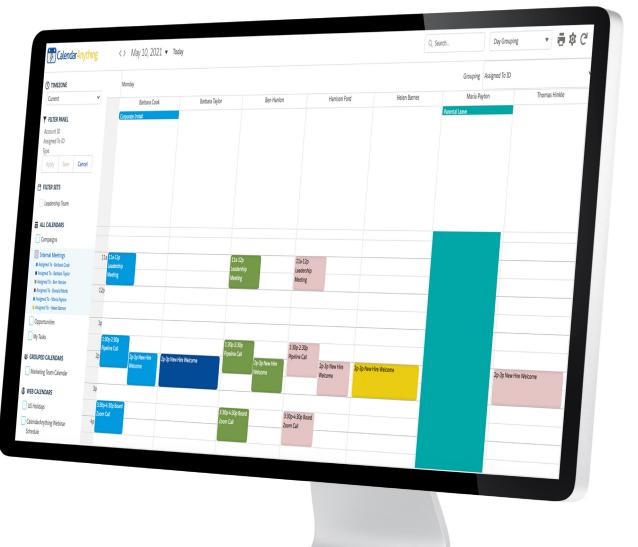


Calendar Anything



Advanced Admin Configuration Guide

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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 are a date or date/time field. CalendarAnything LWC can be downloaded from the AppExchange at:

HTTP://APPEXCHANGE.SALESFORCE.COM/

This advanced admin guide is recommended for system administrators who already have at least a basic understanding of CalendarAnything LWC functionality.



Implementation of the features described in this admin guide will require system administrator access to the organization.

Technical Specifications

Salesforce.com supported editions:

Enterprise Edition, Unlimited Edition, Force.com Platform Edition, Developer Edition



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

User Permissions Needed

All CalendarAnything LWC clients are required to make the permission changes below. These changes will need to be made for all profiles or permissions sets that apply to Users using CalendarAnything LWC.

1. 1. Navigate to Setup >> Security >> Sharing Settings.

- 2. 2. Make sure that Organization Wide Default access in Internal and External columns is set to **Private** for all objects with "**CA**__" prefix.
- 3. 3. From Setup, click Users | Profiles.
- 4. 4. Select a profile.

Enhanced Profile User Interface	Standard Profile User Interface
 In Apps, click on Object Settings. Select any of the CalendarAnything LWC custom objects, these objects have the CA_ prefix. Check the Read column to see if all fields are checked. If all fields are checked select the next CA_ custom object. If some fields are unchecked, click the Edit button and check all fields under the Read column. Save changes. Make sure the profile has Create permission on CA_UserSettings. Repeat for the next CA_ custom object. Repeat until all fields on all CA_ custom objects are visible for that profile. 	 In Custom Object Permissions block, make sure the profile has Create permission on CA_UserSettings. Scroll to the Field Level Security section. Locate the CalendarAnything custom objects, these objects will have the CA_ prefix. Click View next to each CA_ custom object to show the field security settings. Check the Read Access column to see if all fields are checked. If all fields are checked, click Back to Profile button. If some fields are unchecked, click the Edit button and check all fields under the Read Access column. Save changes. Return to profile details and repeat for the next CA_ custom object. Repeat until all fields on all CA_ custom objects are visible for that profile.

Next, enable **Apex Class Access** for all CalendarAnything LWC components (those with the **SLCALWC.CA**_ prefix). Also enable Visualforce Page Access for all CalendarAnything LWC components (also beginning with the **SLCALWC.CA**_ prefix).

