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CALENDAR PRO (for Salesforce Lightning)

User Guide

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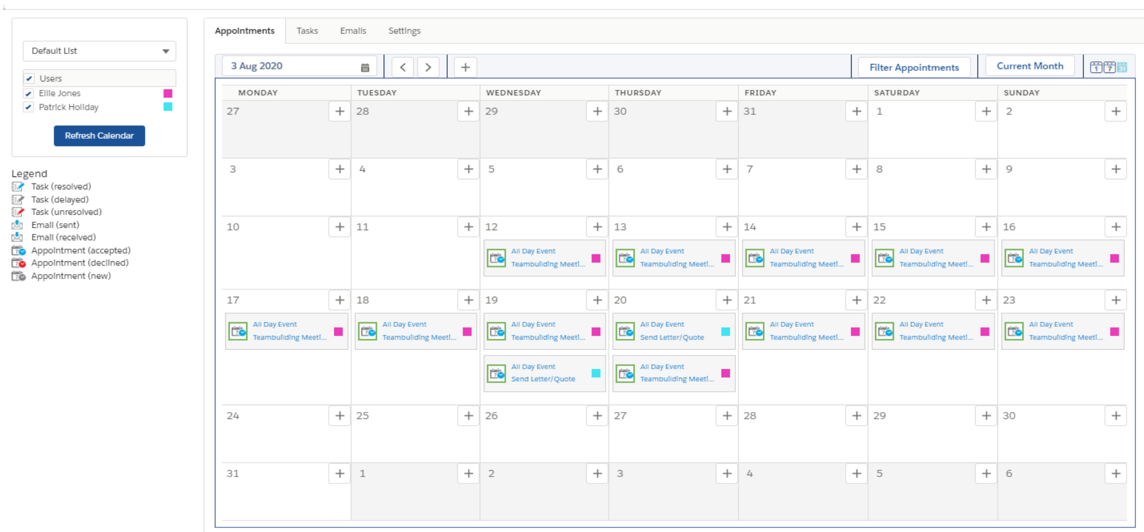
1. Introduction

CALENDAR PRO for Salesforce Lightning is the perfect solution to streamline your daily workflow schedule, allowing you to successfully manage large teams and eliminate Outlook or Excel duplications.

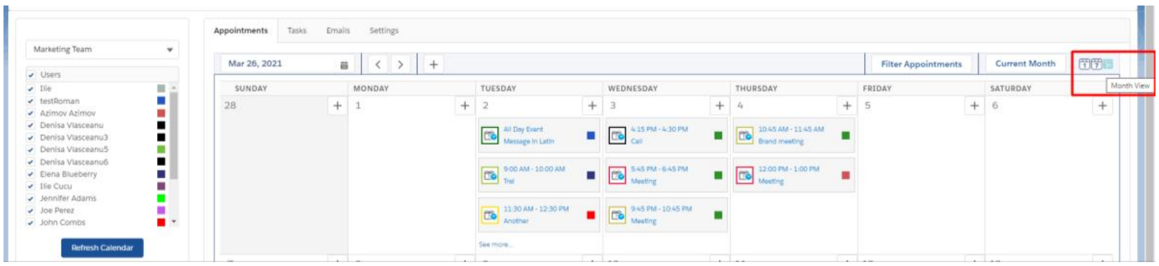
CALENDAR PRO is a custom-made tool that enables Salesforce users to create, customize, and visualize their calendar activities. Maximum efficiency is achieved through color coding different types of activities and calendar users.



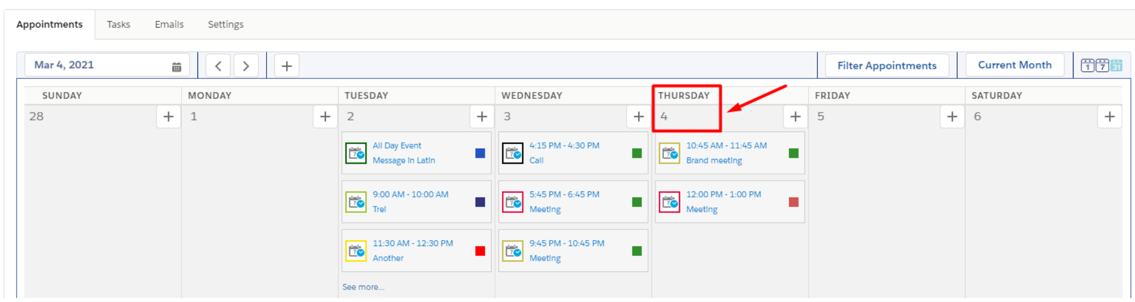
2. Viewing Options for CALENDAR PRO

2.1. VIEWING TIME PERIODS IN TABLE

CALENDAR PRO can be displayed in three views: **month**, **week**, and **day**. The preferred view can be selected from the top right corner:

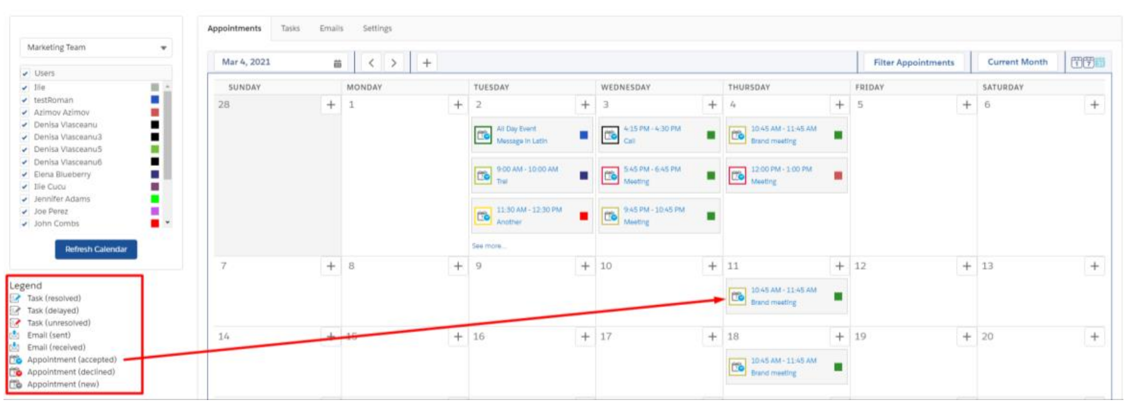


Tip: When clicking on a certain date from the **week** or **month** views, you are automatically redirected to the selected **day** view.



