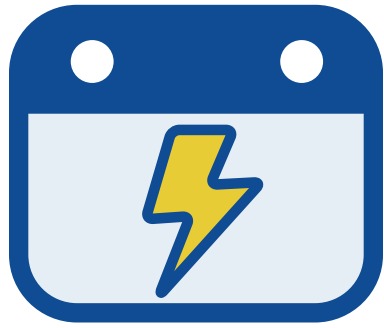




Calendar Anything



Admin Guide
Installation and Configuration

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Overview

CalendarAnything LWC is a Salesforce.com application that allows users to create calendar views from any Standard or Custom objects that include a date or date/time field.

This user guide covers the basic features of CalendarAnything LWC including creating calendars, editing various settings, and understanding how to use the application.

For information on how to set up more advanced features of CalendarAnything LWC that require System Administrator access, please refer to our [ADVANCED ADMIN GUIDE](#), available on the [APPEXCHANGE](#).

Technical Specifications

Salesforce.com supported editions: Enterprise, Professional, Unlimited, Developer, Essentials.

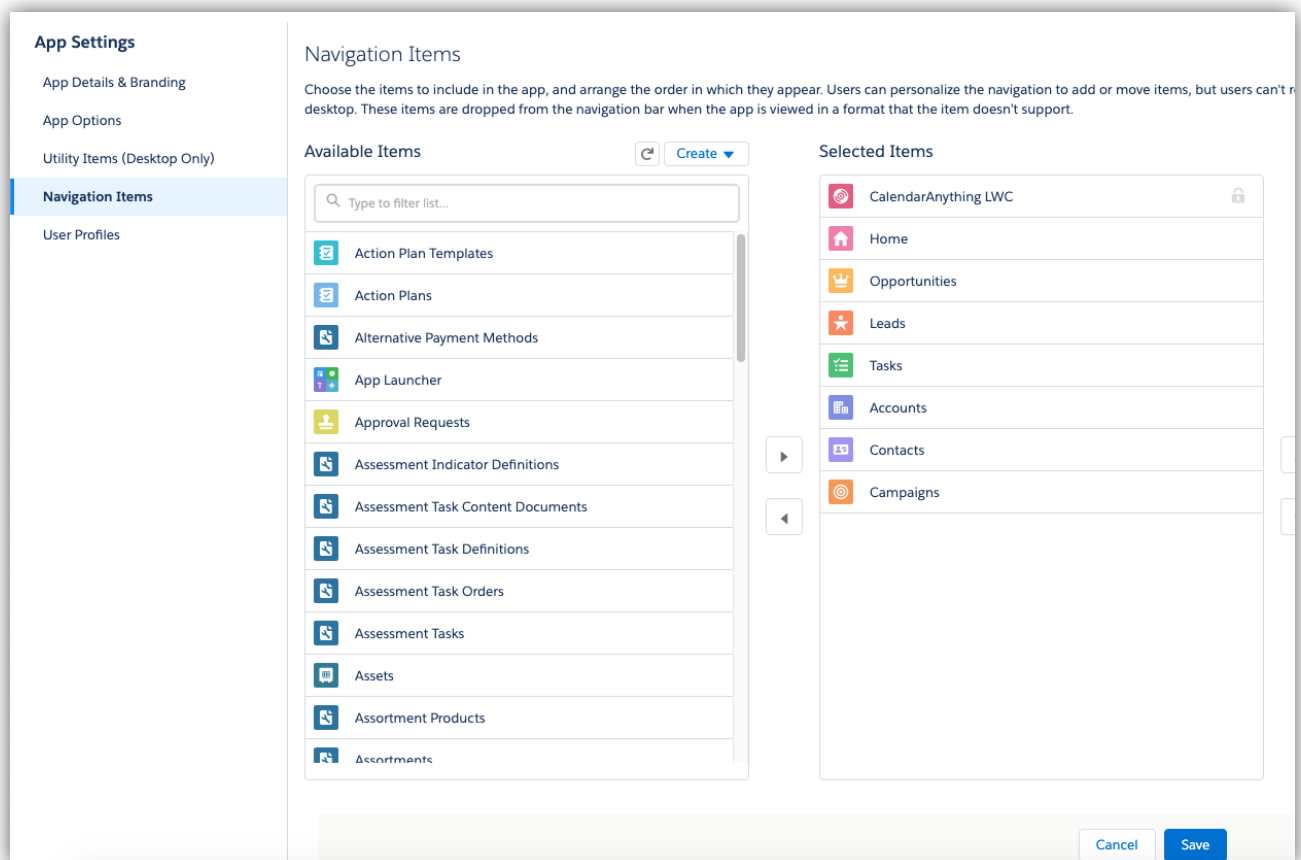
Salesforce.com users without the above editions are unable to use the app, even if CalendarAnything LWC licenses are assigned to the user.

Accessing CalendarAnything LWC

Access the app through the **App Launcher**.

Users only see the apps that they are authorized to see according to their profile or permission sets.

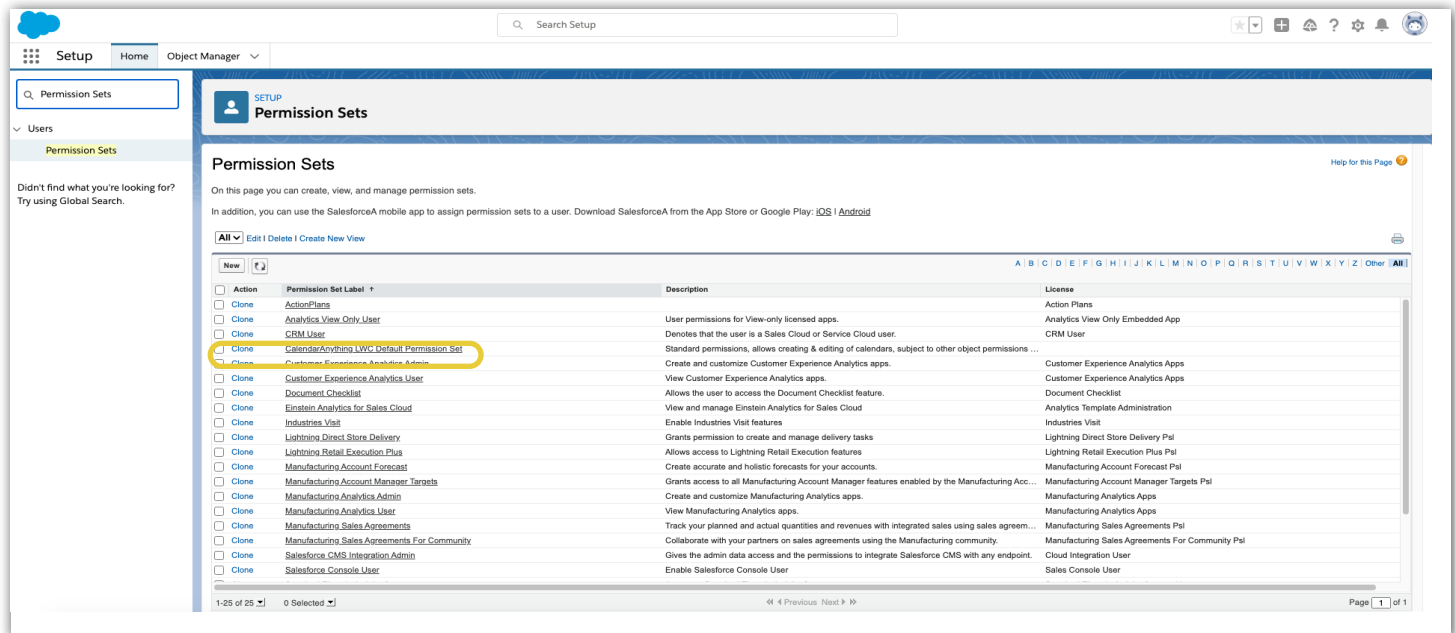
You can also add the CalendarAnything tab to your existing Salesforce tabs in Lightning. Go to the Home Page and click the **Setup Gear Icon > Platform Tools > Apps > App Manager**. Click the **Edit** drop down menu next to the **App Name** you'd like to add the CalendarAnything LWC tab.



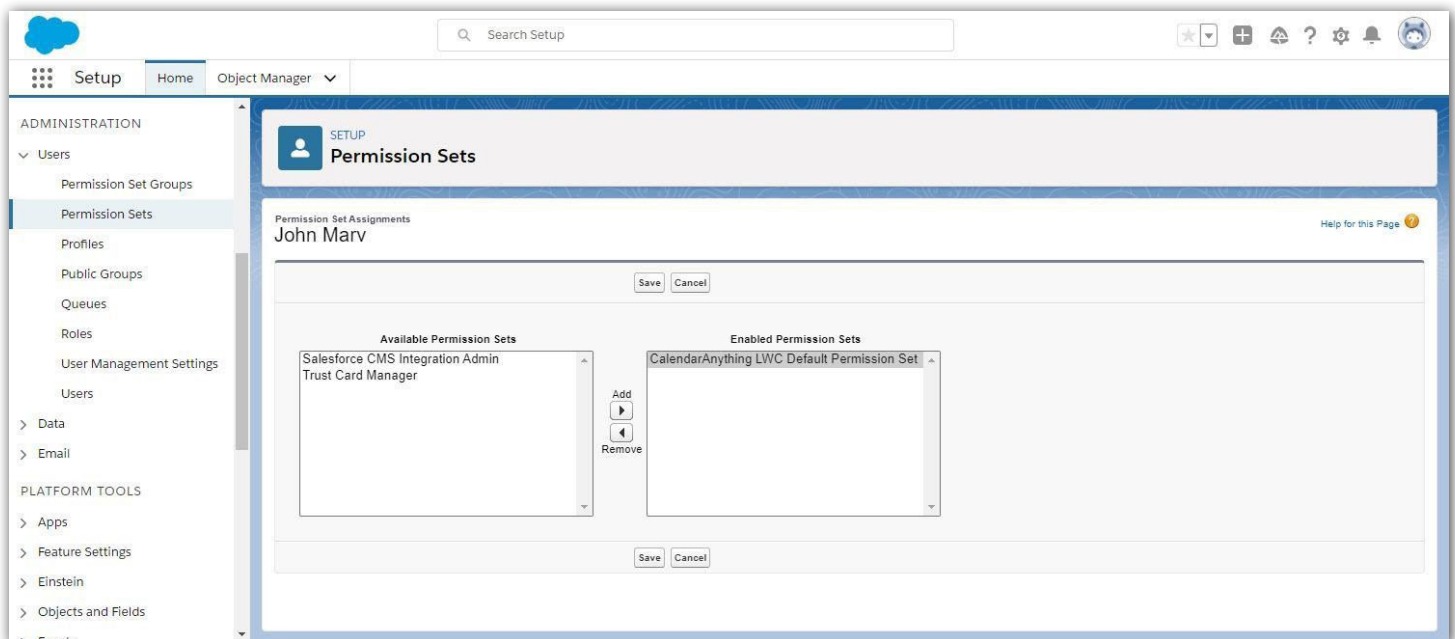
In the Lightning App Builder go to **App Settings > Navigation** Items to add or remove items.

To ensure necessary access to CalendarAnything LWC is given, use a **Permission Set** (now included in CalendarAnything LWC).

Add a Permission Set



When added to the user record, this **Permission Set** allows **creating and editing of calendars**, subject to other object permissions and sharing rules.

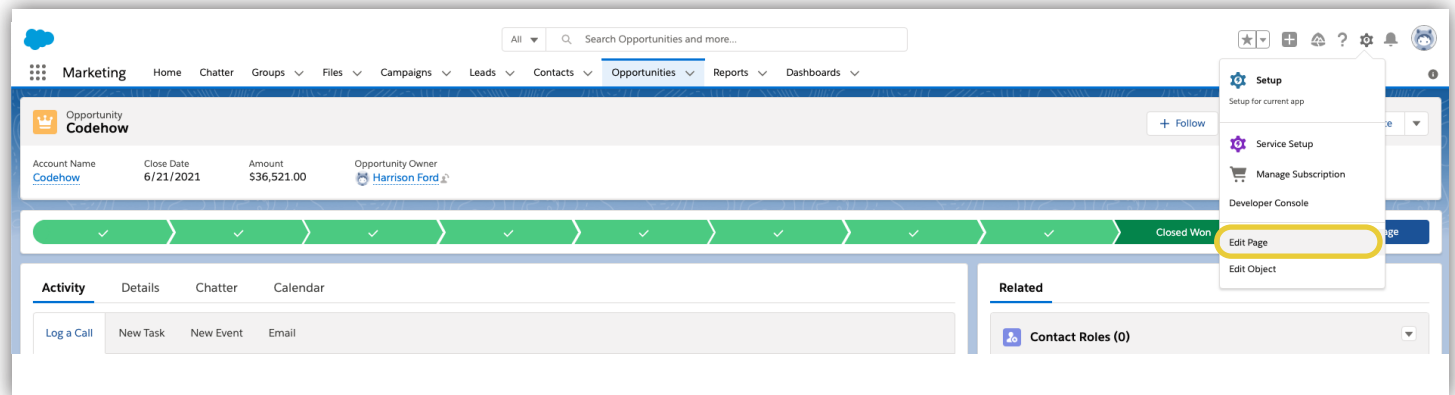


CalendarAnything LWC Default Permission Set

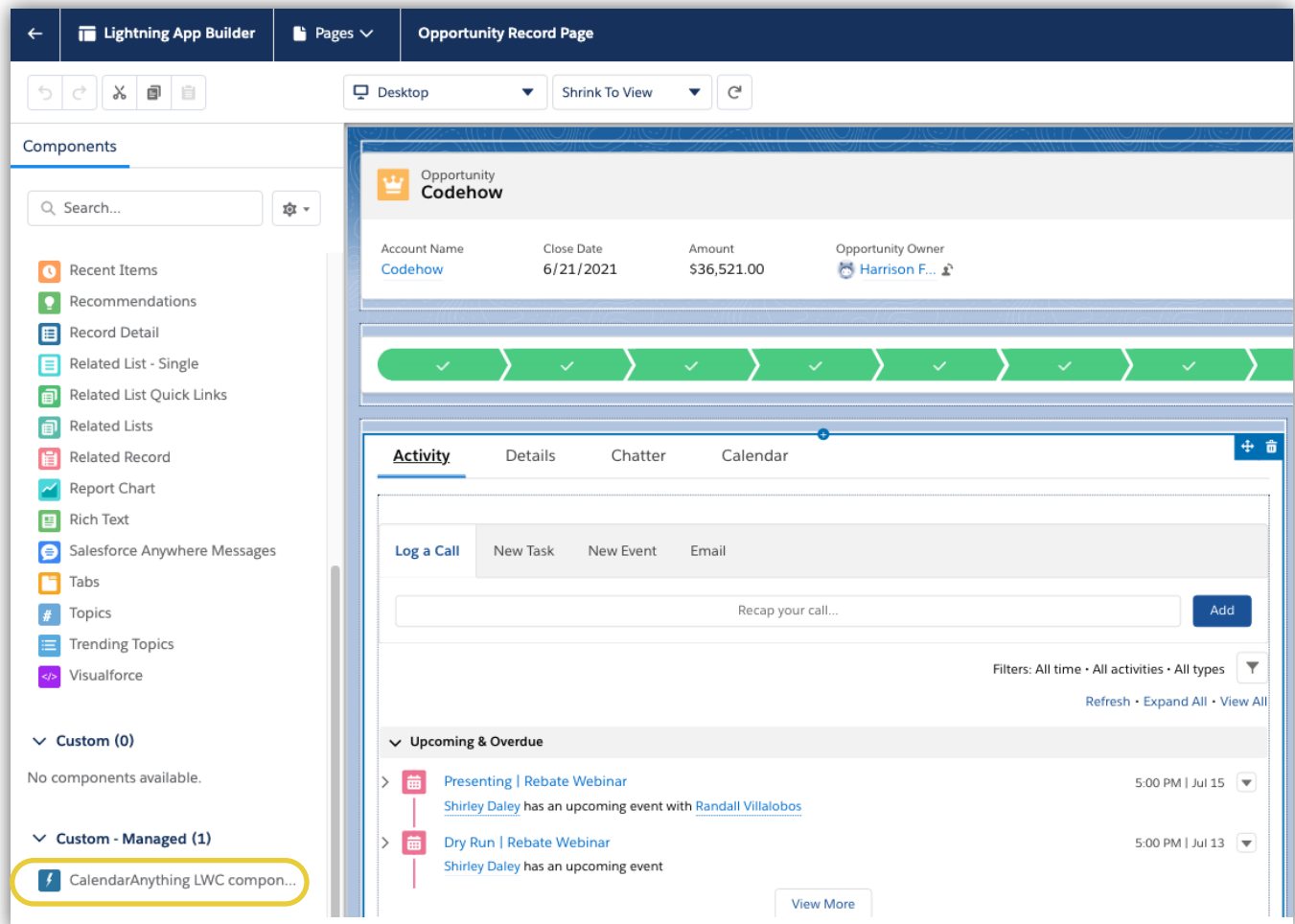
Adding CalendarAnything LWC to your page

You can build in CalendarAnything LWC in any record detail page, homepage, or custom Lightning pages.

