

CALENDAR PRO (for Salesforce Lightning)

Installation Guide



| an OSF Product

CALENDAR PRO

Shared Calendar for Salesforce

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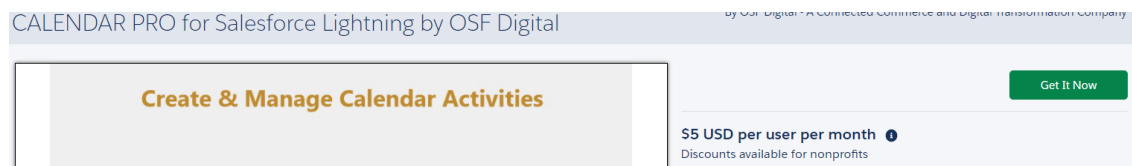
1. Pre-Requirements

To install **CALENDAR PRO** for Salesforce Lightning, you must be logged in as an administrator in Salesforce.com. The application can be installed in Professional, Enterprise, Force.com, Developer, and Unlimited editions.

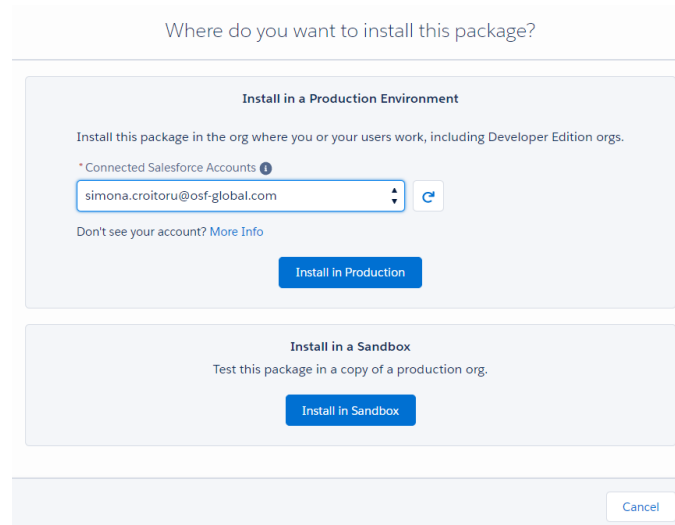
2. Installing the Application

To install **CALENDAR PRO** for Salesforce Lightning:

1. On AppExchange, access CALENDAR PRO for Salesforce Lightning.
2. Click **Get It Now**.



3. Choose where you wish to install the product: **Production** or **Sandbox**.

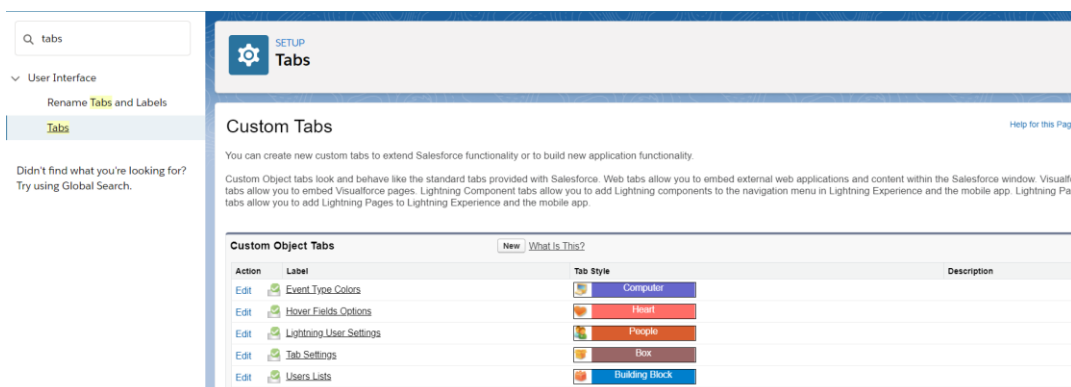


4. Select *I have read and agree to the terms and conditions*. Click **Confirm and Install**.
5. Enter your credentials.
6. Choose a security level, then click **Install**.
7. After the **Install Complete** message appears, click **Done**.

