



| an OSF Product

CALENDAR PRO

Shared Calendar for Salesforce

OSFDIGITAL

Real-Time Insight into Your Teams' Activities



AppExchange
Certified



LIVE
Demo



FREE
Trial



CUSTOMIZATION
Services Available

osf.digital

MEET YOUR BUSINESS NEEDS

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GAIN

a full overview and keep track of scheduled calendar activities.



IMPROVE

performance and planning capabilities directly in Salesforce.



INCREASE

productivity among multiple users with a unified calendar view.

MAIN FEATURES

EASY-TO-USE PLUGIN

Implement a reliable planning and scheduling tool directly into Salesforce. The Calendar is easily integrated. 15-day Free Trial available.

MONITOR WORKFLOWS

Track the progress of Appointments, Tasks and Emails across the entire company. Filter Tasks and Appointments in the Calendar.

MANAGE USERS

Organize a large number of users through User Lists. Improve performance and planning capabilities by easily navigating between different User Lists directly in Salesforce.

REAL-TIME INSIGHT

Gain complete visibility over teams' schedule. Get a full overview of your scheduled Appointments, Tasks and Emails in the calendar view directly in Salesforce.

CLEAR PICTURE

Maximize your efficiency by color-coding different Types of Activities and Calendar users. Hover over the Event and customize the information to be displayed.

SCHEDULE A LIVE DEMO

CREATE & MANAGE CALENDAR ACTIVITIES

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The screenshot displays the Salesforce Calendar Pro interface. On the left, a sidebar lists users, including Trend Consultant 3, Trend Manager, Trend Sales 1, Trend Sales 2, Ilie Cucu, Jennifer Adams, Joe Perez, Denisa Viasceanu5, Denisa Viasceanu6, and Elena Blueberry. The main calendar view shows June 2017 with various appointments and tasks. A mobile app interface is overlaid on the right, showing a similar calendar view with a '+' button to add new appointments, tasks, or emails.

Create Appointments, Tasks, and Emails associated with Users directly in Salesforce through the (+) button and organize them by day, week or month.

ACTIVITY COLOR-CODING OPTIONS

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

No of records shown per day on week view

Set color codes for Appointment and Task types

Appointment Types	Task Types
Tour	Follow up Call
Rescheduled	Email
Appointment	No Type
Consulting	Other
Board meeting	Call
Finance Team meeting	Meeting
No Type	
Meeting	
Call	

Choose a color

The screenshot displays the Salesforce Settings page for appointments and tasks. It features three main sections under the 'Display Options' tab: setting the number of records shown per day on month and week views, and setting color codes for appointment and task types. The 'Set color codes' section consists of two side-by-side tables. The left table lists various appointment types, and the right table lists task types. Each entry in these tables has a corresponding color selection icon. A detailed callout provides a closer look at the 'Choose a color' interface, which presents a comprehensive grid of color options for users to select from.

Color code different types of Salesforce Appointments and Tasks from the Settings in the desktop view.

CREATION OF USER LISTS

Display Options

User Lists

Detail Options

Create new users list

List Name:

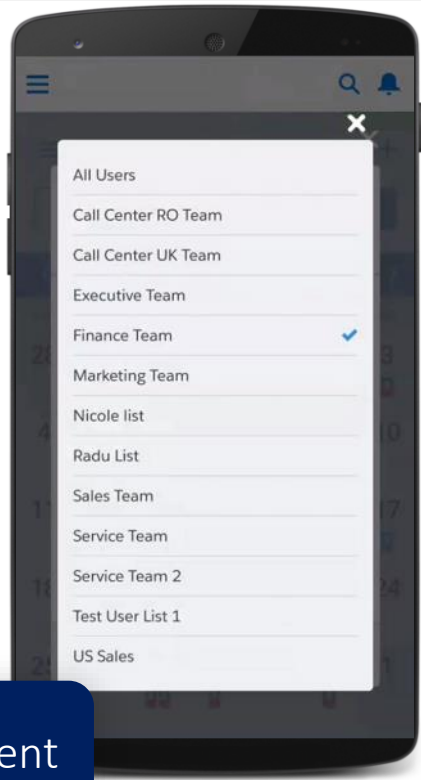
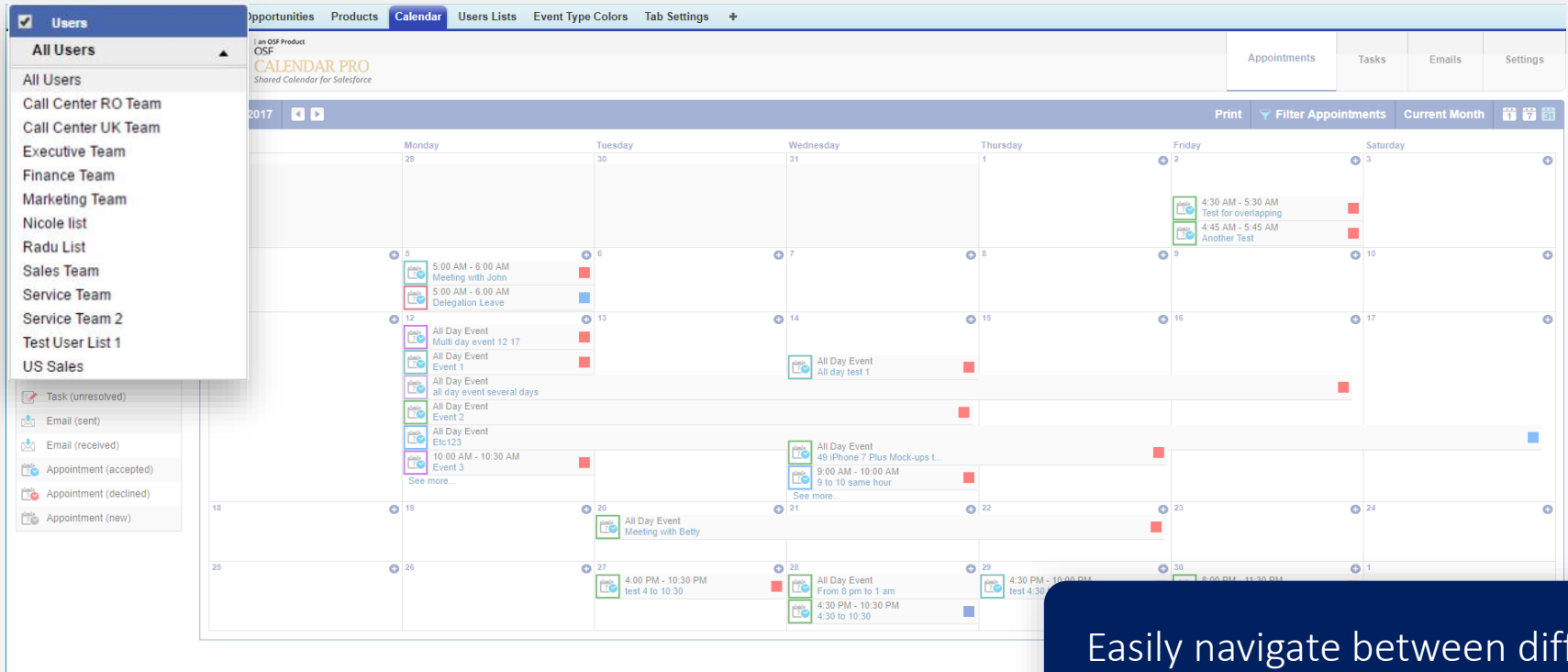
Save and Add Users

Manage existing users lists

	List Name
Edit Delete	All Users
Edit Delete	Call Center RO Team
Edit Delete	Call Center UK Team
Edit Delete	Executive Team
Edit Delete	Finance Team
Edit Delete	Marketing Team
Edit Delete	Nicole list
Edit Delete	Radu List
Edit Delete	Sales Team
Edit Delete	Service Team
Edit Delete	Service Team 2
Edit Delete	Test User List 1
Edit Delete	US Sales

Create various User Lists to easily manage the information displayed in the Calendar.

USER LISTS NAVIGATION



Easily navigate between different User Lists.