To add CalendarAnything LWC to your page, go to the **Edit Page**:



Select **CalendarAnything LWC component** from the left sidebar and add it to your page.



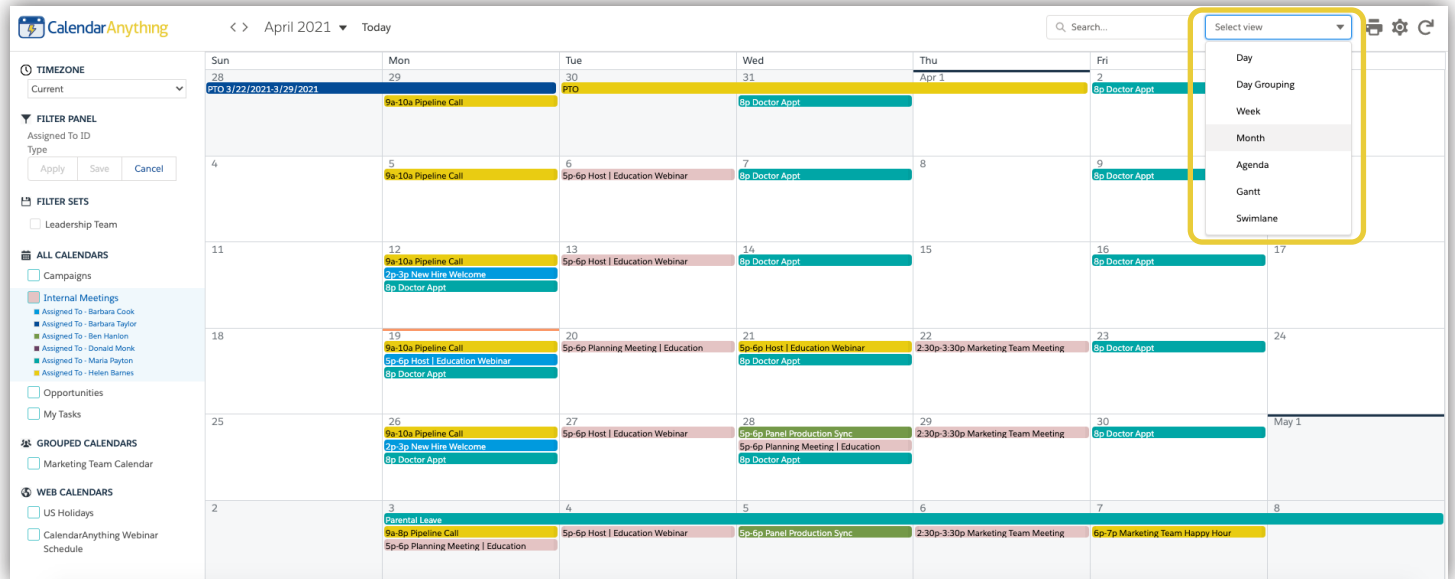
Click **Save**.



IMPORTANT: It may take up to three minutes for Calendar to load for the first time.

Calendar View

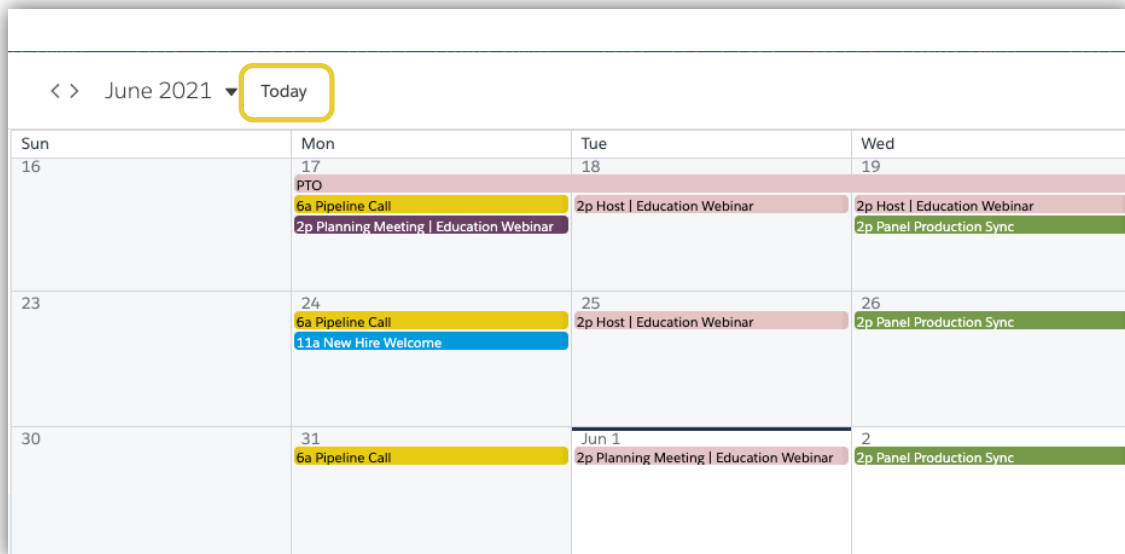
The default view in CalendarAnything LWC is the Month View. Users can switch between the **Month**, **Week**, **Day**, **Day Grouping**, **Agenda**, **Gantt**, and **Swimlane** views.



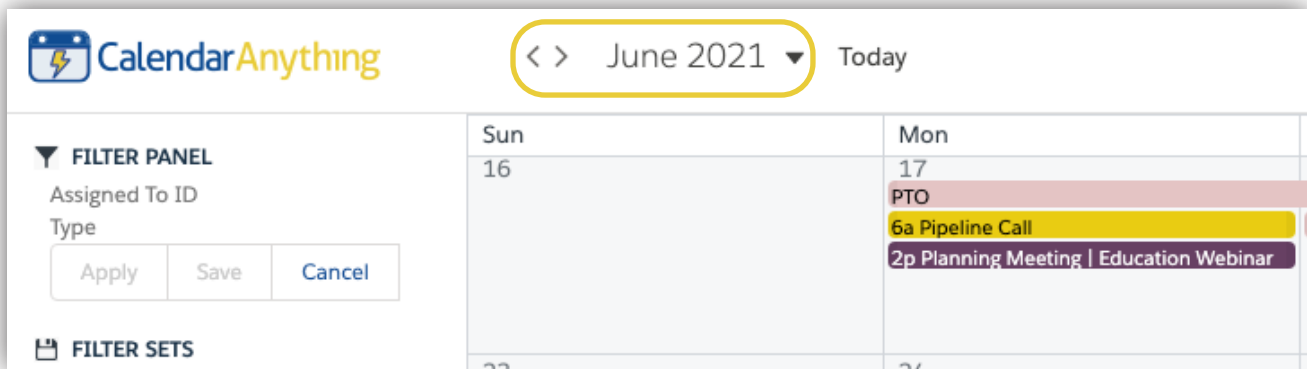
Main calendar page

From Calendar layout, access the following options:

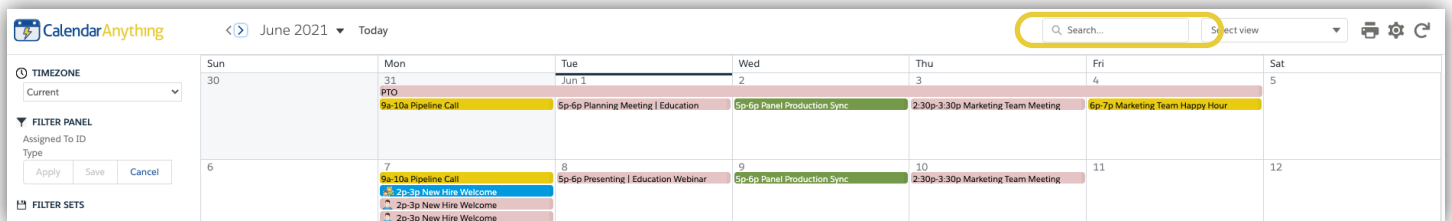
Switch to **Today** to see the current day's events and appointments:



Select **Date** and switch to the past or future dates:

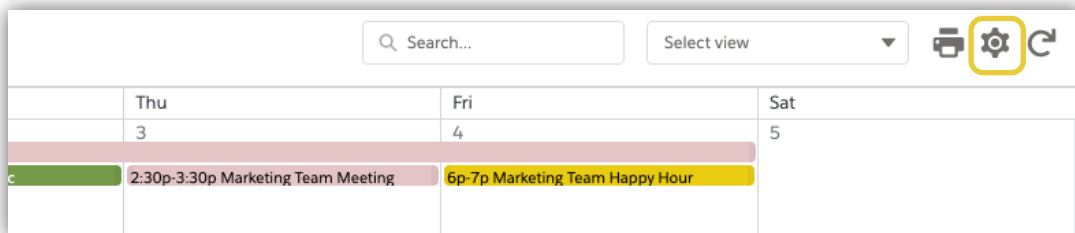


Search through the visible calendar's events:



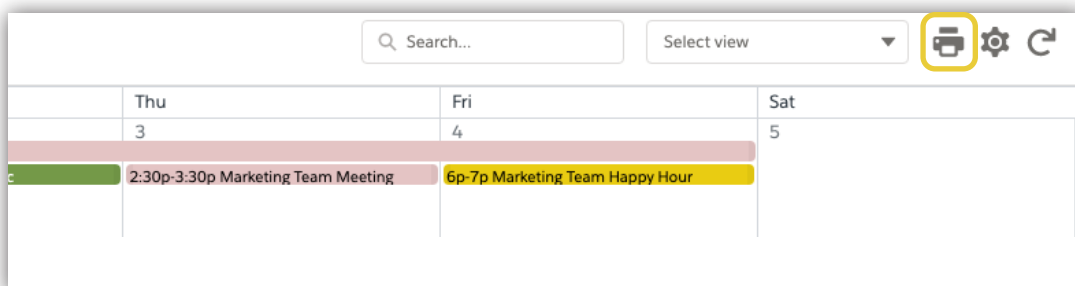
Using the search box automatically filters events on the calendar layout to show only those that contain entered search criteria.

Open Settings by clicking on the **gear** icon:



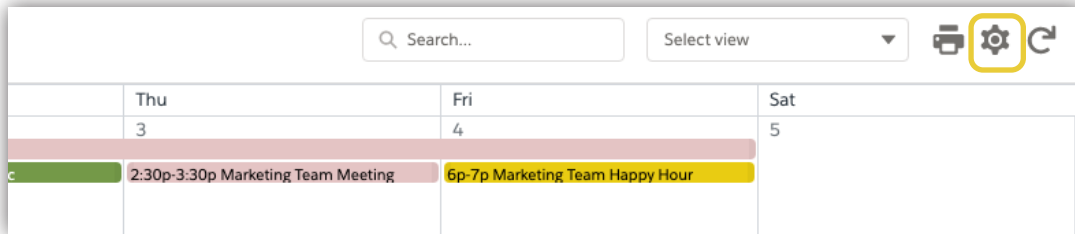
Setup and configure General Settings, which manage settings for each calendar and control visibility of the calendars.

To print out a calendar, open the Print Dialog by clicking on the **printer** icon:



Settings: General Settings

Access General Settings from the main Calendar layout:



Display Settings

Text Size

Customize the font size.

Default Calendar View

Specifies whether the calendar will always load in Day, Week, Month, Agenda, Gantt or Swimlane views. The current default is set to Month View.

Week Starts On

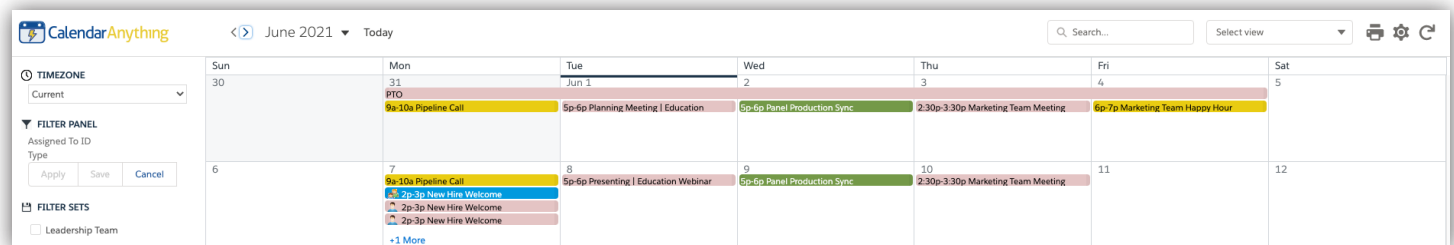
Applicable to Day, Week and Month View.

View Options

Specifies whether the Month, Week, Day or Swimlane views will show 5 days, 6 days, or 7 days.

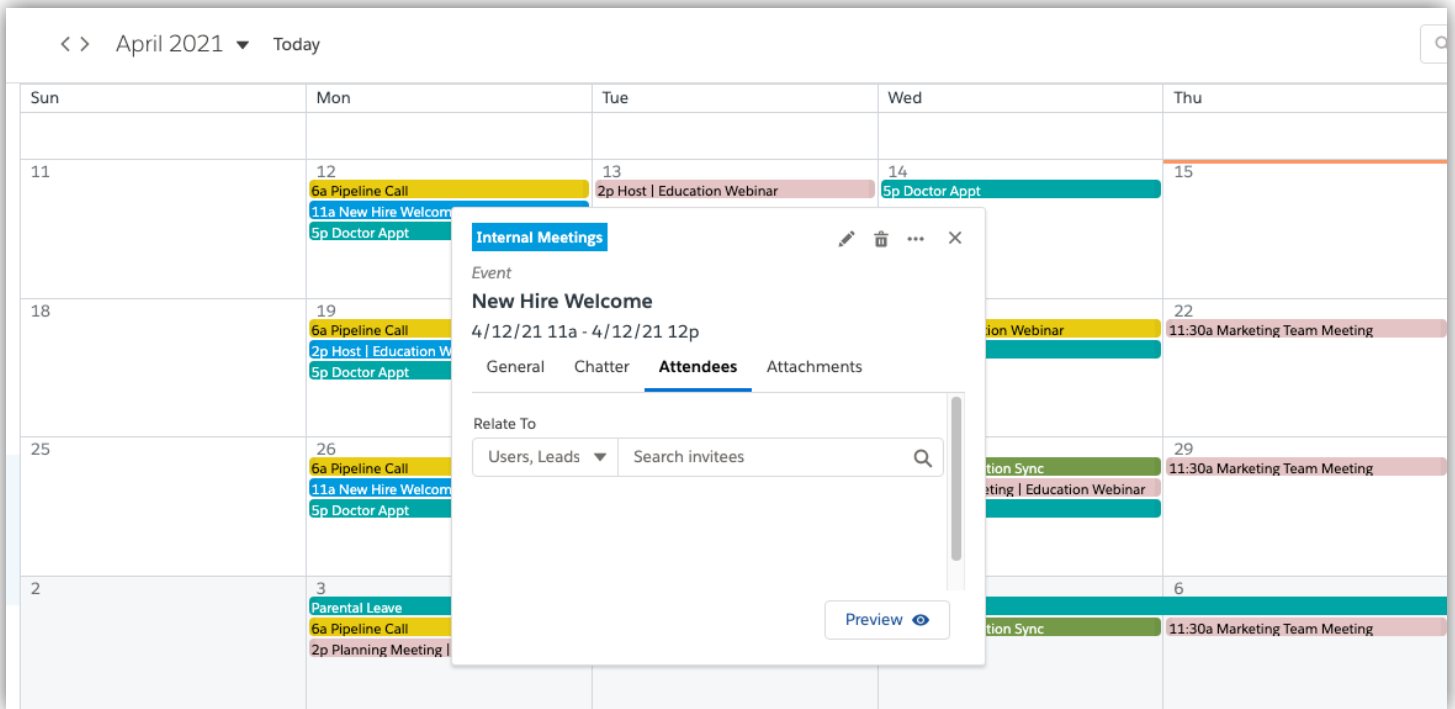
Display Search Bar

Controls whether or not the search box is present on the calendar page layout.



