



CalendarAnything Mobile Lightning Experience -- Setup and User Guide

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☰ +	< September 2019 > 🔄 🏠
Monday, Sep 16, 2019	
Team Meeting Start 9/16/19 3p End 9/16/19 3:30p ▼	
NAME	Global Media's
DESCRIPTION	Weekly team meeting
Friday, Sep 20, 2019	
Meeting with John Smith Start 9/20/19 10a End 9/20/19 11p ▼	
NAME	Acme
DESCRIPTION	Meeting with John to discuss Q4 targets
Monthly dashboard review with cl... Start 9/20/19 12p End 9/20/19 1p >	
Wednesday, Sep 25, 2019	
Call Start 9/25/19 12a End 9/25/19 12a ▼	
NAME	CA Top 5 Features

September 2019

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Overview

This guide has been written under the assumption that you already have CalendarAnything installed in your Salesforce.com organization.

CalendarAnything can be downloaded from the Salesforce AppExchange at:

<http://appexchange.salesforce.com/listingDetail?listingId=a0N30000003Hn2kEAC>

Implementation of some features described in this document will require System Administrator access to the organization.

Technical Specifications

Salesforce.com supported versions: Enterprise Edition, Unlimited Edition, Force.com Platform Edition, Developer Edition.

CalendarAnything version 2.9.90 or higher is required.

To access CA Lightning Mobile extension, users will need to have CalendarAnything license assigned to them.

In order for the lightning component to work, Domain should be enabled and published in the org. For information on how to setup My Domain visit Salesforce help at https://help.salesforce.com/articleView?id=domain_name_overview.htm&type=5 .

Installing the Lighting Package Extension

To install, use installation link provided by Silverline or download the component from appexchange <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000F0mFCUA1>.

You will be shown the *Package Installation page* (shown below). Select “Install for All Users” and Click Install to install package.