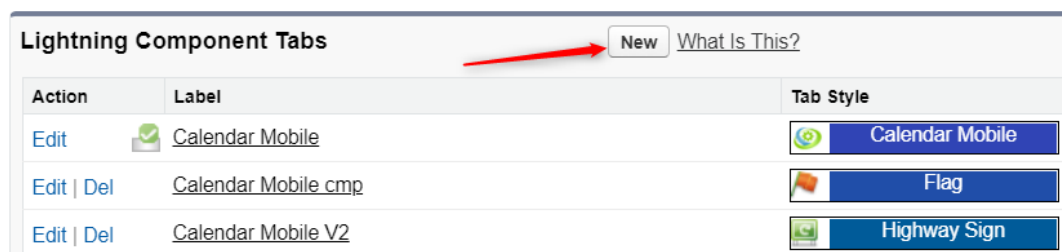
Tip: CALENDAR PRO for Salesforce Lightning can be set up and used as a Home Page Component. This enables the application to be displayed on the Salesforce Home Page when users log in.

To enable this:

1. Navigate to **Setup** and enter *Tabs* in the Quick Find box.



2. In the Lightning Component Tabs section click New.



Enter your new component's details. Start by choosing **OSF_CalendarPro:osfCalendarContainer** for the Lightning Component field, then select a Tab Label and a Tab Name and Style of your choice. Click **Next**.

New Lightning Component Tab

Step 1. Enter the Details

Choose the component for this new tab. Fill in other details.

Lightning Component	--None--
Tab Label	--None--
Tab Name	OSF_CalendarPro:CalendarDayViewTaskMobile
Tab Style	OSF_CalendarPro:Mobile_CalendarDayViewAppointmentsComponent
Description	OSF_CalendarPro:Mobile_CalendarMonthViewComponent
	OSF_CalendarPro:Mobile_CalendarMonthViewComponentV2
	OSF_CalendarPro:Mobile_CalendarViewV2
	OSF_CalendarPro:Mobile_CalendarWeekViewComponent
	OSF_CalendarPro:Mobile_CalendarWeekViewComponentV2
	OSF_CalendarPro:OSF_Calendar_Tab
	OSF_CalendarPro:OSF_CalendarMobile
	OSF_CalendarPro:OSF_CustomLookupSearchResults
	OSF_CalendarPro:OSF_CustomLookupWithoutPill
	OSF_CalendarPro:OSF_CustomLookupWithPill
	OSF_CalendarPro:osfCalendar
	OSF_CalendarPro:osfCalendarContainer
	OSF_CalendarPro:tesmobile

- Choose the user profiles where you want the new Lightning Component tab to be available and click **Save**.

New Lightning Component Tab

[Help for this Page](#)

Step 2. Add to Profiles Step 2 of 2

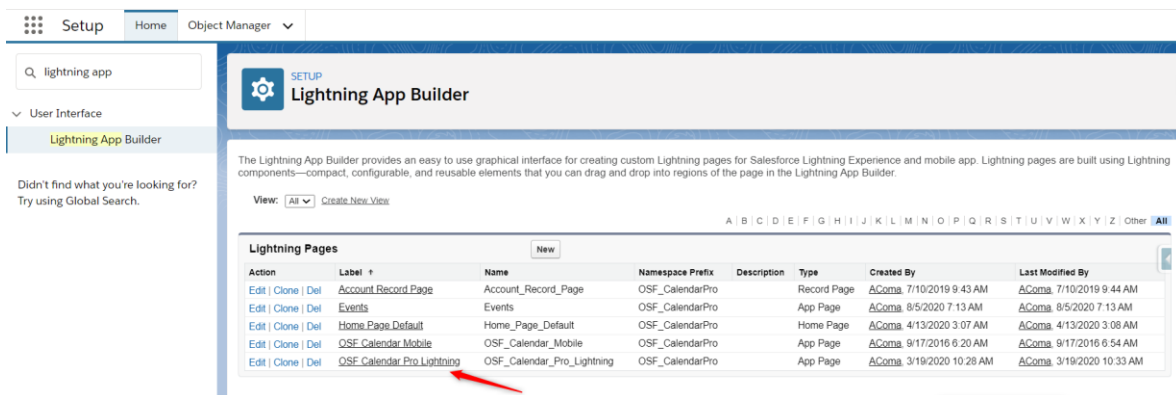
Choose the user profiles for which the new Lightning Component tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles (Default On)
 ☐ Apply a different tab visibility for each profile

