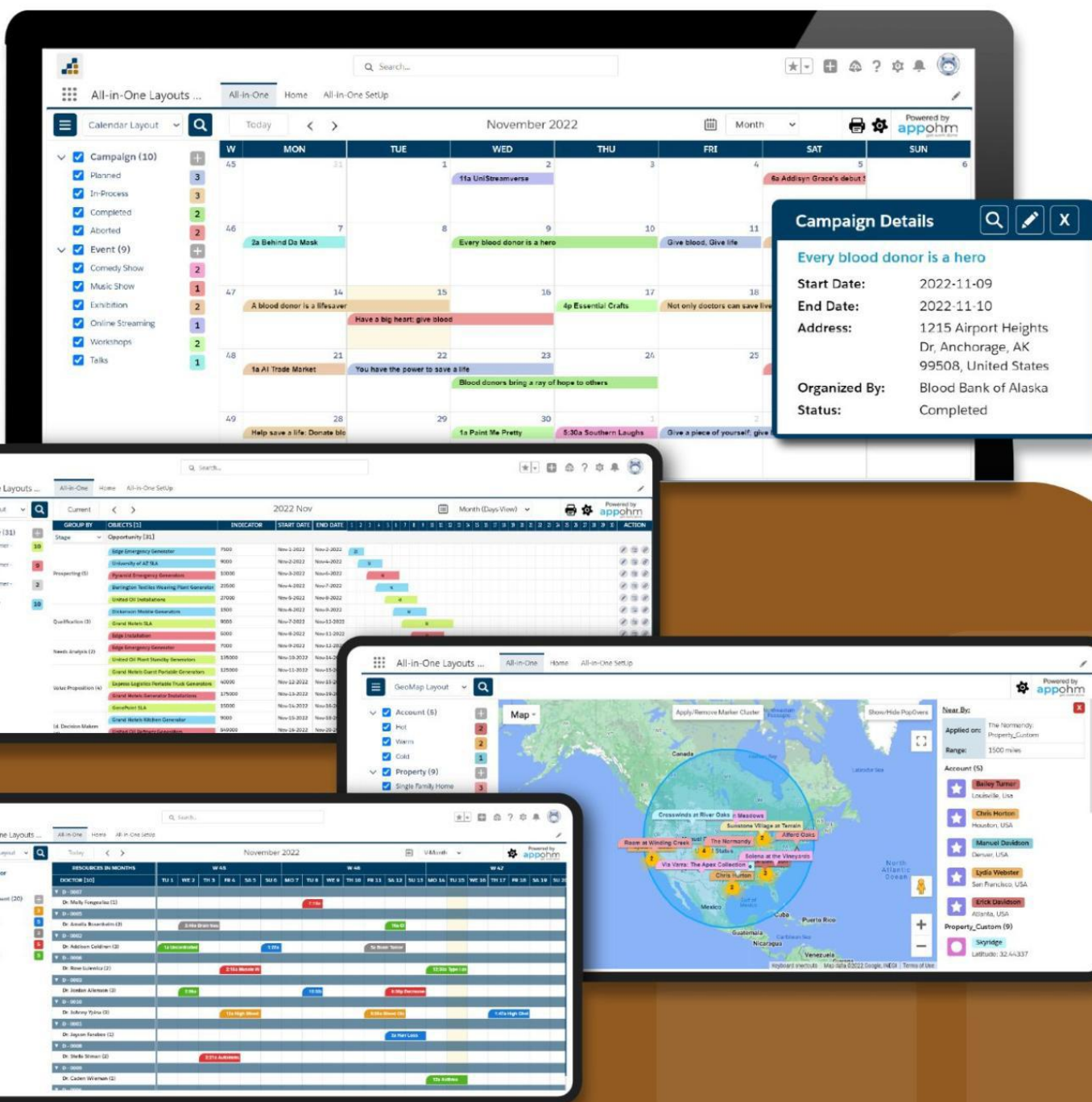


All-in-One Layouts by Appohm Technologies



Installation & Configuration Guide

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Overview

All-in-One Layouts is an app for Salesforce that leverages the power of standard list views to filter and extend visual capability for data. The app is easy to configure within mins and works in Classic, Lightning and SF1. The application can be downloaded from the AppExchange at:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000DvKxrUAF>

This user guide covers the basic configuration for All-in-One Layouts.

For information on how to set up more advanced features of All-in-One Layouts that require System Administrator access, please refer to our Advanced Admin Guide, available on the AppExchange.

Technical Specifications

Salesforce.com supported versions:

Enterprise Edition, Professional Edition, Unlimited Edition, Developer Edition.

Salesforce.com users without the above versions are unable to use the app, even if All-in-One Layouts licenses are assigned to the user.

Installation Of All-in-One Layouts

Step 1

To install a Free Version of All-in-One Layouts, visit the All-in-One Layouts AppExchange listing: <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000DvKxrUAF> and click the **Get It Now** button.