Enabled Apex Class Access Edit	Enabled Apex Class Access Help (?		
Apex Class Name	AppExchange Package Name		
SLCALWC.CA AjaxResponceController	CalendarAnything LWC		
SLCALWC.CA CalendarWrapper	CalendarAnything LWC		
SLCALWC.CA DataLayer	CalendarAnything LWC		
SLCALWC.CA DataUtils	CalendarAnything LWC		
SLCALWC.CA EventHandlerController	CalendarAnything LWC		
SLCALWC.CA EventWrapper	CalendarAnything LWC		
SLCALWC.CA FieldWrapper	CalendarAnything LWC		
SLCALWC.CA Fields	CalendarAnything LWC		
SLCALWC.CA Filters	CalendarAnything LWC		
SLCALWC.CA GroupWrapper	CalendarAnything LWC		
SLCALWC.CA JsonCompiler	CalendarAnything LWC		
SLCALWC.CA Options	CalendarAnything LWC		
SLCALWC.CA ParentController	CalendarAnything LWC		
SLCALWC.CA PostInstall	CalendarAnything LWC		
SLCALWC.CA Remote	CalendarAnything LWC		
SLCALWC.CA Security	CalendarAnything LWC		
SLCALWC.CA Shares	CalendarAnything LWC		
SLCALWC.CA UserSettings	CalendarAnything LWC		
SLCALWC.CalendarAnything_pageController	CalendarAnything LWC		
SLCALWC.DateUtils	CalendarAnything LWC		
SLCALWC.DescribedCore	CalendarAnything LWC		
SLCALWC.FilterSet	CalendarAnything LWC		
SLCALWC.FilterSoglCompiler	CalendarAnything LWC		
SLCALWC.StringUtils	CalendarAnything LWC		
SLCALWC Test CreateTestData	CalendarAnything LWC		

Enable profile access to CalendarAnything LWC custom Apex classes and Visualforce pages

Enabled Visualforce Page Access	Enabled Visualforce Page Access Help
Visualforce Page Name	AppExchange Package Name
SLCALWC.CAL RESTSession	CalendarAnything LWC

Please see the explanations of CA_ custom object functions to determine what other permissions User profiles might require.

CA_ object functions to help in determining sharing settings.

Object Name	Function	User Profile Permissions Needed
CA_Calendar	Main object used for storing Standard Calendars.	Read, Create (if creating calendars), Edit, Delete (if deleting calendars), View All.
CA_HoverFields	Stores fields that display on the "hover dialog"	Read, Create, Edit, Delete, View All.
CA_CreatingField	Stores fields used on the "Quick Create" popup when creating events from the CalendarAnything page	Read, Create, Edit, Delete, View All.
CA_CalendarToken	Stores calendar token	Read, Create, Edit, Delete, View All.
CA_Filters	Stores information about calendar filters	Read, Create, Edit, Delete, View All.
CA_Groups	Stores information about calendar groups	Read, Create (if creating Calendar Groups), Edit, Delete, View All.
CA_UserSettings	Stores user settings such as a list of visible calendars	Read, Create, Edit, Delete, View All.
CA_WebCalendar	Stores list of Web Calendars. Will not be used by clients	Read, Create, Edit, Delete, View All.

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

Add a Permission Set

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Clone SateStore CMS Integration Admin Gives the admin data access and the permissions to integrate Satesforce CMS with any endpoint. Cloud Integration User	_	Clone	Manufacturing Sales Agreements	Track your planned and actual quantities and revenues with integrated sales using sales agreem.	Manufacturing Sales Agreements Psl
		Clone	Manufacturing Sales Agreements For Community	Collaborate with your partners on sales agreements using the Manufacturing community.	Manufacturing Sales Agreements For Community Psl
Cione Salesforce Console User Enable Salesforce Console User Sales Console User		Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce CMS with any endpoint	Cloud Integration User
		Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
125 of 25 0 Selected ((Previous Next)) Page)					

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

*	Q Search Setup	* 🖬 🚓 ? 🏟 🖡 🐻
Setup Home Object	t Manager 🗸	
ADMINISTRATION V Users Permission Set Groups	SETUP Permission Sets	
Permission Sets Profiles	Permission Set Assignments John Marv	Help for this Page 🥹
Public Groups Queues	Save Cancel	
Roles User Management Settings Users > Data > Email PLATFORM TOOLS > Apps	Available Permission Sets Salesforce CMS Integration Admin Trust Card Manager Add Remove	
Feature Settings Einstein Objects and Fields Events	Save	