USERS COLOR-CODING OPTIONS

Display Options | User Lists | Detail Options

Rename List :

Name: User Role: Select Value User Profile: Select Value Public Groups: Select Value

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

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

☐ Name	Role	Profile
☐ Chatter Expert		Chatter Free User
☒ West Allen	Alexandru Zamfirescu Partner User	Partner Community Login User
☐ Dion Alyson	OSF Global Services Partner User	Partner Community Login User
☐ User Customer		Customer Community User
☐ User CustomerPlus	CustomerPlus User Customer User	Customer Community Plus User
☐ Vlasceanu Denisa	OSF Global Services Partner User	Partner Community Login User
☐ Jones Erin	Mary Partner User	Partner Community User Clone
☐ User Integration		Analytics Cloud Integration User
☐ Doe John	CFO	Standard Platform User
☐ Smith John	John Partner User	Partner Community Login User
☐ Green Lisa	CEO	
☐ Customer User Radu		
☐ Daniel Radu	Channel Sales Team	

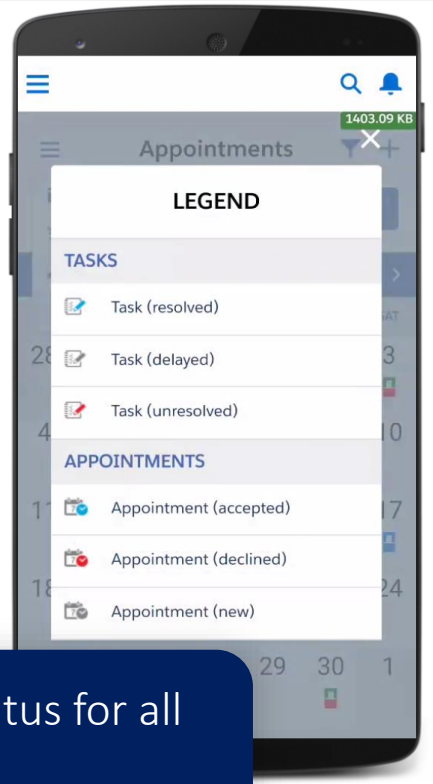
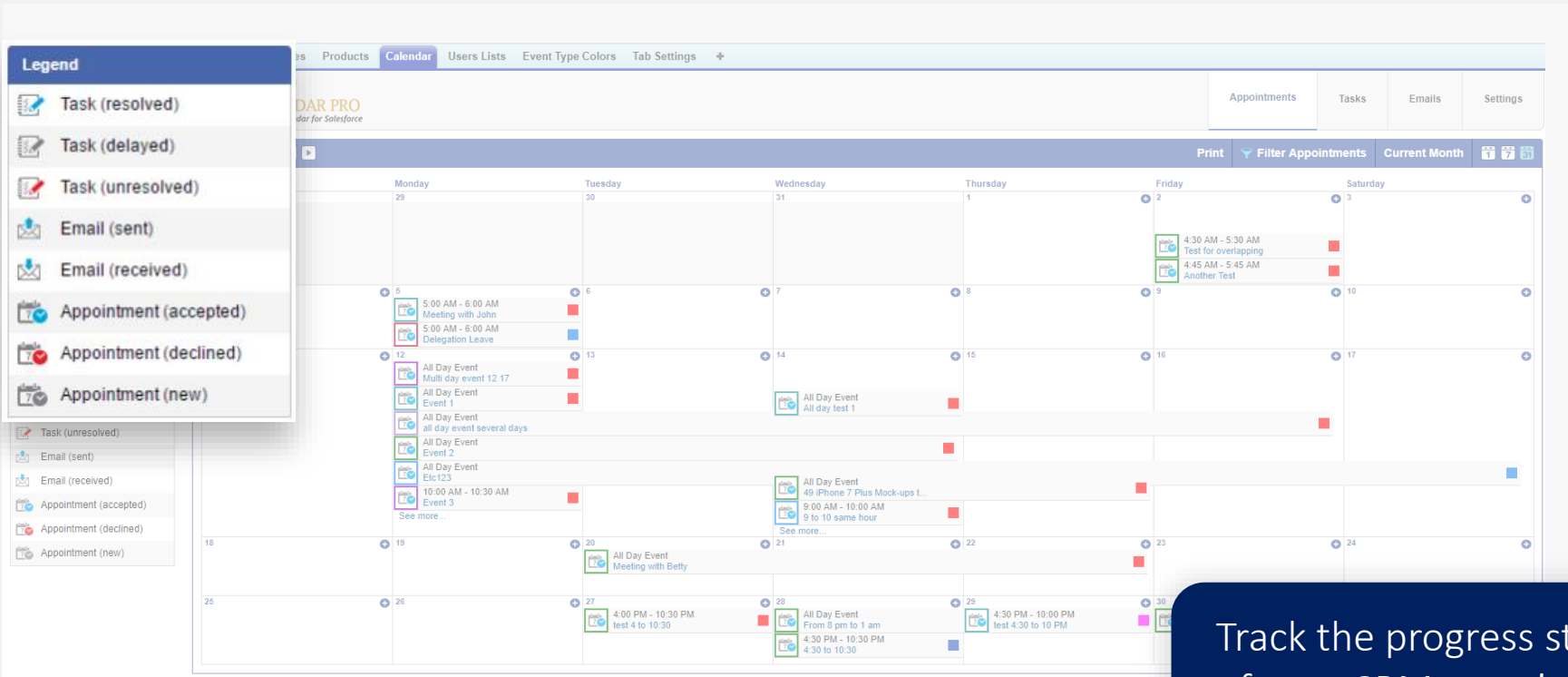
[Save](#) [Cancel](#)