Add-ons

Controls the appearance of Chatter, Invitees, and Attachment tabs on the event edit popup. If checked, user will see these tabs together with General:



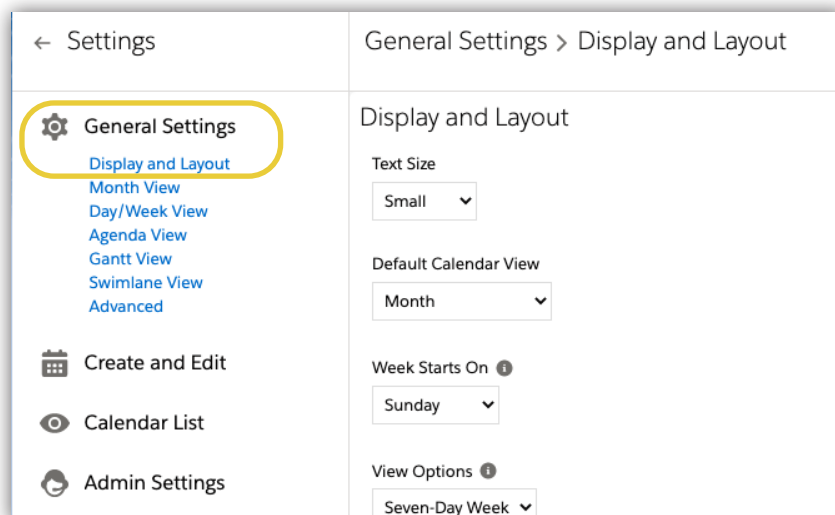
Chatter and Invitees Add-ons don't work for users who don't have API enabled. [LEARN MORE](#)

Dismiss Event Details

If checked, this setting automatically closes the Event Details popup when switching to another view. Otherwise, the popup will remain open until you Close.

Support User Locale

If checked, will allow to support different locale's number formats.



General Settings -Display and Layout

Month View

Cell Height Expansion

Determines whether calendar cells in Month view will have fixed height or will adjust to the number of events per certain day.

Request Extended Date Ranges

When checked, loads 120-day window on scroll instead of 60-day. Note that this setting is not recommended for organizations with a lot of data, as it can decrease your calendar performance.

Choose Sort Order

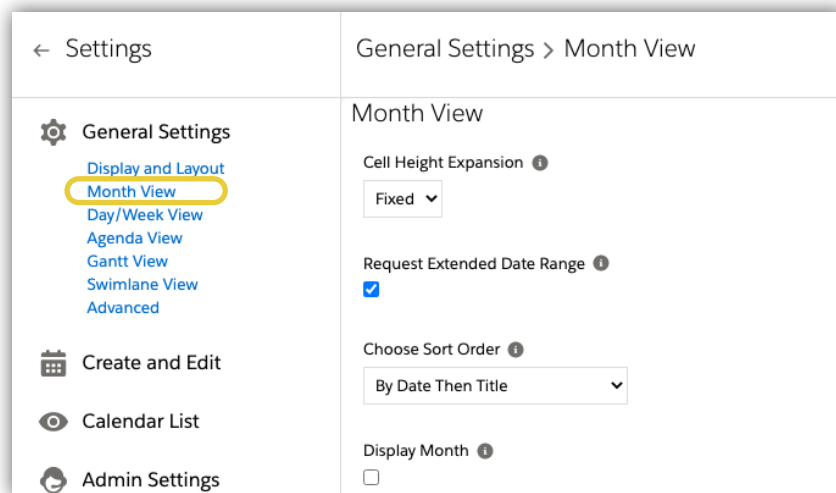
Determines what will the sort order be for the + more Day details popup in Month View.

Scrolling Speed

Equalizes scrolling speed in pixels per second (1-100), defaults to 30.

Display Month

If enabled, includes the name of the month when showing a day on the calendar.



General Settings - Month View Settings

Day/Week View

Start Time/End Time

Specifies hours displayed in the Day/Week views. Uses 24-hour clock settings (for example, 13:00 for 1:00 PM)

Display Non-Working Hours

Specifies whether the calendar should display or hide hours outside your set working hours such as from 9 AM to 5 PM.

Time Slots

Specifies whether Day/Week views timed area will show 5 min, 10 min, 15 min, 30 min or 60 min windows for events and appointments.

Event Bar Display

Specifies whether the calendar will display All Day Only records, Time Only events, or a % ratio of both Day and Week views.

Display Additional Fields Day/Week View

Specifies whether or not to show field labels in Day/Week view.

← Settings	General Settings > Day/Week View
General Settings - Display and Layout - Month View Day/Week View - Agenda View - Gantt View - Swimlane View - Advanced	Day/Week View Start Time ⓘ 0 End Time 24 Display Non Working Hours? Hide Time Slots ⓘ 30 Event Bar Display ⓘ 30% Display Display Additional fields ⓘ Day View ☐ Week View ☐

General Settings - Day/Week View Settings

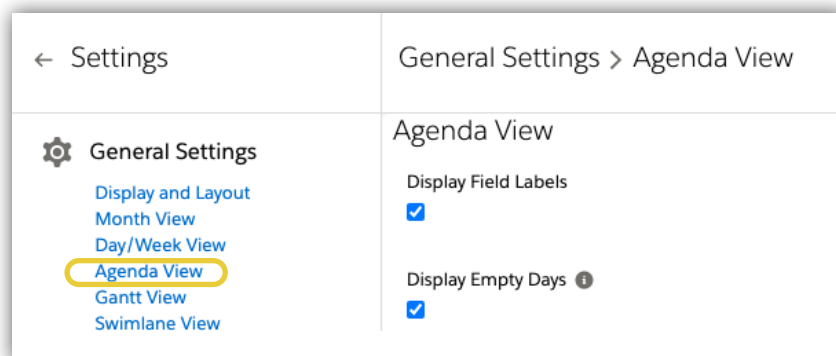
Agenda View

Display Field Labels

Enables users to toggle field labels in Agenda View independently of other calendar views.

Display Empty Days

If a given day doesn't have any events, check this box to automatically remove it from the calendar.



General Settings: Agenda View Settings

Gantt View

Default Time Grouping

Select how events look in Gantt view. Options: Hour, Day, Week, Month, or Quarter.

Default Time Period

Sets the Default Time period. Options: 1 Day, 1 Week, 1 Month, 3 Months, 6 Months, 1 Year, 3 Years, 10 Years, or All Dates.

Respect Working Hours

Maintains display of working hours only.

Display Collapsed Grouping by Default

Set if Gantt groups of events will be collapsed by default.

Hide Day Breaks in Collapsed View

Select how collapsed events will display.

New Week Marker

Identify which day signals the start of a new week (Sunday, Monday, etc.)

Expand Title Label: if unchecked, titles will be clipped.

The screenshot shows the 'Gantt View' settings page. On the left is a sidebar with a 'Settings' header and a list of menu items: 'General Settings' (with sub-items: Display and Layout, Month View, Day/Week View, Agenda View, Gantt View (highlighted with a yellow circle), Swimlane View, and Advanced), 'Create and Edit', 'Calendar List', 'Admin Settings', 'Public Groups', 'Help', and 'Clear Cache'. The main content area is titled 'General Settings > Gantt View' and contains the following settings:

- Gantt View**
 - Default Time Grouping**: A dropdown menu set to 'Day'.
 - Default Time Period**: A dropdown menu set to '3 Months'.
 - Respect Working Hours**: A checkbox that is checked.
 - Display Records From Hidden Working Hours**: A checkbox that is checked.
 - Display Collapsed Grouping by Default**: An unchecked checkbox.
 - Hide Day Breaks in Collapsed View**: A checked checkbox.
 - New Week Marker**: An unchecked checkbox.
 - Expand Title Label**: An unchecked checkbox.

General Settings - Gantt View Settings

Swimlane View

Auto-Populate Grouping Values upon Quick Creation

When this option is checked, the Assigned To field pre-populates with user name from selected Swimlane. Please note that this option works only when records are grouped by User list view.

Continuous Scrolling

Scroll in Swimlane view without having to click through dates.

Display Field Labels

Show or hide field labels. By default, this checkbox is checked to show field labels.

Day Cell Width

Enables user to set the Day Cell Width.

Default Time Grouping

Defines if Swimlanes will be grouped By Days or By Hours.

Grouping Options

Select between the following grouping options: Fields, User List Views, Custom, Display Public Groups, Subgroups, Include Group Roles Users, Include Group Hierarchy Users.

Display Start Date/Time and End Date/Time

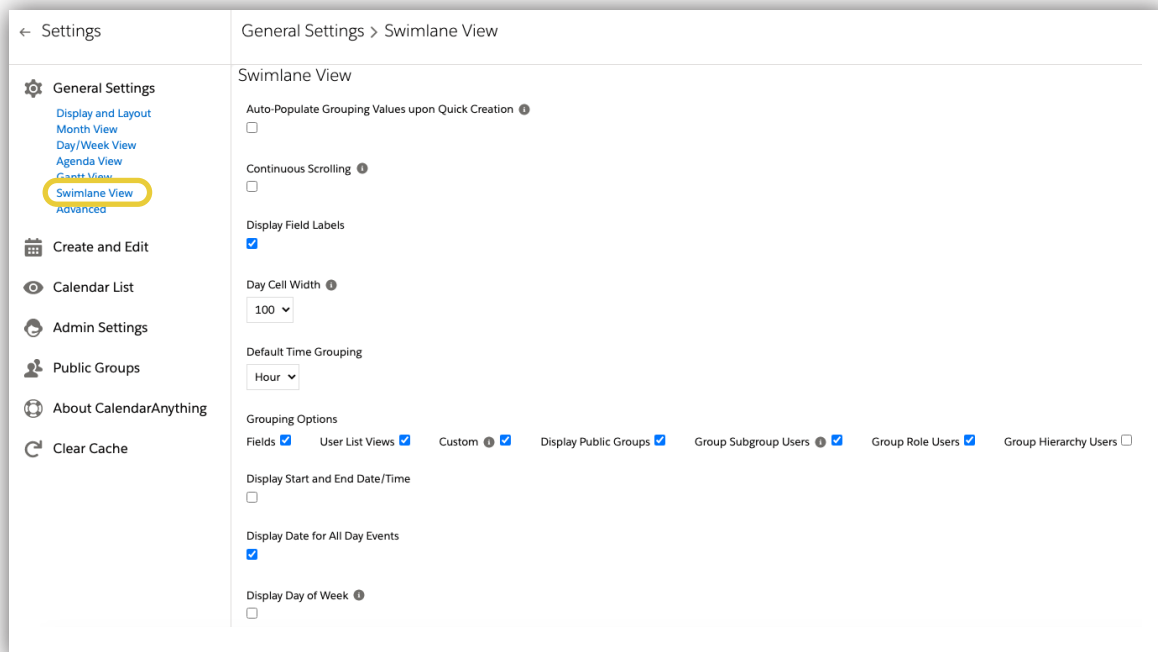
Allows users to hide or show Start Date/Time and End Date/Time on event labels in Swimlane view.

Display Date for All Day Events

Select whether to show a Date on the label of any single-day All Day events.

Display Day of Week

Include the Day of the Week when showing the date on the calendar.



Display Settings - Swimlane View Settings

Advanced

Dismiss Error Messages

Choose Yes/No. **No** means users must automatically exit an error message, **Yes** means CalendarAnything automatically dismisses error messages after 10 seconds.

Event Bar Label Includes

See time details on the entry label at a glance. Applies to Day/Week and Month Views.

Enable Second/Third Level Fields

Gives users an ability to show Second/Third level details on a given event. [LEARN MORE](#)

Parallel Requests to Server

Increase load speed by breaking up data requests to Salesforce's servers.

Display Creating Dates

Control the display of Entry Start and Entry End fields in Edit mode. When the checkbox is checked, fields selected as Entry Start and Entry End will be visible to the user.

Load Only Last Selected Period

Loads data only from the month that user is currently viewing.

Confirm Delete

When checked, CalendarAnything prompts a user to confirm before moving items to trash.

Display Multiple Contacts

When checked, includes all contacts for an event to all calendar views. Make sure "Allow Users to Relate Multiple Contacts to Tasks and Events" activity setting is enabled in your org.

Calendar Loading Settings

Automatically add events to the specific calendar when using Create and Edit Popup when enabled.

Enable Calendar after Quick Creation

Determines whether corresponding calendar will be turned on when adding a new event.

Auto Refresh

When set to API Auto, will automatically refresh calendar data. Note that this option will increase the number of API calls and count towards org's API Usage.

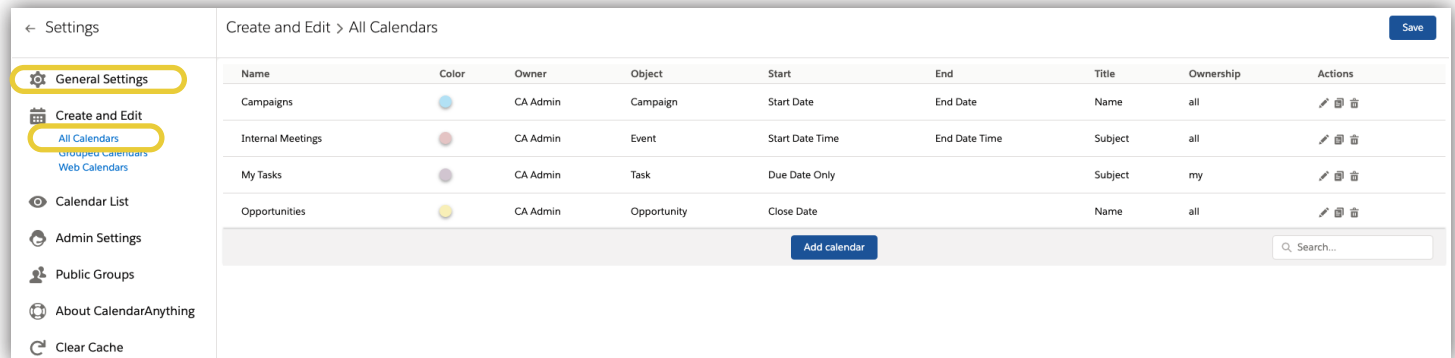
The screenshot shows the 'Advanced' settings page in the CalendarAnything application. On the left is a sidebar menu with options: General Settings (selected), Display and Layout, Month View, Day/Week View, Agenda View, Gantt View, Swimlane View, Create and Edit, Calendar List, Admin Settings, Public Groups, About CalendarAnything, and Clear Cache. The main content area is titled 'General Settings > Advanced' and contains several settings: 'Dismiss Error Messages' (Yes), 'Event Bar Label Includes' (Both Start and End Time), 'Enable Second Level Fields' (checked), 'Enable Third Level Fields' (checked), 'Parallel Requests to Server' (10), 'Display Entry Dates' (checked), 'Load Only Last Selected Period' (unchecked), 'Confirm Delete' (checked), and 'Display Multiple Contacts' (unchecked).

General Settings - Advanced Settings

Settings: Create and Edit

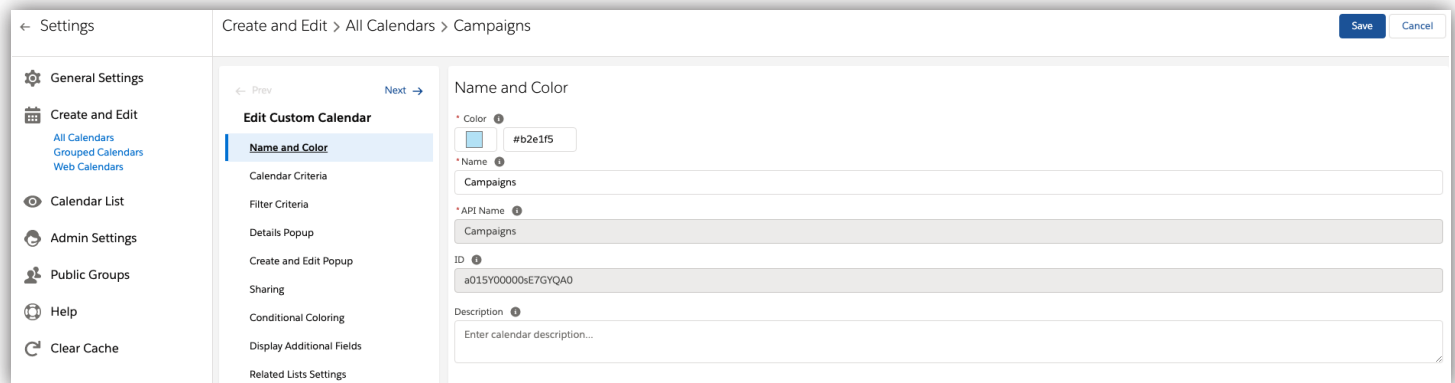
Creating All Calendars

To begin creating a calendar, click the **gear** icon on the top right to open Calendar Settings. Then click **Create and Edit > All Calendars**:



To create a new calendar, click the **Add Calendar** button on the Calendar Settings page.

