

CALENDAR PRO (for Salesforce Lightning)

Mobile User Guide



| an OSF Product

CALENDAR PRO

Shared Calendar for Salesforce

Contents

1.	Introduction	3
2.	Configure CALENDAR PRO Mobile as a Salesforce Mobile Component	4
3.	Interface Options.....	5
4.	Appointments	7
4.1.	Create new appointment.....	7
4.2.	view appointment IN CALENDAR.....	8
4.3.	WEEK VIEW	11
4.4.	day VIEW	12
5.	Tasks.....	13
5.1.	create new task.....	13
5.2.	view tasks IN CALENDAR	14
5.3.	WEEK VIEW	16
5.4.	Day VIEW	17
6.	User Lists	17
7.	Legend	18

1. Introduction

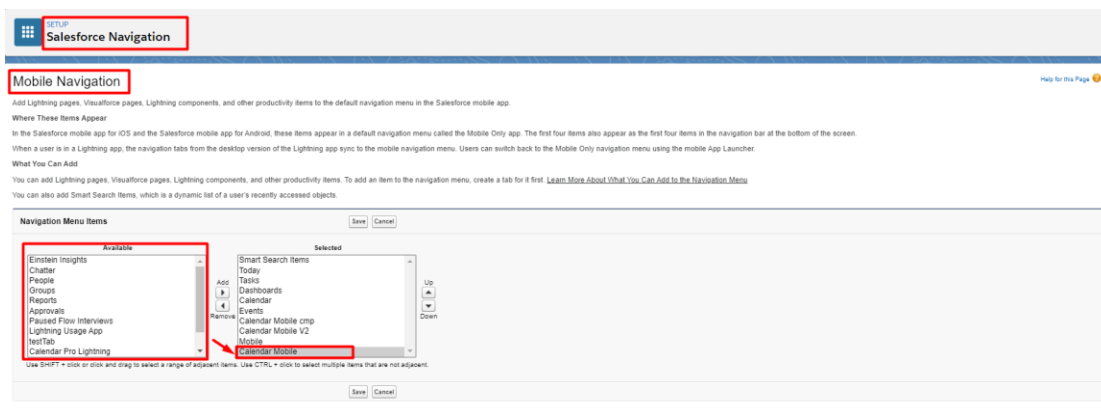
CALENDAR PRO Mobile for Salesforce allows you to see all of your Events and Tasks in one place on your mobile device (phone or tablet). It also offers the option of adding Events with one user and making that event visible for other users. You can also create events or tasks and assign them to other users.



2. Configure CALENDAR PRO Mobile as a Salesforce Mobile Component

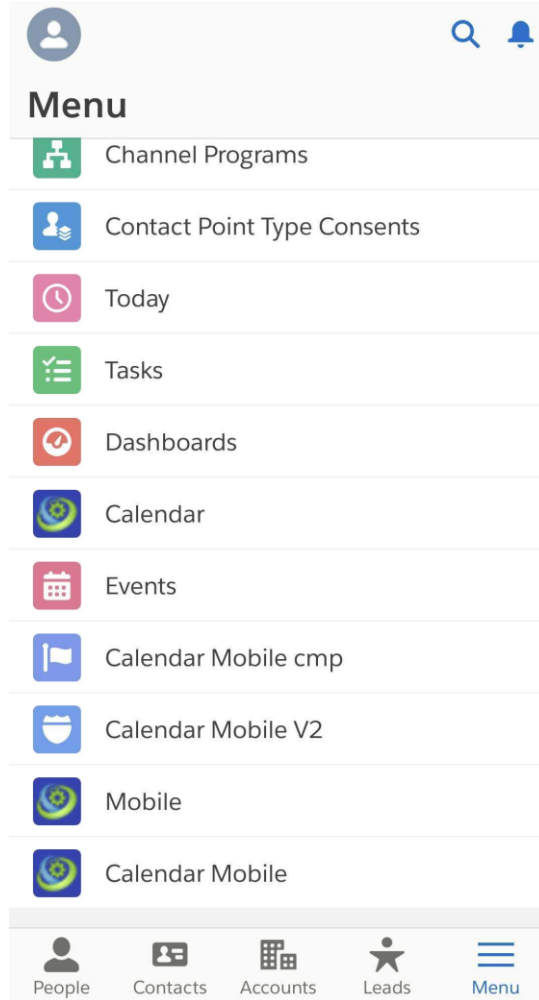
The CALENDAR PRO for Salesforce Lightning package comes with a built-in Lightning Component ready to be used as a Mobile tab. To enable this component as a visible tab in your Salesforce Mobile App:

From **Setup**, navigate to **Salesforce Navigation > Mobile Navigation**.



From the column, add the Calendar Mobile component as a Navigation Menu Item.

The next time you log into the Salesforce Mobile App, the Calendar Mobile navigation item is displayed.



3. Interface Options

CALENDAR PRO for Salesforce Mobile App offers a simple, yet innovative user interface.

1. In the top left corner, the collapsed menu is used to navigate between the app's 2 tabs (Appointments and Tasks), to open the User Lists section, and to display the Legend pop-up.



2. The tab indicator displays the tab that you're currently on – Appointments (Events) or Tasks.
3. The Funnel icon, located next to the tab label is used to open filters the Appointments or Tasks tabs.
4. The rightmost button in the header (+) is used to create new Appointments (Events) and Tasks.
5. There are also a Search and Notifications icons.



4. Appointments

4.1. CREATE NEW APPOINTMENT

In order to create a new Appointment (Event), tap on the (+) button and select **New Appointment**.

This opens the **Create Event** page. Creating an event works the same as in Salesforce, however, some fields require special attention, as they determine the way they are displayed in CALENDAR PRO. The fields are:

Assigned to

Calendar Details

* Assigned To

Ilie

x

* Subject

Meeting

Name

x

Related To

x

IsDetailPrivate

☐

Test Checkbox

☐

Repeat

☐

Location

* Type

Call

* Start

03/02/2021

* End

03/02/2021

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

☒

03/02/2021, 8:00 AM

Description Information

Description

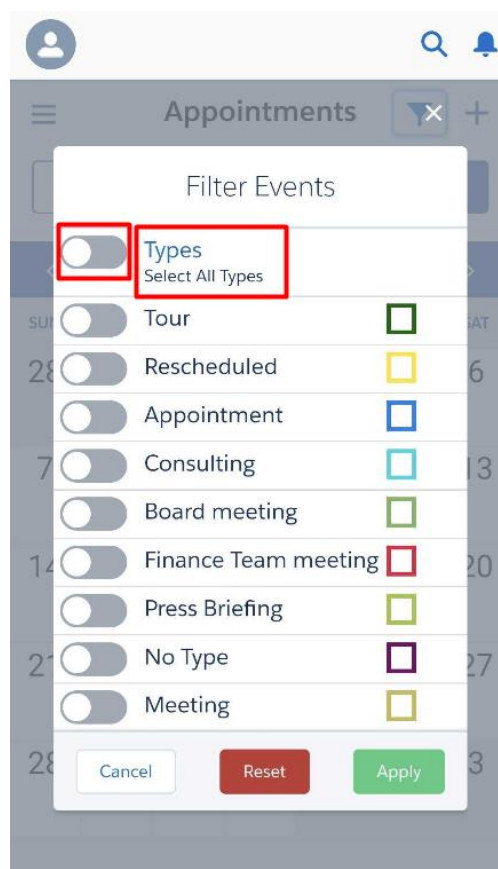
- Subject
- Name
- Related to
- IsDetailPrivate
- Test Checkbox
- Repeat
- Location
- Type
- Start
- End
- All Day Event
- Private
- Public
- Reminder Set
- Description Information

4.2. VIEW APPOINTMENT IN CALENDAR

Appointments can be viewed through the **Day**, **Week**, or **Month** time-frames.