Color

- ☐
- ☐
- ☐
- ☐
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- ☐
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- ☐
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- ☐

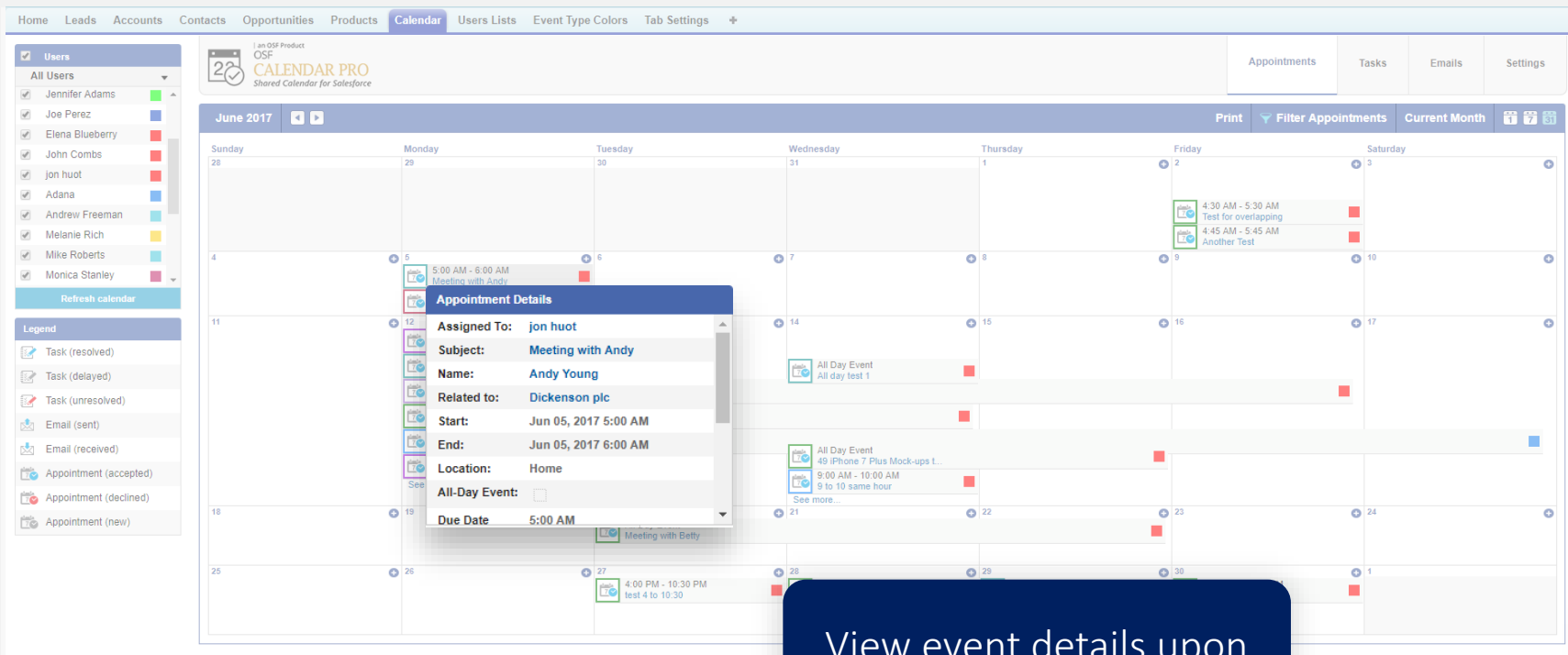
Color code different
Salesforce Users from the
Settings in the desktop view.