Follow the install prompts and log in to your Salesforce account. After confirming your Salesforce account, you will be given the option to install the application in a Sandbox or Production environment. Select the environment where you would like to install the All-in-One Layouts application

Where do you want to install this package?

Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment

Install where you or your users work, including developer orgs.

Install in Production

Install in a Sandbox

Test in a copy of a production org.

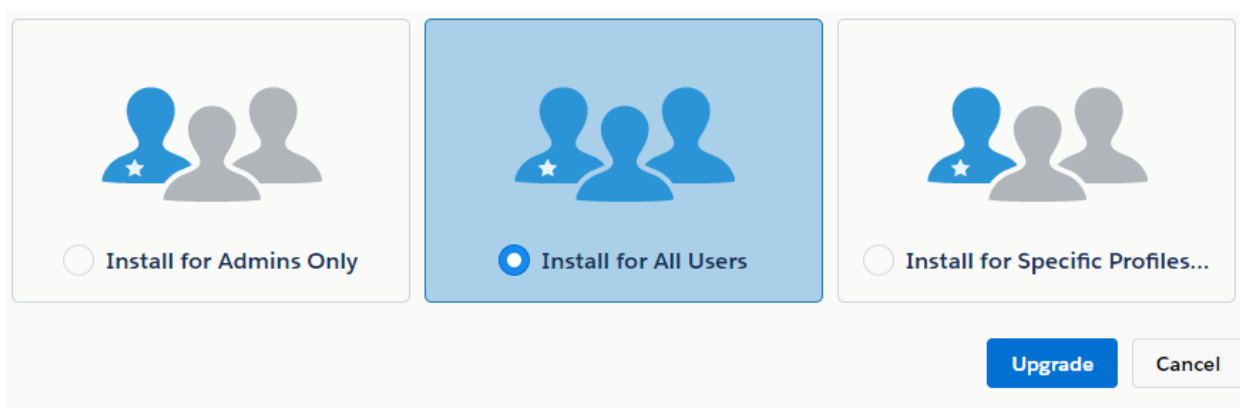
Install in Sandbox

Cancel

After confirming the install location, you will also be asked to agree to the All-in-One Layouts Terms and Conditions as well as the Salesforce.com AppExchange Terms and Conditions. Once you have agreed to the Terms and Conditions, you will be asked to confirm the installation.

Step 2

After confirming the installation and entering your org credentials, select the visibility of the application for users. Select “Install for All Users”.



The screenshot shows a selection interface for user visibility. It contains three radio button options, each with an icon of three user silhouettes. The first option, 'Install for Admins Only', is unselected. The second option, 'Install for All Users', is selected and highlighted with a blue background. The third option, 'Install for Specific Profiles...', is unselected. At the bottom right, there are two buttons: 'Upgrade' (blue) and 'Cancel' (gray).

In the final step, click the Install button.

Step 3

It may take a few moments for the installation to complete. During that time your browser will likely remain on the page of the last step of the installation process for a few minutes before moving to the “processing” page.

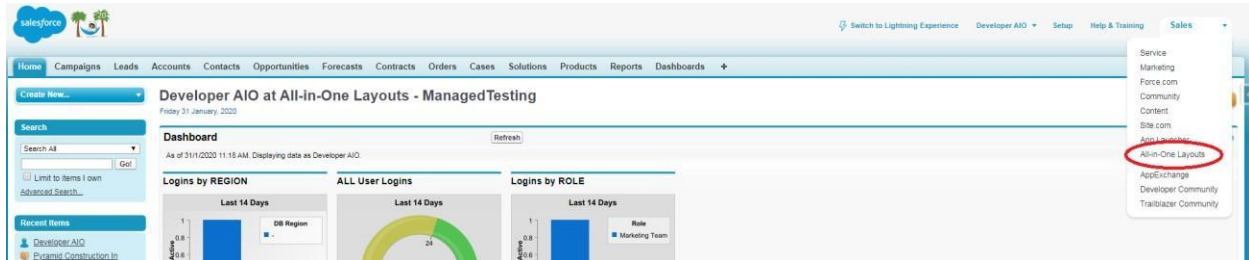
Once the package installation is complete, you will receive an email from Salesforce.

Accessing All-in-One Layouts

There are several ways to access All-in-One within Salesforce.