2.2. LEGEND

The **Legend** box at the bottom left corner displays explanatory icons for the event types available (task, email, appointment), as well as their respective status (resolved, delayed, accepted declined, sent, received, etc.).



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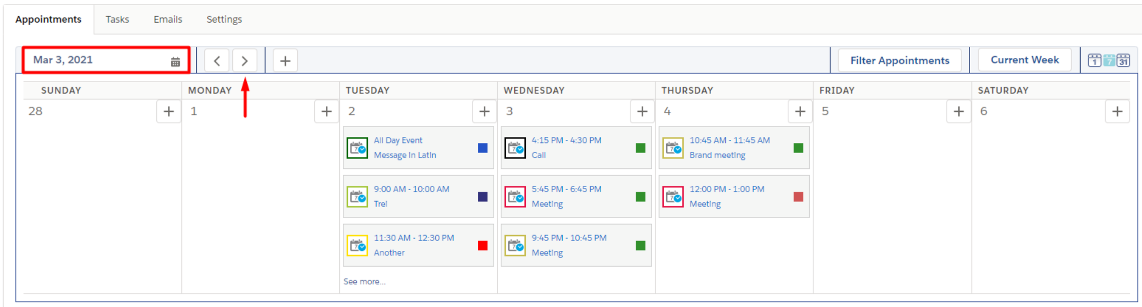
2.3. FILTERING TIME INTERVALS

You can easily select the desired time-frame, depending on the selected view (day, week, or month).



Depending on the selected periods, by clicking on a specific day in the calendar you can see:

- **Day Viewing Mode** - opens that specific date.
- **Week Viewing Mode** – opens the week containing that specific date.
- **Month Viewing Mode** – opens the month containing that specific date.

By clicking on the **Left** / **Right** arrows next to the date selector, you can shift between the previous/next available days/weeks/months.

Tip: Depending on the selected timeframe, you can click on the **Current Day**/**Week**/**Month** as a shortcut to navigate directly to your current timeframe, instead of going through the calendar dates.

3. Appointments, Tasks, Emails

Calendar activities/events that can be scheduled or created:

- Appointments (also referenced as events)
- Tasks
- Emails

To create any of these entries, click the **+** icon visible in each calendar slot. All entry possibilities are visible in the main Calendar Menu.

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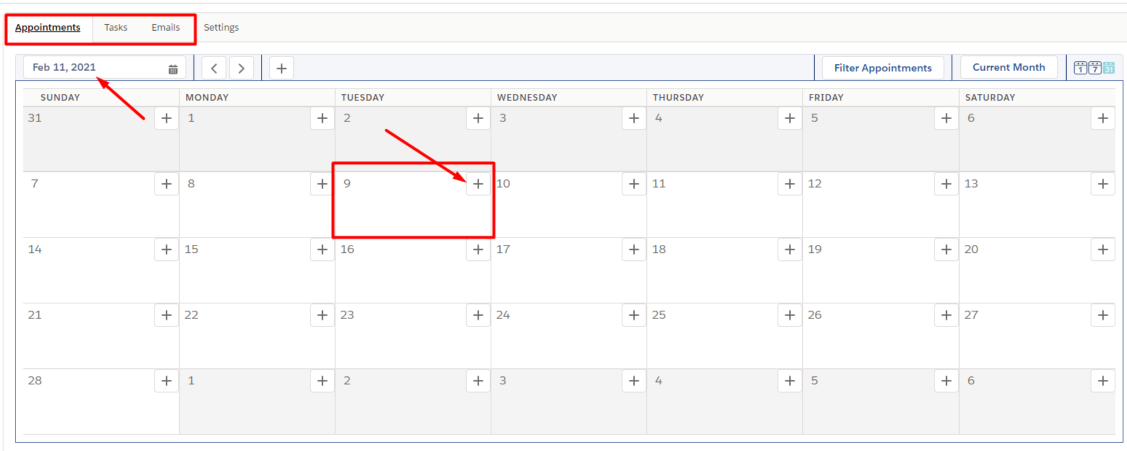

3.1. APPOINTMENTS – CREATING AND VIEWING

Select the **Appointments** tab in the CALENDAR PRO main menu. To create or schedule an **Appointment**, follow the instructions in the screenshot above.

In the **New Event** pop-up window, input info into the relevant fields. Be sure to fill in all mandatory options.

The **Type Listing** lets you choose between all defined event objects: Meeting, Call, Consulting, Appointment, Rescheduled, Tour, Finance Team Meeting, Board Meeting, etc.

For **Subject**, choose between the following options: Call, Email, Meeting, Send Letter/ Quote, Other.