CalendarAnything LWC Default Permission Set

Publishing CalendarAnything LWC on Force.com

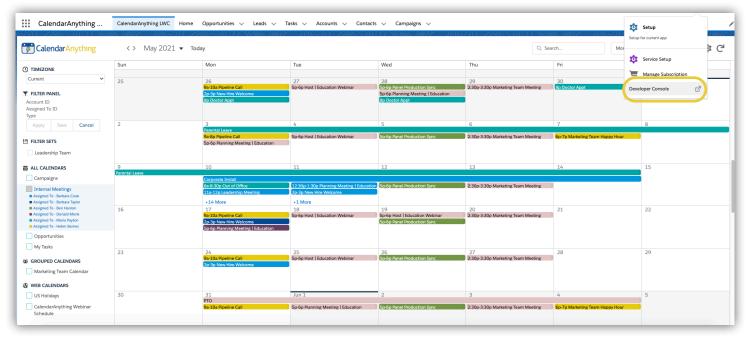
Create a Lightning App

The CalendarAnything LWC can be displayed on a force.com site.



A System Administrator should help with the set up.

To create a lighting app, navigate to Salesforce and click on the **gear** icon in the top right corner. Then choose **Developer Console** from the dropdown.



In Developer Console, Click File > New > Lightning Application.

New	•	Apex Class
Open	CTRL+O	Apex Trigger
Open Resource	CTRL+SHIFT+O	Visualforce Page
Open Lightning Res	sources CTRL+SHIFT+A	Visualforce Component
Open Log	CTRL+G	Static Resource
Open Raw Log	CTRL+SHIFT+G	Lightning Application
Download Log	CTRL+ALT+G	Lightning Component
Save	CTRL+S	Lightning Interface
Save All	CTRL+SHIFT+S	Lightning Event
Delete	CTRL+DELETE	Lightning Tokens
Close	CTRL+/	
Close All	CTRL+ALT+/	

Name the application (Ex:calendarLWC) and make sure to check the 'Lighting Out Dependency App' checkbox.

Name:	calendarLWC	
Description:		
	nfiguration with any of the following configurations (optional Dut Dependency App	D

That creates something that looks like:

	dit • Debug • Test • Workspace • Help • < > rLWC.app R
1 • 2	<aura:application extends="ltng:outApp"></aura:application>
3	

Remove everything and copy/paste the following:

<aura:application access="GLOBAL" extends="ltng:outApp" implements="ltng:allowGuestAccess" />

It should look like this:

Save by going to **File > Save**.

Create a VisualForce Page That Our Site Will Load

To create a VisualForce Page, navigate to **Setup > VisualForce Pages >** click **New**. Fill in the fields in the Page Information section. Make sure to check the **Available for Lightning Experience, Lightning Communities, and the mobile app** checkbox.

age Edit		Save Q	uick Save	Cancel	Where is this used?	Component Reference	Preview	
Page Information								= Required Information
Label	SiteCalendar_LW	/C						
Name	SiteCalendar_LW	/C						
Description								
Available for Lightning Experience, Experience Builder sites, and the mobile app								
Require CSRF protection on								