Classic

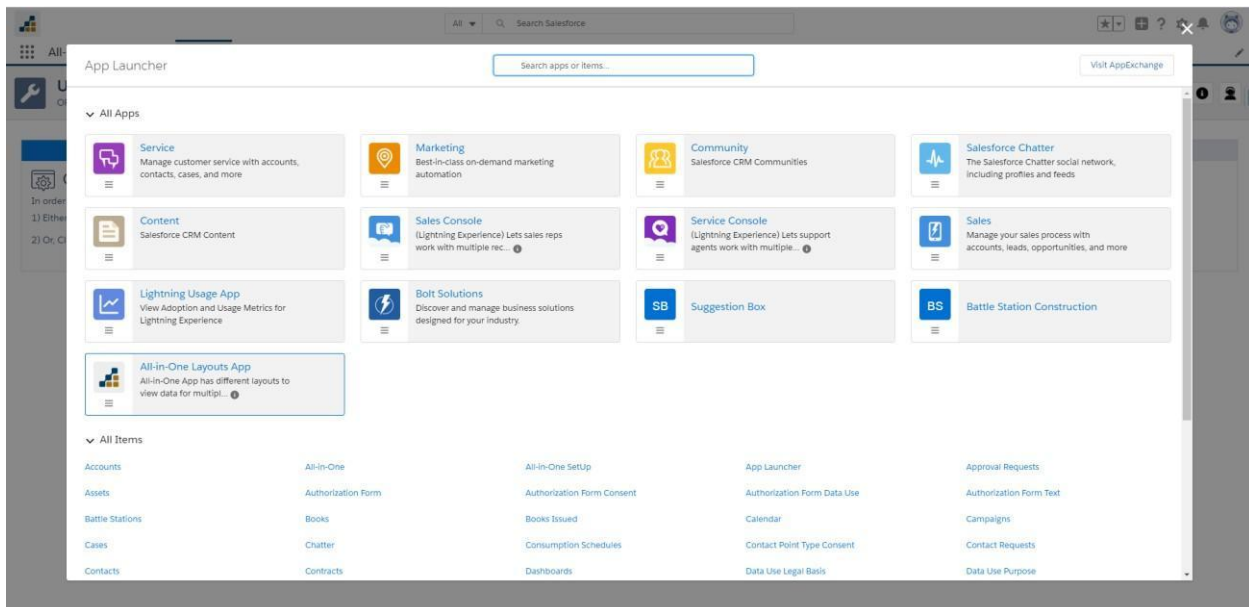
In Classic, you can access the app through the application dropdown in the upper right corner of every Salesforce page.



Lightning

In Lightning, 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.



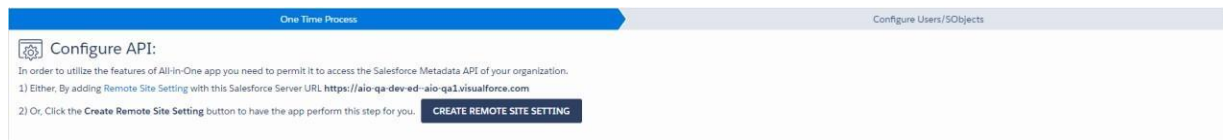
Configuration Of All-in-One Layouts

All-in-One app requires following steps to set up before you can use the App.

REMOTE SITE Setting

This is the first and One-time step of Configurations after the Installation of All-in-One. The App requires access to the Salesforce Metadata API of your organization before you can utilize the features of All-in-One App.

To utilize All-in-One features click on "Create Remote Site Setting" Button and the app will create a Remote Site for you itself.



The app comes with one main configurations -

1. SObject Configuration

Administrator can add Subjects by clicking on  icon. Further Admin can edit and delete the existing sObjects Configuration by clicking  and  icons respectively available under the "Action" column of the Subject Table. By clicking  icon.

Users can get the visualforce page code which can be used to access the app on the record detail page.

For more information, you can refer "Subjects Settings" available on [Subject Settings](#) section

Every Subject has a total of 31 configurations which are used in all 4 All-in-One layouts as shown in below screenshot.

New Configuration

Standard Details

*All-in-One Config Unique Name:

Select Object:

Account

Select Record to Redirect on Click:

Created By ID

Select StartDate Field:

Created Date - (DATETIME)

Set Default:

☐

Select Record Display Name:

Account Number

Select Record Redirect Behavior:

Display in new tab

Select EndDate Field:

Created Date - (DATETIME)

Record Filter Criteria

List View Filter Criteria

Select ListView Filter

Custom Filter

Create Filter

Filter Criteria SOQL

USING Mine WHERE IsValid=true OR (Cost != 100 AND IsApproved = true)

GeoMap Layout Details

Select Geo-Location Field:

Billing Address

Select GeoMarker PopUp Field:

Account Number

Planner Layout

Planner GroupBy Field:

Account Number

Planner Indicator Field:

Account Number

Show classic mini-layout on hover of Planner Indicator Field:

☐

Select Sort Type:

--None--

Select Sort Field:

Account Number

Resource Layout Details

Is Resource:

☒

Select Resource Item Configurations:

Account : Account > Parent Account ID

My Events : Event > Related To ID

All Events : Event > Related To ID

Opportunity : Opportunity > Account ID

Select Resource GroupBy Field:

Account Number

Tooltip Details

Select Tooltip Information (max. 5):

Available Fields

Account Source

Annual Revenue

Billing City

Billing Country

Billing Geocode Accuracy

Billing Latitude

Add

Remove

Selected Fields

Up

Down

Search Like Me Fields

Select Search Like Me Fields (max. 50):

Search Fields

Account Number

Account Source

Annual Revenue

Billing City

Billing Country

Billing Geocode Accuracy

Billing Latitude

Add

Remove

Selected Fields

Up

Down

Color Code

Set Config Color:

Swap color code scheme:

☐

Sr. No	Rule Display Name *	Select Field *	Field Operator *	Field Value *	Choose Color *	Action
1	Enter Rule Name	Search Field	--Select Operator--	Static Filter Value		

Cancel

Save

All-in-One Layouts | Installation and Configuration Guide

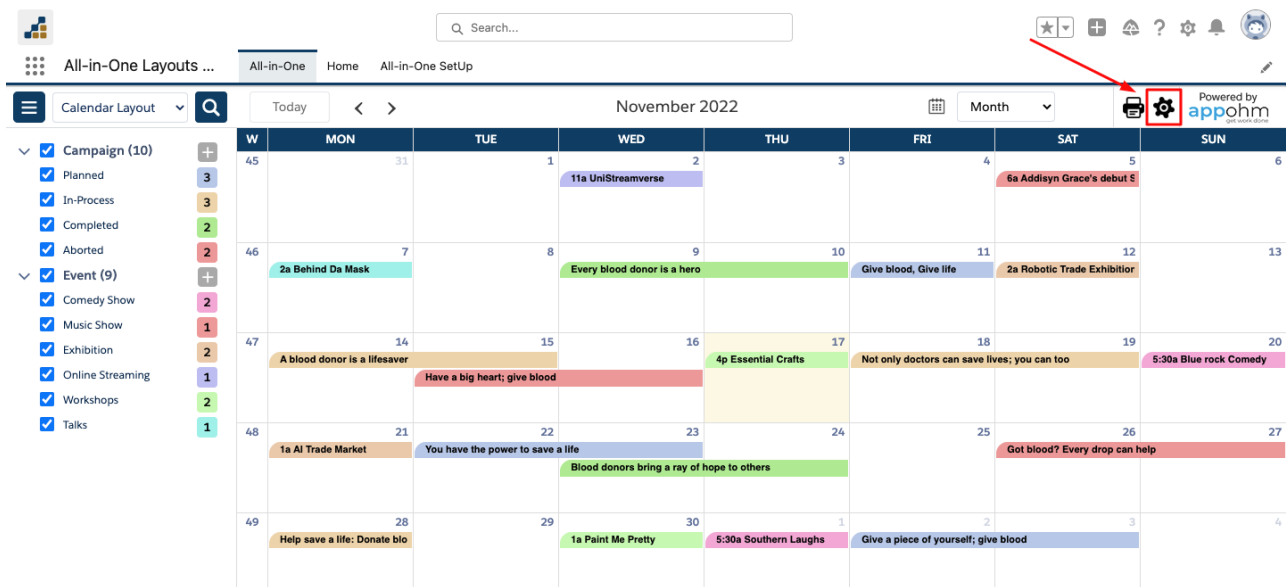
Object Configurations	Description	Used in Layouts
SC 1	*All-in-One Config Unique Name - App uses this field to add a unique name to the configuration.	Calendar, Planner, Resource, Geomap
SC 2	Select Object - App considers this field as the selected object for which the configuration is being created	Calendar, Planner, Resource, Geomap
SC 3	Select Record Display Name - App uses this field to display record title on layout. Choose a field that can identify records easily within a group of records.	Calendar, Planner, Resource, Geomap
SC 4	Select Record to Redirect on Click - App considers this field to navigate to detail page. Admin can configure any reference or record id field to redirect. Eg, From event record, User can redirect to associated lead or contact.	Calendar, Planner, Resource, Geomap
SC 5	Select Record Redirect Behavior - App considers this field to redirect the detail page in existing window or on a new tab	Calendar, Planner, Resource, Geomap
SC 6	Select StartDate Field - App considers this field as Start date to set left boundary of record within the layouts.	Calendar, Planner, Resource
SC 7	Select EndDate Field - App consider this field as End date to set the right boundary of record within the layouts.	Calendar, Planner, Resource
SC 8	Set Default- SET DEFAULT checkbox when marked true the configuration will act as the default for the system created List views. When users create a list view in the backend for the particular object its configuration will be based on the configuration you marked SET DEFAULT true for. With the help of this, a user can directly create a list view based on the selected SET DEFAULT Configuration. <i>SET DEFAULT checkbox can be marked true for only per object configuration of multiple Configuration.</i> When no configuration is selected as default, no list view without configurations will be visible in the search panel.	Calendar, Planner, Resource