☐ Install for Admins Only


☒ Install for All Users

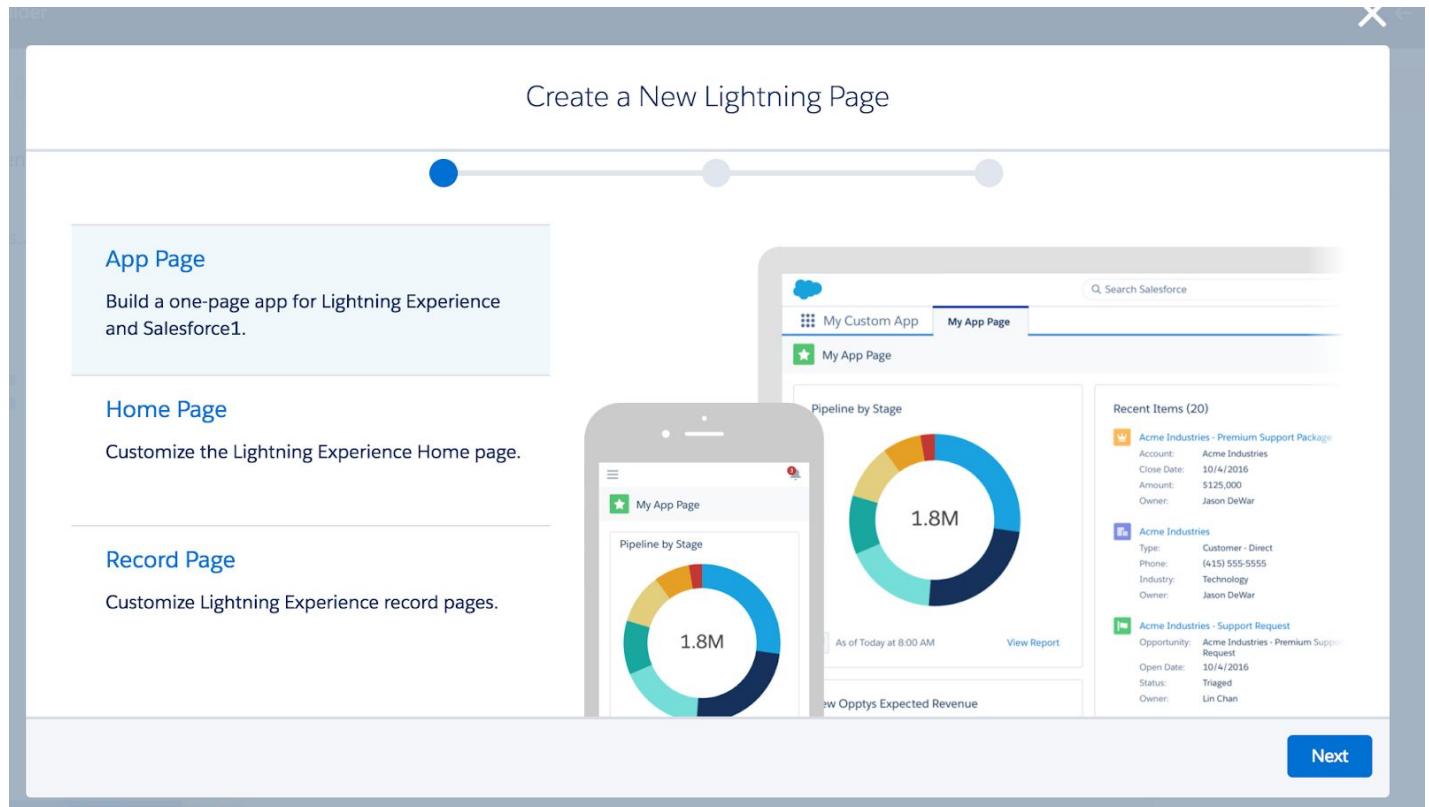

☐ Install for Specific Profiles...

Package Installation Page

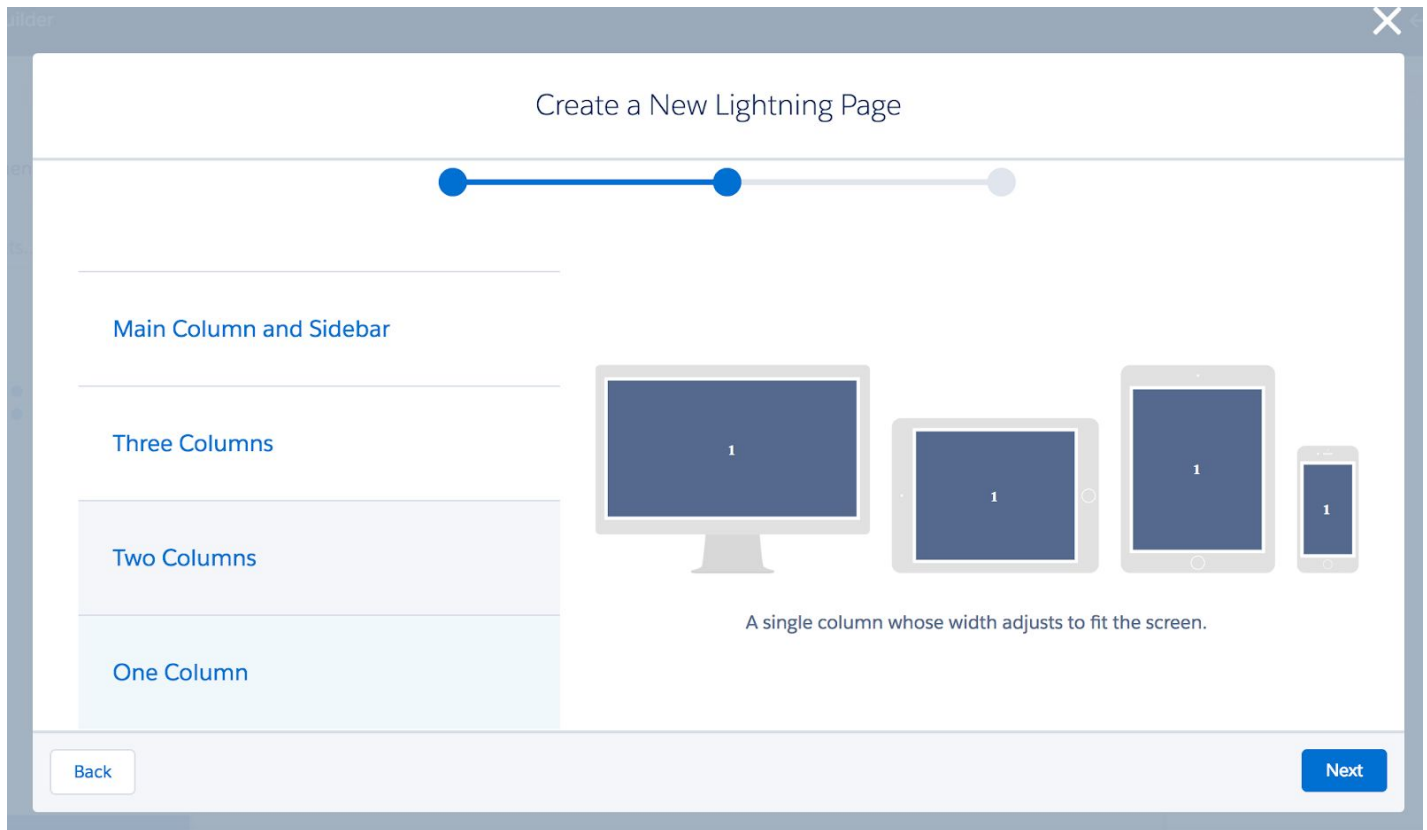
Once the package installation is complete, you can proceed to set up Lightning Component.