On the next page is a code sample for the site. In this example, we include Calendar IDs, but replace them with the IDs of the calendars you need to display and enable on your site when you copy and paste. Copy from <apex:page> to </apex:page>.

```
<apex:page >
<apex:slds />
<apex:includeLightning />
<div id="calLightning" class="wrapper"></div>
<script>
    var calendarApi = null;
    // Create custom app and expose it to VisualForce
    $Lightning.use('c:calendarMobileApp', function () {
        // add some settings
        let userAdditionalSettings = {
            displayTimeZone: true,
            dayModeArea: '0 1',
            readonly: {
                move: false
            }
        };
        $Lightning.createComponent(
            'SLCALE:CALWC',
            {
               calendar: "a024T00000257LDQAY, a024T00000257LFQAY",
//These are just example IDs and should be replaced with your CalendarIDs
               enabled: "a024T00000257LDQAY, a024T00000257LFQAY",
//These are just example IDs, you should be replaced with your CalendarIDs
          view: 'Agenda', // The default start view mode, in this example we are defaulting
to Agenda.
                showModeSelector: true,
                userAdditionalSettings: JSON.stringify(userAdditionalSettings),
                useCAForm: true,
                useCADetail: true,
                showIcoCreate: false,
                showIcoCalendars: false,
                height: '600px',
                readonly: {
                    move: false
                },
                // executes after calendar is fully loaded
                fReady: function (oApi) {
calendarApi = oApi; // for calendar API method (set dynamic filters, create custom buttons,
etc);
                }
            },
            'calLightning', // id of div you want to put new Lightning element
            (cmp) => {
               // callback for create element (NB calendar load event is not equal to this
event).
                // if you want to execute something after calendar is loaded use fReady
                console.info('created');
            }
        );
    });
</script>
</apex:page>
```

Create a Force.com Site Page

To make your CalendarAnything LWC public, you must create a force.com site page. This can be an existing page or a new one. To set up your Force.com site, refer to **SALESFORCE'S SETTING UP SALESFORCE SITES**.

Once on the site set up, replace the Active Site Home page with the VisualForce page we just created.

SETUP	Visualforce Page ~ Salesforce - Enterprise Edition - Google Chrome	
Sites	A	
	🔜 🔍 Lookup	
Site Edit	SiteCalendar_LWC Go! You can use *** as a wildcard next to other characters to improve your search results.	
New Site Save Cancel		
Site Label ForceCalendarLWC	< <u>Clear Search Results</u>	
Site Name ForceCalendarLWC	Search Results	
Site Description	Label Name Namespace Prefix Api Version Description Created By Alias Cr	reat
		16/ 10 /
Site Contact Swimlane UAT Admin		
Default Record Owner Swimlane UAT Admin	Copyright @ 2000-2021 salesforce.com, inc. All rights reserved.	
Default Web Address http://caswim.force.com/		Þ
Active 🗌 👔		ŕ
Active Site Home Page		
Inactive Site Home Page InMaintenance Site Preview]		
Site Template SiteTemplate	•	

Save and your site is ready to be published.

If your site is brand new, then you will need to configure Sharing Rules as well (see next page).

Create Sharing Rules for Guest Site User on Your Force.com Site

First, go to the **gear** icon on the top left of your page and then click on **Setup**. Once there, click on **Sharing Settings**.

Q Sharing Settings✓ Security	Sharing Settings			
Sharing Settings	Sharing Settings	11.2410~2410.916/SA	-32111-311(2-9) (j=9) 	Help for this Page 🥝
Didn't find what you're looking for? Try using Global Search.	This page displays your organization's sharing se Jobs to monitor the progress of a change to an or			each others' data. Go to <u>Background</u>
	Manage sharing settings for: All Objects Disable External Sharing Model Default Sharing Settings	~		
	Disable External Sharing Model Default Sharing Settings	▼ Edit		Organization-Wide Defaults Help ?
	Disable External Sharing Model Default Sharing Settings		Default External Access	Organization-Wide Defaults Help (?) Grant Access Using Hierarchies

In Organization Wide Defaults, click on the Edit button.

Then, turn the Secure Guest User Record Access on.

Scroll all the way to the bottom to find this option.