SC 9	List View Filter Criteria - App uses this setting to filter records on Layouts according to Selected List view	Calendar, Planner, Resource
SC 10	Custom Filter - App uses this setting to select/filter records on Layouts according to provided Custom filter/SOQL	Calendar, Planner, Resource
SC 11	Filter Criteria SOQL - App uses this field to display the selected Custom filter/SOQL	Calendar, Planner, Resource
SC 12	Select Geo-Location Field - App sets the markers on google map based on the selected fields value of any record.	Geomap
SC 13	Select GeoMarker PopUp Field - App considers this field to show single field information of any record on pop up.	Geomap
SC 14	Planner GroupBy Field - App uses this field to group the records based on the selected group by field and display on the layout.	Planner
SC 15	Planner Indicator Field - App uses this field to show the value of the chosen field of any record on Layout. Choose an important field whose detail you want to see.	Planner
SC 16	Show classic mini-layout on hover of Planner Indicator Field - When the app is used in Classic mode, App shows a mini layout on hover on Subject's record display name.	Planner
SC 17	Select Sort Field - App uses this field to sort the records based on the chosen field. Select a field by which you want to sort the records and display on the layout.	Planner
SC 18	Select Sort Type - App uses this field to sort and display the records in Ascending or Descending order.	Planner
SC 19	Is Resource - When a Subject is required to use as resource, the admin should check this configuration.	Resource
SC 20	Select Resource Item Configurations - App shows all selected items for resource and relates right resources with items based on selected relationship fields.	Resource
SC 21	Select Resource GroupBy Field - App considers this field to group resources based on the values of the selected field.	Resource
SC 22	Tooltip Details - App considers all 5 selected fields to show the information of record on Layouts when user clicks on a record.	Calendar, Planner, Resource, Geomap

SC 23	Search Like Me Fields - App considers all (max 50) selected fields to show on the Search Like Me pop-up of the record on Layouts when user clicks on the Search icon of a record.	Calendar
SC 24	Set Config Color - App considers this field to set the background color of all records.	Calendar, Planner, Resource, Geomap
SC 25	Swap Color - When the user enables swap color checkbox, Config color interchanges with Field Options Color. It means config color will now be forecolor and field option color will be background.	Calendar, Planner, Resource, Geomap
SC 26	Rule Display Name - App considers this field to set the name of the color-coding rule.	Calendar, Planner, Resource, Geomap
SC 27	Select Field - App considers this field to select/choose a field for the color-coding rule.	Calendar, Planner, Resource, Geomap
SC 28	Find Operator - App uses this field to set an operation for the selected color coding field.	Calendar, Planner, Resource, Geomap
SC 29	Field value - App uses this field to select a static or dynamic value for the color coding rule.	Calendar, Planner, Resource, Geomap
SC 30	Choose Color - App uses this field to set a color for the records.	Calendar, Planner, Resource, Geomap
SC 31	Action (Delete icon) - App uses this field to delete the color coding rule.	Calendar, Planner, Resource, Geomap

USER Configuration

When a user performs a search on Subjects then ORG configurations will be cloned and assigned to the user. Users can change their Subjects configuration using setting  icon placed at the top right corner of All-in-One Layout.



The screenshot displays the 'All-in-One Layout' interface. At the top, there is a search bar and navigation tabs including 'All-in-One', 'Home', and 'All-in-One SetUp'. Below the navigation bar, a sidebar on the left lists various categories and their counts: Campaign (10), Planned (3), In-Process (3), Completed (2), Aborted (2), Event (9), Comedy Show (2), Music Show (1), Exhibition (2), Online Streaming (1), Workshops (2), and Talks (1). The main area shows a calendar for November 2022, with events listed by date. A red arrow points to the settings gear icon in the top right corner of the interface.

	W	MON	TUE	WED	THU	FRI	SAT	SUN
45		31	1	11a UniStreamverse	2	3	4	5
46	2a Behind Da Mask	7	8	Every blood donor is a hero	9	10	11	12
47	A blood donor is a lifesaver	14	15	Have a big heart; give blood	16	17	18	19
48	1a AI Trade Market	21	22	You have the power to save a life	23	24	25	26
49	Help save a life: Donate blo	28	29	1a Paint Me Pretty	30	5:30a Southern Laughs	1	2

Publish Configuration (available with Unlimited plan)

All-in-One can be used on lightning app pages, communities and sites using Lightning Component. Lightning Component uses Publish Configurations which further uses Shared type Subject Configuration for Record fetching.

Each and Every Publish Config has total of 15 following configurations -

Publishing Console

PC 1

* Publish Name:

PC 2

Page Title:

Header/Footer Config

PC 3

Page Header (HTML Content):

PC 4

Layout Instruction Text:

PC 5

Page Footer (HTML Content):

Layout Config

PC 6

Layout Theme Type:

Dark Theme

PC 7

Layout Theme Color:

PC 8

Layout Type (Body Content):

Calendar Layout

PC 9

* Select Layout Options:

Available Layout Options

Month

Week

Day

List Month

Week with TimeSlots

Day with TimeSlots

Add

Remove

Selected Layout Options

Up

Down

PC 10

Allow Record Creation:

PC 11

* Select Configurations:

Available Organization Configurations

Doctor

Appointment

My Events

My Tasks

All Events

All Tasks

Patient

Add

Remove

Selected Organization Configurations

Up

Down

PC 12

Layout Item Redirect URL:

siteURL/apex/pagename?recId={id}

PC 13

Layout Item Redirect Behavior:

Display in new tab

PC 14

Bypass SOObjects User Security (Comma separated):

PC 15

Is Active:

☒

Cancel

Publish

Publish Config	Description	Used on
PC 1	Publish Name - Unique Name for Publish Configurations	Site/Community
PC 2	Page Title - Title of the page. App uses it to show in the browser tab or window.	Site/Community
PC 3	Page Header (HTML Content) - App uses this field content to show in Header of AIO layout	Site/Community
PC 4	Layout Instruction Text - App uses this field content to show between AIO layout and Page Header	Site/Community
PC 5	Page Footer (HTML Content) - App uses this field content to show in Footer of AIO layout	Site/Community
PC 6	Layout Theme Type - App considers this field to set theme type for AIO	Site/Community Lightning Page
PC 7	Layout Theme Color - App considers this field to set theme color for AIO	Site/Community Lightning Page
PC 8	Layout Type (Body Content) - App considers this field to set Layout for AIO	Site/Community Lightning Page
PC 9	Select Layout Options - App considers this field to show "Selected views" in case of Calendar Layout.	Site/Community Lightning Page
PC 10	Select Configurations - App considers this field to show records of selected Shared Records	Site/Community Lightning Page
PC 11	Allow record creation - App considers this field to allow users to create records on sites/communities	Site/Community
PC 12	Layout Item Redirect URL - App considers the URL(external or internal) provided in this field to redirect the User on click of any Record. Eg: https://www.google.com	Site/Community
PC 13	Layout Item Redirect Behavior - App considers this field to redirect the user in New tab or Existing window on click of Record.	Site/Community
PC 14	Bypass SObjects User Security (Comma separated) - App considers this field to Bypass Object permission required for User when permissions can not be provided through user profile. (Ex. Bypassing Permission of Campaign Object for a Community User)	Site/Community
PC 15	Is Active - App considers this field to check activeness/Inactiveness of Publish Configurations.	Site/Community Lightning Page

CAFields Fieldset For Subjects

Fieldsets are required to create/edit records of an sObject within the App.

Fieldset can be created by using the following steps -

1. Add a New Configuration.
2. Under the Subjects Table, Click on the name of Subject. (You will be redirected to Create Fieldset Page)
3. Create a new fieldset with Name **"CAFields"**.
4. Include Subject fields whose values you need during creation of the Subject record.
5. After Saving, Go to All-in-One Tab.
6. Click on a Day Box in the Calendar layout, Select the Subject whose Fieldset you just created. The form will show only those fields which you included in the Fieldset. (See Attachments for more understanding.)
7. Fill details and Save.

You'll be able to create and edit records on the App.



New Event [X]

* Subject

Location

* Start Date Time

* End Date Time

All-Day Event ☐

* Assigned To ID

Related To ID Account ▼

Description

Cancel Save

Information related to Configurations -

- ❖ Users can configure Subjects to sort data, apply color code, add tooltip fields(5) and more using USER Configurations.
- ❖ User can filter 5 configured Subject list views to view filtered consolidated records of 5 objects on one Layout.
- ❖ Users can view Resources (Admin configurable(default 40 resources)) of only 1 resource configured Subject with multiple resource items on Resource layout.
- ❖ User can edit/create records within app only when **CAFields** fieldset is available for the Subject.
- ❖ Admin can override user's Personalized Configurations with ORG Configurations by clicking  icon.
- ❖ Result-set will group and sort records for listview selected for each Subject

App Settings

These configurations are available on the All-in-One Set up tab for admin to control the behavior of All-in-One Layouts application. There are 3 links and 16 app settings (AS) as shown in the screenshot below:

The screenshot displays the 'App Settings' configuration page for the 'Unlimited Version' of the application. The page is titled 'App Settings' and includes a subtitle 'These settings control app behavior for All-in-One users'. It features a top navigation bar with 'LINK 1', 'LINK 2', 'LINK 3', and 'LINK 4'. The settings are organized into two columns. The left column includes settings for theme type (AS 1), theme color (AS 2), fieldset name for subjects (AS 3), max records per object limit (AS 4), active layouts (AS 5), and default views for calendar (AS 6), planner (AS 7), resource (AS 8), and geomap (AS 9, AS 10, AS 11) layouts. The right column includes settings for hide standard Salesforce list view (AS 12), show Salesforce page header in classic mode (AS 13), allow app users to modify their configuration (AS 14), and various layout-specific settings like allow prev/next on scroll (AS 15), show week and day view with time slots (AS 16), show basic week and day view without time (AS 17), select default file upload setting (AS 18), center to user location (AS 19), add Google Map API key (AS 20), default zoom level (AS 21), and item tooltip event (AS 22). A 'Update App Settings' button is located at the bottom right.

Setting Name	Description
Link 1	This link navigates the user back to the All-in-One layout page.
Link 2	This link navigates admin to understand pricing and plan for the app.
Link 3	This link navigates the user to provide a basic understanding of the app.
Link 4	This link navigates the user to create a support ticket for issues within the app.