Setting up CA Mobile Lightning Component

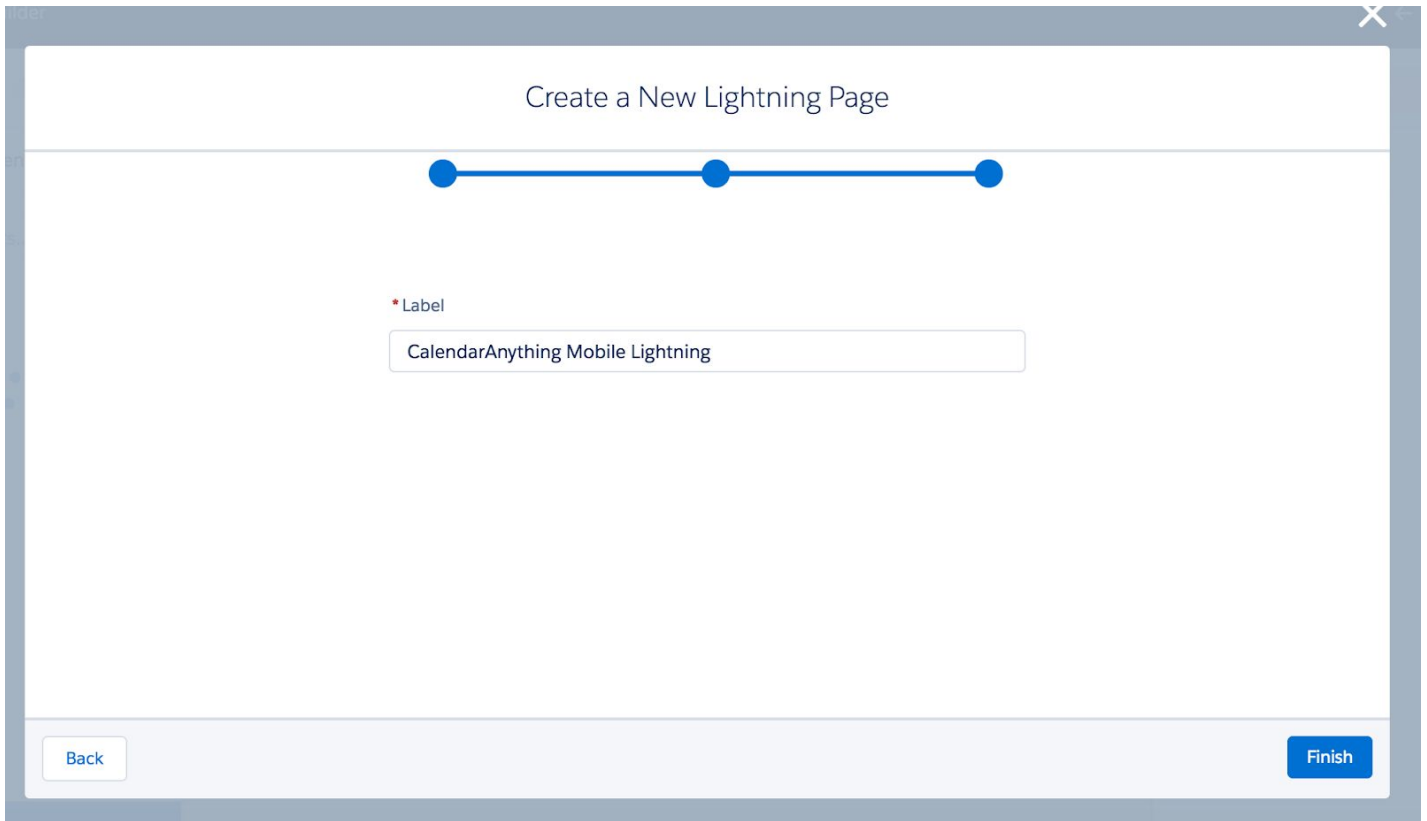
Once the package extension has been installed, in Setup, navigate to Lightning APP Builder. Click New and follow the steps to create new Lightning Page.



