



CalendarAnything

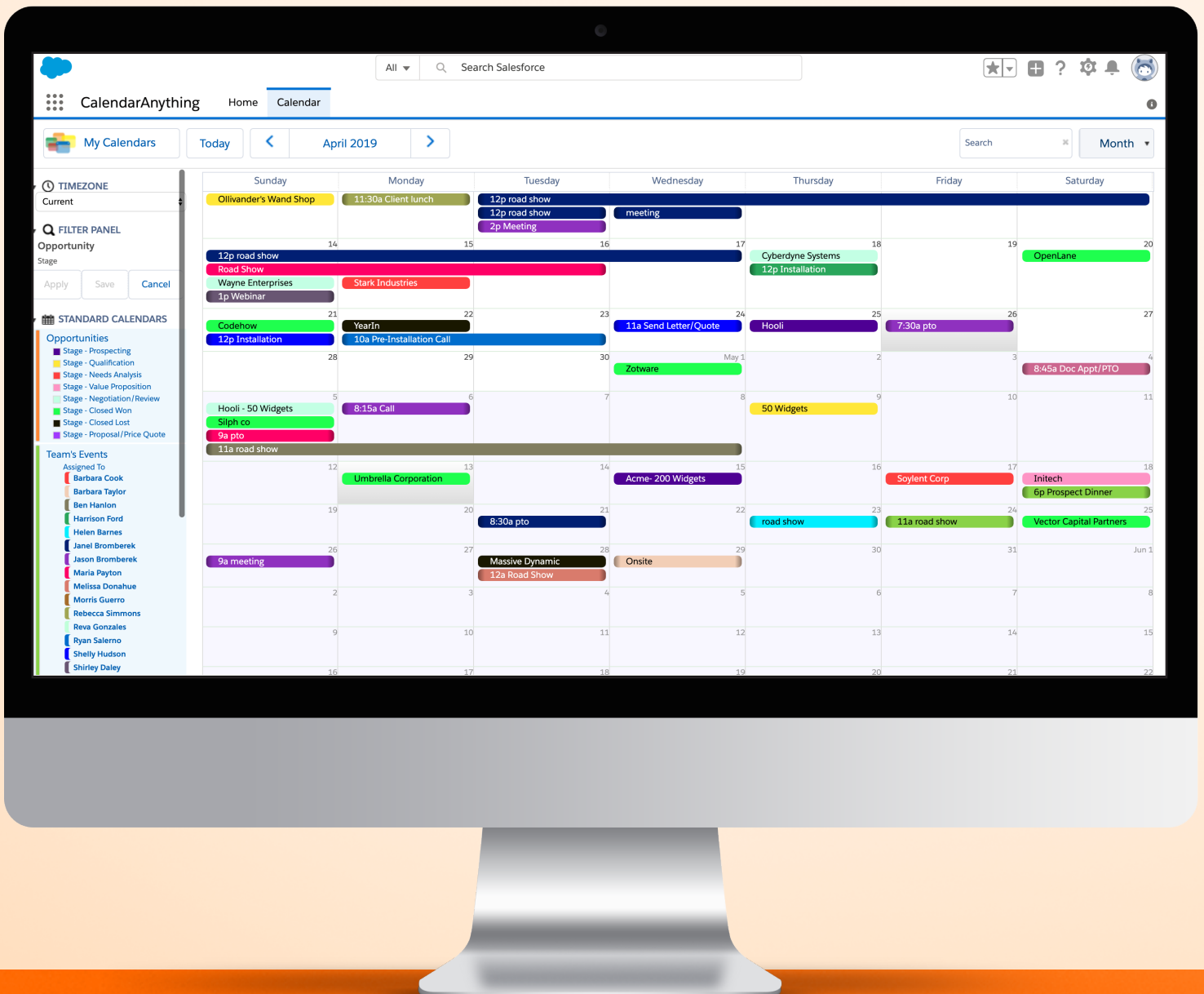




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Overview

CalendarAnything is a Salesforce.com application that allows users to create calendar views from any Standard or Custom objects that are a **date** or **date/time** field. CalendarAnything can be downloaded from the AppExchange at:

<http://appexchange.salesforce.com/listingDetail?listingId=a0N300000003Hn2kEAC>

This advanced admin guide is recommended for system administrators who already have at least a basic understanding of CalendarAnything functionality.

Implementation of the features described in this user guide will require system administrator access to the organization.

Technical Specifications

Salesforce.com supported versions:

Enterprise Edition, Unlimited Edition, Force.com Platform Edition, Developer Edition.

Salesforce.com users without the above versions are unable to use the app, even if CalendarAnything licenses are assigned to the user.

User Permissions Needed

All CalendarAnything clients are required to make the permission changes below. These changes will need to be made for all profiles or permissions sets that apply to users using CalendarAnything.

1. Make sure that Organization Wide Default access is set to Private for all objects with “CA_” prefix.
2. From **Setup**, click **Manage Users | Profiles**.
3. Select a profile.

Enhanced Profile User Interface	Standard Profile User Interface
• Click on Object Settings • Select any of the CalendarAnything custom objects, these objects have the “CA_” prefix. • Make sure profile has “Create” permission on “CA_UserSettings”. • Check the Read column to see if all fields are checked. If all fields are checked select the next CA_ custom object. • If some fields are unchecked, click the Edit button and check all fields under the Read column. • Save changes. • Repeat for the next CA_ custom object. • Repeat until all fields on all CA_ custom objects are visible for that profile.	• Make sure profile has “Create” permission on “CA_UserSettings”. • Scroll to the Field Level Security section. • Locate the CalendarAnything custom objects, these objects will have the “CA_” prefix. • Click View next to each CA_ custom object to show the field security settings. • Check the Visible column to see if all fields are checked. If all fields are checked, click Back to Profile button. • If some fields are unchecked, click the Edit button and check all fields under the Visible column. • Save changes. • Return to profile details and repeat for the next CA_ custom object. • Repeat until all fields on all CA_ custom objects are visible for that profile.