Clicking the **Add Calendar** button opens the **Calendar Settings** dialog. Follow the steps to create your calendar.



Calendars Creation page

Name and Color

Start by picking a Calendar Name. Calendar Name cannot contain +, &, / or = characters. This automatically populates The Site Calendar Name field, which is uneditable and used when publishing public Site Calendars, discussed in the [ADVANCED ADMIN GUIDE](#).

Select a color from the available colors or create a color from the color wheel. Enter your calendar description.

Calendar Criteria

Select the Object and Entry Details for tracking in CalendarAnything LWC, whether custom or standard. The object you select determines the fields that will be available in following steps.

The screenshot shows the 'Calendar Criteria' configuration page within the 'Create and Edit > All Calendars' section. The left sidebar contains navigation links: General Settings, Create and Edit (with sub-links for All Calendars, Grouped Calendars, and Web Calendars), Calendar List, Admin Settings, Public Groups, About CalendarAnything, and Clear Cache. The main content area is titled 'Calendar Criteria' and includes a 'Save' button in the top right. The configuration fields are as follows:

- Object Name:** A dropdown menu with 'Specified' selected and 'Campaign' entered in the search field.
- Field Name:** A dropdown menu with 'Name' selected.
- Start Date/Time:** A dropdown menu with 'Start Date' selected.
- End Date/Time:** A dropdown menu with 'End Date' selected.
- Gantt Grouping Default:** A dropdown menu with 'Type' selected.
- Gantt Subgrouping Default:** A dropdown menu with 'Sub-Type' selected.
- Gantt Summary Field:** A dropdown menu with 'Select an Option' selected.
- Swimlane Sort Default:** A dropdown menu with 'Owner ID' selected.
- Designate All Day:** A dropdown menu with 'Select an Option' selected.
- Display on Sidebar:** A checkbox that is checked.
- Allow Editing:** A checkbox that is checked.
- Auto Toggle:** An unchecked checkbox.

- **Object Name** specifies what Salesforce Object builds the calendar.
- **Field Name** can be selected from the available fields and will represent the items on this calendar.
- **Start** and **End Date/Time** fields determine the start and/or end date and/or time within each entry on the calendar. These must be of the same format (for example, both are dates or both are times.)
- **Gantt Grouping Default** relates to the Gantt view feature and allows you to determine which field to use for grouping records in Gantt view. This field is not required.
- **Gantt Subgrouping Default** relates to the Gantt view feature and allows you to determine which field to use for sub-grouping the grouped records in Gantt view. This field is not required.
- **Gantt Summary Field** determines what field will be used as a summarizing field for Gantt Grouping.
- **Swimlane Sort Default** determines the field to use as a sorting field when displaying records in swimlanes (including Day With Grouping Views) when grouping data using User List View or Public Group. Options are limited to lookup date type fields related to a user, such as Assigned To, Owner ID, or Last Modified By.
- **Designate All Day** field acts as a flag for the calendar to display a record with start date/time and end date/time as an All Day record. Must be a checkbox field type.
- The **Display on Sidebar** box determines if the calendar will be available for other CalendarAnything LWC licensed users to display in their left panel. Leaving this box unchecked effectively marks the calendar as private.
- The **Allow Editing** box allows permissioned users to add or modify events from within the CalendarAnything UI.
- The **Auto Toggle** box determines if other users are able to create new records when viewing the calendar.



CalendarAnything LWC will only display fields from one object at a time i.e the object selected in this step.

Filter Criteria

Specify Filter Criteria. This allows you to filter through object records and display only relevant records. You may filter based on almost any field available in your selected object and users can add up to 29 filters per each calendar.

The screenshot shows the 'Filter Criteria' configuration page for 'Installation Events'. The left sidebar lists settings categories, with 'Filter Criteria' highlighted. The main panel has a breadcrumb trail 'Create and Edit > All Calendars > Installation Events' and a 'Save' button. The 'Filter Criteria' section includes a 'Show Me' toggle (set to 'All Records'), a list of filters, and an 'Add Filter Logic' section.

Filter Criteria

Show Me: All Records (selected) | My Records

1. Field Name: Subject, Operator: equals, Subject: Pre-Installation Call X, Prospect Meeting X, Commerical Prospect Meeting X, Lunch and Learn X, Trade Show X, Installation X, Post Installation Call X

2. Field Name: Subject, Operator: contain, Subject: Install X

+ Add

▼ Add Filter Logic

1 OR 2

Details Popup

Specify Fields To Display On Details Popup. This step allows you to control which fields, if any, display when a user clicks on a record in CalendarAnything LWC.

The screenshot shows the 'Details Popup' configuration page for 'Installation Events'. The left sidebar lists settings categories, with 'Details Popup' highlighted. The main panel has a breadcrumb trail 'Create and Edit > All Calendars > Installation Events' and a 'Save' button. The 'Details Popup' section includes a search bar and two lists: 'Available' and 'Selected'.

Details Popup

Search Fields: Enter field label...

Fields: Available

- Account ID
- Activity ID
- Archived
- Create Recurring Series of Events
- Created By ID
- Created Date
- Related...

Selected

- Assigned To ID
- Subject
- Description
- All-Day Event
- Test Formula

Create and Edit Popup

Specify Fields to Display on **Create** and **Edit Popups**. If the **Allow Edit** box is checked, create records by clicking on a date (or selecting a date range) when viewing the calendar. Here, you may specify which fields are available for users creating records from CalendarAnything LWC. Some Salesforce objects have required fields, which may not be removed from the **Selected** box.

The screenshot shows the 'Create and Edit Popup' configuration page for 'Campaigns'. The left sidebar lists settings categories, with 'Create and Edit Popup' highlighted. The main panel has a breadcrumb trail 'Create and Edit > All Calendars > Campaigns' and a 'Save' button. The 'Create and Edit Popup' section includes a search bar and a table of fields.

Create and Edit Popup

Search Fields: Enter field label...

Fields: Available

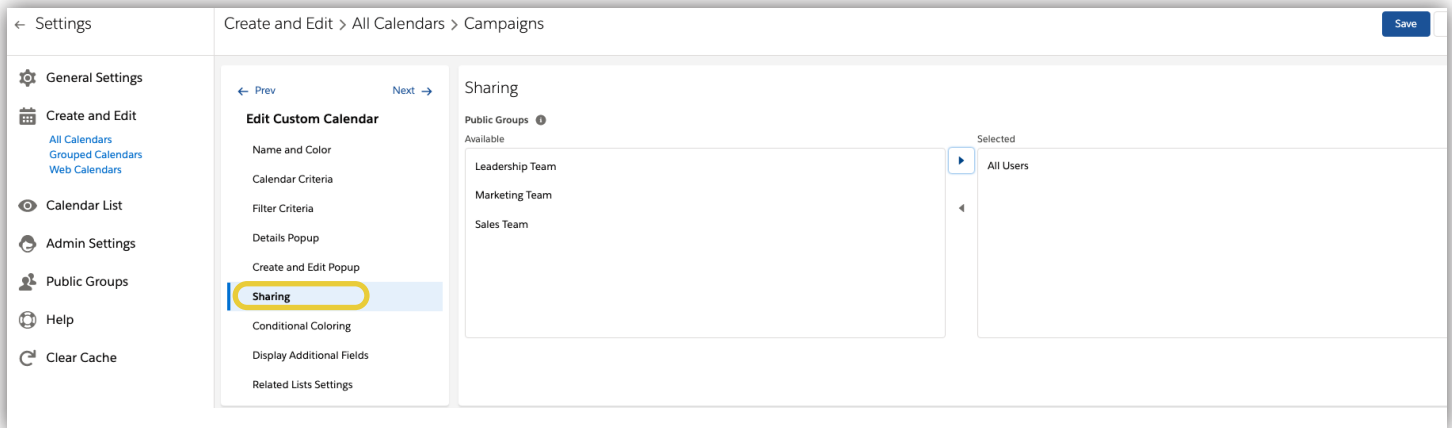
- Active
- Actual Cost in Campaign
- Budgeted Cost in Campaign
- End Date
- Expected Response (%)
- Expected Revenue in Campaign
- Next Step in Campaign

Selected FIELD	REQUIRED	VISIBILITY
Name	*	👁️
Start Date	*	👁️
Status	*	👁️
Type	*	👁️
Sub-Type	*	👁️

Sharing

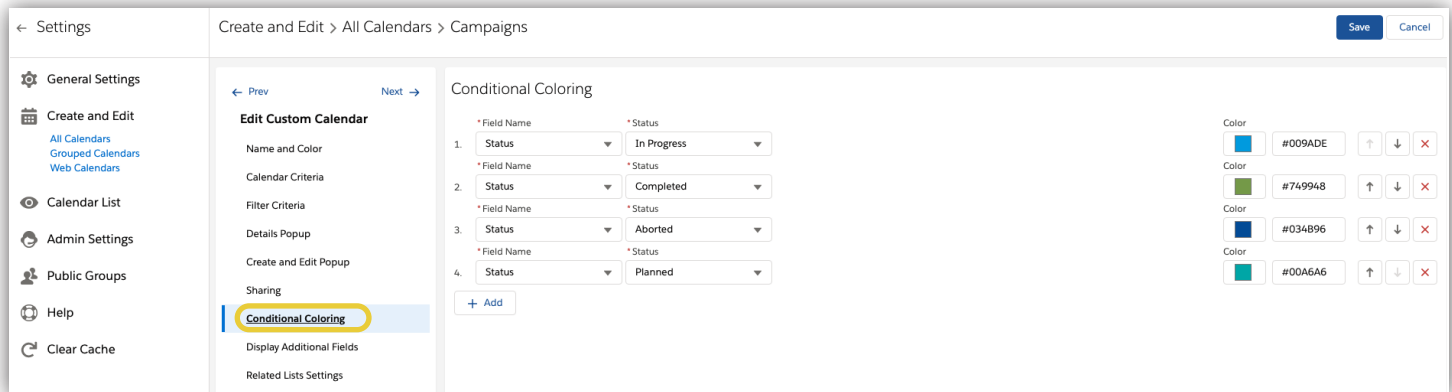
CalendarAnything utilizes Salesforce's Public Groups feature to share calendars to the rest of your organization. To create **Public Groups**, your system administrator must set them up in Salesforce. Once they're set by role or hierarchy, for example, you will be able to change calendar visibility when creating and editing a calendar.

Do this by going to **Display Settings** to view the calendars available to them. Users can then move calendars from **Available** to the **Selected** section to display them on the calendar sidebar (refer to page 26 for step by step instructions).



Conditional Coloring

Assign multiple colors to a single calendar based on field filter criteria.



Display Additional Fields

Select fields to display on Agenda and Swimlane Views.

The screenshot shows the 'Display Additional Fields' configuration page. On the left, the 'Settings' sidebar has 'Display Additional Fields' highlighted. The main area is titled 'Create and Edit > All Calendars > Campaigns'. Below the breadcrumb, there are 'Prev' and 'Next' navigation links. The 'Edit Custom Calendar' section on the left lists various settings, with 'Display Additional Fields' selected. The main content area has a search bar 'Search Fields' with the placeholder 'Enter field label...'. Below this, there are two columns: 'Available' and 'Selected'. The 'Available' column lists fields such as 'Active', 'Actual Cost in Campaign', 'Budgeted Cost in Campaign', 'Campaign ID', 'Contacts in Campaign', and 'Converted Leads in Campaign'. The 'Selected' column currently contains 'Owner ID / Full Name' and 'Type'.

Related List Settings

Specify related objects

The screenshot shows the 'Related Lists Settings' configuration page. The sidebar and breadcrumb are the same as in the previous screenshot. The 'Edit Custom Calendar' section has 'Related Lists Settings' highlighted. The main content area is titled 'Related Lists Settings'. It features a table with one row containing the number '1' and a dropdown menu set to 'Campaign Member (Campaign ID)'. Below the table is an '+ Add' button.

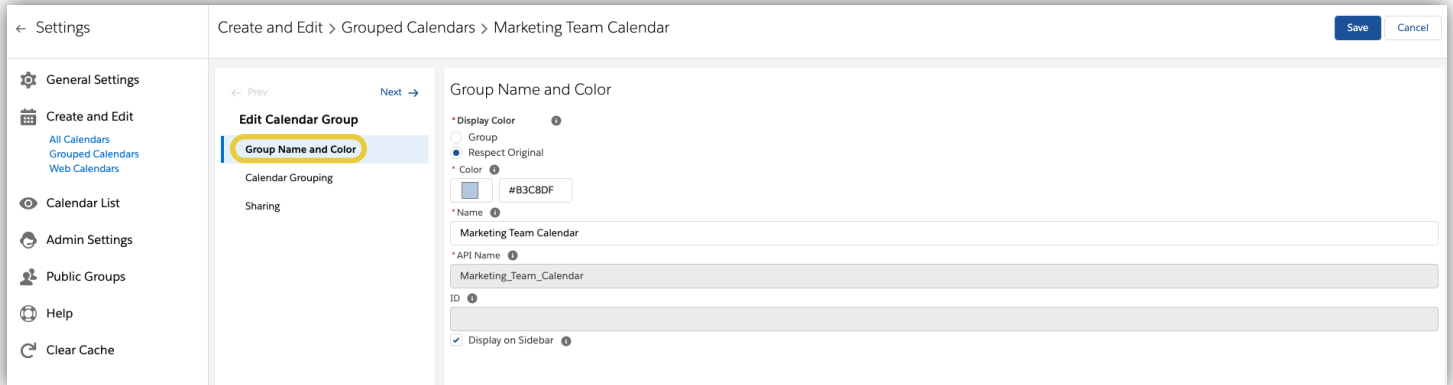
The screenshot shows the 'Add List View' dialog box. The title bar reads 'Add List View: Campaign > Campaign Member (Campaign ID)'. Inside the dialog, there is a 'Sorting Field' dropdown set to 'Name' and a 'Hyperlink to Record' checkbox that is checked. Below these are two columns: 'Available' and 'Selected'. The 'Available' column lists fields like 'Related Record Owner ID', 'Related Record ID', 'Type', 'Company (Account)', 'Lead Source', 'Fax Opt Out', and 'Email Opt Out'. The 'Selected' column contains 'Name', 'Phone', and 'Status'. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Once you have entered the settings for your calendar, click **Save** to save your calendar and return to the Calendar main page. The calendar will display in the left side panel and may now be overlaid with other CalendarAnything LWC calendars.

Creating Grouped Calendars

CalendarAnything LWC users can create calendar groups that allow for a more organized left side panel and quicker overlay of multiple calendars. You may create a group from any existing calendar.

To begin creating a calendar group, click the **gear** icon to open Calendar Settings and click on **Calendars > Grouped Calendars**:

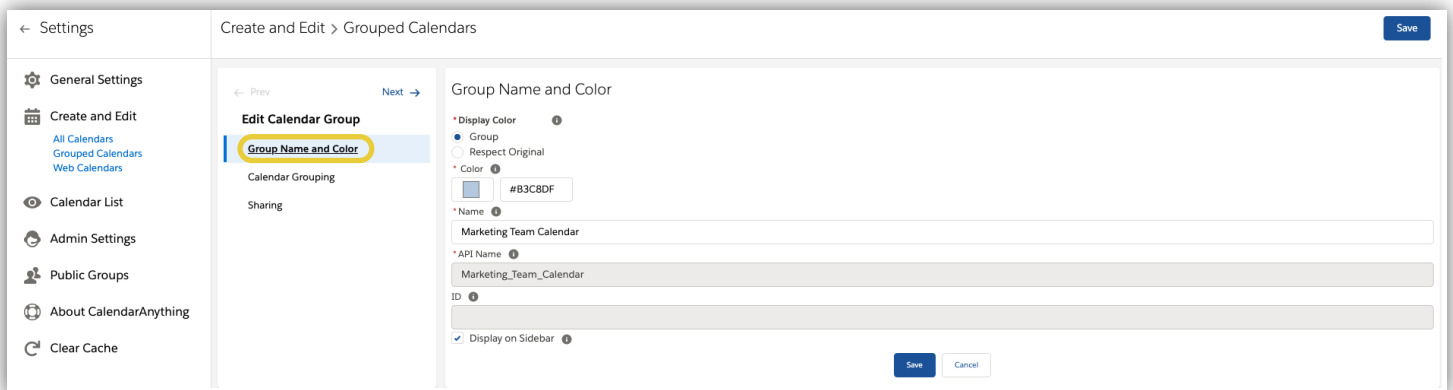


To create a new calendar group, click the **Add Calendar** button on the Calendar Groups page.