Select App Page and click Next



Select One Column template



Create a New Lightning Page

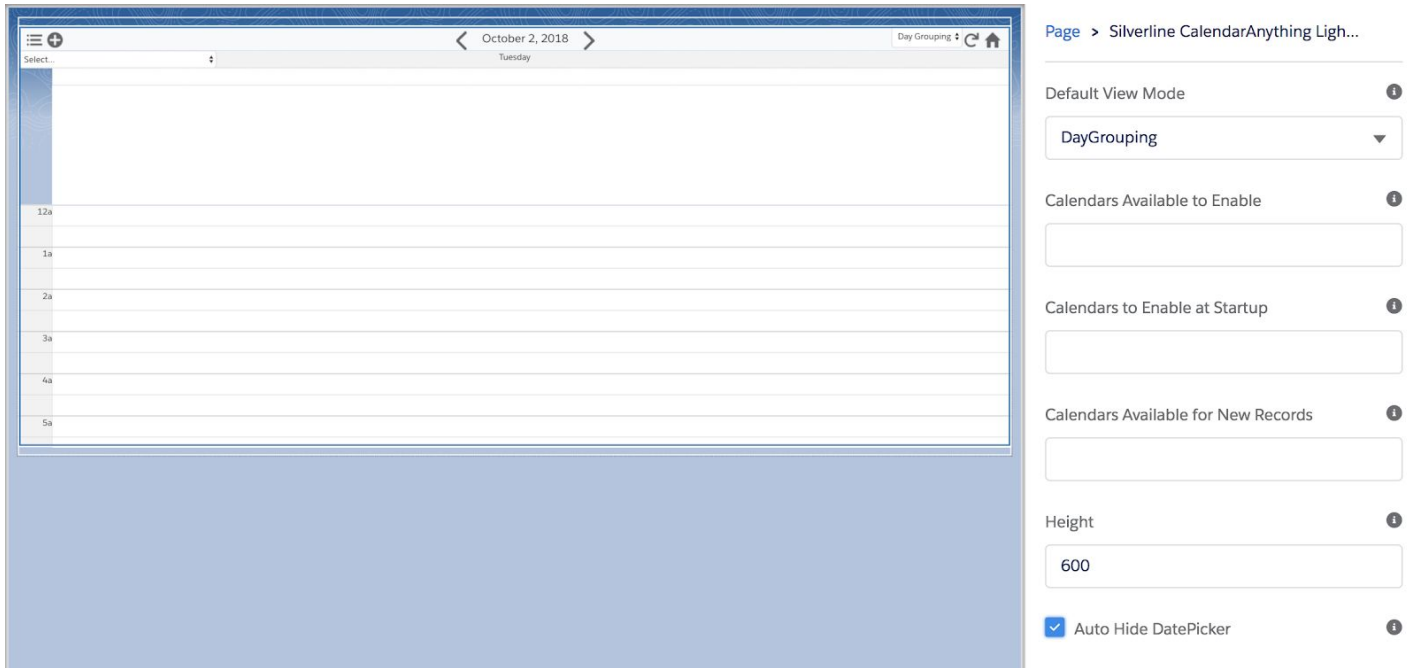
Label

CalendarAnything Mobile Lightning

Back Finish

Add Label and click Finish

From Custom – Managed components list, drag Silverline CalendarAnything Lightning component and drop it on the page.



Optionally, fill in component properties and click Save.

Activate the page.

Activating the page for all users will set custom tab visibility for this page to Default On.

Activating the page for System Administrators only will set custom tab visibility for System Admin to Default On and for ALL other users to Default Off.

PAGE SETTINGS

LIGHTNING EXPERIENCE

MOBILE NAVIGATION

Give this app page a name, set the page visibility, and choose an icon.

App Name

Enter a name for your app.

CA Mobile

Icon

Choose an icon to represent your app in Lightning Experience and the mobile app.



[Change...](#)

Page Activation

When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

- ☒ Activate for all users
☐ Activate for System Administrators only

To set further restrictions on who sees this page, use permission sets and profile assignments in Setup.

Cancel

Save

Add the page to Salesforce Mobile menu.

Activation: CA Mobile

PAGE SETTINGS
LIGHTNING EXPERIENCE
MOBILE

Activate this page for the mobile app, then drag the page to where you want it in the menu.