All three viewing types offer the following options:

- **Navigation:** Navigate back and forth through days, weeks, or months of the year by using the **Next/ Previous** arrows from the calendar body header.
- **Filtering:** Display or hide appointments from the calendar table, based on their type field. To open the **Filter Appointments** pop-up, click the Funnel icon while on the **Appointments** tab.



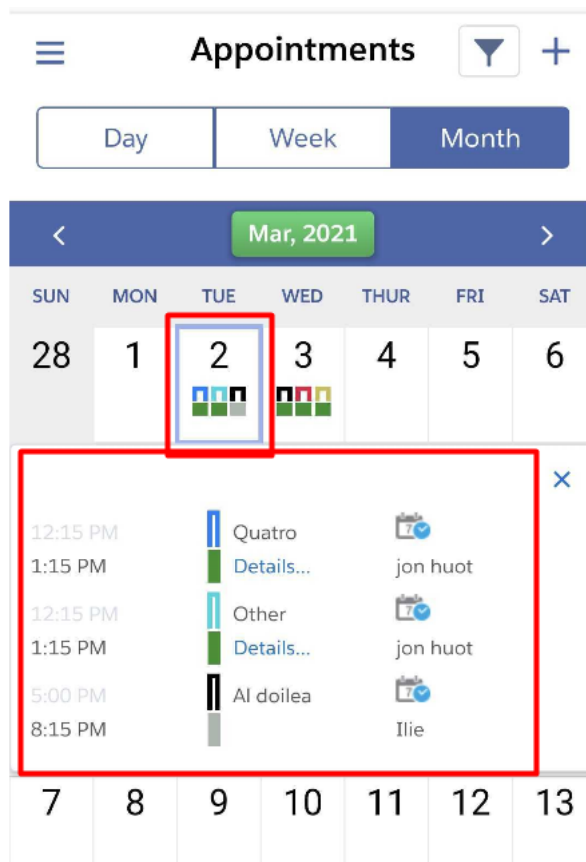
In the **Filter Events** pop-up, all values from the **Type** field are displayed.

To apply the desired filter, enable the types of events that you want to see in the calendar and disable the types that you want to hide, then click **Apply Filter**. Only the desired types of events are displayed. Whenever a filter is applied, it is applied for all views (Month/Week/Day).

- **Color Coding:** Each appointment is displayed with two colors (bottom solid color for user, top border for type).



- **See all events** for that specific selection (week, month): Tap on the day to see all events that occur in a single day directly from the Month View.



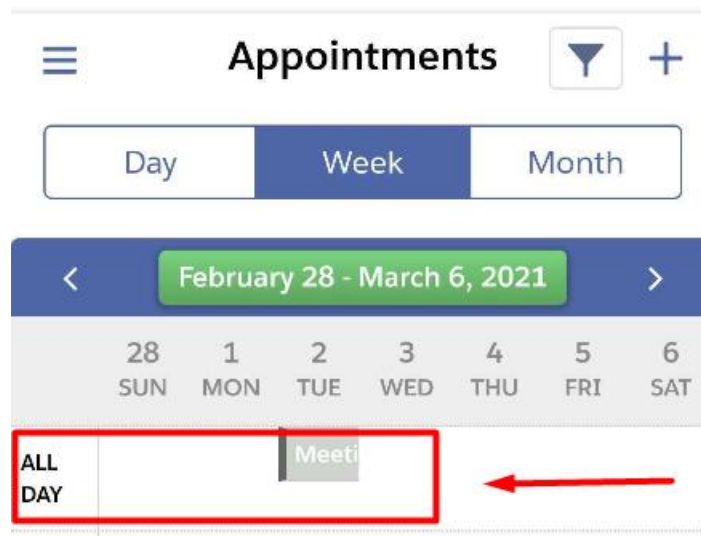
Note: Because of the limited space available in a mobile layout, the maximum display of events on each day is 3. If a day contains more than 3 events, a + symbol is displayed next to the event entries.