Clicking the **Add Calendar** button opens the **Grouped Calendars Settings** dialog. Create your calendar group following the steps displayed on the Grouped Calendars Settings page shown below.

Group Name and Color

Enter a name for the new calendar Group. You may choose to display all calendars using a single group color or allow grouped calendars to retain their individual colors.



Calendar Grouping

Select the calendars that will be available for the group. Only calendars that are moved to Selected by the user will display.

The screenshot shows the 'Calendar Grouping' configuration page for a 'Marketing Team Calendar'. The left sidebar contains navigation links: Settings, General Settings, Create and Edit (with sub-links for All Calendars, Grouped Calendars, and Web Calendars), Calendar List, Admin Settings, Public Groups, Help, and Clear Cache. The main content area has a breadcrumb trail: 'Create and Edit > Grouped Calendars > Marketing Team Calendar'. Below this is a sub-header 'Edit Calendar Group' with tabs for 'Group Name and Color', 'Calendar Grouping' (which is highlighted with a yellow circle), and 'Sharing'. The 'Calendar Grouping' section includes a search bar 'Search Calendars' with the placeholder 'Enter calendar name...'. Below the search bar, there are two columns: 'Available' and 'Selected'. The 'Available' column lists 'My Tasks' and 'Installation Events'. The 'Selected' column lists 'Campaigns', 'Internal Meetings', and 'Opportunities'.

Sharing Calendars

As with standard CalendarAnything LWC calendars, you may specify which Salesforce Public Groups have access to this calendar group.

The screenshot shows the 'Sharing' configuration page for the same 'Marketing Team Calendar'. The left sidebar is identical to the previous screenshot. The main content area has the same breadcrumb trail. The sub-header 'Edit Calendar Group' now has the 'Sharing' tab highlighted with a yellow circle. The 'Sharing' section includes a 'Public Groups' section with a plus icon. Below this, there are two columns: 'Available' and 'Selected'. The 'Available' column lists 'Leadership Team', 'Marketing Team', and 'Sales Team'. The 'Selected' column lists 'All Users'.

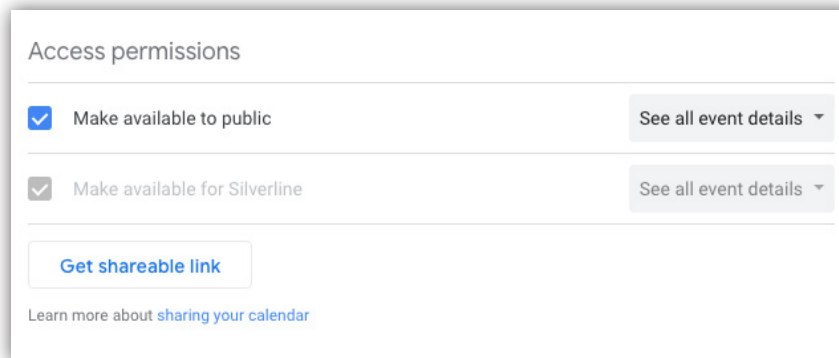
Once you have entered the settings for your calendar group, click **Save** to save your calendar group and return to the Calendar main page. The calendar group will display in the left side panel and may now be overlaid with other CalendarAnything LWC calendars.

Creating Web Calendars

Display information from a public Google Calendar within the CalendarAnything LWC app in Salesforce using Web Calendar. Using this feature requires that the Google Calendar be made public and the Salesforce user is able to obtain a public URL for the Google Calendar.

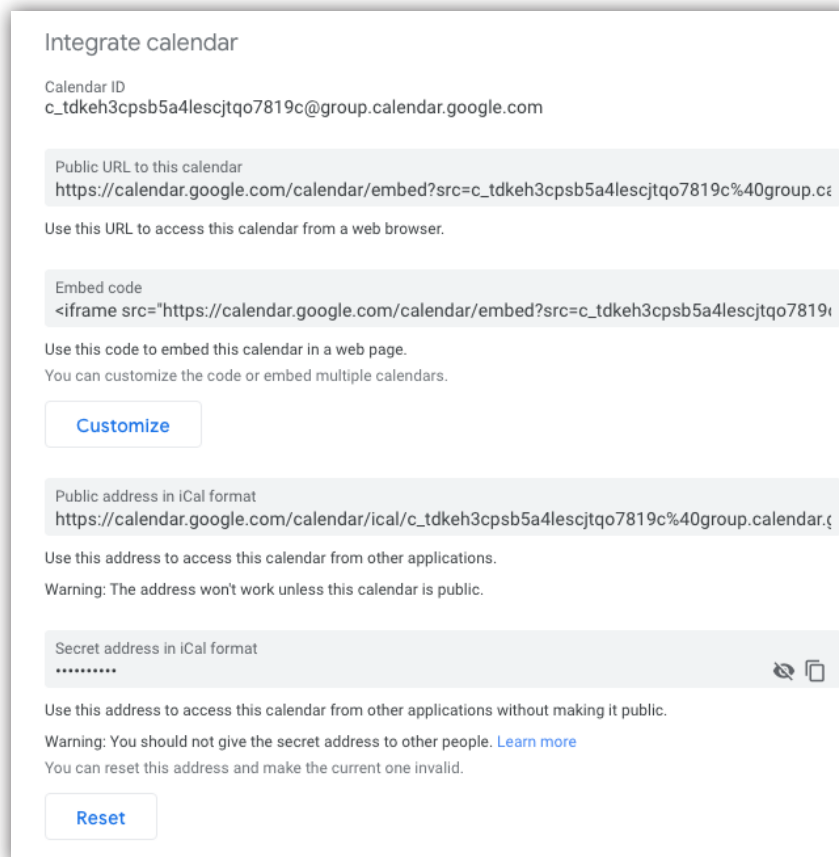
To make a Google Calendar public and retrieve a public ICAL address:

1. Log in to Google Calendar from your browser by going to google.com/calendar.
2. In the calendar list on the left, click the **down-arrow** button next to the appropriate calendar, then select **Settings and Sharing Access permissions > Make available to public** checkbox



The screenshot shows the 'Access permissions' section of a Google Calendar. It has two checkboxes: 'Make available to public' (checked) and 'Make available for Silverline' (checked). Each checkbox has a 'See all event details' dropdown menu to its right. Below the checkboxes is a 'Get shareable link' button. At the bottom, there is a link that says 'Learn more about sharing your calendar'.

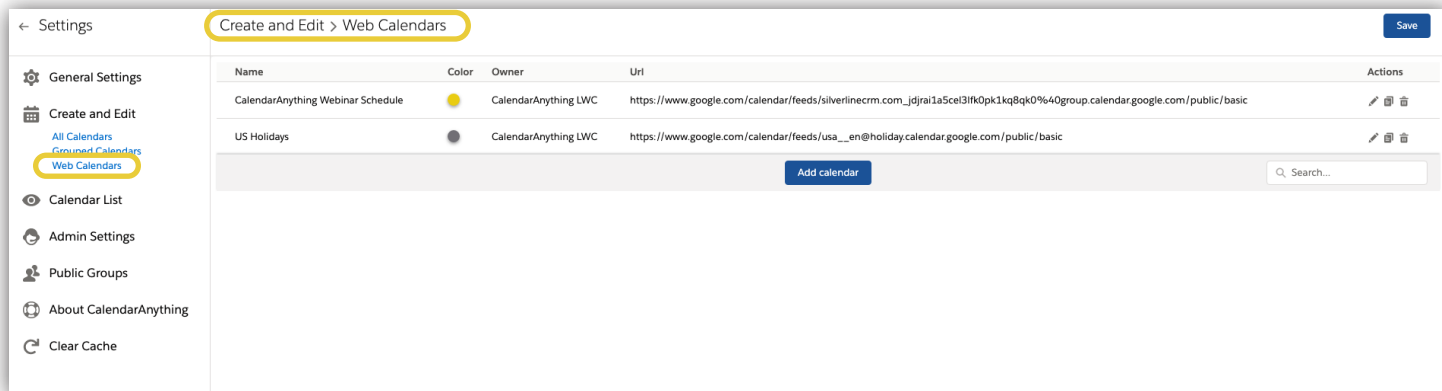
3. **Integrate calendar > Public address in iCal format**



The screenshot shows the 'Integrate calendar' section of a Google Calendar. It displays the 'Calendar ID' as 'c_tdkeh3cpsb5a4lescjtqo7819c@group.calendar.google.com'. Below this, it shows the 'Public URL to this calendar' as 'https://calendar.google.com/calendar/embed?src=c_tdkeh3cpsb5a4lescjtqo7819c%40group.c...' and instructs the user to use this URL to access the calendar from a web browser. It also shows the 'Embed code' as '<iframe src="https://calendar.google.com/calendar/embed?src=c_tdkeh3cpsb5a4lescjtqo7819c...' and instructs the user to use this code to embed the calendar in a web page. Below the embed code is a 'Customize' button. Further down, it shows the 'Public address in iCal format' as 'https://calendar.google.com/calendar/ical/c_tdkeh3cpsb5a4lescjtqo7819c%40group.calendar.?' and instructs the user to use this address to access the calendar from other applications. It includes a warning: 'Warning: The address won't work unless this calendar is public.' Below this, it shows the 'Secret address in iCal format' as '*****' with a copy icon to its right. It instructs the user to use this address to access the calendar from other applications without making it public. It includes another warning: 'Warning: You should not give the secret address to other people. Learn more' and a note that the user can reset the address and make the current one invalid. At the bottom, there is a 'Reset' button.

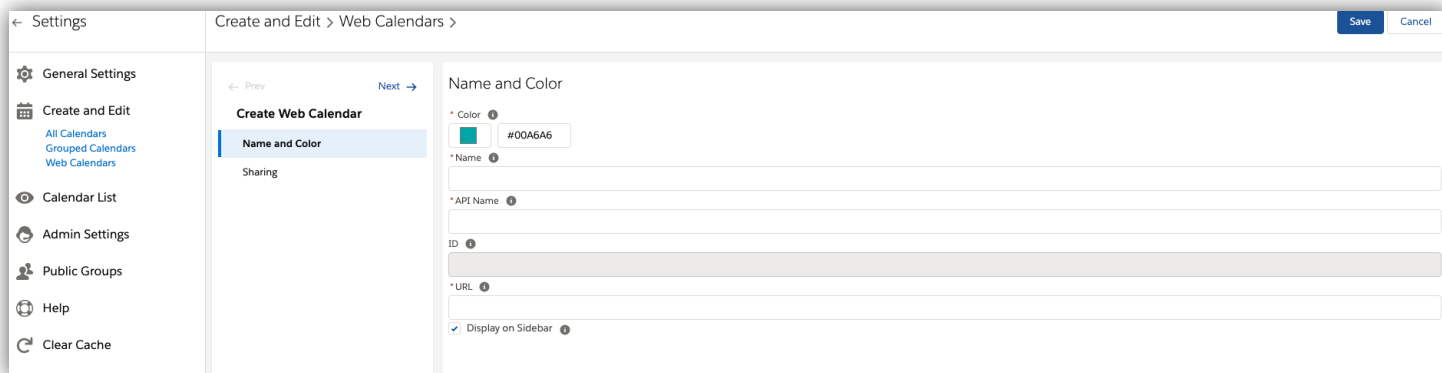
To make Web calendars imported from Google work, you should add <https://calendar.google.com/> to Remote Sites in your org Setup.

To begin creating a web calendar group, click the **gear** icon to open Calendar Settings and click on **Create and Edit > Web Calendars**:



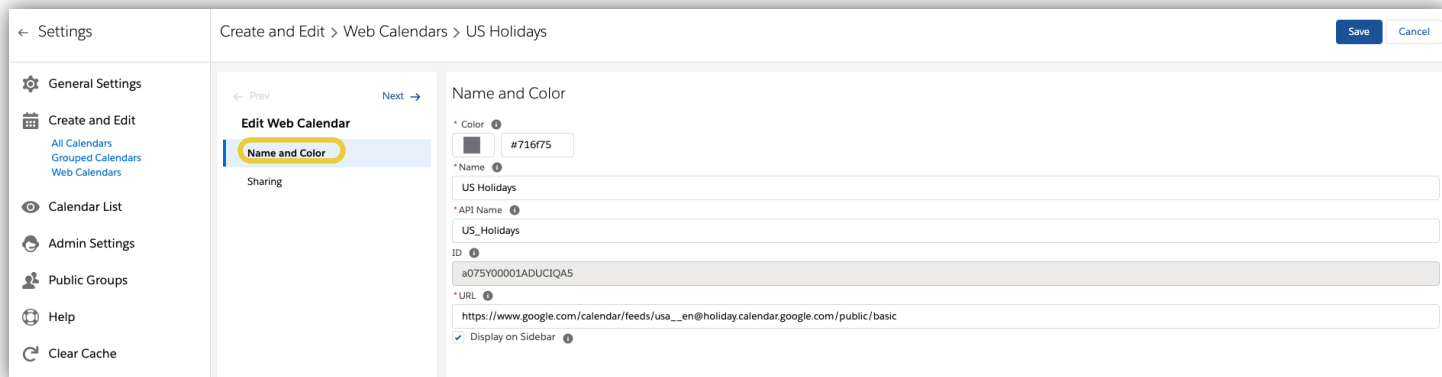
To create a new calendar group, click the **Add Calendar** button on the Web Calendars page.

Clicking the Add Calendar button opens the Web Calendar Settings dialog. Create your web calendar following the steps displayed on the Calendar Group Settings page shown below.



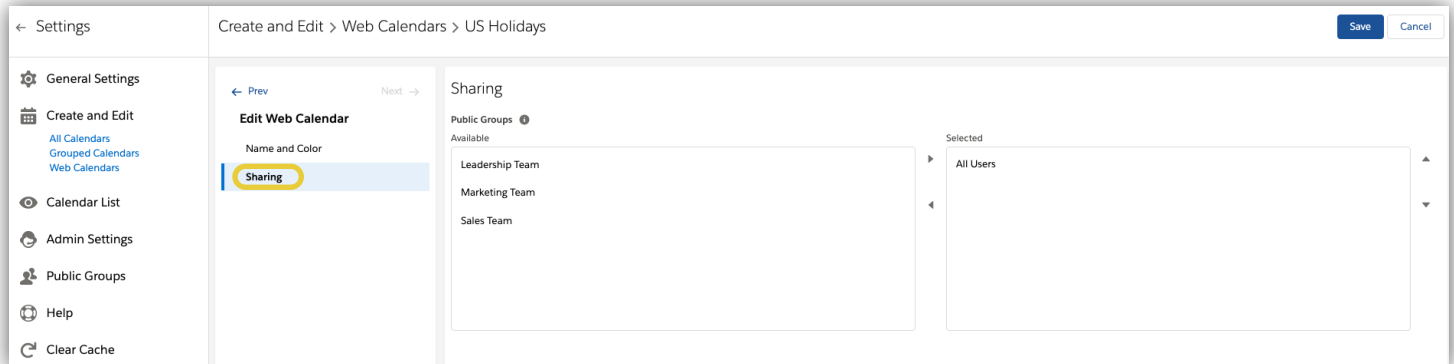
Name and Color

Enter a name for the Google Calendar being added to CalendarAnything LWC and select a color for the calendar. Paste the public ICAL address in the Calendar URL field.



Sharing

As with standard CalendarAnything LWC calendars, you may specify which Salesforce Public Groups have access to this web calendar.