ACTIVITIES STATUS

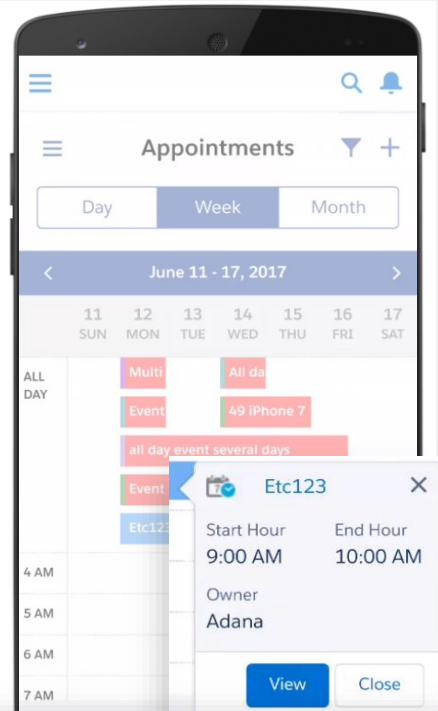


Track the progress status for all of your CRM users' Appointments, Tasks and Emails through the Legend.

INSTANT EVENT DETAILS



View event details upon mouse hover



Tap on Activity entry

CUSTOMIZABLE ACTIVITY DETAILS

Display Options

User Lists

Detail Options

Select detail fields displayed for each Appointment/Task/Email

Appointment: Field Name	Visible
Name	☒
Related To	☒
Subject	☒
Location	☒
All-Day Event	☒
Due Date Time	☒
Due Date Only	☒
Duration	☒
Start Date Time	☒
End Date Time	☒
Description	☒
Assigned To	☒
Type	☒
Private	☐
Public	☒
CustomField121	☐
CustomField_Test2	☐
CustomField_Test3	☐
CustomField_Test4	☐