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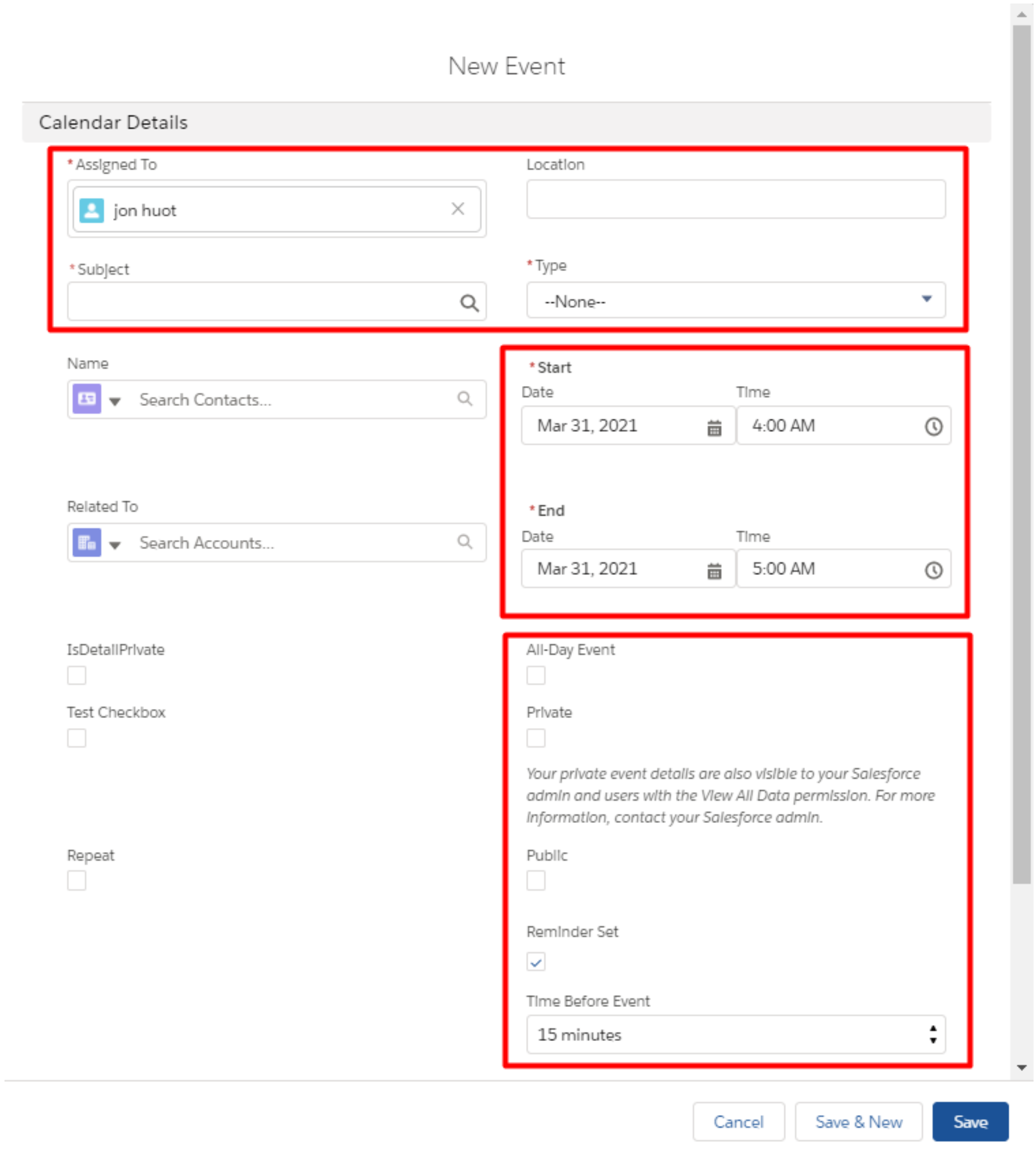

Other details for creating your Meeting Appointment are selecting the **privacy settings** (public vs. private), **reminder** before the event, and **description**.

After saving your first Meeting Appointment, a new tab opens with a summary. All included items are still editable.

You can also access the **Related** attachments for this appointment (next to details) and **Chatter** functionality to chat with other Salesforce members or clients in your organization.

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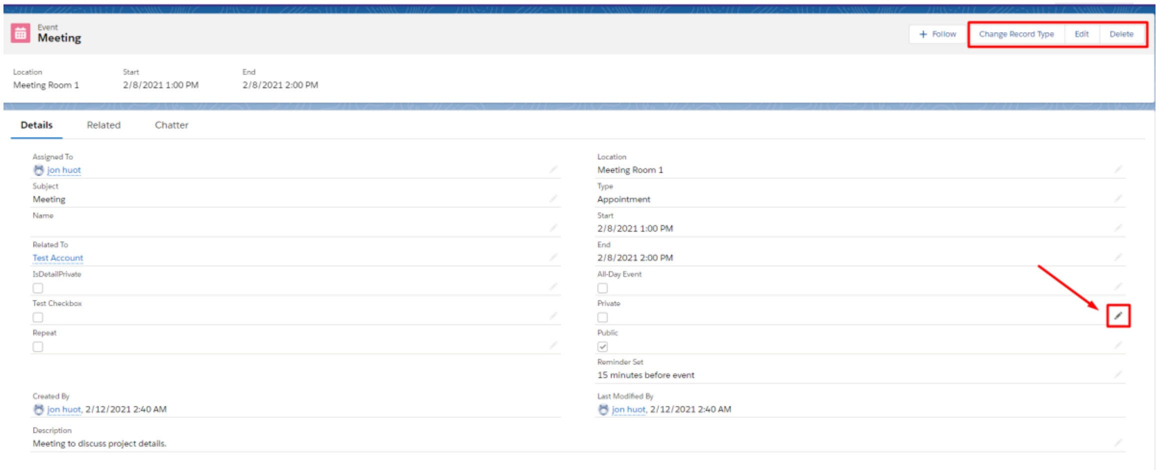
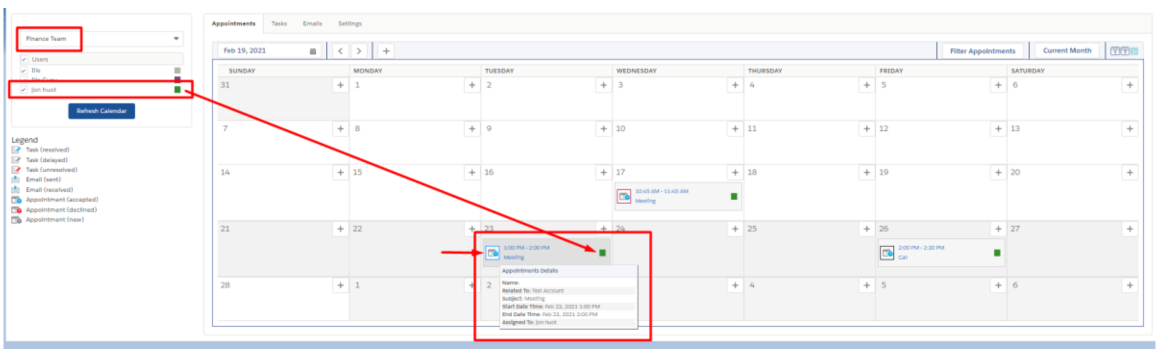
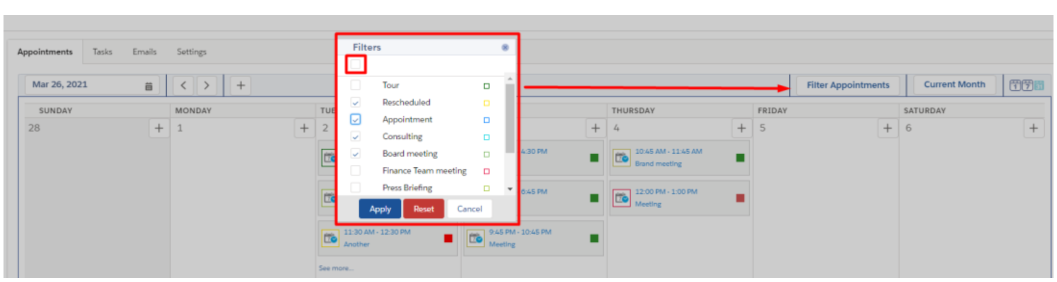


