

CALENDAR PRO (for Salesforce Lightning)

User Guide



| an OSF Product

CALENDAR PRO

Shared Calendar for Salesforce

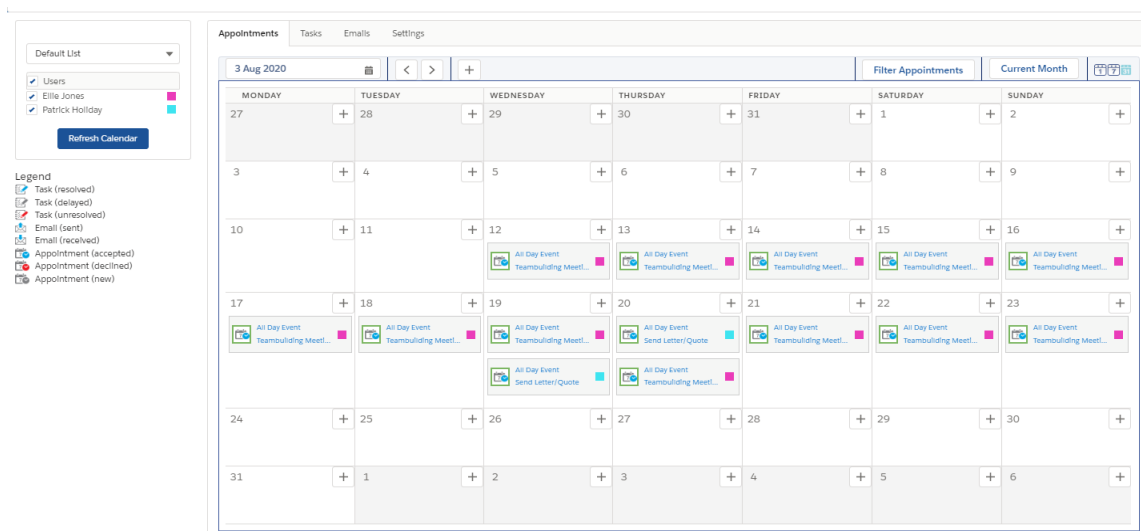
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1. Introduction

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.

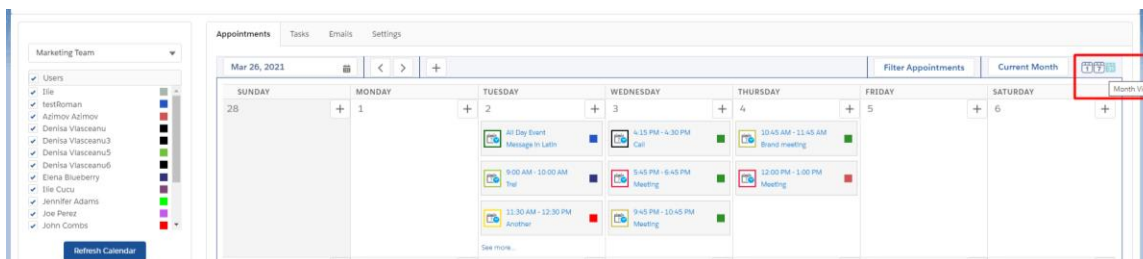
CALENDAR PRO is a custom-made tool that enables Salesforce users to create, customize, and visualize their calendar activities. Maximum efficiency is achieved through color coding different types of activities and calendar users.



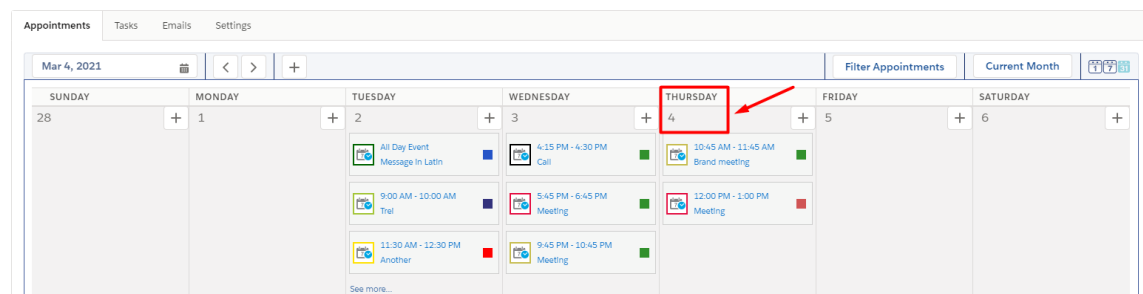
2. Viewing Options for CALENDAR PRO

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:

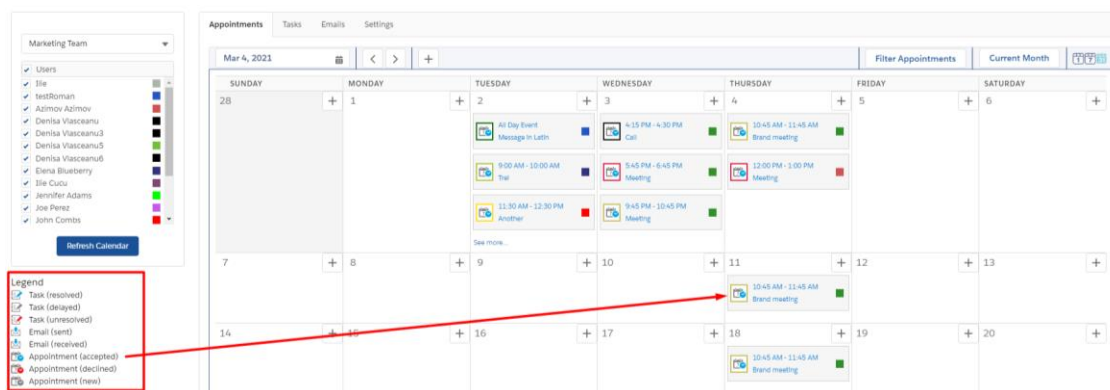


Tip: When clicking on a certain date from the **week** or **month** views, you are automatically redirected to the selected **day** view.



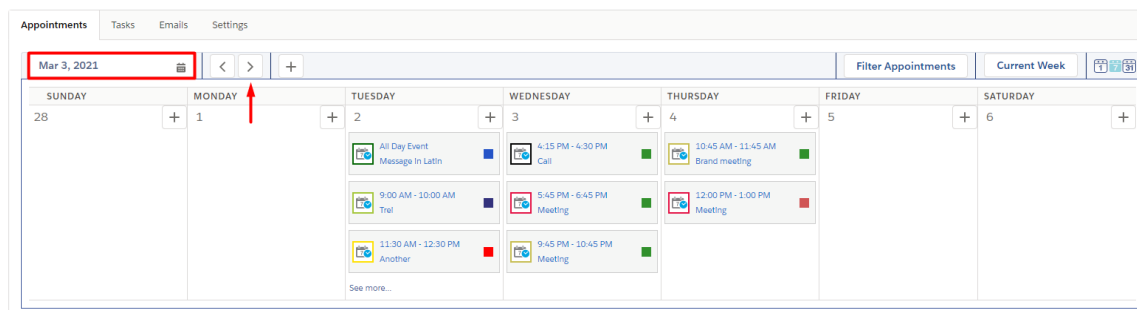
2.2. LEGEND

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.).



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.

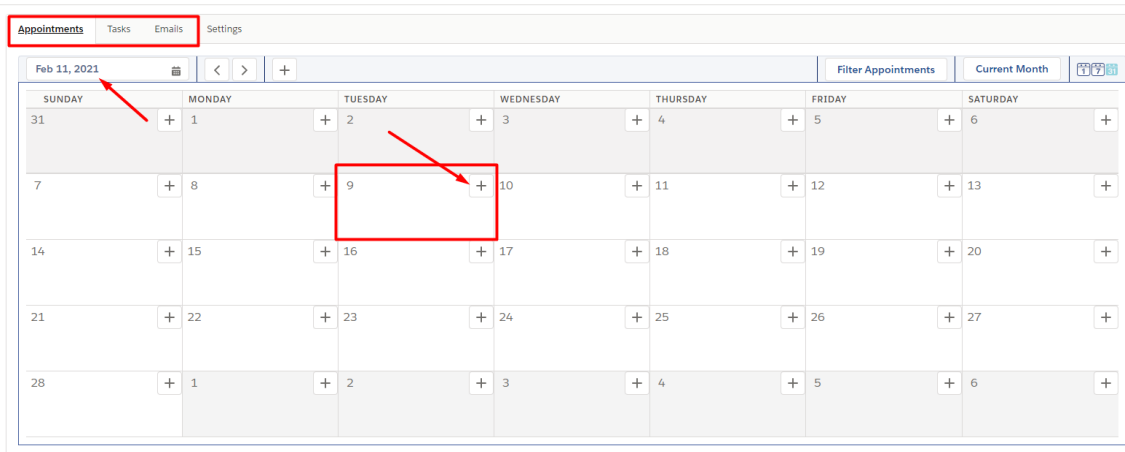
Tip: Depending on the selected timeframe, you can click on the **Current Day/Week/Month** as a shortcut to navigate directly to your current timeframe, instead of going through the calendar dates.

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.



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.