AS 1	Admin can choose the desired theme type which automatically applies to All-in-One layouts.
AS 2	Admin can choose the desired color which automatically applies to All-in-One layouts.
AS 3	Admin should create a CAFields fieldset to edit/create new records from All-in-One layouts for every configured Subjects.
AS 4	Admin can configure Max. Number of records per object to display on layouts.
AS 5	Active Layouts setting gives control to the admin to select the default layout when the user performs Reload.
AS 6	This setting gives control to the admin to select the default view for Calendar layout when the user performs reload/search.
AS 8	This setting gives control to the admin to select the default view for Planner layout when the user performs search/reload.
AS 7	This setting gives control to the admin to select the default view for Resource layout when the user performs search/reload.
AS 8	Admin can configure total Resources (Parents sObject) to show on resource layout based on data. Only when there are less than 10 resources, a horizontal view (H-Day) is available.
AS 9	App consider this field to set a Default Location (Latitude) on Geomap Layout.
AS 10	App consider this field to set a Default Location (Longitude) on Geomap Layout.
AS 11	Apps automatically make use of Salesforce list views created by users on sObjects but admin can control to show or hide Salesforce list view options for search filters on All-in-One layouts.
AS 12	Admin can control to show or hide classic page header to maximize All-in-One layouts visualization on full screen.
AS 13	Admin can control whether All-in-One app users are allowed to change their sObjects configuration settings or not.
AS 14	This setting allows Calendar layout to change month on mouse scroll.
AS 15	This setting allows Calendar layout to show week and day options with time slots.

AS 16	This setting allows Calendar layout to show week and day options without time slots.
AS 17	This setting allows Users to add files/attachment to the records on the Planner layout
AS 18	App considers this field to set User (Browser) Location as Default Location on Geomap Layout. It overrides/ignores the GEOMAP LAYOUT : Default Location
AS 19	Admin needs to add Google map API token key for using All-in-One Geomap layout.
AS 20	App considers this field to set a Default Zoom level on the defined Default Location where Each integer step increments the Zoom level.
AS 21	This setting allows users to view the record tooltip information “On click” or “On hover”

Subject Settings

The app consists of two kinds of sObjects: Standard and Custom. The app comes with already configured sObjects “Task” and “Event” by default having two listview filters each.

 Subjects These Subjects configurations are available in All-in-One tab for app users to perform search utilizing filters   								
Action	Unique Name	Subject	Filter Type	Config Type	Display Field	Config Color	Start Date Field	End Date Field
  	My Events	Event	Custom	Organization	Subject		Start Date Time	End Date Time
  	My Tasks	Task	Custom	Organization	Status		Created Date	Last Modified D...
  	All Events	Event	Custom	Organization	Subject		Start Date Time	End Date Time
  	All Tasks	Task	Custom	Organization	Status		Created Date	Last Modified D...
  	Campaign	Campaign	Standard	Organization	Name		Start Date	End Date
  	Event	Event	Standard	Organization	Event Name		Start Date	End Date
  	Opportunity	Opportunity	Standard	Organization	Name		Created Date	Close Date
  	Doctor	Doctor	Custom	Organization	Doctor Name		Created Date	Created Date
  	Appointment	Appointment	Custom	Organization	Appointment For		Start Time	End Time
  	Patient	Patient	Custom	Organization	Patient Name		Created Date	Created Date
  	Property	Property_Custom	Custom	Organization	Property Name		Date	Date
  	Account	Account	Standard	Organization	Account Name		Created Date	Created Date

Note: Admin must create fieldset with name **CAFields** for all Subjects listed above to create/edit records within app.

This panel has 3 Call to Action(CTA) and 3 action icons available for every Subject configuration.

Subject Settings	Description
CTA 1	This link navigates to OWD Sharing to set up org Subject access for users.
CTA 2	When there is modification needed in Subject configurations of Organization type then admin needs to click this icon to apply the latest configurations for all users.
CTA 3	Admin can add new Subject(standard or custom) configurations.
Icon 1	Admin can edit existing Subject configurations.
Icon 2	Admin can remove/delete existing Subject configurations.
Icon 3	Admin can copy and add existing configurations within the visualforce page to view All-in-One layouts in the Salesforce record detail page.

Layout Configurations

To view records on each layout, there are some configurations you need to make. They are as following -

Configuration For Calendar Layout:

1. Go to All-in-One Setup Tab.
2. Edit/Add an Object.
3. Set the **All-in-One Config Unique Name**
4. **Select Record Display Name** (Field whose value you want to see on Record strip)
5. **Select Record to Redirect on Click** (On clicking Record strip, App redirects to Selected Record Page)
6. **Select Record Redirect Behavior** (to set the redirect behavior of the Record Page)
7. **Select StartDate Field** to set the left boundary of Record Strip.
8. **Select EndDate Field** to set the right boundary of Record strip.