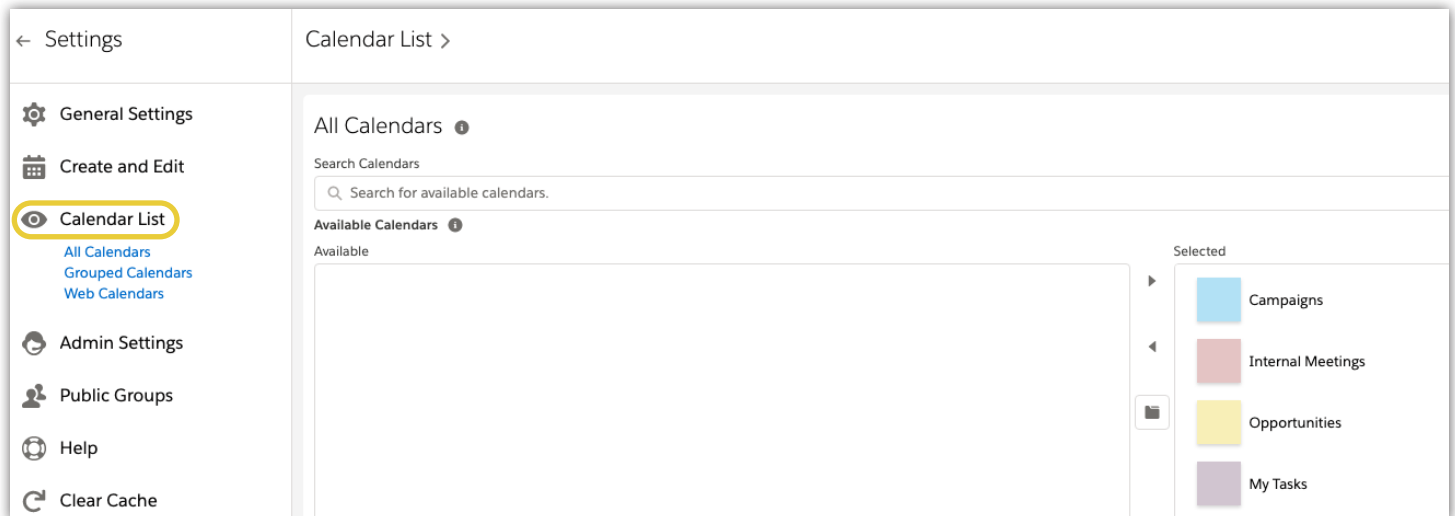


Once you have entered the settings for the web calendar, click **Save** to save the settings and return to the main Calendars page. The web calendar will display in the left side panel and may now be overlaid with other CalendarAnything LWC calendars.

Settings: Calendar List

Add/remove calendars to the list that display in the left sidebar in CalendarAnything LWC.

Click the **gear** icon on the main calendar layout, and select Calendar Visibility Settings. **Calendars** refers to All Calendars, **Groups** refers to Grouped Calendars, and **Web Calendars** refers to external web calendars.



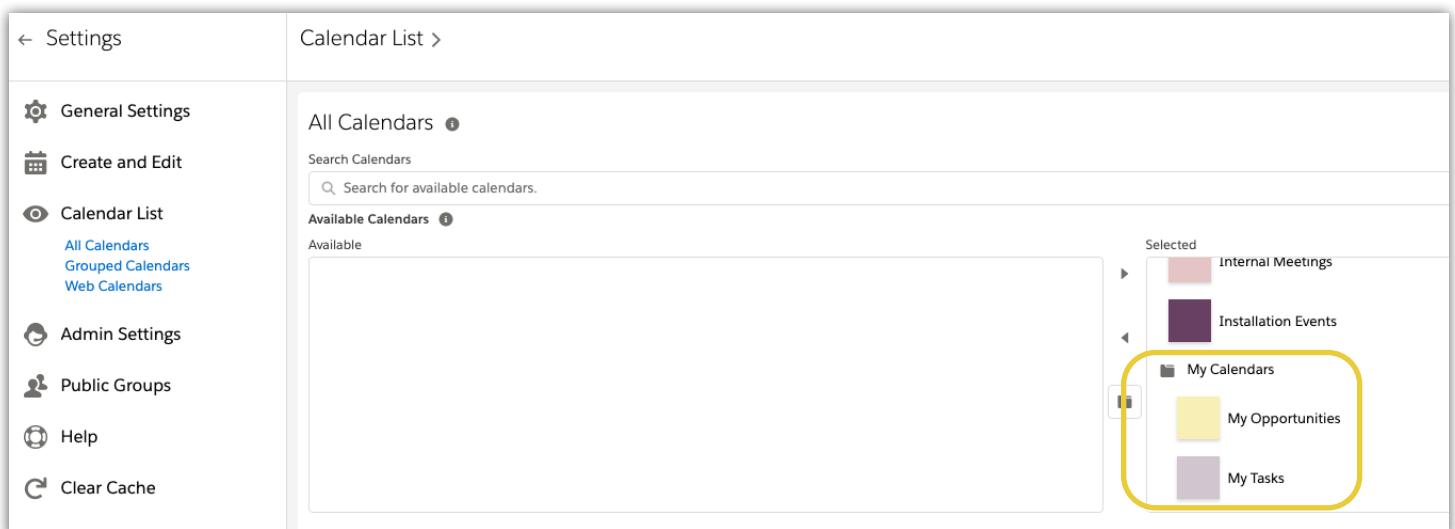
Drag calendars to hide/display or re-arrange the calendars in the sidebar.

Calendars on the Sidebar can be organized into **Calendar Folders**.

To add **Folders**, click on the **folder icon** between Available and Selected calendars sections and enter the Calendar Folder Name in the popup.

This then appears at the top of the **Selected Calendars** list.

All calendars below the Folder will be considered as those that belong to that folder. Drag and drop folders to re-organize.



Calendars Folders

To delete a Folder, drag it from Selected to Available and it will be deleted after page refresh. After adding Folders, collapse or expand them on the Sidebar to hide or show all calendars below:

< >

May 2021

▼ Today

	Sun	Mon	Tue
▼ FILTER PANEL 📅 FILTER SETS ☐ Leadership Team 📅 STANDARD CALENDARS ☐ Campaigns ▶ All Meetings ▼ My Calendars 📅 My Tasks ■ Status - Not Started ■ Status - In Progress ■ Status - Completed 📅 My Opportunities ■ Stage - Closed Won ■ Stage - Closed Lost ■ Stage - Negotiation/ Review	18	19	20
	25 Globex	26	27 Edit Solar Education Content Update Rebate Education Changes
	2	3 Acme	4 Update Rebate Education Changes

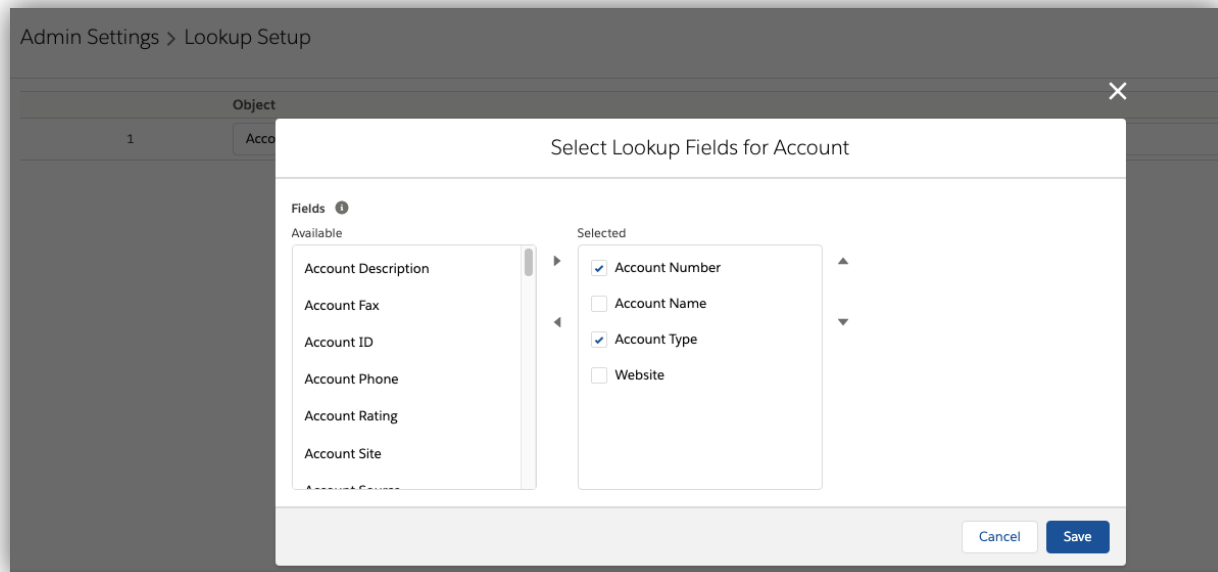
All Meetings Folder is collapsed, My Calendars folder is expanded

Settings: Admin Settings

Admin Settings allow for more complex configuration for your calendars. This includes:

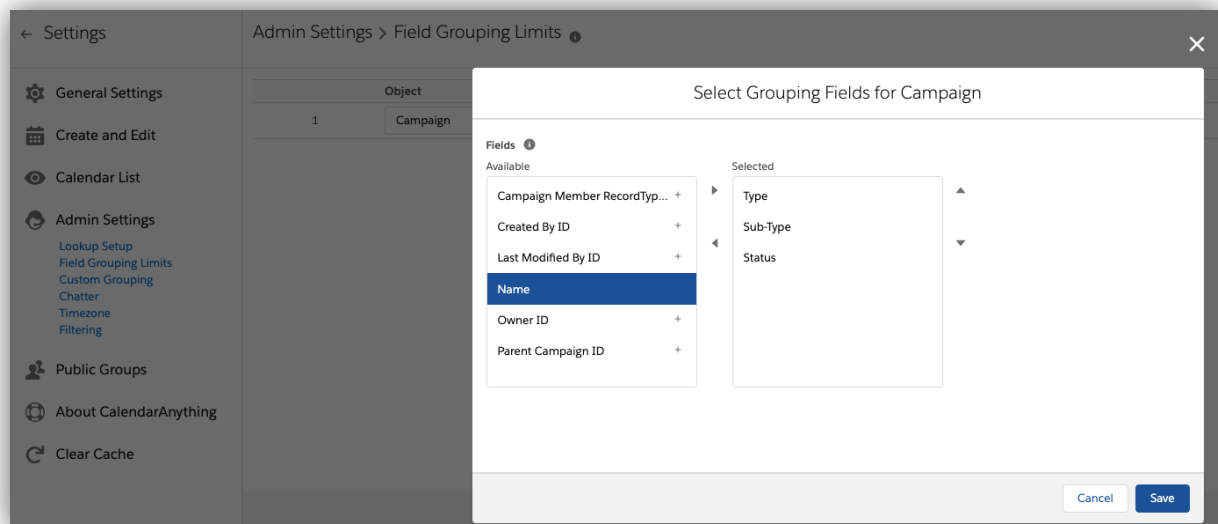
Lookup

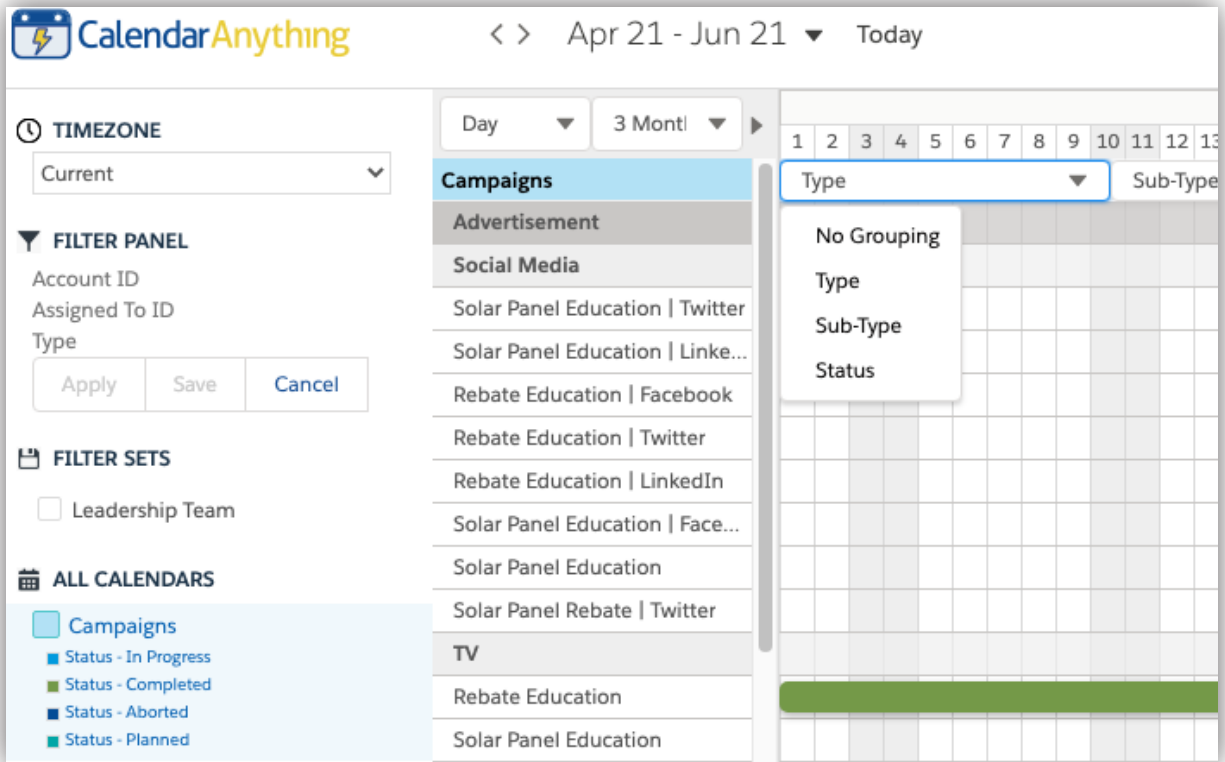
For selected Object, move Available fields to Selected to display within Details Popup.



Grouping Fields

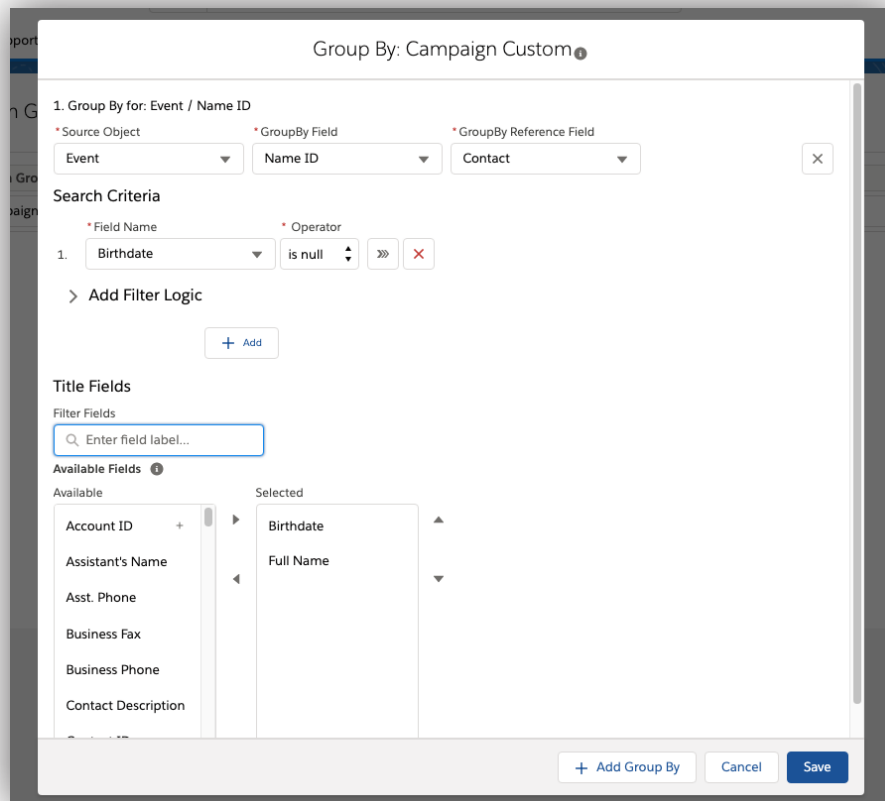
For selected Object, limit fields that can be used as Grouping Fields in Swimlane, Gantt, and Day Grouping calendar views.