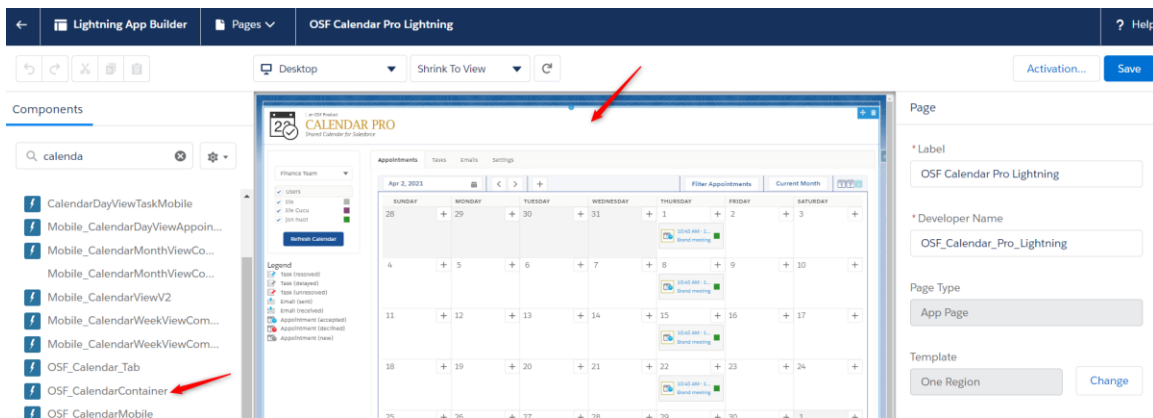
Profile	Tab Visibility
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On

Previous Save Cancel

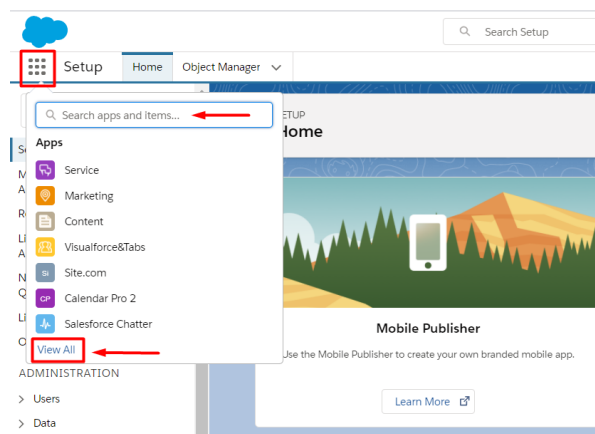
- Assign the component to the desired Home Page layouts:
 - Click the gear icon.
 - Navigate to **Setup** and enter App Builder in the Quick Find box. Select the Lightning App Builder.
 - Click **Edit** next to the Lightning Home Page you wish to assign the new component to (if you have only one layout, edit the default one for it to be displayed for all users with access to CALENDAR PRO Lightning).



d) Drag and drop the calendar component onto the layout Click **Save** then **Activate**.



You have successfully set CALENDAR PRO as a custom Home Page component. The application is accessible through the App Menu:



3. Setups (Enterprise Edition)

3.1. SET UP PROFILE RIGHTS

1. Navigate to Setup > Users > Profiles and edit the profile(s) that require access to the application.
2. In the **Custom App Settings** section, use the checkbox to make Calendar PRO visible for Salesforce Lightning.

Custom App Settings		
	Visible	Default
App Launcher (standard__AppLauncher)	☐	☐
Calendar Pro (OSF_CalendarPro__OSF_Calendar_Pro)	☐	☐
Calendar Pro 2 (OSF_CalendarPro__OSF_Calendar_Pro_2)	☐	☐
Calendar Pro Lightning (OSF_CalendarPro__OSF_Calendar_Pro_Lightning)	☒	☐

3. In the **Custom Tab Settings** section, select **Calendar Default On**.

Custom Tab Settings	
Calendar Pro Lightning	Default On

4. In the **Administrative Permissions** section, enable the **View Setup and Configuration** option.

Administrative Permissions	
View Setup and Configuration	☒

5. In the **Custom Object Permissions** section, make sure you have **Read, Create, Edit** and **Delete** as available options for **Event Type Colors, Hover Fields Options, User Lists**, and **User Lists Colors** objects.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Event Type Colors	☒	☒	☒	☒	☐	☐
Hover Fields Options	☒	☒	☒	☒	☐	☐
Users Lists	☒	☒	☒	☒	☐	☐
Users Lists Colors	☒	☒	☒	☒	☐	☐

3.2. SET UP FIELD VISIBILITY

1. On the same profile you previously set up, navigate to the **Field-Level Security** section and make sure that **Event**, **Task**, **User**, **Event Type Color**, **Hover Fields Option**, **User Lists**, and **User Lists Colors** fields are visible.
2. Next to each object, click **View** to see if all fields are visible.