Tapping on **Details** opens the event record detail page in the Salesforce Mobile layout.

4.3. WEEK VIEW

The Week View is divided in 2 sections:

All Day: Events with the *All Day Event* checkbox and events that take place over multiple days are displayed here.



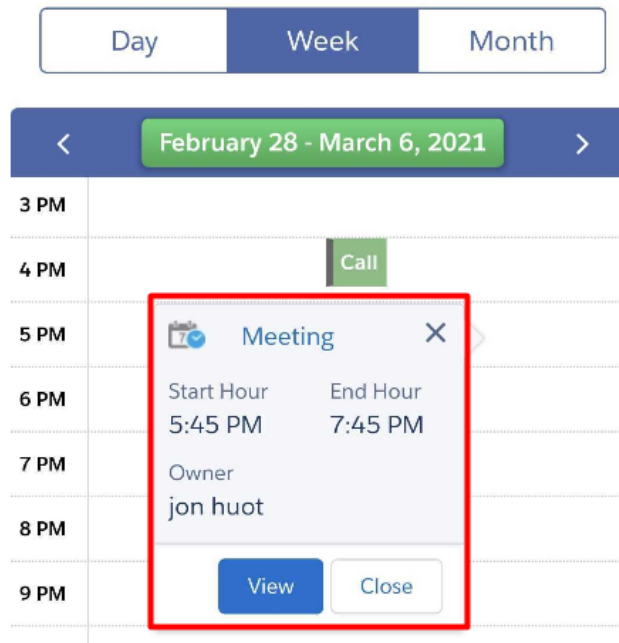
Normal: All normal events (taking place within a day).



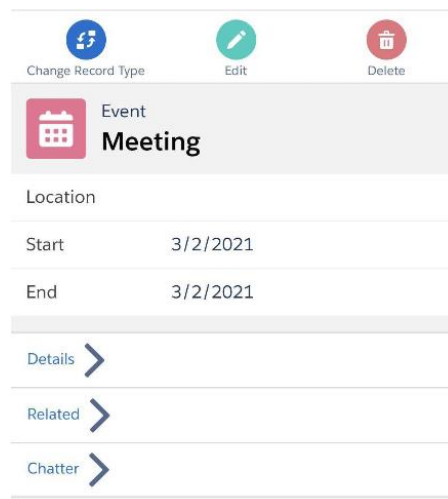
Color coding in the Week View consists of two fully colored bars:

- The thin left bar is assigned according to the user (the color displayed in the User List)
- Event Body (color for Type)

To display more details for an event, tap on the event entry; a pop-up appears with the following information: Approval status icon, Subject, Start Hour, End Hour, Owner, **View** button, and **Close** button.

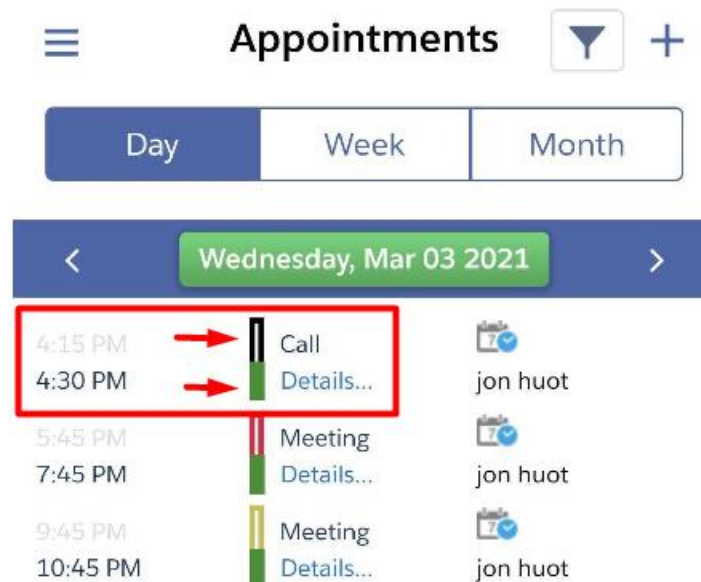


Tapping on **View** opens the event record detail page in the Mobile layout.