Next, enable Apex Class Access for all CalendarAnything components (those with the “SLCA2” prefix). Also enable Visualforce Page Access for all CalendarAnything components (also beginning with the “SLCA2” prefix).

Enabled Apex Class Access

[Edit](#)
[Enabled Apex Class Access Help ?](#)

Apex Class Name	AppExchange Package Name
SLCA2.CA_ActionRouterController	CalendarAnything
SLCA2.CA_AjaxResponseController	CalendarAnything
SLCA2.CA_CalendarWrapper	CalendarAnything
SLCA2.CA_DataLayer	CalendarAnything
SLCA2.CA_DataUtils	CalendarAnything
SLCA2.CA_EventHandlerController	CalendarAnything
SLCA2.CA_EventWrapper	CalendarAnything
SLCA2.CA_FieldWrapper	CalendarAnything
SLCA2.CA_Fields	CalendarAnything
SLCA2.CA_Filters	CalendarAnything
SLCA2.CA_GanttChart_controller	CalendarAnything
SLCA2.CA_GroupCreator_controller	CalendarAnything
SLCA2.CA_GroupWrapper	CalendarAnything
SLCA2.CA_JsonCompiler	CalendarAnything
SLCA2.CA_Options	CalendarAnything
SLCA2.CA_ParentController	CalendarAnything
SLCA2.CA_PostInstall	CalendarAnything
SLCA2.CA_PublicCalendar_controller	CalendarAnything
SLCA2.CA_Security	CalendarAnything
SLCA2.CA_Shares	CalendarAnything
SLCA2.CA_Trace	CalendarAnything
SLCA2.CA_iCalWSDL	CalendarAnything
SLCA2.CalendarAnything_pageController	CalendarAnything

Enabled Visualforce Page Access

[Edit](#)
[Enabled Visualforce Page Access Help ?](#)

Visualforce Page Name	AppExchange Package Name
SLCA2.AllEvents	CalendarAnything
SLCA2.CA_AjaxResponses	CalendarAnything
SLCA2.CA_EventHandler	CalendarAnything
SLCA2.Calendar	CalendarAnything
SLCA2.CalendarAnything	CalendarAnything
SLCA2.CalendarEditBtn	CalendarAnything
SLCA2.CalendarNewBtn	CalendarAnything
SLCA2.CalendarsList	CalendarAnything
SLCA2.EventHover	CalendarAnything
SLCA2.GanttChart	CalendarAnything
SLCA2.GroupCreator	CalendarAnything
SLCA2.NewWebBtn	CalendarAnything
SLCA2.SL_FilterLookupPage	CalendarAnything
SLCA2.ca	CalendarAnything
SLCA2.camanifest	CalendarAnything
SLCA2.ical	CalendarAnything
SLCA2.robots	CalendarAnything
SLCA2.sitecalendar	CalendarAnything
SLCALE.SL_RESTSession	CalendarAnything Lightning

Enabled External Data Source Access

[Edit](#)
[Enabled External Data Source Access Help ?](#)

No External Data Sources enabled

Enable profile access to CalendarAnything custom Apex classes and Visualforce pages

Please see the explanations of CA_ custom object functions to determine what other permissions user profiles might require.

“CA_” object functions to help in determining sharing settings.

Object Name	Function	User Profile Permissions Needed
CA_Calendar	main object used for storing Standard Calendars.	Read, Create (if creating calendars), Edit, Delete (if deleting calendars), View All.
CA_HoverFields	stores fields that display on the “hover dialog”	Read, Create, Edit, Delete, View All.
CA_CreatingField	stores fields used on the “Quick Create” popup when creating events from the CalendarAnything page	Read, Create, Edit, Delete, View All.
CA_CalendarToken	stores calendar token	Read, Create, Edit, Delete, View All.
CA_Filters	stores information about calendar filters	Read, Create, Edit, Delete, View All.
CA_Groups	stores information about Calendar Groups	Read, Create (if creating Calendar Groups), Edit, Delete, View All.
CA_GroupsMembers	stores information about available groups	Read, Create, Edit, Delete, View All.
CA_Sites	stores information about available Force.com sites	Read, Create, Edit, Delete, View All.
CA_UserSettings	stores user settings such as list of visible calendars.	Read, Create, Edit, Delete, View All.
CA_WebCalendar	stores list of Web Calendars. Will not be used by client.	Read, Create, Edit, Delete, View All.

Another way to ensure the necessary access to CalendarAnything Application is given, is to use a Permission Set (now included in CalendarAnything Application).

ADMINISTRATION

Users

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

> Data

> Email

PLATFORM TOOLS

> Apps

> Feature Settings

> Einstein

> Objects and Fields

> Events

> Process Automation

> User Interface

> Custom Code

> Development

> Environments

SETUP

Permission Sets

Help for this Page

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Edit Delete Create New View

New

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Permission Set Label	Description	License
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
Clone	CalendarAnything Default Permission Set	Standard permissions, allows creating & editing of calendars, subje...	
Clone	Einstein Analytics Platform Admin	Create and customize Einstein Analytics apps, dashboards, datase...	Analytics Platform
Clone	Einstein Analytics Platform User	View Einstein Analytics apps and dashboards.	Analytics Platform
Clone	Einstein Analytics for Sales Cloud	View and manage Einstein Analytics for Sales Cloud	Analytics Template Administration
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

1-7 of 7 0 Selected << Previous Next >> Page 1 of 1

Permission Sets Setup

When added to the User record, this Permission Set allows creating and editing of calendars, subject to other object permissions and sharing rules.