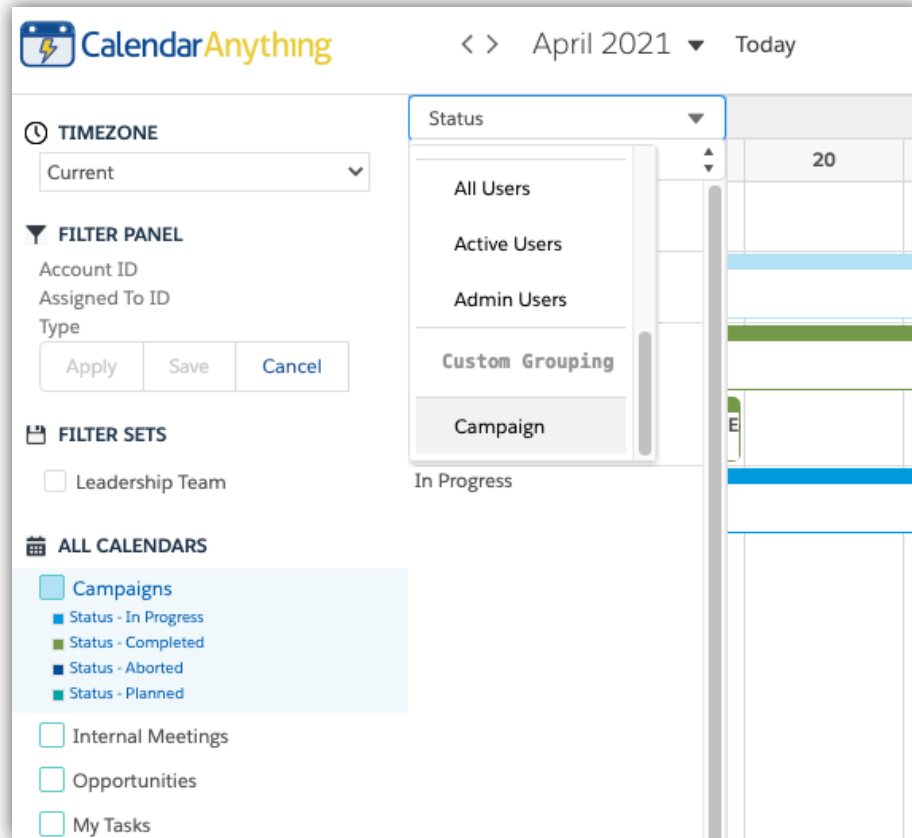




Custom Grouping

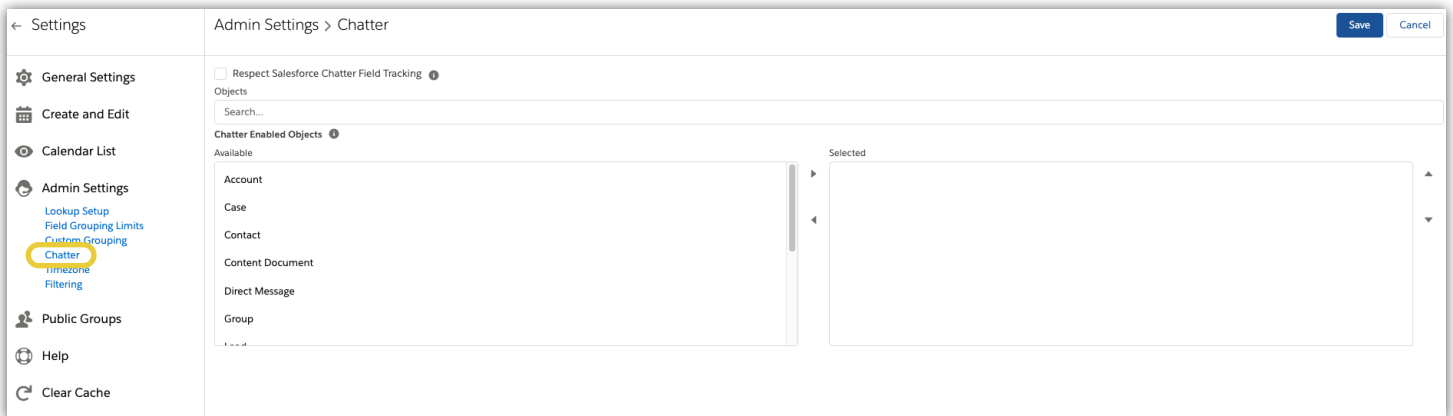
Create and configure grouping that is not found within native Salesforce by creating custom grouping(s) for Swimlane and Day Grouping views.





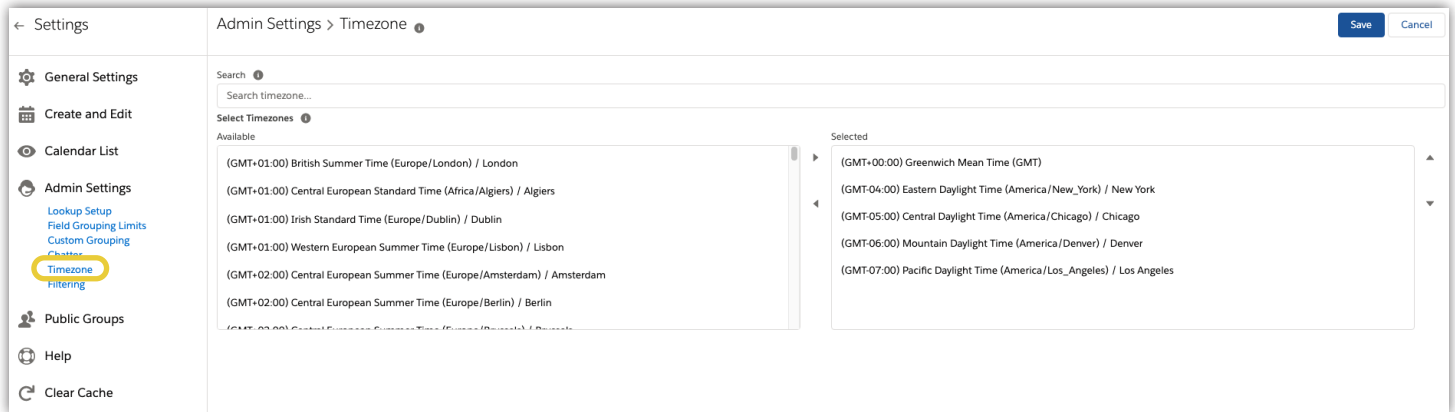
Chatter

Use Salesforce Tracking Feed for Objects or manually select Objects to limit Chatter feed on the details popup.



Timezone

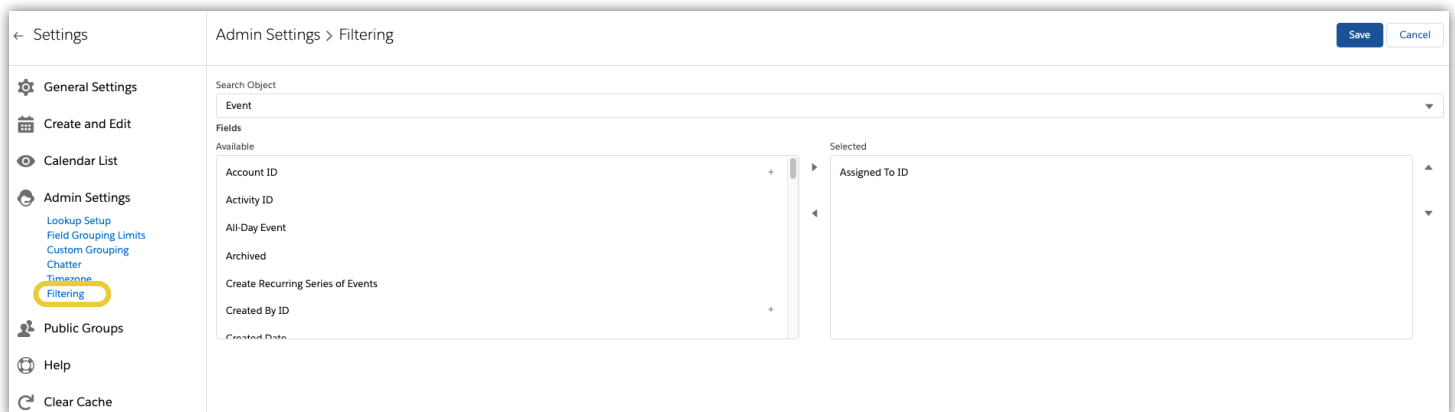
If there are no selected timezones in **Admin Settings > Timezone**, you will be able to select from all timezones when they are enabled in **General Settings**. In case there are selected timezones in **Admin Settings > Timezone**, only those timezones will display as options.



Filtering

First enable filter panel and filter sets - **Settings > General Settings > Advance** and select the **Display Filter Panel** and the **Display Filter Sets** checkbox.

Then go to the **Settings > Admin Settings > Filtering**. Select which object you wish to filter by in the Object list. Then move the desired field from Available to Selected and click **Save**.



Settings: Public Groups

With these Settings, choose how Public Groups display as a grouping option for Swimlane and Day Grouping views:

← Settings

Public Groups >

Save

Cancel

General Settings

Create and Edit

Calendar List

Admin Settings

Public Groups

Help

Clear Cache

Per User Public Group Limits

Search Groups

Enter group label...

Available

Leadership Team

Marketing Team

Selected

Sales Team

CalendarAnything

< > May 2021 Today

TIMEZONE

Current

FILTER PANEL

Assigned To ID

Type

Apply

Save

Cancel

FILTER SETS

Leadership Team

ALL CALENDARS

Campaigns

Status - In Progress

Status - Completed

Status - Aborted

Status - Planned

Internal Meetings

Opportunities

My Tasks

GROUPED CALENDARS

Marketing Team Calendar

WEB CALENDARS

US Holidays

Sales Team

Public Groups

All Users

Sales Team

Group by field

Type

Guerro, Morris

Hanlon, Ben

Hinkle, Thomas

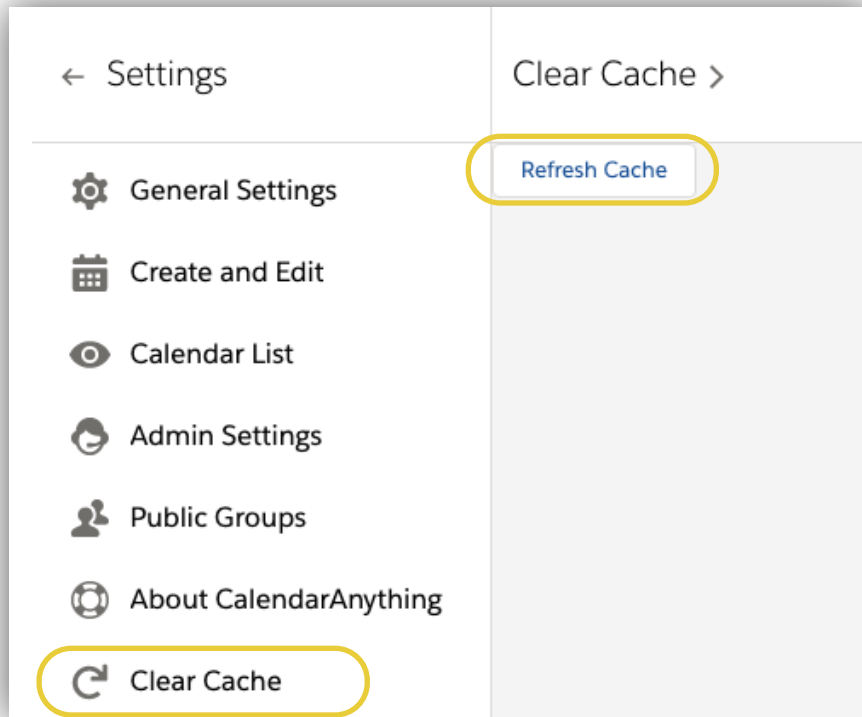
Hinson, Karin

Taylor, Barbara

26

Settings: Clear Cache

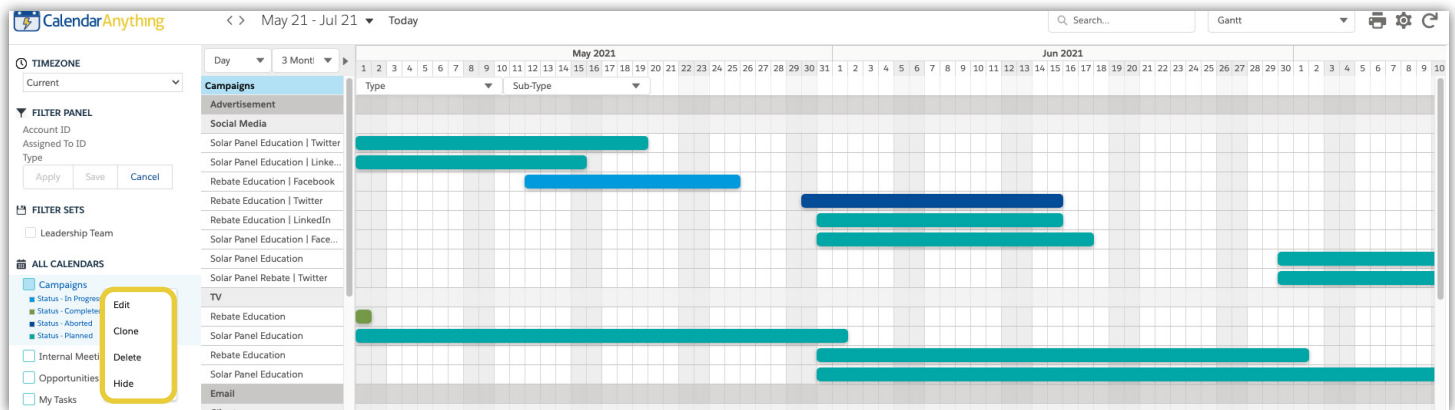
Clicking on the **Clear Cache** button resets Object metadata, cached user permissions, and updates records displayed by enabled calendars.



Editing Saved Calendars

Unless a user is a System Administrator, editing a saved calendar is limited to the user who created the calendar.

To easily edit the calendar settings, from the main calendar page, right click on the **Calendar name** to open the calendar menu.



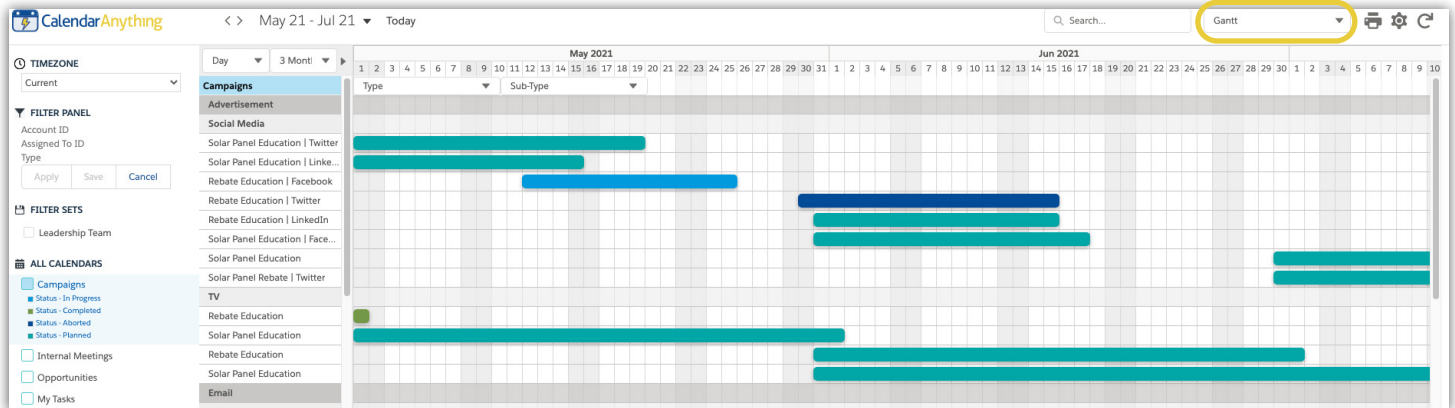
Calendar menu

Selecting the **Edit** option opens the Calendar Settings page. From this menu, you can also **Clone**, **Hide**, and **Delete** the calendar.