4.4. DAY VIEW

The **Day View** is similar to the section that appears when tapping on a specific day in the Month View. It displays all events for the current day and contains a timeline on the left.



The same color-coding rules apply to the Day View.

Previous to each event entry, two bars are displayed:

- Bottom solid color is for user (color as displayed in User List)
- Top border (color for Type)

5. Tasks

5.1. CREATE NEW TASK

To create a new task, tap the (+) button and select **New Task**. This opens the **Create Task** page.

Creating a task works the same as in Salesforce. The fields that determine the way they are displayed in CALENDAR PRO for Salesforce Mobile are the following:

Cancel New Task Save

Task Information

* Assigned To
jon huot x

* Subject
Q

Due Date

* Priority
Normal v

Completed date

IsDetailPrivate
☐

* Type
--None-- v

* Status
Not Started v

Name
Q

Related To
Q

Description Information

Comments

Assigned to
Subject
Due Date
Priority
Completed date
IsDetailPrivate
Type
Status
Name
Related to
Comments

5.2. VIEW TASKS IN CALENDAR

Tasks can be viewed through the **Day**, **Week**, or **Month** time-frames.

All three viewing types offer the following options:

- **Navigation:** Navigate back and forth through the days, weeks, or months of the year by using the **Next/ Previous** arrows from the calendar body header.
- **Filtering:** Display or hide tasks from the calendar table, based on their type and status field. To open the **Filter Tasks** pop-up, click the Funnel icon while on the **Tasks** tab.

Filter Tasks

☒	Types Select All Types	
☒	Follow up Call	☐
☒	Email	☐
☒	No Type	☐
☒	Other	☐
☒	Call	☐
☒	Meeting	☐
☒	Statuses Select All Status	
☒	Completed	
☒	Deferred	

Cancel
Reset
Apply

In the **Filter Tasks** pop-up, all values from the **Type** and **Status** fields are displayed. In order to apply the desired filters, enable the Types/Statuses of the task that you want to see in the calendar, and disable the Types/Statuses that you want to hide.

Cross-filtering works as well. For example, if you want to only see the calls that are in progress, select **Type = Call** and **Status = In Progress**, then click **Apply Filter**.

Only the desired Types/Statuses of Task are displayed. Whenever a filter is applied, it is applied for all views (Month/Week/Day).

- **Color Coding:** Each appointment is displayed with two colors (bottom solid color for user, top border for type).
- **See all tasks** for that specific selection (week, month): If you want to see all tasks that occur in a single day directly from the Month View, tap on the day you want to display the tasks for.