SETUP

Permission Sets

Help for this Page

Permission Set Assignments

Jason Bromberek

Save Cancel

Available Permission Sets

CRM User
Einstein Analytics Platform Admin
Einstein Analytics Platform User
Einstein Analytics for Sales Cloud
Salesforce Console User
Standard Einstein Activity Capture

Add
Remove

Enabled Permission Sets

CalendarAnything Default Permission Set

Save Cancel

CalendarAnything Default Permission Set

Publishing Public Site Calendars via Force.com Sites

The **Site Calendar** feature allows you to create a read-only version of a CalendarAnything calendar and display this on a Force.com sites page.

Site Calendars are available via a public URL without the need for Salesforce authentication. Be sure the calendar you are sharing in this method does not include information that should not be made available to the public. With the Site Calendar, you can only display one calendar per URL. Viewers using this URL will be unable to open records.

In order for the Site Calendar to display properly, the object being referenced in the CalendarAnything calendar will need to have at least **Public Read Only** access in **Sharing Settings**. (Your **Name>>Setup>>Administration Setup>>Security Controls>>Sharing Settings**).

To create a Site Calendar, first create the Force.com site page you will use to display the calendar.

To set up a Force.com site for use with CalendarAnything:

1. Click Your **Name>>Setup>>Develop>>Sites**.
2. If this is the first time this feature is being used, you will be asked to register a custom Force.com domain for your organization. This cannot be changed.
3. Create a new Force.com site for use with CalendarAnything.

Force.com sites have certain limits depending on an organization's Salesforce edition. For more information visit: https://na12.salesforce.com/help/doc/en/sites_limits.htm

4. Enter a **Site Label**. We suggest using something that "CalendarAnything" or "Calendar" for easy identification.

Site Edit

New Site [Save] [Cancel]

Site Label: CalendarAnything [i]

Site Name: CalendarAnything [i]

Site Description: [Text Area]

Site Contact: Shelly Hudson [Search] [i]

Default Web Address: http://silverlinedemoorg.force.com/ [i]

Active: ☐ [i]

Active Site Home Page: [Select] [Search] [i]

Inactive Site Home Page: InMaintenance [Search] [Preview]

Site Template: SiteTemplate [Search] [i]

Site Robots.txt: [Text Field] [Search] [i]

Site Favorite Icon: [Image Field] [Search] [i]

Analytics Tracking Code: [Text Field] [i]

URL Rewriter Class: [Text Field] [Search] [i]

Enable Feeds: ☐

Clickjack Protection Level: Allow framing by the same origin only (Recommended) [Dropdown] [i]

Require Secure Connections (HTTPS): ☒ [i]

5. Select a User as the **Site Contact**.
6. **Default Web Address** applies to organizations with a Salesforce edition that allows for the creation of multiple Force.com sites. You can use this field to add a default address for each Force.com site.
7. Enter an **Active Site Home Page**. Use the lookup to select the **sitecalendar** template. This template is installed with your CalendarAnything package.

It is important to select the right site template for the Active Site Home Page. See next image for help.

Lookup

sitecalendar

You can use "*" as a wildcard next to other characters to improve your search results.

< Clear Search Results

Search Results

Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
sitecalendar	sitecalendar	SLCA2	44.0		JBROM	3/1/2019 10:56 AM	JBROM	3/1/2019 10:56 AM

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Selecting the "sitecalendar" template

8. Optional: Select a template for Inactive Site Home Page (the page users will see if the page is unable to load). The "InMaintenance" template is a standard Force.com template available in your organization.
9. You may choose to check the Active check box now to activate the site. Alternatively, when you are ready to make the site public, click Activate on the Site Edit or Site Details pages.
10. Save your changes.

Return to the Site Details page and click the Public Access Settings button to open the Profile page for the sites user.

Site Details
CalendarAnything Test

[Back to List: Sites](#)

Site Detail

Site Label	CalendarAnything Test	Site Name	CalendarAnything_Test
Site Description		Site Contact	Scott Smith
Active	☒	Login	Not Allowed
Active Site Home Page	SLCA2.sitecalendar [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	robots [Preview]
Site Template	SiteTemplate [Preview]	Enable Feeds	☐
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by any page (No protection)	Require Secure Connections (HTTPS)	☒ i
Lightning Features for Guest Users	☒ i	Upgrade all requests to HTTPS	☐ i
Enable Content Sniffing Protection	☐ i	Enable Browser Cross Site Scripting Protection	☐ i
Referrer URL Protection	☐ i	Guest Access to the Support API	☐ i
		Created By	Scott Smith, 1/10/2012 5:16 PM
Last Modified By	Scott Smith, 3/11/2016 3:17 PM		

Site Details page

On the **Sites Profile** page, edit the sites user access to objects in the org.

Profile

CalendarAnything Test Profile

[Help for this Page](#)

Find Settings...

Edit Properties

Profile Overview

Assigned Users

Description			
User License	Guest User License	Custom Profile	☒
	☒	Created By	Scott Smith, 1/10/2012 5:16 PM
Last Modified By	Jane Chen, 6/15/2019 3:04 AM		

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Named Credential Access

Permissions to authenticate against named credentials

[Sites Profile page](#)

The site user will need "Read" access to all CalendarAnything objects (with the "CA_" prefix). You will also need to enable "Read" access to any objects that the calendars are based on.