To see your appointment in the calendar, go back to the CALENDAR PRO tab.



Note: All details input when creating the appointment are visible when hovering over the Appointment. Users are showcased through right-hand side color, while the activity type colors the Meeting square.

If only certain appointment **types** are needed, you can simply **Filter Appointments**. Select or deselect all available options, or choose the desired type (single or multiple selection available).



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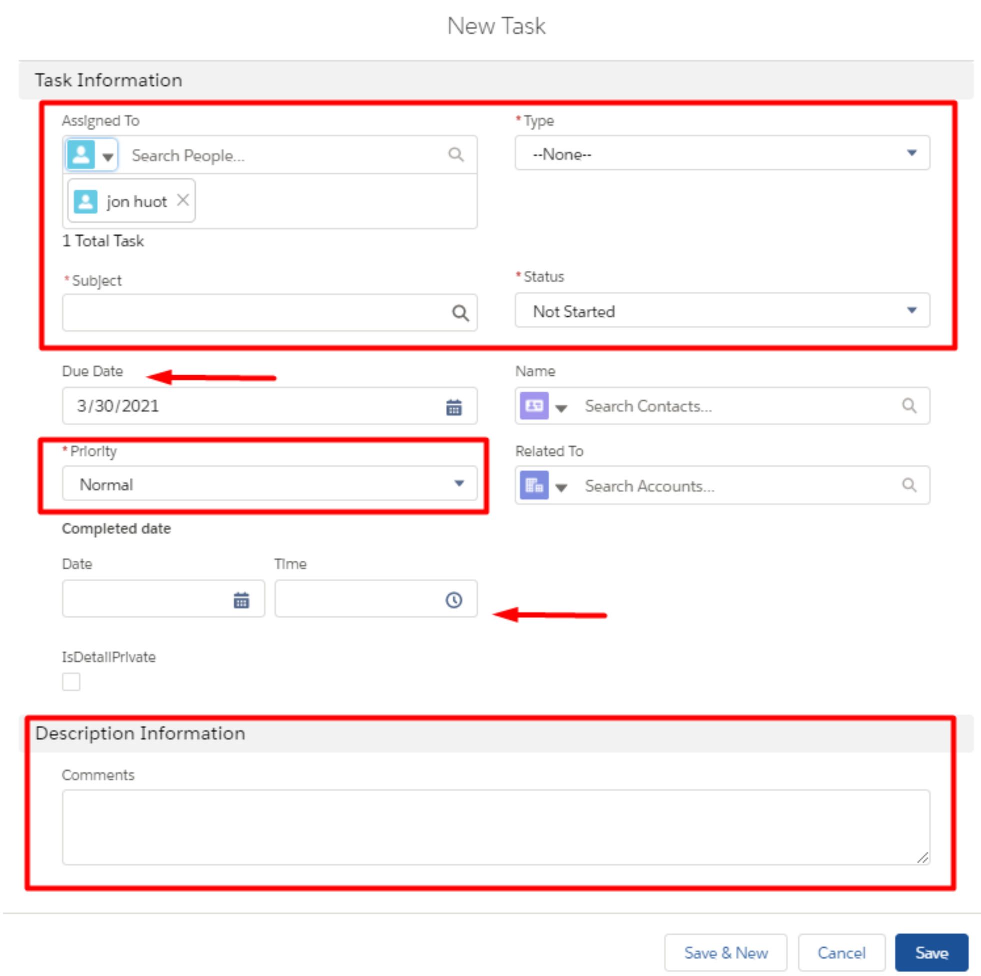
3.2. TASKS – CREATING AND VIEWING

Select the **Tasks** tab in the menu, and then click the **+** icon in the slot desired (choose the day for the task you want to create).

Fill in all mandatory details. Choose a **Task Type** (Call, Meeting, Other, Email, Follow Up Call), **Subject** (Call, Email, Send Letter, Send Quote, Other), **Task Status** (Not started, In Progress, Completed, etc.), and **Priority** (High, Normal, Low).