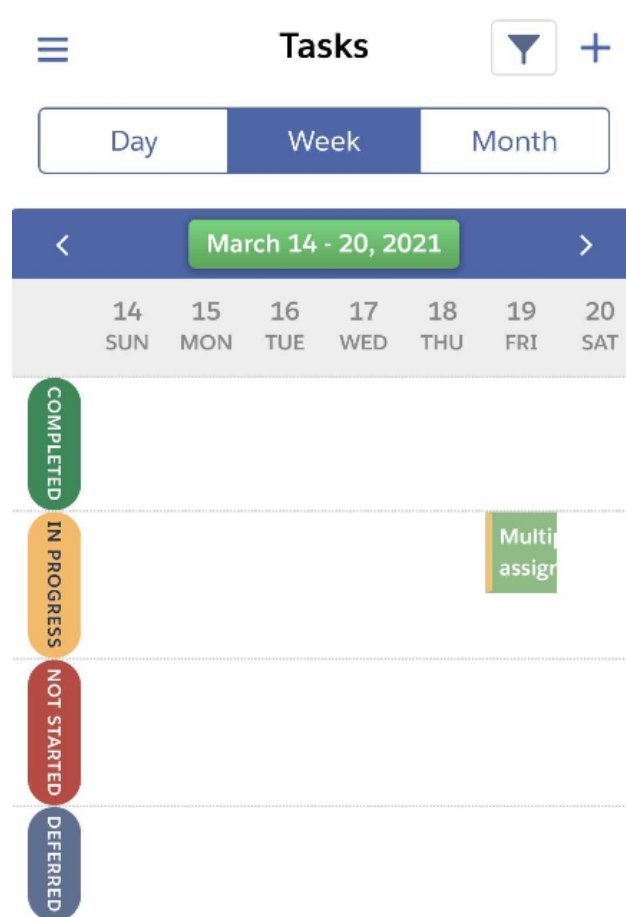
5.3. WEEK VIEW

The **Tasks Week View** is slightly different from the **Appointments Week View** for two main reasons:

- Tasks do not occur over a period. They have a due date and don't require an exact hour.
- Apart from Type, Tasks also require a status.

Given these facts, the Tasks Week View contains two major changes:

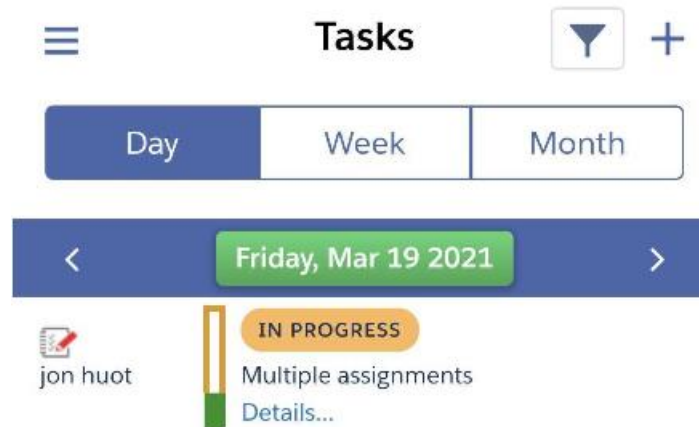
- It does not contain a timeline.
- It contains a bar that displays the Task Status.



Color coding and **See more details** are the same as for the **Appointments Week View**.

5.4. DAY VIEW

The Tasks Day View works the same as the Appointments Day View, the only difference that there is no timeline required, and the Task Status is added.



6. User Lists

The functionality of CALENDAR PRO for Salesforce Mobile is centered around User Lists.

Note: User Lists can only be created from CALENDAR PRO for Salesforce Lightning (desktop). A User List determines the activities (Events/Tasks) displayed in the calendar by using the **Assigned To** field. If a User List contains a user, this determines the activities to be displayed.



In the User List pop-up, the following elements are available:

1. **User List Picklist:** All available User Lists for your user.
2. **Select button:** Displays users for the selected User List when tapped.
3. **Select All button:** Selects all users from a list when tapped.
4. **User checkbox before each user:** Enable/disable the user from the list.
5. **Color** of the selected user (can be set in CALENDAR PRO for Salesforce Lightning).
6. **Close** button.

User List

Marketing Team ▼
Select

✓ Select All

✓ Ilie
☐

✓ testRoman
☐

✓ Azimov Azimov
☐

✓ Denisa Vlasceanu
☐

Close

7. Legend

The Legend (available from the top left collapsed menu) contains symbols that indicate:

- For **Events**: Approval Status
- For **Tasks**: Completion Status

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Pg. 18

LEGEND

TASKS

 Task (resolved)

 Task (delayed)

 Task (unresolved)

APPOINTMENTS

 Appointment (accepted)

 Appointment (declined)

 Appointment (new)

Cancel

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