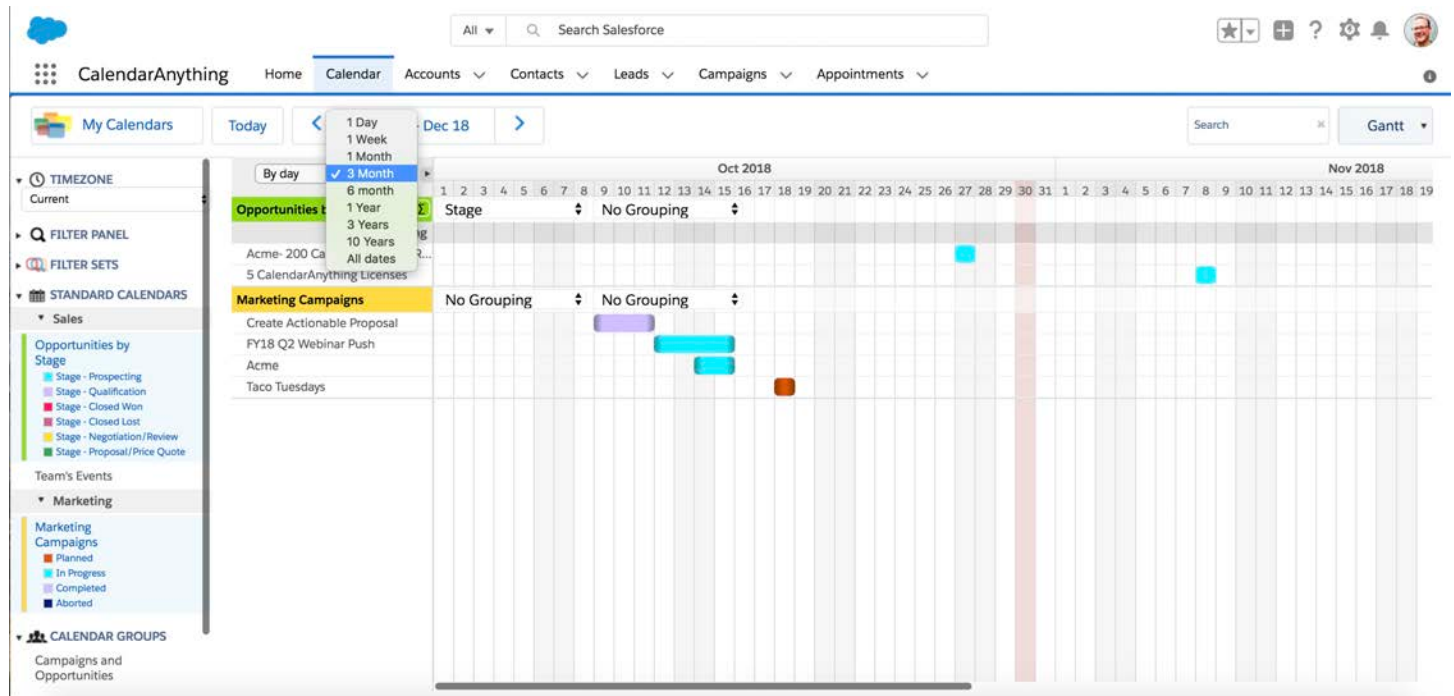
To enable this go to My Display Settings>Layout settings> Layout Theme>Lighting



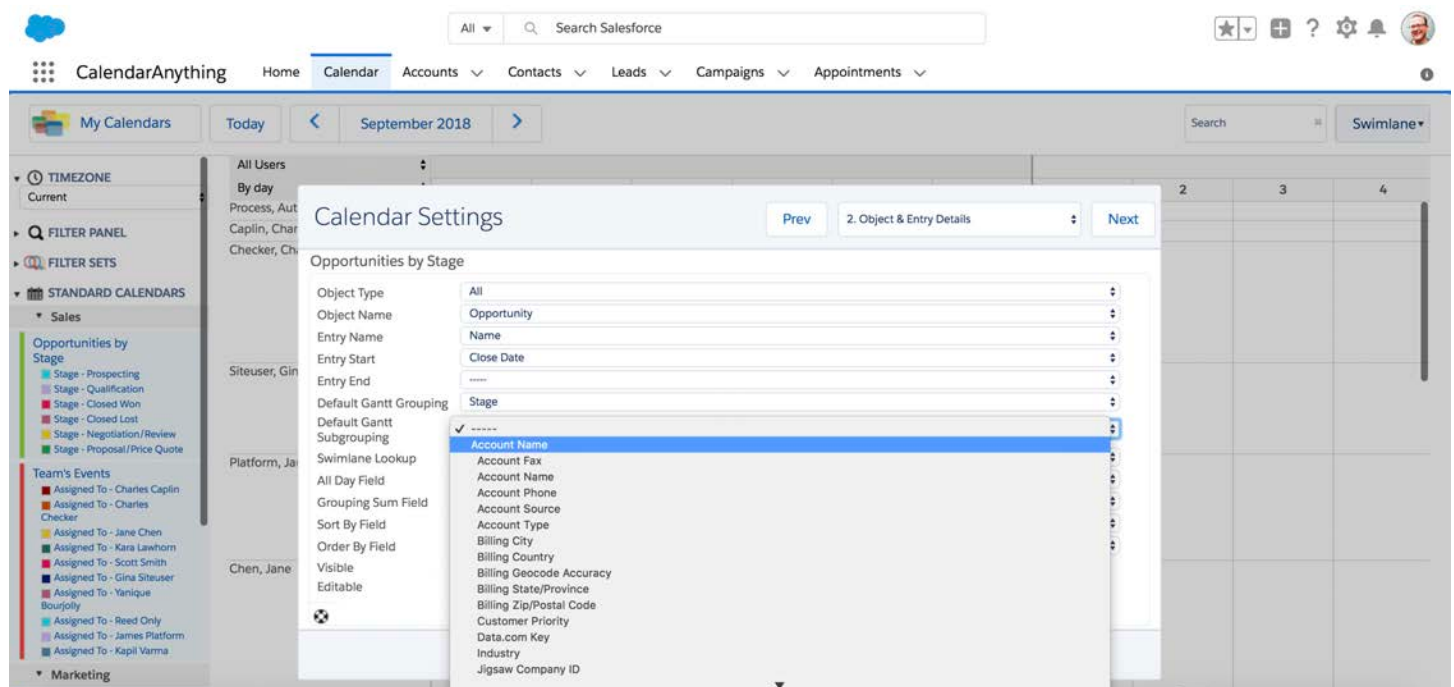
# How do I use Gantt view?