SETUP

Profiles

CA_Analytics	--	--	Tab Hidden	--
CA_AnalyticsReport	--	--	Tab Hidden	--
CA_Calendar	Read, Create, Edit, Delete	20	Default On	CA_Calendar Layout
CA_CalendarByUsers	Read, Create, Edit, Delete	7	Default On	CA_CalendarByUser Layout
CA_CalendarTokens	Read, Create, Edit, Delete	10	Tab Hidden	CA_CalendarToken Layout
CA_CreatingFields	Read, Create, Edit, Delete	8	Tab Hidden	CA_CreatingField Layout
CA_FiltersPlural	Read, Create, Edit, Delete	10	--	CA_Filters Layout
CA_GroupsMembersPlural	Read, Create, Edit, Delete	6	--	CA_GroupsMembers Layout
CA_GroupsPlural	Read, Create, Edit, Delete	9	Tab Hidden	CA_Groups Layout
CA_HoverFieldsPlural	Read, Create, Edit, Delete	9	--	CA_HoverFields Layout
CA_Sites	Read, Create, Edit, Delete	6	--	CA_Sites Layout
CA_tests	Read, Create, Edit, Delete	9	--	CA_test Layout
CA_UsageMetrics	No Access	12	Tab Hidden	CA UsageMetrics Layout
CA_UserSettings	Read, Create, Edit, Delete	12	Tab Hidden	CA_UserSettings Layout
CA_WebCalendars	Read, Create, Edit, Delete	7	--	CA_WebCalendar Layout
Calendar	--	--	Default On	--
CalendarAnything	--	--	Default On	--
CalendarAnything (Read)	--	--	Tab Hidden	--
CalendarAnything Mobile	--	--	Tab Hidden	--
CA Mobile	--	--	Default On	--
Campaign Members	--	29	--	Campaign Member Page Layout
Campaigns	Read	49	Tab Hidden	Varies by Record Type
Cases	Read	37	Tab Hidden	Case Layout
Chatter	--	--	Default On	--
Child Object	No Access	10	--	Child Object Layout
COMMUNITY EMBED CAL	--	--	Tab Hidden	--
Conferences	No Access	8	Tab Hidden	Conference Layout

[Enable access to CalendarAnything custom objects](#)

Enabled Apex Class Access

Edit

Enabled Apex Class Access Help ?

Apex Class Name	AppExchange Package Name
SLCA2.CA.ActionRouterController	CalendarAnything
SLCA2.CA.AjaxResponseController	CalendarAnything
SLCA2.CA.CalendarWrapper	CalendarAnything
SLCA2.CA.DataLayer	CalendarAnything
SLCA2.CA.DataUtils	CalendarAnything
SLCA2.CA.EventHandlerController	CalendarAnything
SLCA2.CA.EventWrapper	CalendarAnything
SLCA2.CA.FieldWrapper	CalendarAnything
SLCA2.CA.Fields	CalendarAnything
SLCA2.CA.Filters	CalendarAnything
SLCA2.CA.GanttChart_controller	CalendarAnything
SLCA2.CA.GroupCreator_controller	CalendarAnything
SLCA2.CA.GroupWrapper	CalendarAnything
SLCA2.CA.JsonCompiler	CalendarAnything
SLCA2.CA.Options	CalendarAnything
SLCA2.CA.ParentController	CalendarAnything
SLCA2.CA.PostInstall	CalendarAnything
SLCA2.CA.PublicCalendar_controller	CalendarAnything
SLCA2.CA.Security	CalendarAnything
SLCA2.CA.Shares	CalendarAnything
SLCA2.CA.Trace	CalendarAnything
SLCA2.CA.iCalWSDL	CalendarAnything
SLCA2.CalendarAnything_pageController	CalendarAnything

Enabled Visualforce Page Access

Edit

Enabled Visualforce Page Access Help ?

Visualforce Page Name	AppExchange Package Name
SLCA2.AllEvents	CalendarAnything
SLCA2.CA.AjaxResponses	CalendarAnything
SLCA2.CA.EventHandler	CalendarAnything
SLCA2.Calendar	CalendarAnything
SLCA2.CalendarAnything	CalendarAnything
SLCA2.CalendarEditBtn	CalendarAnything
SLCA2.CalendarNewBtn	CalendarAnything
SLCA2.CalendarList	CalendarAnything
SLCA2.EventHover	CalendarAnything
SLCA2.GanttChart	CalendarAnything
SLCA2.GroupCreator	CalendarAnything
SLCA2.NewWebBtn	CalendarAnything
SLCA2.SL_FilterLookupPage	CalendarAnything
SLCA2.ca	CalendarAnything
SLCA2.camanifest	CalendarAnything
SLCA2.ical	CalendarAnything
SLCA2.robots	CalendarAnything
SLCA2.sitecalendar	CalendarAnything
SLCA2.SL_RESTSession	CalendarAnything Lightning

Enabled External Data Source Access

Edit

Enabled External Data Source Access Help ?

No External Data Sources enabled

Enable profile access to CalendarAnything custom Apex classes and Visualforce pages

Once all changes have been made, return to the top of the site user profile page and click the **Assigned Users** button.

Profile

CalendarAnything Test Profile

Help for this Page

Find Settings... Edit Properties

Profile Overview

Assigned Users

Description	User License	Guest User License	Custom Profile	Created By
		☒	☒	Scott Smith, 1/10/2012 5:16 PM
Last Modified By	Jane Chen, 6/15/2019 3:04 AM			

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible

View site users

Then, click the name of the site user on the list.

CalendarAnything Test Profile

[Help for this Page](#)

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All								
Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Siteuser, Gina	guest	calendaranything_test@calendaranythingtest1.force.com			✓	CalendarAnything_Test Profile	

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Select site user to assign license

From the Site user page, click the **Assign Licenses** button in the Managed Packages list and assign a CalendarAnything license to the Site User.

Public Group Membership			New Group	Public Group Membership Help ?
Label	Group Name	Reason for Membership		
West Coast	Natasa_Test	Group Member		
SouthWest	CalendarAnythingTestGroup	Group Member		
all users	all_users	Group Member		
CalendarAnything	CalendarAnything	Group Member		
Internal	Internal	Group Member		
Show 1 more » Go to list (6) »				

Queue Membership		New Queue	Queue Membership Help ?
No records to display			

Installed Mobile Apps	
No records to display	

Managed Packages				Assign Licenses	Managed Packages Help ?
Action	Package Name	Status	Expiration Date		
Remove	CalendarAnything	Active	Does not Expire		
Remove	Visual Relationship Mapping	Active	Does not Expire		
	CalendarAnything Lightning Component	Free	Does not Expire		

Assign CalendarAnything license to site user

Also add “**CalendarAnything Default Permission Set**” to Site Guest User.