Q Sharing Settings			1 (- Nilley (G. 2005) (G. 20		ADSGA CHARGENALL ANNUM	
✓ Security	Sharing	Settings				
Sharing Settings	Test_Resource	Public Read/Write 🗸	Public Read/Write 🗸		75-8X-200 - 1006-210	
	TestObject	Public Read/Write 🗸	Private 🗸	12		
Didn't find what you're looking for?	TestObject	Public Read/Write 🗸	Private 🗸	5		
Try using Global Search.	TestObject1	Public Read/Write 🗸	Public Read/Write 🗸	12		
	User Setting	Public Read/Write 🗸	Public Read/Write 🗸	12		
	Work Rule	Public Read/Write 🗸	Public Read/Write 🗸	15		
	User Visibility Settings	i marine in				
		Portal User Visibility 🔽 👔	Site User Visibility 🔽 👔			
	Other Settings					
		Standard Report Visibility 🗌 i	Manual User Record Sharing 🗹 1) Manager Groups 🗋 👔	Use Grant SecureRequire person site guest permission role for users user to view first site accessments in partner related lookup and case i fields customer i i i i i i i	
		Save	ncel			Ţ

In order to support the visibility of the calendar and the data exposed by CalendarAnything LWC, your system admin must create sharing rules for all objects exposed on a Force.com site.

For example, to publish a force.com site with an event calendar see the next section, **Create a Sharing Rule For CA_Calendar Object**.

Create a Sharing Rule For CA_Calendar Object

Fill in the Sharing Rule label. The criteria defines what will be shared with your site user and depends on your use case. In this example, we will create a rule that gives the Guest Site user access to all calendars. Please make sure you are sharing with the right Guest Site user.

Q. Sharing Settings	Sharing Setti	DOS				
Security	Sharing Seco	ing.s				
Sharing Settings	Step 1: Rule Name				I + Naquined Information	
lich't find what you're looking for? Iy using Global Search.	Lakel Role Name Description	Force_com				
	Step 2: Select your rule type					
	Rule Type 🕜 Based on necond owner 🔿 Based on criteria 💣 Geest user access, based on criteria					
	Step 3: Select which records	to be shared				
		these criteria, you're allowin even without logging in. To :	g immediate and unlimited secure your site and its dat that you think are appropri-	to from quest users, consider all the late for the sensitivity of your date. 3	e criteria to anyone accessing the site, use cases and implications, and	
	Gritteria	Field	Operator	Value		
		Ovner ID 👻	not equal to 👻	NULL	AND	
		-None- v	-None- ¥		AND	
		-None- v	-None- ¥		AND	
		-None- •	-None- v		AND	
		-None- V	-None- ¥			
	Step 4: Select the users to a	-None- v -None- v Add Filter Look_	-None- ¥			

Once shared, the Guest Site user can access the calendars but not the records displayed on the calendar. You will have to replicate the process for each object that feeds into the calendar.

Create and Assign Custom Calendar Anything LWC Permission Set for a Guest User

Salesforce is removing the View All, Modify All, Edit, and Delete object permissions on all objects for guest users in new and existing orgs. These permissions are removed for custom objects and standard objects. Guest users can only have Read and Create object permissions. See <u>SF SPRING 2021 RELEASE NOTES</u> for more.

How does this change affect calendars published on Force.com sites?

Guest Site Users will receive an error message and will not be able to view the calendars. If the View All, Modify All, Edit, and Delete object permissions are part of a permission set or permission group and assigned to a guest user, then the guest user is removed from the permissions set or permission set group. Guest users also lose access to other permissions that are included in those permission sets and permission set groups.

CalendarAnything LWC Default Permission Set includes Edit and Delete permissions for CalendarAnything LWC custom objects.

This is what your organization's Salesforce admin will need to do before the Spring'21 Release is applied

to your organization to avoid service interruption for Force.com calendars.