Gantt view is the perfect way to manage marketing campaigns, project plans and schedules over an extended time period.

Use the Gantt view time drop down to change the date range being displayed. Shrink or expand time by showing data by day, week month or quarter. Display 3 months, one year, or data from all time.



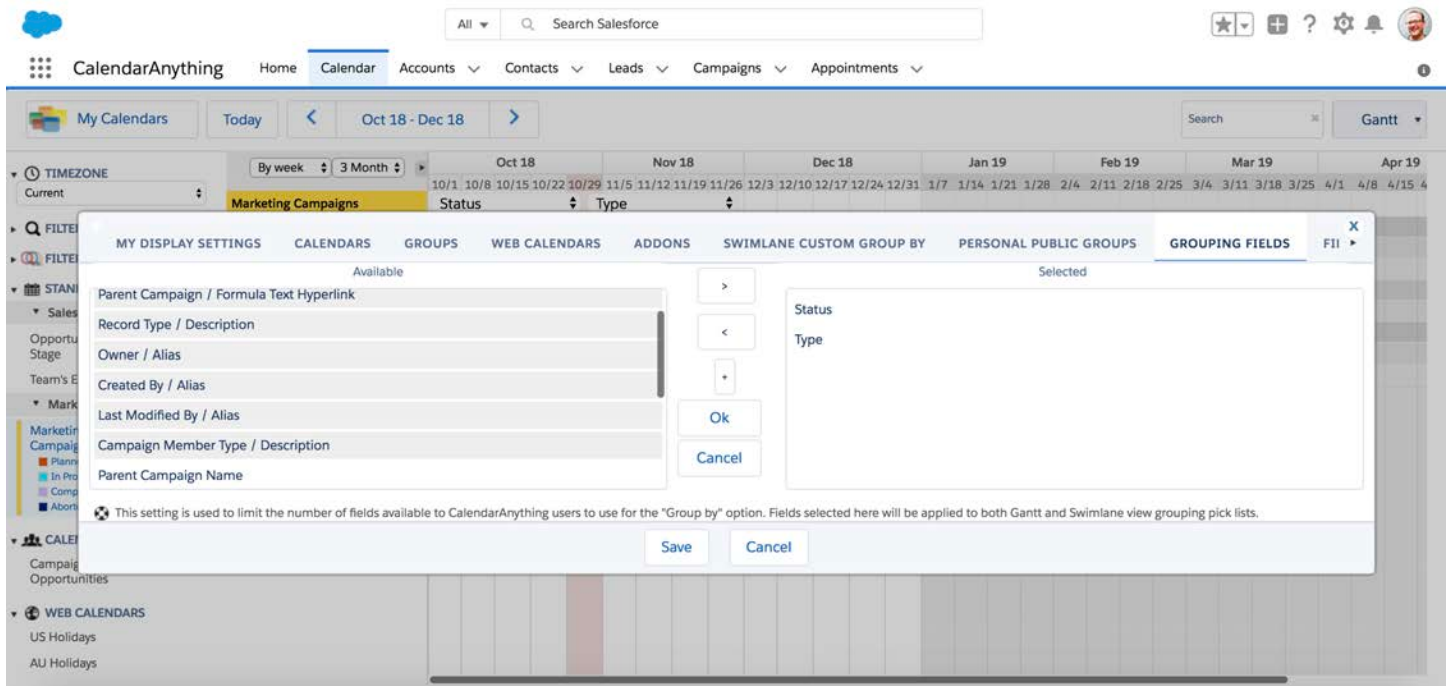
You can default which fields you want to group by in the “Default Gantt Grouping/Sub Grouping” setting specified for the calendar in Step 2.



Users can collapse the Gantt grouping to hide the rows below it by clicking on it.

User can limit the number of fields available for Gantt Grouping in the Display Settings >> Grouping fields tab

On this tab, User can select the object for which s/he wants to limit the number of grouping fields, and then click Edit and move the fields he wants to show for Gantt grouping from Available to Selected. Fields added in Grouping Tab apply to Gantt, Swimlane and Day View with grouping views.





## About Silverline

Silverline creates unique digital experiences that transform the way our clients do business. As a Salesforce Platinum Cloud Alliance Partner, Silverline leverages best practices acquired by over 1,100 implementations, with significant expertise in the Financial Services and Healthcare industries. Our Industry solution focus combines Strategic Advisory, technical implementation, and ongoing Managed Services to enable organizations to achieve maximum value with the Salesforce platform. Additionally, Silverline offers popular AppExchange applications and industry-proven Fullforce Certified accelerators.

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