Field-Level Security

Standard Field-Level Security

Email Message	[View]		Task	[View]
Engagement Channel Type	[View]		User	[View]
Event	[View]		User Provisioning Request	[View]

Custom Field-Level Security

Account Location	[View]		Offer	[View]
BT User	[View]		Tab Settings	[View]
Event Type Color	[View]		Users List	[View]
Hover Fields Option	[View]		Users Lists Colors	[View]
Lightning User Settings	[View]		Visit	[View]

3. For **Event Type Color**, **Hover Fields Option**, **User Lists**, and **User Lists Colors**, all fields need to be visible.
4. For the **Event**, **Task**, and **User** objects, the following fields need to be made visible to the user:
 - Picklist Color
 - Event & Task
 - Assigned to

- Completed Date
- Due Date
- Name
- Type
- Subject
- Related to
- Start End

Note: It is essential to make the **Type** field visible first when completing the setup.

By default, Salesforce has the **Type** field set to invisible for both Events and Tasks.

If the Calendar tab displays the Set up CALENDAR PRO screen, make the Type field visible for both Events and Tasks.

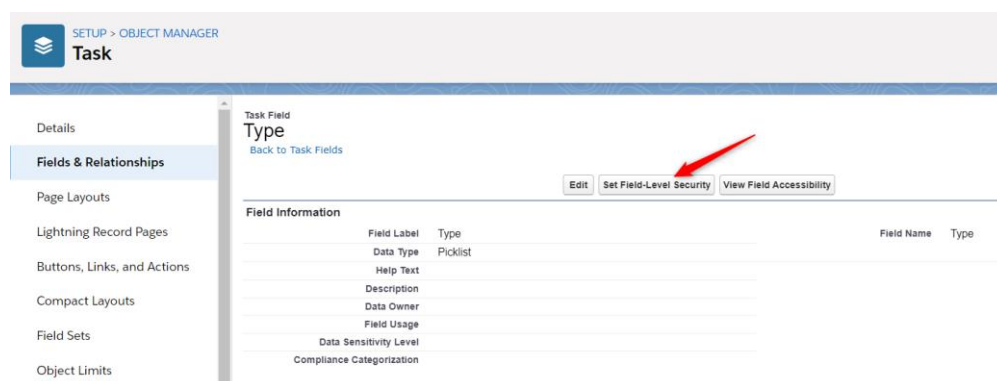
Thank you for installing OSF Calendar Pro!

If you are seeing this page, this means that you don't have the correct rights set up.

You can do this in one of two ways:

1. [Setting up rights to individual users using predefined permission set](#)
2. [Setting up rights using profiles](#)

Navigate to **Setup > Object Manager > Task > Fields & Relationships > Type**, and click **Set Field-Level Security** to make the field visible for the needed profiles. Click **Save**.



Field Label	Type	Data Type	Picklist
Field-Level Security for Profile			
		☒ Visible	☐ Read-Only
Authenticated Website		☒	☐
Contract Manager		☒	☐
Cross Org Data Proxy User		☒	☐
Custom: Marketing Profile		☒	☐
Custom: Sales Profile		☒	☐
Custom: Support Profile		☒	☐
Customer Community Login User		☒	☐
Customer Community User		☒	☐

Navigate to **Setup > Object Manager > Event > Fields & Relationships > Type**, and click **Set Field-Level Security** to make the field visible for the needed profiles. Click **Save**.

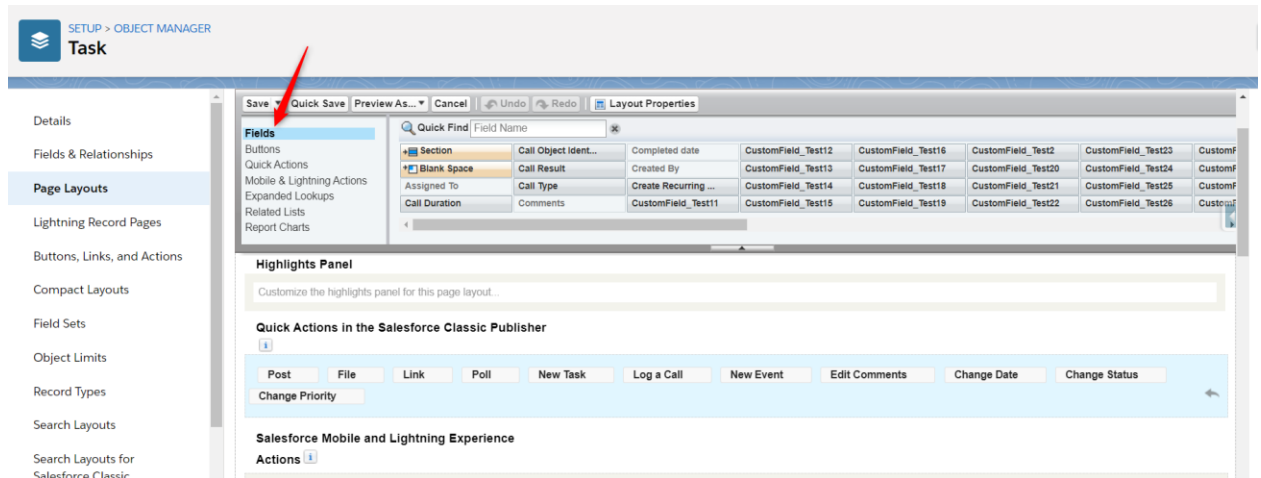
4. Set Up Rights (Professional Edition)