In order to support visibility of the calendar and data exposed by CalendarAnything, system admin will need to also create sharing rules for all objects that will be exposed on a [force.com](#) site.

For example, to publish a force.com site with Event Calendar, following sharing rules are required

1. Sharing rule for CA_Calendar object

 **SETUP**
Sharing Settings

Setup

CA_Calendar Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization.

You can use sharing rules only to grant wider access to data, not to restrict access.

LabelCalendar Sharing for Sit

Rule NameCalendar_Sharing_for_S ⓘ

Description

Step 1: Select your rule type

Criteria	Field	Operator	Value	
	CA_Calendar Name	equals	Events	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

Add Filter Logic...

Share withroot Site Guest User

Access LevelRead Only

Created BySwimlane UAT Admin, 2/19/2020 3:40 PM

Save

Cancel

2. Event/Activity sharing has to be set to Controlled by Parent and sharing rule should be added to parent object like Account

SETUP
Sharing Settings

Setup
Account Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization.

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label Enter Sharing Rule label

Rule Name

Description

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria Select Rule Type

Step 3: Select which records to be shared

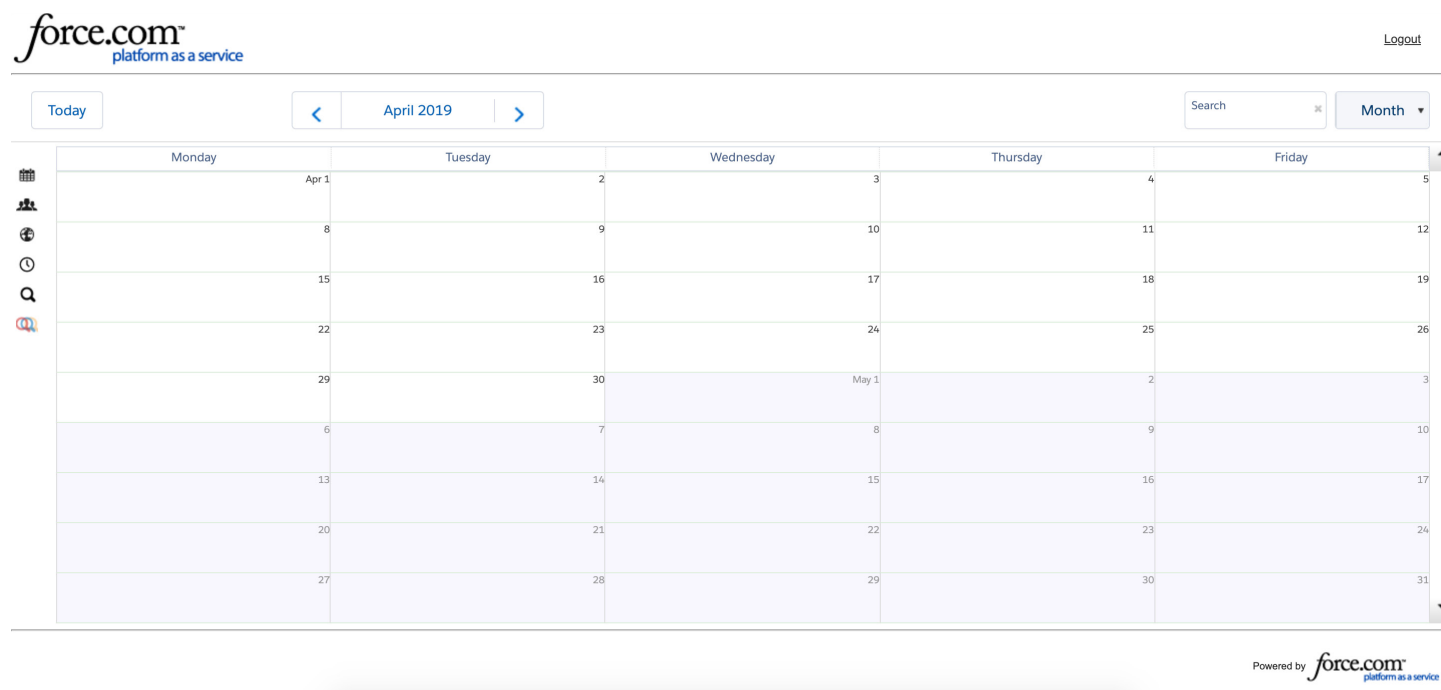
Criteria

Field	Operator	Value	
Type	equals	Prospect	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Enter conditions based on which records will be shared

After sharing rules are in place, calendar on force.com site will display data that is visible only as defined in sharing rules.

To check that your new site has been properly configured for use with CalendarAnything, enter the **Default Web Address** of your site in a browser window. The following page should appear.



Assign CalendarA Site Calendar default home page

Once you have confirmed the site is properly set up, return to CalendarAnything.

From the calendar view, you may choose to edit the settings of an existing calendar for publishing on the Force.com site or you may create a new calendar for publishing on the site.

We recommend creating new CalendarAnything calendars specifically for publishing to sites, there may be internal information on existing calendars that is not appropriate for external sharing.

On the **Calendar Edit** page, first be sure to take note of the **SiteCalendar** name in **Step 1**. This will be appended to the **Default Web Address** URL to form the URL for the calendar.

You need also to create a **Public Group** that includes **Site Guest User**.

Next, click on **Step 6** and share your Calendar with the Public group you've created.