Mobile Activation Remove page

✓ Mobile Navigation Menu

Chatter

CA Mobile ↑↓

People

Groups

Today

Smart Search Items

Tasks

Cancel
Save

CalendarAnything lightning component properties

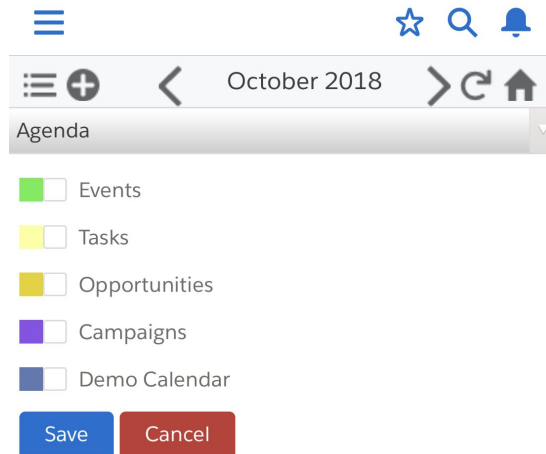
Component properties are optional.

Default View Mode – Agenda is the default view. Admin can change the default view to one of other options we offer, such as Day, Day with grouping or Week.

Calendars Available to Enable – Admin can list Calendar friendly names (comma separated) or Calendar IDs to limit the number of calendars available to users in Salesforce mobile.

Calendars to Enable at Startup – Admin can list Calendar friendly names (comma separated) or Calendar IDs that will be loaded by default every time user opens the page in Salesforce Mobile. It will **override** any selection made by user from the list of available calendars.

If left blank no calendars will be loaded when user opens application for the first time. To enable calendars, users will need to tap on navigation icon and select calendars from the list.



Calendars Available for New Records – Admin can limit list of calendars available to users to create new records. Enter calendar ID or Name from step 1 of calendar setup.

Height – can set component height in px. For mobile recommended height value is set to 500.

Auto Hide Date-Picker property – when checked will auto hide date picker calendar after user selected some date.

Record Dynamic Filter Field property – used to filter record when component is placed on the record page.

For example

- add component on Account page,
- set **Record Dynamic Filter** Field = Id,
- Add Dynamic filter on Calendar Edit -> Step 3: Related To = DYN

then only calendar events related to current Account will be displayed with the component.

Display Mode Selector - if checked will display View Mode selector

Display Create New Record Icon - if checked will display + icon (Create New)

Display Calendar Selector - if checked will display Calendar Selector

Display Refresh Icon - if checked will display Refresh icon. Clicking Refresh icon will display the latest records for all selected calendars

Display Today Icon - if checked will display Today icon

Use CalendarAnything Create Form - if checked will display custom create form based on fields defined in step 5 of calendar setup

Enabled Calendars Only on Create – if checked will only display currently selected list of calendars to choose from when creating new records.

Additional User Settings – Admin can specify default user settings in Json format. For example: {"swimlaneEnableListViews":false}

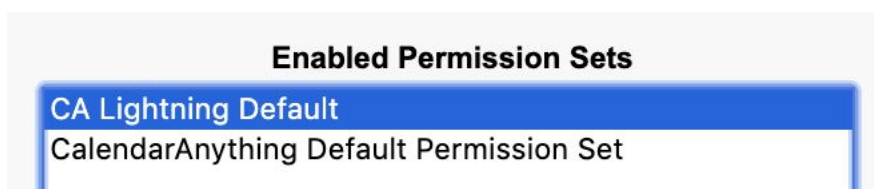
Max Reference Options – Admin can define number of related lookup objects to load on start. For optimal performance, we recommended to set Max Reference Options to 10 or less

Static Caching Time (minutes) – cache time limit for object's metadata and user's permissions

Session Caching Time (minutes) – cache time limit for calendar's information.

User Setup

All users who will be accessing CalendarAnything Mobile extension must have CA Lightning Default permission set assigned to them.



Support

Get support help by visiting our support site:

<http://silverline.force.com/calendaranything/HelpHome?subId=>

Purchasing CalendarAnything Licenses

CalendarAnything costs \$150 dollars per license per year - billed annually. The CalendarAnything Lightning Mobile package extension is available free for existing CalendarAnything customers.

To purchase CalendarAnything licenses visit us on the AppExchange <https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003Hn2kEAC> or contact us at: <http://silverlinecrm.com/contact-us/>