- Clone CalendarAnything LWC Default Permission Set
- Open newly created permission set
- o Go to Object Settings
- o Update object permissions for CalendarAnything LWC custom objects to Read access

CA_Calendar	Read
CA_CalendarByUsers	No Access
CA_CalendarTokens	Read
CA_CreatingFields	Read
CA_FiltersPlural	Read
CA_GroupsMembersPlural	Read
CA_GroupsPlural	Read
CA_HoverFieldsPlural	Read
CA_Sites	Read
CA Test Page	-
CA_tests	No Access
CA_UserSettings	Read
CA WebCalendars	Read

• After the new permission set is ready, update Permission Set Assignment for all Site Guest Users

In Setup, go to Sites > click on Site Label > Public Access Settings > View Users > click on user's Full Name > Edit Assignments (Permission Set Assignments).

CalendarAnything LWC properties

CalendarAnything LWC properties are optional.

Default View Mode

Agenda is the default view. Admin can change the default view to one of other options we offer, such as Day, Day with grouping or Week.

Calendars Available to Enable

Admin can list Calendar friendly names (comma separated) or Calendar IDs to limit the number of calendars available to users.

Calendars to Enable at Startup

Admin can list Calendar friendly names (comma separated) or Calendar lds that will be loaded by default every time the user opens the page. It will override any selection made by the user from the list of available calendars. If left blank, no calendars will be loaded when the user opens the application for the first time. To enable calendars, tap on the navigation icon and select calendars from the list.

Calendars Available for New Records

Admin can limit the list of calendars available to users to create new records. Enter calendar ID or Name from 'Name and Color' of calendar setup.

Height

Set component height in px. For mobile recommended height value is set to 500.

Auto Hide Date-Picker property

When checked, will auto hide date picker calendar after user selected some date.

Record Dynamic Filter Field property

Used to filter records when a component is placed on the record page. For example:

- Add component on Account page
- Set Record Dynamic Filter Field = Id
- Add Dynamic filter on Calendar Edit > 'Filter Criteria': Related To = DYN Then only calendar events related to the current Account will be displayed with the component.

Display Mode Selector

If checked, will display View Mode selector.

Display Create New Record Icon

If checked, will display + icon (Create New).

Display Calendar Selector

If checked, will display Calendar Selector.

Display Refresh Icon

If checked, will display Refresh icon. Clicking the Refresh icon will display the latest records for all selected calendars.

Display Today Icon

If checked, will display Today icon.

Use CalendarAnything Create Form

If checked, will use a custom record create form based on Create and Edit Popup within calendar setup. Otherwise, will use standard new record layout for selected record type.

Enabled Calendars Only on Create

If checked, will only display the currently selected list of calendars to choose from when creating new records.

Additional User Settings

Admin can specify default user settings in JSON format. For example: {"swimlaneEnableListViews":false}

Max Reference Options

Admin can define the number of related lookup objects to load on start. For optimal performance, we recommended to set Max Reference Options to 10 or less.

Static Caching Time (minutes)

Cache time limit for object's metadata and user's permissions.

Session Caching Time (minutes)

Cache time limit for calendar's information.

Purchasing CalendarAnything LWC Licenses

CalendarAnything LWC costs can be found on our **<u>APPEXCHANGE LISTING</u>**.

Initial license purchases are at the annual rate for a one-year subscription which entitles you to all upgrades of the application released during the year. Any additional licenses prior to the subscription renewal date will be calculated on a prorated basis.

You are not required to purchase CalendarAnything Licenses for all Salesforce users in your organization--only for users needing Read, Write or Edit access to CalendarAnything.

For larger companies, Silverline CRM offers volume discounts and a site license option. We also offer a nonprofit discount. Please contact us for details.

You are able to purchase licenses directly from the CalendarAnything package installed in your organization via Stripe Checkout.

To purchase licenses via Stripe Checkout directly from the installed package, navigate to **Your Name>> Setup>> Installed Packages**. Click the Configure link and a Stripe Checkout window will appear. Follow the on-screen instructions to purchase your licenses. Once the purchase is complete, the CalendarAnything licenses will be active in your organization.

If you are unable to purchase licenses using this method, contact us at: calendaranything@silverlinecrm.com

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**.