Calendar Settings

Marketing Campaigns

Prev

6. Restrict Visibility with Public Groups



Next

Search	Available		Selected
	Internal	>	Site User
	Limited access group	<	
	Marketing Team	↓	
	Partner Users	↓	
	Sales		
	SouthWest		
	West Coast		
	all users		

Save

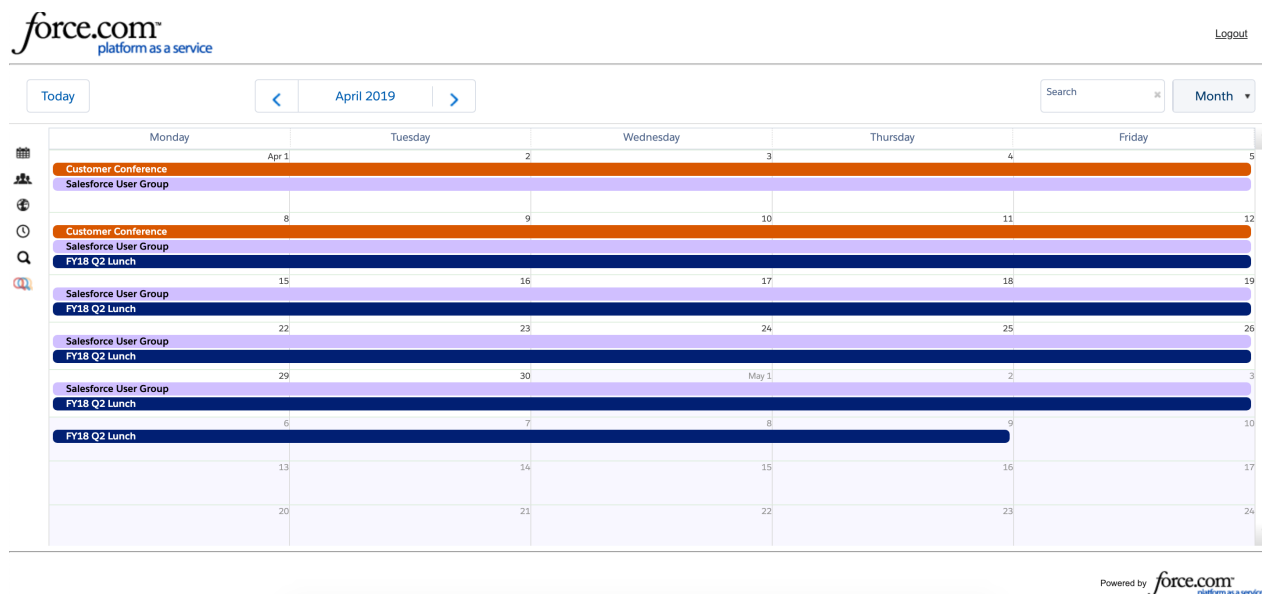
Cancel

Publishing your CalendarAnything calendar on a Force.com site

Select Public Group and click “**Save**” to save your calendar settings.

To display the Site Calendar, the following URL template should be used:

<http://DefaultWebAddress?calendar=SiteCalendarName>



Sample Site Calendar

More than one calendar can be added to Site Calendar page. Calendar names should be comma separated.

<http://DefaultWebAddress?calendar=SiteCalendarName,SiteCalendarName2>

Embedding a CalendarAnything Calendar in an Object Page Layout

Salesforce administrators have the ability to embed a CalendarAnything calendar within a Visualforce component on an object page layout in SalesforceClassic. To embed a calendar in Lightning experience please install our free CalendarAnything Lightning component off our AppExchange listing).

Relationships (5+) | Contacts (5+) | Partners (2) | Contact Roles (1) | Open Activities (5+) | Activity History (5+) | Opportunities (5+) | Cases (5+) | Notes & Attachments (5+) | GanttTesters (5+) | Appointments (5+) | Custom Projects (4) | Campaigns (4) | TestObject (0)

Account Detail Edit Delete Sharing View Partner Scorecard Manage External Account I Know You CA Opportunity Calendar CA Case Calendar

Account Owner	Scott Smith (Change)	Phone	(212) 555-5555
Account Name	Acme's (View Hierarchy)	Fax	(212) 555-5551
Parent Account		Website	
Custom Date Start	12/19/2012		
Custom Date end			
Custom Date Time Start			
Custom Date Time End			
Tomorrow's Date	6/27/2019		
Location	New York, NY		
Test Alex	Acme's-Smith		

▼ Embedded Opportunity Calendar for this Account

Today < December 2018 > Day Week Month Custom Agenda Gantt Swimlane

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

100 Widgets
2000 Widgets
15 VRM Licenses
5 CalendarAnything Licenses
20 CalendarAnything Seats
100- WaterCooler Bolt

CalendarAnything calendar embedded on Lead page

The embedded calendar can be set to display in any available CalendarAnything view (Day, Week, Month, Custom, Agenda, Gantt, Swimlane). The embedded calendar can also be set up to reference information from the record being displayed, similar to the Dynamic Calendars feature discussed on page 14.

Embedding the calendar requires the following:

1. Creating the appropriate CalendarAnything calendar(s). Be sure to select the correct object. For example, if you plan to display an embedded Events calendar on an Accounts object page layout, in step 2 of your calendar setup you should select the Events object not the Accounts object.
2. Creating Visualforce page components for each object page layout where you plan to embed the calendar(s).

3. Adding appropriate parameters to the Visualforce page component to control the embedded calendar(s) display and pass any filter criteria from the record to the calendar(s).
4. Adding the Visualforce page component to the object page layout

Creating the object specific Visualforce Page component

Go to **Setup>> Develop>> Pages** and click the New button to create a new page. In the example below, a number of pages have already been created for embedding calendars in different object page layouts.