You can also add a **Description** and assign a user needed for this task.

The **due date** represents the deadline for the task, while the Completed Date is automatically filled in once the status is set to **Complete**.



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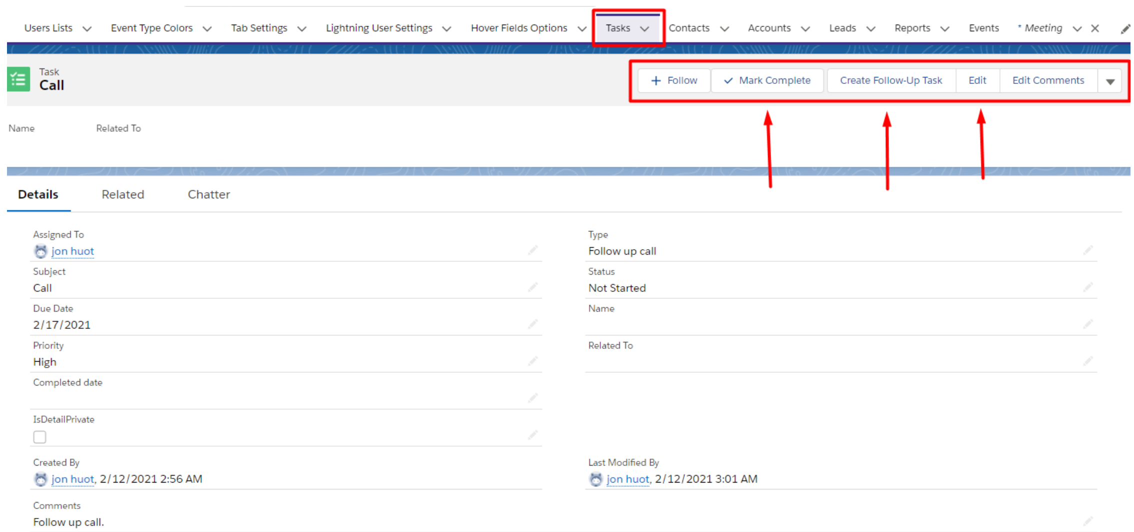
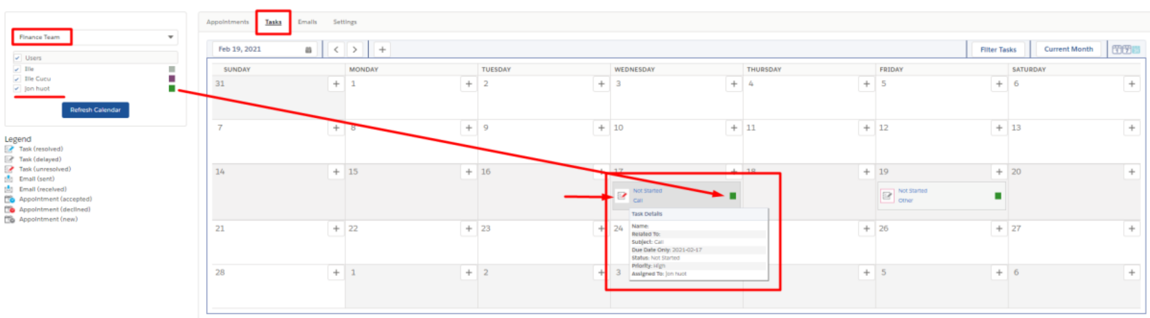
The summary of the newly created task is presented in a different tab. You can edit your task details, mark a task as completed (which also changes its status), and create a follow-up task without going to the calendar slots.



To visualize the created Task, go back to the CALENDAR PRO Lightning Tab.



You can also filter by **Type** and **Status**, by clicking on the **Filter Tasks** option.

3.3. EMAILS – CREATING AND VIEWING

Emails can only be sent for the current date. Therefore, the plus icon only appears on the current date.

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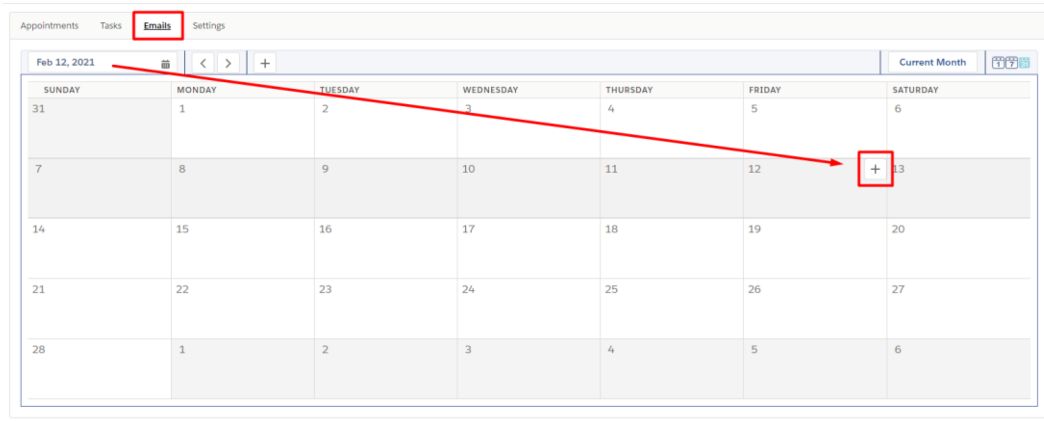
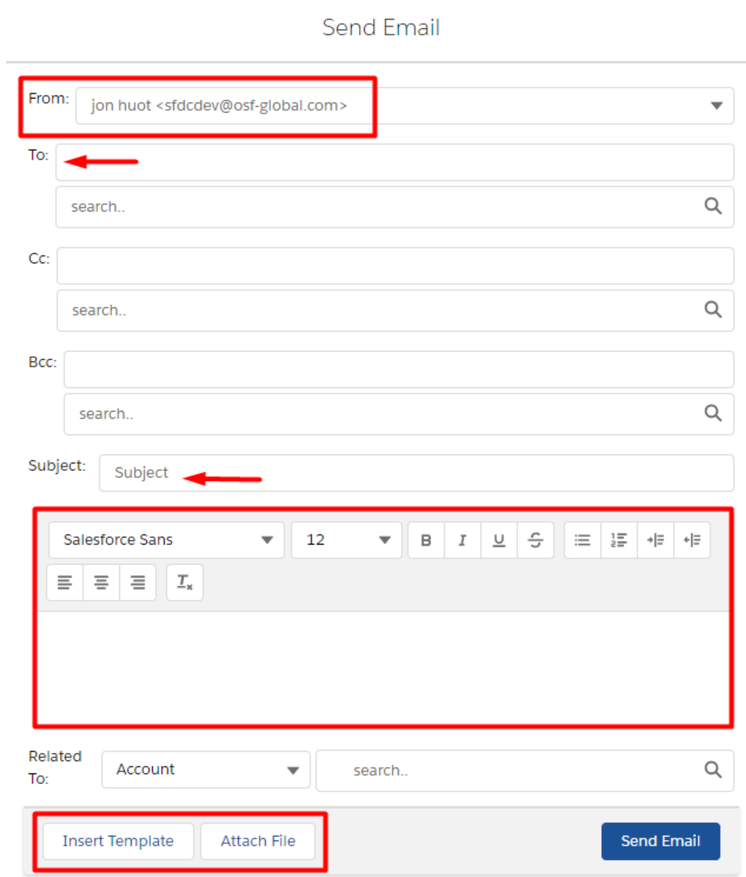