New Event

Calendar Details

* Assigned To

jon huot

* Subject

Location

* Type

--None--

Name

Search Contacts...

Related To

Search Accounts...

IsDetailPrivate

Test Checkbox

Repeat

* Start

Date: Mar 31, 2021 Time: 4:00 AM

* End

Date: Mar 31, 2021 Time: 5:00 AM

All-Day Event

Private

Your private event details are also visible to your Salesforce admin and users with the View All Data permission. For more information, contact your Salesforce admin.

Public

Reminder Set

Time Before Event

15 minutes

Cancel Save & New Save

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.

Event Meeting + Follow Change Record Type Edit Delete

Location: Meeting Room 1 | Start: 2/8/2021 1:00 PM | End: 2/8/2021 2:00 PM

Details | Related | Chatter

Assigned To: [Jon Huot](#)

Subject: Meeting

Name:

Related To: [Test Account](#)

IsDetail/Private: ☐

Test Checkbox: ☐

Repeat: ☐

Created By: [Jon Huot](#), 2/12/2021 2:40 AM

Description: Meeting to discuss project details.

Location: Meeting Room 1

Type: Appointment

Start: 2/8/2021 1:00 PM

End: 2/8/2021 2:00 PM

All-Day Event: ☐

Private: ☐

Public: ☐

Reminder Set: 15 minutes before event

Last Modified By: [Jon Huot](#), 2/12/2021 2:40 AM

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

Calendar Pro

Appointments | Tasks | Emails | Settings

Feb 15, 2021

Filter Appointments | Current Month | **Calendar Pro**

SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY

31 | 1 | 2 | 3 | 4 | 5 | 6

7 | 8 | 9 | 10 | 11 | 12 | 13

14 | 15 | 16 | 17 | 18 | 19 | 20

21 | 22 | 23 | 24 | 25 | 26 | 27

28 | 1 | 2 | 3 | 4 | 5 | 6

Legend:

- ☒ Task (assigned)
- ☒ Task (assigned)
- ☒ Task (assigned)
- ☒ Email (sent)
- ☒ Email (received)
- ☒ Appointment (accepted)
- ☒ Appointment (declined)
- ☒ Appointment (new)

Refresh Calendar

Meeting

1:00 PM - 2:00 PM

Appointment Details

Name: Meeting

Related To: Test Account

Start Date Time: 2/8/2021 1:00 PM

End Date Time: 2/8/2021 2:00 PM

Assigned To: Jon Huot

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).

Filters

- ☐ Tour
- ☒ Rescheduled
- ☒ Appointment
- ☒ Consulting
- ☒ Board meeting
- ☒ Finance Team meeting
- ☒ Press Briefing

Apply | Reset | Cancel

Filter Appointments | Current Month | **Calendar Pro**

Mar 26, 2021

SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY

28 | 1 | 2 | 3 | 4 | 5 | 6

6:30 PM | 10:45 AM - 11:45 AM | 11:00 PM - 1:00 PM

11:30 AM - 12:30 PM | 9:45 PM - 10:45 PM

Another | Meeting

See more...

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**.

New Task

Task Information

Assigned To

▼

Search People...

Q

jon huot

×

1 Total Task

* Type

--None--

* Subject

Q

* Status

Not Started

Due Date

3/30/2021

📅

Name

▼

Search Contacts...

Q

* Priority

Normal

Related To

▼

Search Accounts...

Q

Completed date

Date

📅

Time

🕒

IsDetail/Private

☐

Description Information

Comments

Save & New

Cancel

Save

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.

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

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.

Appointments Tasks Emails **Settings**

Display Options User Lists Detail Options

Set the number of Appointments/Tasks/Emails displayed for each day on month and week views

No of records shown per day on month view

3

No of records shown per day on week view

10

APPOINTMENT TYPES		
Tour		#006400
Rescheduled		#FFE100
Appointment		#007FFF
Consulting		#00D5E0
Board meeting		#7BB661
Finance Team meeting		#E41043
Press Briefing		#A4C639
No Type		#760667
Meeting		#C7BD51
Call		#000000

TASK TYPES		
Follow up Call		#EA16BD
Email		#7BB661
No Type		#9400D3
Other		#413AA6
Call		#A01818
Meeting		#E4980A

Save

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.

APPOINTMENT TYPES			TASK TYPES		
Tour		#006400	Follow up Call		#D891EF
Rescheduled		#FFE100	Email		
Appointment		#007FFF	No Type		
Consulting		#00FF08	Other		
Board meeting		#7BB661	Call		
Finance Team meeting		#E41043	Meeting		
Press Briefing		#A4C639			
No Type		#760667			
Meeting		#AF002A			
Call		#000000			

Save

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.