Apex Triggers	Security	CA_Analytics	CA_Analytics	SLMETR	36.0	S Thom
Apex Test Execution	Security	CA_AnalyticsReport	CA_AnalyticsReport	SLMETR	36.0	S Thom
Apex Hammer Test Results	Security	CA_EventHandler	CA_EventHandler	SLCA2	44.0	S Thom
Apex Settings	Security	ca_sfx	ca_sfx	SLCALC	40.0	S Thom
API	Edit Del Security	CA_Test	CA_Test		27.0	S Thom
Visualforce Components	Edit Del Security	CA_VF_Account_Opp	CA_VF_Account_Opp		45.0	S Thom
Change Data Capture	Edit Del Security	CA_VF_Account_Project	CA_VF_Account_Project		26.0	S Thom
Custom Permissions	Edit Del Security	CA_VF_Campaign	CA_VF_Campaign		26.0	S Thom
Events	Edit Del Security	CA_VF_Campaign_Child_LY	CA_VF_Campaign_Child_LY		26.0	S Thom
Custom Metadata Types	Edit Del Security	CA_VF_Contact_Event	CA_VF_Contact_Event		26.0	S Thom
Custom Settings	Edit Del Security	CA_VF_Page_Lead	CA_VF_Page_Lead		26.0	CalendarAnything Visualforce Page Embedded Component S Thom
Dev Hub	Edit Del Security	CA_VF_Page_LeadTest	CA_VF_Page_LeadTest		26.0	CalendarAnything Visualforce Page Embedded Component S Thom
Email Services	Edit Del Security	CA_VF_Tab	CA_VF_Tab		26.0	S Thom
Lightning Components	Edit Del Security	CA_VF_test2	CA_VF_test2		26.0	S Thom
Visualforce Pages						
Platform Cache						
S-Controls						
Sites						
Static Resources						
Tools						
Remote Access						
External Data Sources						
External Objects						
Platform Events						
Deploy						
Lightning Bolt						
Schema Builder						

Copy and Paste the following. This is the actual page code:

```
<apex:page showHeader="false" showChat="false" standardController="Object" sidebar="false">
<SLCA2:calendar namespace="SLCA2"
calendar="CalendarId"
settings="[ 'l_ds', 'r_y', 'r_l', 'r_g', 'r_c' ]"
urlparams="sb=2&url=0&v=w&pv1={!Account.Name}">
</SLCA2:calendar>
</apex:page>
```

The most important elements of the component are indicated in **Red**. You will need to change these to reflect the calendar you would like to embed.

The standardController="Object" variable needs to match the object API name. Account, Lead, Contact and other standard objects have simple API names e.g "Account", "Contact". Custom objects use the API name format "Custom_Object_Name__c" e.g. "Projects_c", "Custom_c".

The calendar="CalendarId" variable needs to match the Calendar Id of the calendar that you want to embed. You can copy this information from Step 1 of the Calendar Settings page in CalendarAnything. Each calendar has a unique id.

The variables in **Green** control the display of the calendar. A complete list of URL display parameters is available on page 21 of this document.

The variable in **Blue** controls any passing of record data to the calendar as filter criteria. In the sample code above, the Account Name is being passed as "pv1" which works as "filter 1" from Step 3 in the Calendar Settings shown below.

Calendar Settings

Prev 3. Filter Criteria Next

Team's Events

Filter by Owner ☒ All Records ☐ My Records

1 Related To equals Type to search > Del Dyn

Add Search Criteria Reset

Advanced Filter Rule

Save Cancel

The screenshot shows the Salesforce Object Page Layout editor. At the top, there's a 'Layout Properties' tab. Below it, a 'Quick Find' search bar is visible. The main area displays a grid of fields for an account object, including Account Owner, Billing Address, Employees, Ownership, Shipping Address, and Type. Below the field grid, there are sections for 'Description Information', 'Address Information', 'System Information', 'Custom Links', and 'Road Show Calendar'. The 'Road Show Calendar' section is highlighted in blue and contains a 'CA Account Emb' entry. A 'Wrench' icon in the upper right corner of the blue area is used to control the size of the embedded component.

Use the “Wrench” icon in the upper right corner of the blue component area to control the size of the embedded component. Suggested dimensions are 100% width and 400 pixel height. This makes for a usable calendar that does not take up too much screen space. Be sure to set this as a 1-column section.

The screenshot shows the 'Visualforce Page Properties' dialog box. It has a title bar with a close button. The dialog contains the following fields and options:

- Width (in pixels or %)**: A text input field with the value '100%'.
- Height (in pixels)**: A text input field with the value '400', which is highlighted with a blue border.
- Show scrollbars**: A checkbox that is currently unchecked.
- Show label**: A checkbox that is currently unchecked.

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Creating Dynamic Calendars

With **Dynamic Calendars** users are able to easily view a CalendarAnything calendar relating to a record by clicking a button on the record page in SalesforceClassic.

In the example below, when viewing an Account record, a user is able to click the **Dynamic Opportunity Calendar** button to open a CalendarAnything calendar displaying the Opportunities related to that Account record.

Account Detail		Edit	Delete	Sharing	View Partner Scorecard	Manage External Account ▼	Dynamic Opportunity Calendar
Account Owner	 Scott Smith [Change]	Phone	(212) 537-6781				
Account Name	Acme's [View Hierarchy]	Fax	(212) 555-0741				
Parent Account		Website	http://www.acme.com				
Custom Date Start	12/11/2019						
Tomorrow's Date	7/16/2019						
Location	New York, NY						

Setting up Dynamic Calendars is a two phase process.

First, create a calendar in CalendarAnything for using this feature. Be sure the calendar will be visible to the users who will have access to the dynamic calendar button.

When creating a calendar with filter criteria for this feature, the Filter Criteria are entered a little differently.

You will need to decide how many fields you would like to use for the filter criteria, the maximum is 29 per calendar.

Next, select the fields you are interested in using as filters, then select the corresponding parameter value for each field. Please see the next image for an example of a calendar using 29 filter criteria.

Calendar Settings		Prev	3. Filter Criteria	Next
Team's Events				
Filter by Owner ☒ All Records ☐ My Records				
1	Account Name	equals	Type to search	Del Dyn
2	Account Fax	equals		Del Dyn
3	Account Type	equals	Analyst Competitor Customer Integrator	Del Dyn
4	Account Name	equals	Type to search	Del Dyn
5	Title	equals		Del Dyn
Add Search Criteria Reset				
▲ Advanced Filter Rule				
				
Save Cancel				

Sample Dynamic Calendar Filter Criteria

Once the calendar is created, be sure to Save the calendar in order to assign an ID to the newly created calendar.