The **Send Email** pop-up contains the following fields: emails are automatically sent **from** your own user; input **subject** and **text**/message.

You can also insert a **template** and/or **attach files** to your email.

In the **To** section, you can only input leads, contacts, or custom email addresses.



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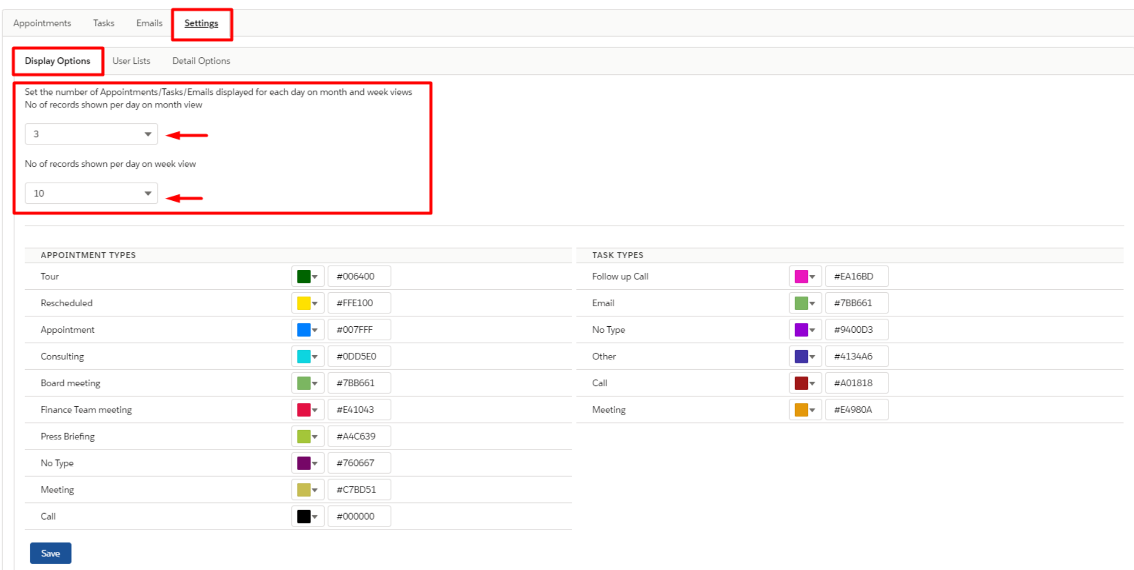
4. Settings

The Settings section is divided into three parts: **Display Options**, **User Lists**, and **Detail Options**. From this section you can select different colors for types of records and users, manage user lists, select how many records are displayed on month and week view of the calendar, and choose which fields are to be displayed when hovering over a record (Appointment Details, Task Details and Email Details).

4.1. DISPLAY OPTIONS

Before creating an activity item within the calendar, you can customize how tasks, appointments, or emails are displayed within the appointed slots.



You can choose the maximum number of records/activities displayed per day when visualizing the **monthly view** or the **weekly view**. Each activity in appointment and task types can have its own color identifier. This can help quickly identify the created activities within your calendar.

After completing customization, click **Save** and start creating your first activity.