Appointments Tasks Emails **Settings**

Display Options **User Lists** Detail Options

Manage existing user lists Create a new user list

ACTIONS	LIST NAME
	Default List
	Executive Team
	Finance Team
	Legal Department List
	Marketing Team
	Radu List
	Radu New List
	Redirect Test
	S List

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

Appointments Tasks Emails **Settings**

Display Options **User Lists** Detail Options

Manage existing user lists Create a new user list

List name

Demo User List

Save and Add Users

Legend

- Task (resolved)
- Task (delayed)
- Task (unresolved)
- Email (sent)
- Email (received)
- Appointment (accepted)
- Appointment (declined)
- Appointment (new)

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 screenshot shows the 'User Lists' interface. At the top, there are tabs for 'Display Options', 'User Lists', and 'Detail Options'. Below the tabs, the breadcrumb 'User Lists > Demo User List' is visible. The main section is titled 'Add / Remove Users' with a sub-link 'Edit Settings'. A 'Filtering options' section is highlighted with a red box, containing several dropdown menus for 'Name', 'Operator', 'User Roles', 'Public Groups', 'User Profiles', and 'User Territories'. Below these are 'Apply Filters' and 'Reset Filters' buttons. A table of users is displayed below the filters, with columns for 'NAME', 'ROLE', 'PROFILE', and 'COLOR'. The table lists three users: '4 Denisa Vlasceanu4', 'Andrew Freeman', and 'Sys Adm Clone Calendar'. Each user has a toggle switch to the left of their name.

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.

This screenshot shows the same 'User Lists' interface, but with a red box highlighting the 'APPLY TO THIS PAGE' toggle switch. A red arrow points to the toggle, and a red text label 'Select all users on page' is next to it. The table of users is visible below, with the first user '4 Denisa Vlasceanu4' having a checked toggle. The second user 'Adana' has a checked toggle, and the third user 'Andrew Freeman' has an unchecked toggle. The 'COLOR' column shows color swatches and hex codes for each user.

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).

User Lists > Demo User List

[Add / Remove Users](#) [Edit Settings](#)

Filtering options

Name

Operator User Roles Operator User Profiles

Operator Public Groups Operator User Territories

[Apply Filters](#) [Reset Filters](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [V](#) [W](#) [Y](#) [Z](#) [Other](#) [All](#)

[First Page](#) [Previous Page](#) [Next Page](#) [Last Page](#)

APPLY TO THIS PAGE	NAME	ROLE	PROFILE
☐ Not Added	4 Denisa Vlasceanu4		Force.com Clone
☒ Added	Adana	SVP, Customer Service & Support	Standard Platform User
☐ Not Added	Andrew Freeman	Marketing Team	Sys Adm Clone Calendar

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 user 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.

OSF CALENDAR PRO

Finance Team

☒ Users ☒ Tasks ☒ Email ☒ Not Found

[Refresh Calendar](#)

Legend

- ☒ Task (connected)
- ☒ Task (disconnected)
- ☒ Task (unconnected)
- ☒ Email (connected)
- ☒ Appointment (connected)
- ☒ Appointment (disconnected)
- ☒ Appointment (unconnected)

Appointments

Feb 28, 2023

Filter Appointments Current Month

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6

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

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.

Select detail fields displayed for each Appointment/Task/Email

Save

APPOINTMENT: FIELD NAME	VISIBLE	TASK: FIELD NAME	VISIBLE	EMAIL: FIELD NAME	VISIBLE
Event Record Type ID	☐	Name	☒	Name	☒
Name	☒	Related To	☒	Related To	☒
Related To	☒	Subject	☒	Subject	☒
Subject	☒	Due Date Only	☒	Status	☐
Location	☐	Status	☒	Priority	☐
All-Day Event	☐	Priority	☒	Assigned To	☒
Due Date Time	☐	Assigned To	☒	Description	☐
Due Date Only	☐	Description	☐	Type	☐
Duration	☐	Type	☐	Public	☐
Start Date Time	☒	Public	☐	Call Duration	☐
End Date Time	☒	Call Duration	☐	Call Type	☐
Description	☐	Call Type	☐	Call Result	☐
Assigned To	☒	Call Result	☐	Call Object Identifier	☐
Type	☐	Call Object Identifier	☐	CustomField121	☐
Private	☐	CustomField121	☐	CustomField_Test2	☐
Public	☐	CustomField_Test2	☐	CustomField_Test3	☐
CustomField121	☐	CustomField_Test3	☐	CustomField_Test4	☐
CustomField_Test2	☐	CustomField_Test4	☐	CustomField_Test5	☐
CustomField_Test3	☐	CustomField_Test5	☐	CustomField_Test6	☐