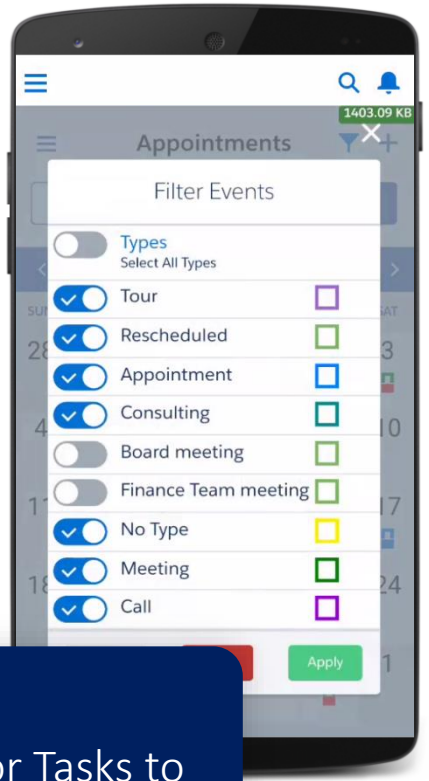
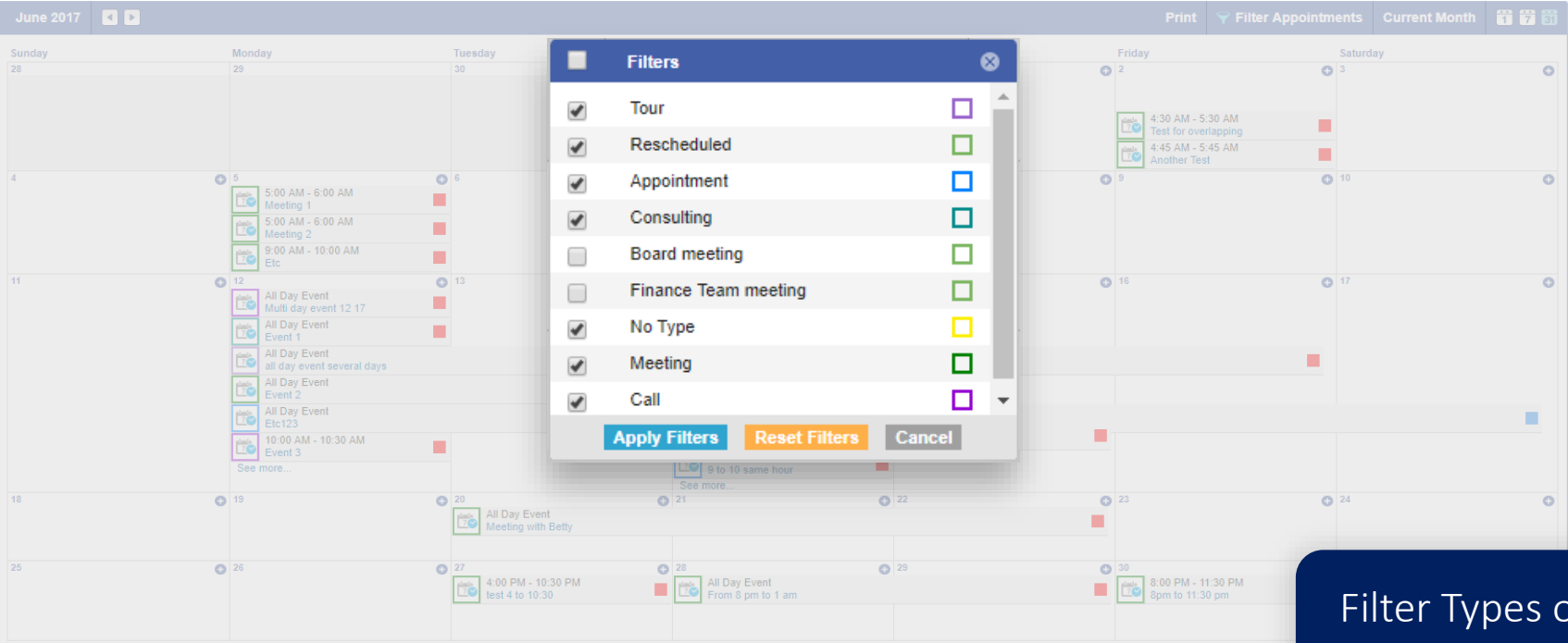
Save

Task: Field Name	Visible
Name	☒
Related To	☒
Subject	☒
Due Date Only	☒
Status	☒
Priority	☒
Assigned To	☒
Description	☐
Type	☒
Public	☐
Call Duration	☒
Call Type	☐
Call Result	☐
Call Object Identifier	☐
CustomField121	☐
CustomField_Test2	☒
CustomField_Test3	☐
CustomField_Test4	☐
CustomField_Test5	☐

Email: Field Name	Visible
Name	☒
Related To	☒
Subject	☒
Due Date Only	☒
Status	☐
Priority	☐
Assigned To	☒
Description	☐
Type	☐
Public	☐
Call Duration	☐
Call Type	☐
Call Result	☐
Call Object Identifier	☐
CustomField121	☐
CustomField_Test2	☒
CustomField_Test3	☐
CustomField_Test4	☐
CustomField_Test5	☐

Customize information that is displayed for an Activity from the desktop view.

CALENDAR ACTIVITIES FILTERING



Filter Types of Appointments or Tasks to easily access the information you seek.

WANT MORE THAN JUST OUT OF THE BOX?

OSFDIGITAL

Our Certified Commerce Specialists can help you with:



Integration Services

Nobody knows better than us how to seamlessly integrate our products on your website



Live Demo

We want to show you our products in action and give you tips on how to use them best



Customization Services

Your business is unique and we know how to enhance our products to better suit your needs

SCHEDULE A LIVE DEMO

REACH THE POTENTIAL OF YOUR ONLINE SHOP

with our Apps & Components for Salesforce

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CALENDAR PRO

Shared Calendar for Salesforce



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Picklist INSIGHTS

Picklist Data Tracking for Salesforce



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Community PLANNER

Calendar for Partner Community



| an OSF Product

LICENSES OPTIMIZER

Licensing Tool for Salesforce Community

EXPLORE FULL CATALOG

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THANK YOU

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