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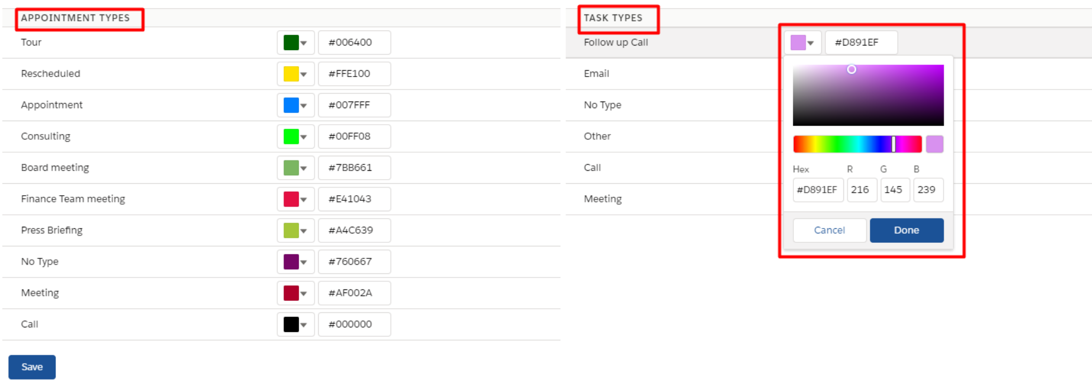
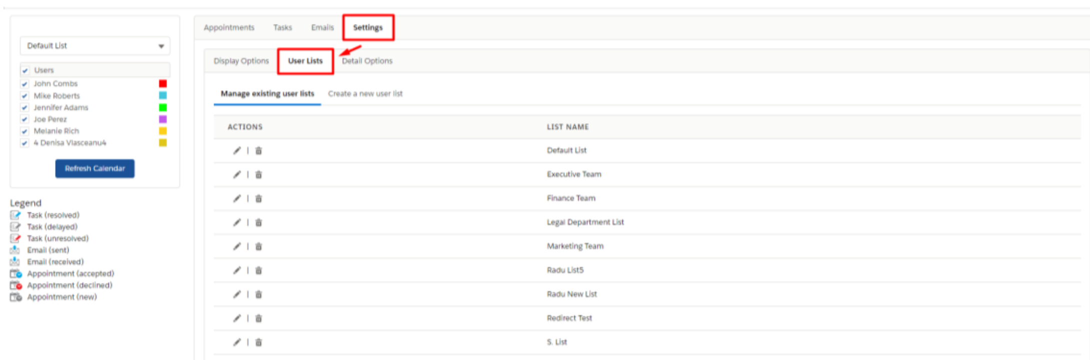
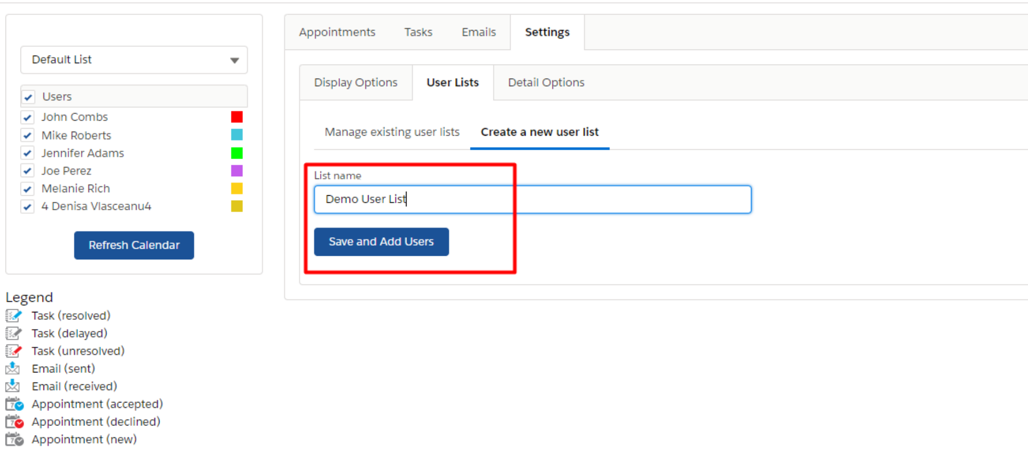


4.2. USER LISTS

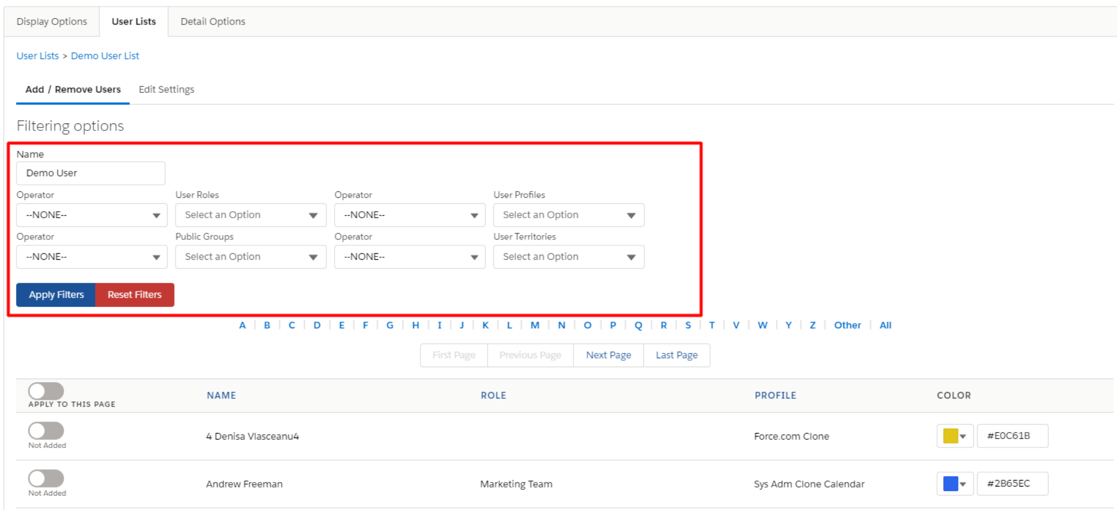
The User Lists tab allows you to choose the user groups that have the right to see the calendar's activities.



To create a new list or edit existing ones, navigate to the **Settings** tab and select **User Lists**.