Gantt View

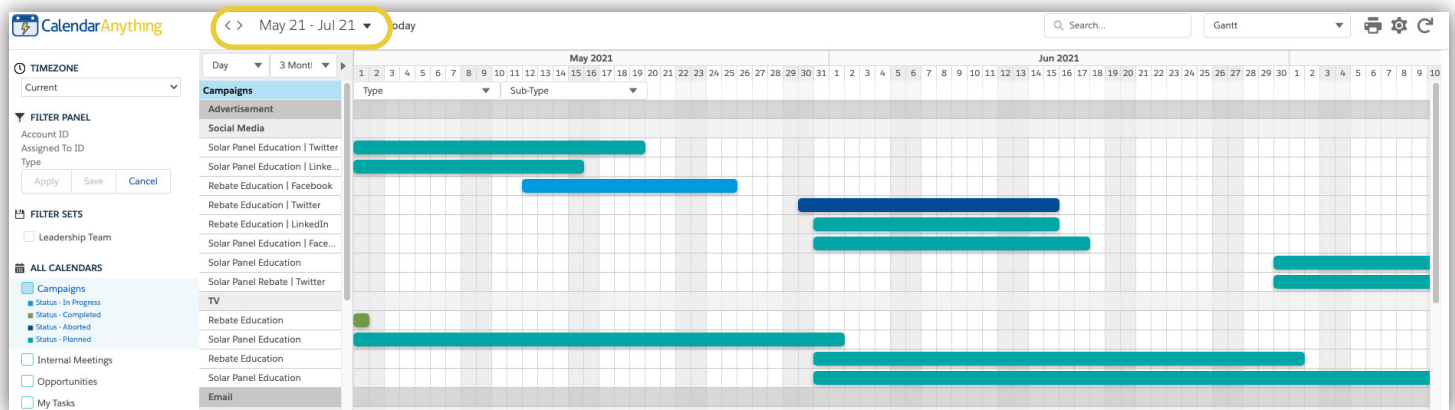
Create Gantt charts based on CalendarAnything LWC calendars and calendar groups. Gantt view allows users to see records up to 10 years ahead.

Access Gantt view by selecting the Gantt view in the right corner.



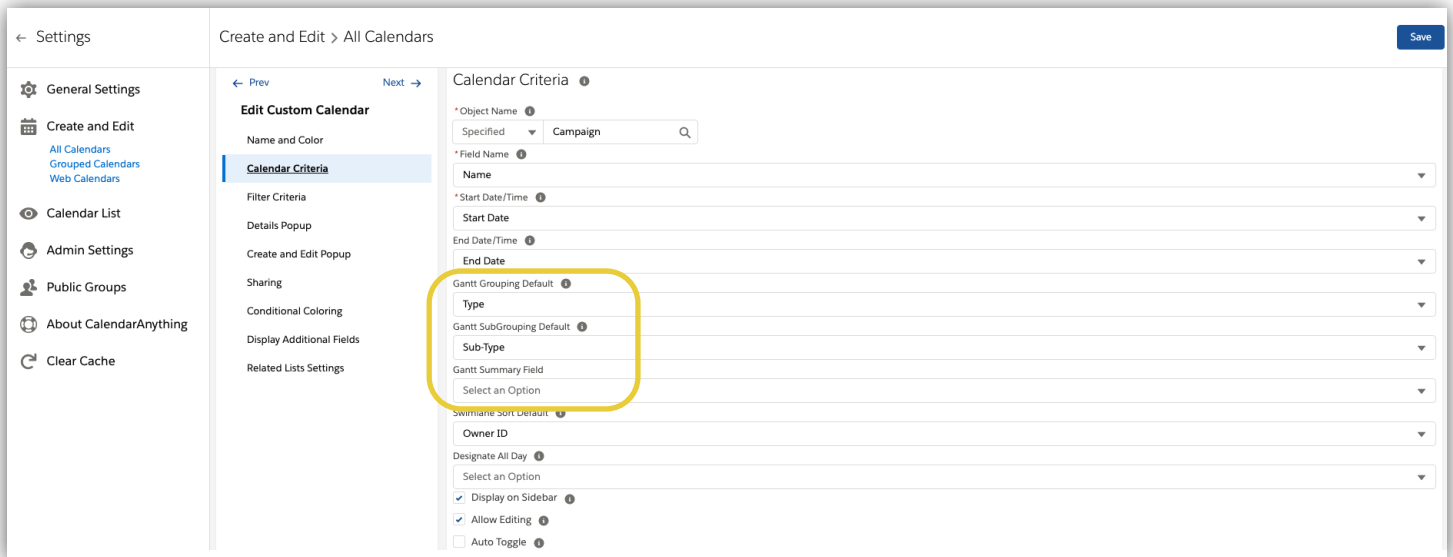
Gantt chart view

Use the Gantt view controls to change the date range and units.



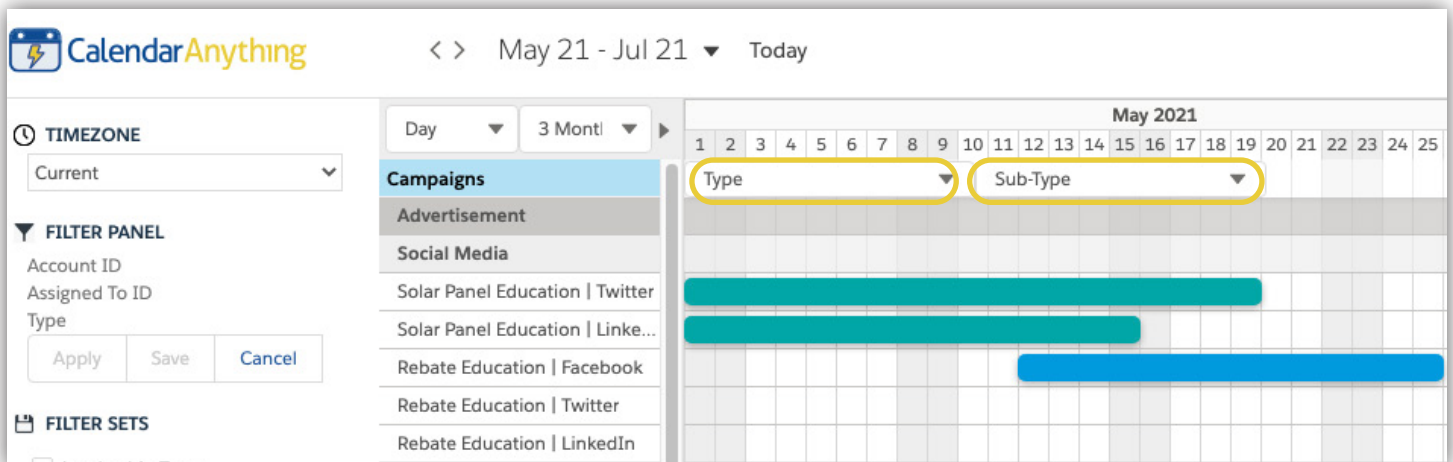
Gantt chart controls

To properly display a calendar in Gantt view, Gantt Grouping/Sub Grouping Default fields should be specified for the calendar in **Create** and **Edit** settings. Return to the settings page for the calendar and select a field for the Gantt view.



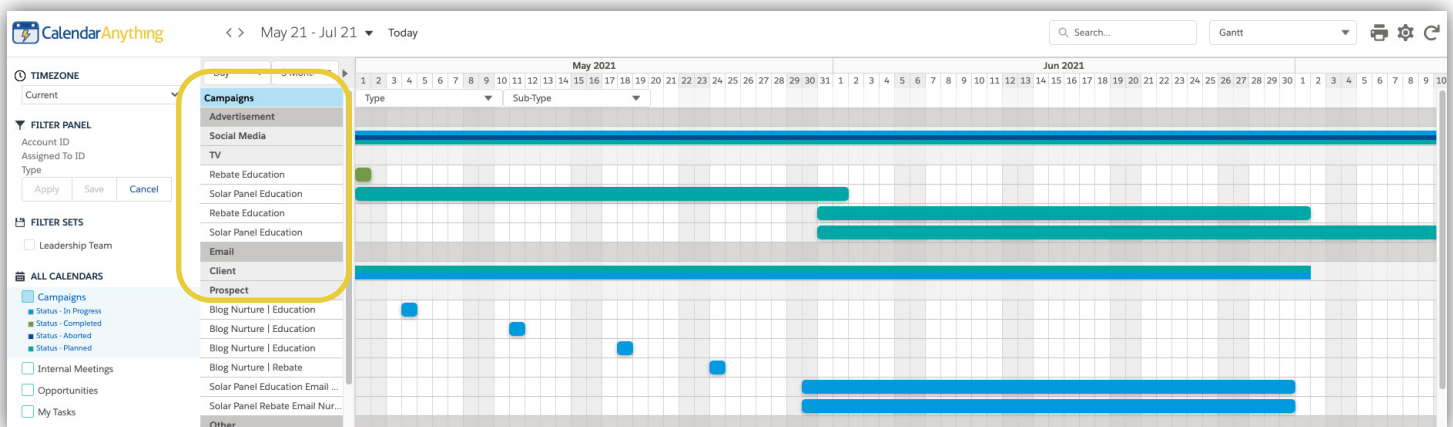
Select a field to group by in Calendar settings.

Alternatively, users can select fields to Group By directly from the Gantt view.



Select a field to group by from Gantt view

Drag and drop, edit records directly from the Gantt view, or collapse the Gantt grouping to hide the rows below it by clicking on it:



Collapse Gantt grouping

Swimlane View

Swimlane is a view in CalendarAnything LWC that is similar to the Standard Salesforce Calendar Multi-User Day View, but that can show records other than Events (including custom objects). It is a consolidated Day view of records from different calendars, grouped by User. This view allows users to see all records (Events, Activities, Cases, etc.) for a specific day for calendars they have read/edit access to.

The dropdown at the head of the user column will give users two options to pick from.

Option 1

Will display and allow the user to select a Salesforce User list-view. Visibility to User list views are defined in 3 ways:

- Visible only to a logged-in user
- Visible to all users (including partner and customer portal users)
- Visible to certain groups of users

Users won't see the list view, even if they're added to it, if the calendar itself is not shared with them.

Option 2

Option 2 allows users to group Swimlanes by sharing settings, such as Public Group of Users.

Option 3 (Admin Only)

Option 3 allows users to select a group by field.



If multiple calendars are enabled, only fields that are common between the calendars will be available.

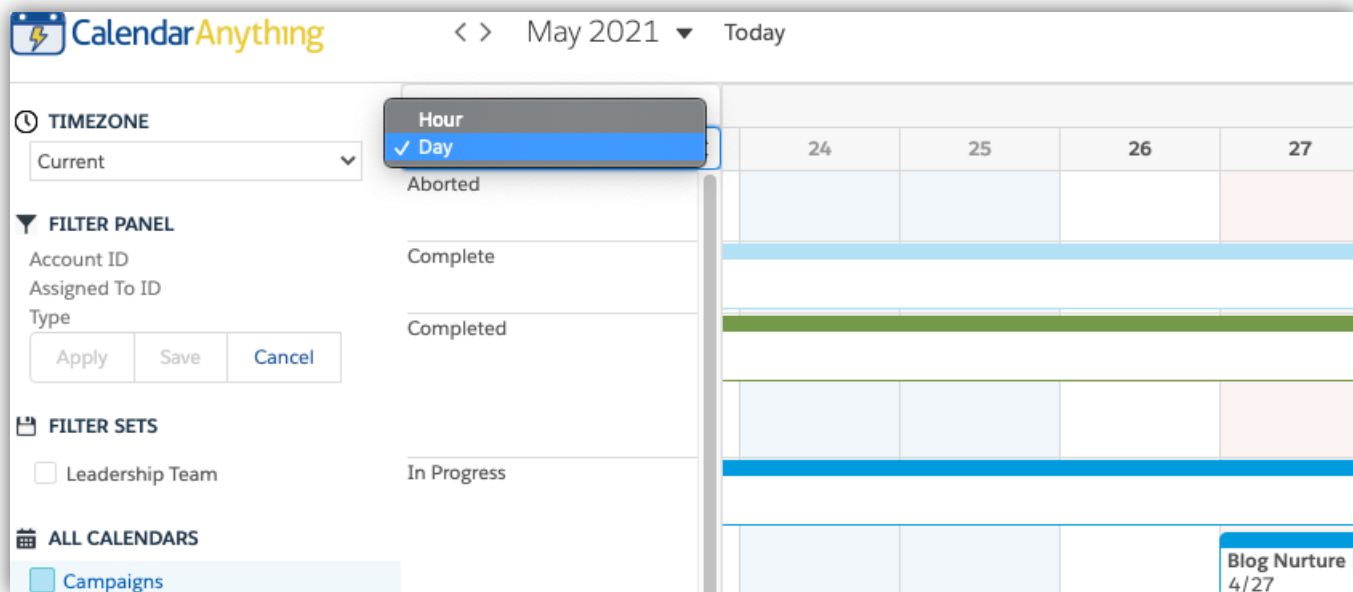
Limit the number of fields available for Group By field from **Admin Settings > Field Grouping Limits** Tab.

Admin Settings > Field Grouping Limits ⓘ	
	Object
1	Campaign

+ Add

All grouping options are also applicable to Day and Gantt Views.

The second drop-down will give users to pick from By Hour or By Day grouping:



Swimlane View will respect the user's locale format and working hours specified in Swimlane View settings. **Scroll** horizontally and vertically to see all records similar to Gantt view and color coded based on Calendar Color.

By default, CalendarAnything displays an Entry label for every record. **Entry Start Date/Time** and **End Date/Time** appearance is controlled by **Display Start Date/Time** and **End Date/Time** checkbox in **General Settings > Swimlane View Settings**.

Users should be able to create a new record by clicking and/or dragging on the grid that would pop up the standard CalendarAnything LWC create dialog. Records can be dragged, stretched, copied, cut, pasted, cloned, edited, and deleted as in Day view. If modified, the record will be updated accordingly.

Day Grouping View

Day Grouping, similar to a Swimlane view, shows columns with the grouped records from different calendars.

The Grouping dropdown at the top right will give users four options to pick from:

Custom

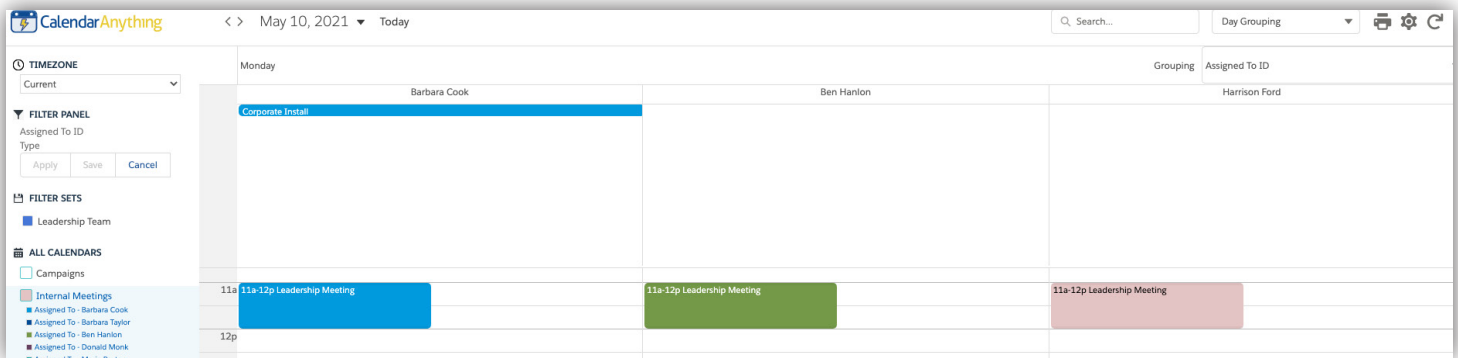
Allows users to select a Custom Group By option, configured in Settings > Admin Settings > Custom Group By.

Public Group

Allows users to select a Public Group.

Fields

Allows users to select a Group By Field.



Day Grouping view will respect the user's locale format and working hours specified Day/Week View settings. Users will be able to scroll vertically to see all records. Records will be colored based on calendar color.

Time slots duration, ratio of timed and all-day sections and appearance of additional fields controlled by corresponding options in **General Settings > Day/Week View Settings**.

Users should be able to **create a new record** by clicking and/or dragging on the grid that would pop up the standard CalendarAnything LWC create popup. Records can be dragged, stretched, copied, cut, pasted, cloned, edited, and deleted as in Day view. If modified, the record will be updated accordingly.

Support

[VISIT OUR CALENDARANYTHING LWC SUPPORT SITE](#)



Since 2009, Silverline has helped clients deploy, manage, and enable continuous value with Salesforce's portfolio of products. Silverline also develops powerful solutions deployed on the Salesforce Platform, best practice industry accelerators, and robust third-party apps. CalendarAnything is the most customizable calendar app for Salesforce. It allows you to display any standard or custom Salesforce object on a calendar. Download the free trial today and find out why CalendarAnything is the highest rated calendar application on the [APPEXCHANGE](#).