After the calendar is saved, return to Edit the calendar settings. In Step 1 a Calendar ID field is now visible. Take note of the Calendar ID.

Calendar Settings

Team's Events

[Prev](#)
1. Calendar Name & Color
[Next](#)

Calendar Name	Team's Events
Calendar Color	
Calendar Description	This is a Company Event Calendar
SiteCalendar Name	Team_s_Events
Calendar ID	a021U000005izYxQAI

Next, a button will have to be created.

Once you have determined which object(s) to create the button for, navigate to **Your Name>>Setup>>Customize**.

Select the object you would like to create a button for (Accounts, Contacts, Leads, Opportunities, etc), then select the **Buttons and Links** option.

In this example, a button will be created for Accounts.

Buttons, Links, and Actions

Account

[Help for this Page ?](#)

Use this page to manage buttons, links, and actions.

Buttons, Links, and Actions							
		New Action New Button or Link Default Custom Links		Buttons, Links, and Actions Help ?			
Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accounts Tab	Tab			Standard page		☐
Edit	Add to Call List	MassCreateCallList			Standard page		☐
Edit	Add to Call List	CreateCallList			Standard page		☐
Edit	Add to Campaign	AccountAddToCampaign			Standard page		☐
Edit Del	Altavista News	AltavistaNews		Detail Page Link	URL		☐
Edit	Check for New Data	XClean			Standard page		☐
Edit	Delete	Delete			Standard page		☐
Edit	Discover Companies	DiscoveryGetAccountsAction			Standard page		☐
Edit	Edit	Edit			Standard page		☐
Edit	Get More Accounts	DataDotComGetAccountsMultiAddAction			Standard page		☐
Edit	Get Survey Invitation	CreateSurveyInvitation			Standard page		☐
Edit Del	Google Maps	GoogleMaps		Detail Page Link	URL		☐
Edit Del	Google News	GoogleNews		Detail Page Link	URL		☐
Edit Del	Google Search	GoogleSearch		Detail Page Link	URL		☐
Edit Del	Hoovers Profile	HooversProfile		Detail Page Link	URL		☐
Edit	List	List			Standard page		☐
Edit	New	New			Standard page		☐
Edit	View	View			Standard page		☐

Click New under Custom Buttons and Links to create a new button.

1. Enter a Label for the button.

2. Select Display Type as **Detail Page Button**.
3. For Behavior, we recommend **Display In new Window**.
4. Content Source, select **URL**.

In the formula box, use the template below to specify the calendar that will open when a user clicks on this button.

/apex/SLCA2__CalendarAnything?cid=CalendarId

You may also use additional options to this URL button. Simply add these additional parameters after the Calendar Id in the URL.

Please see page 24 with link to list of possible URL parameters.

Finally, check Syntax to make sure everything is in order. Click **Save**. The button will now display on your specified object page and will open a calendar matching the Calendar Id and set parameters.

Changing Currency Display in CalendarAnything

CalendarAnything also has custom settings that allow the System Administrator to modify certain features displayed in CalendarAnything.

Any changes made to these custom settings will apply to all CalendarAnything users in the organization.

Using the **Custom Calendar Settings**, the System Administrator is able to change the currency value displayed when currency fields are used in calendars.

To access these settings, navigate to **Your Name>>Setup>>Develop>>Custom Settings**. The **Custom Settings** page will open.

Look for the **CalendarSettings** label and click **Manage**.

Custom Settings

Help for this Page

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

Get Usage

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	CalendarSettings	Public	List	SLCA2		151	0	0
Manage	Default Standard Objects List	Public	List	SLCA2		100	9	900

CalendarAnything Custom Display Settings

This will open the **CalendarSettings** page. Click the **New** button to create a new set of data to manage the CalendarAnything display settings.

Custom Setting

Help for this Page

CalendarSettings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

New

Name

No records to display.

Create New CalendarAnything Custom Settings

This will display the **CalendarSettings Edit** page.

CalendarSettings Edit

Provide values for the fields you created. This data is cached with the application.

Edit CalendarSettings

Save

Save & New

Cancel

CalendarSettings Information

Name

i

Calendar Start Day

CurrencyLabel

Time Increment - 15

[CalendarAnything Custom Display Settings](#)

- 1. Enter a Name for the new setting. Any name will do.
- 2. Enter a Currency Label to be displayed when currency fields are used.

Once you have modified the calendar settings, Click the **Save** button to save your changes. Any changes will be reflected when you return to the Calendar tab.

URL Parameters

This [link](#) to our URL / Component parameters can be used to specify URL parameter behavior when embedding calendars.

Support

Get support help by visiting our support site:

<http://www.calendaranything.com/helphome>

Purchasing CalendarAnything Licenses

CalendarAnything costs \$150 dollars per license per year - billed annually.

Initial license purchases are at the annual rate for a one-year subscription which entitles you to all upgrades of the application released during the year. Any additional licenses prior to the subscription end date will be calculated on a prorated basis from the original purchase date.

You are not required to purchase CalendarAnything Licenses for all Salesforce users in your organization--only for users needing access to CalendarAnything.

For larger companies, Silverline CRM offers volume discounts and a site license option. We also offer a nonprofit discount. Please contact us for details.

You are able to purchase licenses directly from the CalendarAnything package installed in your organization via Stripe Checkout.

To purchase licenses via Stripe Checkout directly from the installed package, navigate to **Your Name>>Setup>>Installed Packages**. Click the **Configure** link and a Stripe Checkout window will appear. Follow the on-screen instructions to purchase your licenses. Once the purchase is complete, the CalendarAnything licenses will be active in your organization.

If you are unable to purchase licenses using this method, contact us at: **calendar@silverlinecrm.com**



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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