In the Professional Edition, for Salesforce users to use **CALENDAR PRO** for Salesforce Lightning and view all events, tasks, and email details, the following fields need to be added to the Event and Task Page Layouts:

- Assigned to
- Completed Date
- Due Date
- Name
- Type
- Subject
- Related to
- Start
- End

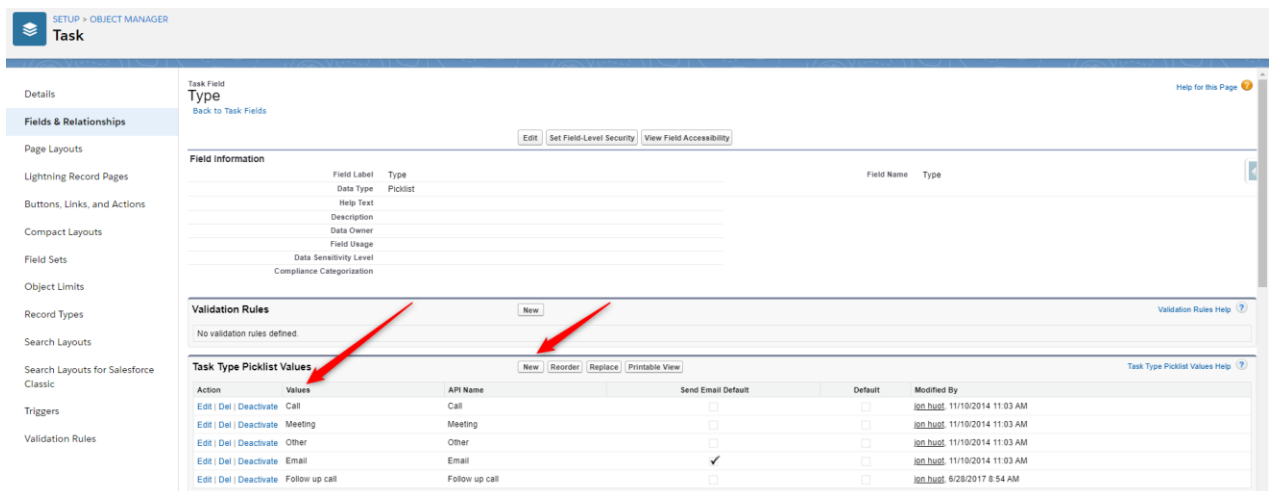
To add the fields on the **Task Page Layout**, navigate to **Setup > Customize > Activities > Task Page Layout > Edit** and drag-and-drop all the necessary fields.

For the **Event Page Layout**, navigate to **Setup > Customize > Activities > Events Page Layout > Edit** and drag-and-drop all the necessary fields.



5. Set Up Email Visibility

To view emails sent and received from customers, add the **Email** task type by navigating to **Setup > Object Manager > Task > Fields & Relationships > Type**.



Click **New** in the **Task Type Picklist Values** section to add a new value to the picklist. Enter **Email** and click **Save**.

Task Type Picklist Values			
New Reorder Replace Printable View			
Action	Values	API Name	Send Email Default
Edit Del Deactivate	Call	Call	☐
Edit Del Deactivate	Meeting	Meeting	☐
Edit Del Deactivate	Other	Other	☐
Edit Del Deactivate	Email	Email	☒
Edit Del Deactivate	Follow up call	Follow up call	☐

After creating the new picklist value, make sure that the option **Make this value the default for sending an email** is selected.

Label

Email

API Name

Email

Send Email Default

☒ Make this value the default for sending an email

Default

☐ Make this value the default for the master picklist

Save

Cancel

If you have any questions, please contact us at contact@osf.digital.