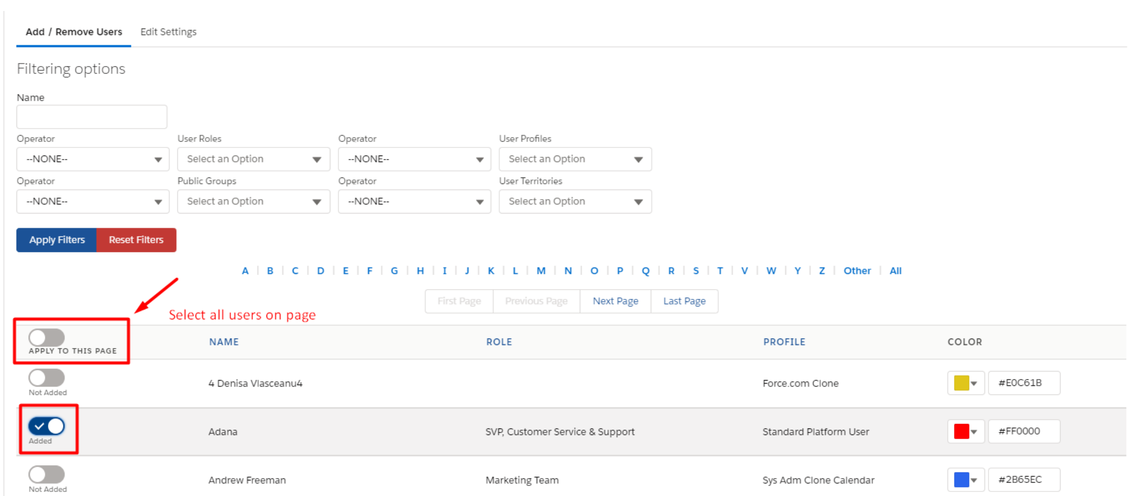


Create a new list and start adding users. You can either input the name directly and click **Apply Filters**, or, if there are multiple users from the same **Public Group** or **User Territories**, start refining the filters below.



The available **Operators** (AND, OR, none) help with adding or choosing between the input filters.

Once you have the desired users in the listing, you can either select all by clicking the toggle, or individually by clicking on the needed users.



The filtering section also allows you to choose individual color coding for each user in the listing, as an identifier for the user activities in the calendar slots (each activity slot indicates the user through the assigned color).

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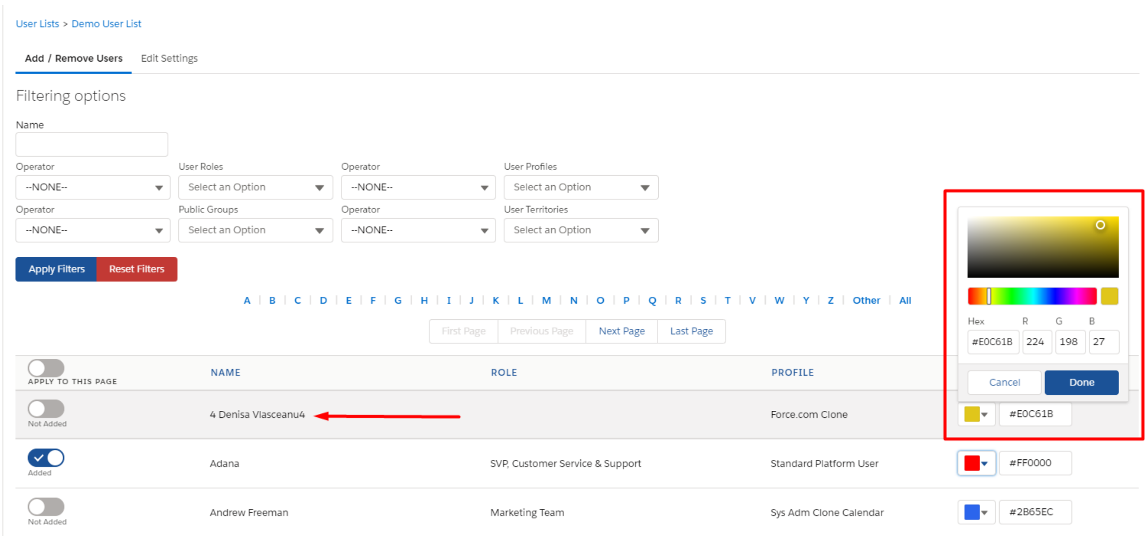
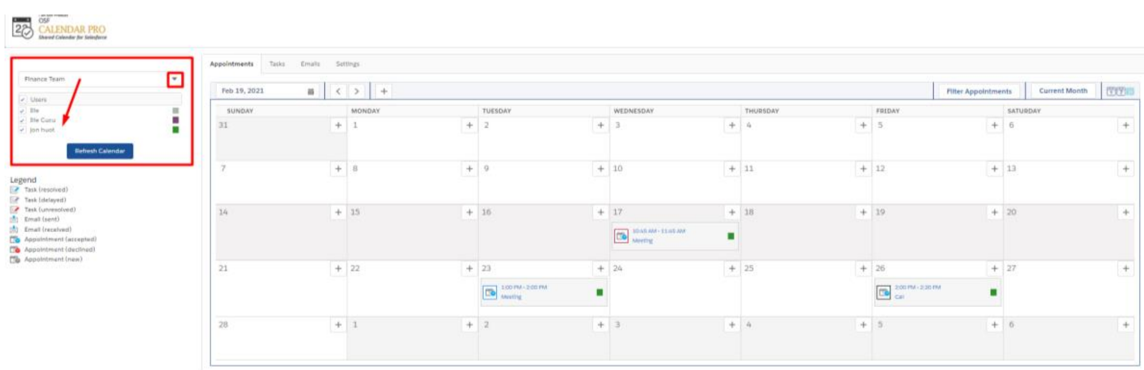


To go back to the User List, scroll down to the bottom of the page after the listing, and select **Back to User Lists**.

Each created group can be edited or deleted.

User Lists are always displayed on the left-hand-side, offering the possibility to choose between the various lists created.



Note: The calendar only displays activities relevant to the **User List** selected (to the users that belong in the list).

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4.3. DETAILED OPTIONS

To select the desired detail fields to be displayed for each of the available activities, navigate to **Detailed Options** under the **Settings** tab.