Standard Details

*All-in-One Config Unique Name:

Select Object:

Account

Select Record Display Name:

Account Number

Select Record to Redirect on Click: ⓘ

Created By ID

Select Record Redirect Behavior:

Display in new tab

Select StartDate Field:

Created Date - (DATETIME)

Select EndDate Field:

Created Date - (DATETIME)

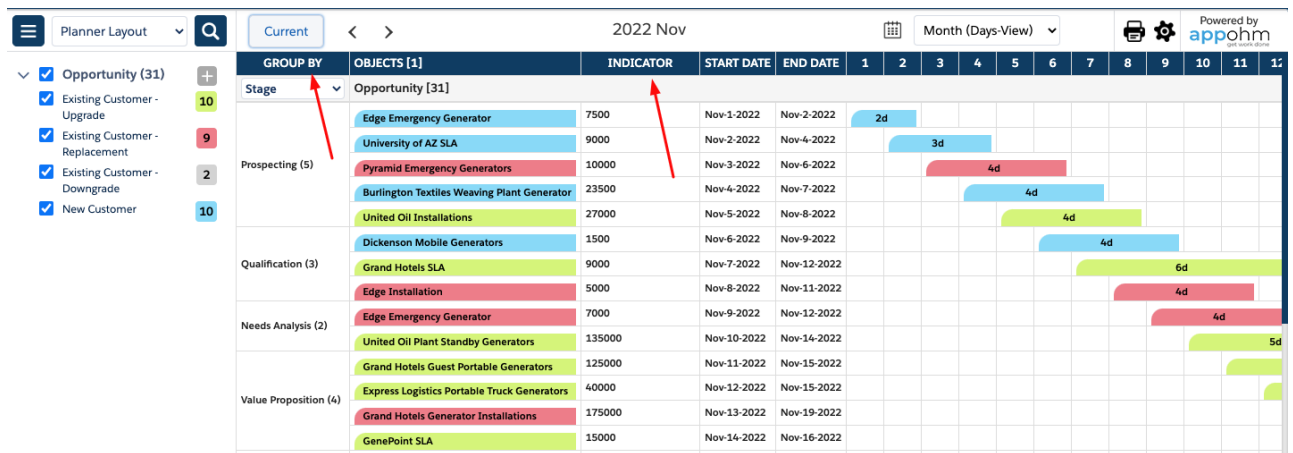
Configuration For Planner Layout:

1. Go to All-in-One Setup Tab.
2. Edit/Add an Object.
3. **Select Planner GroupBy Field and Planner Indicator Field** to view a particular field value of each record in **GroupBy** and **Indicator** Column of Planner Layout.

Planner Layout Details

Planner GroupBy Field:

Planner Indicator Field:



Configurations For GeoMap:

1. Set Geo-Location Field For An Object:

- Go to All-in-One Setup Tab.
- Edit/Add an Object (Say Account)
- Map **Geo-Location Field** with the Object Field (Say Shipping Address) [GeoMap will show records of the object on this address as PopOver]
- Map **Select GeoMarker PopUp** Field with the field whose value you want to see on PopOver.
- Save.

2. Add an Address in the Mapped Field of Records. (Shipping Address according to Example)

GeoMap Layout Details

Select Geo-Location Field:
Billing Address

Select GeoMarker PopUp Field:
Account Number

Calendar Layout | Today | November 2022 | Month | appohm

Account (7)
Prospect
Customer - Direct
Customer - Channel
Channel Partner / Reseller
Installation Partner
Technology Partner
Other

New Account

* Account Name

Account Name

Account Number

Account Number

Billing City

Billing City

Billing Country

Billing Country

Billing Latitude

Billing Latitude

Billing Longitude

Billing Longitude

Cancel

Save

SUN

5

6

12

13

19

20

26

27

3

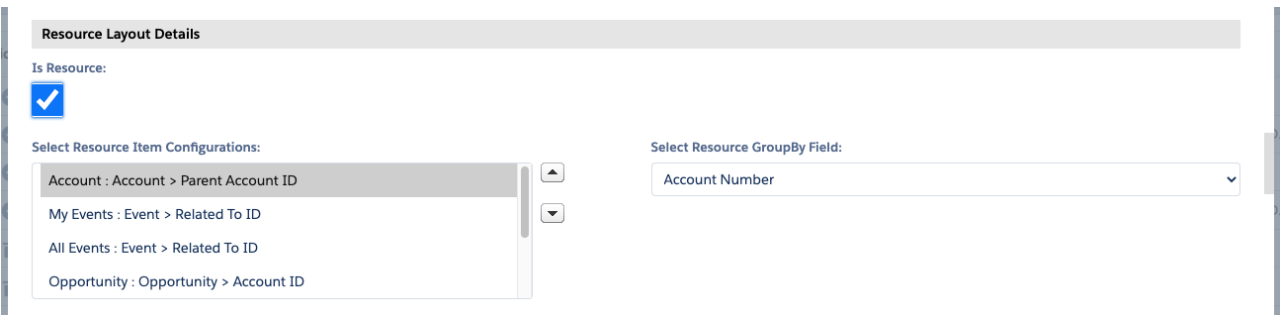
4

Resource layout can be used to view related items of an Object. For Example, Account can have Events, Tasks, Opportunities as Related Items).

Configurations For Resource Layout:

1. Set Resource Fields

- Go to All-in-One Setup Tab.
- Edit/Add an Object (For ex. Account)
- Check **Is Resource** Field. This will make two more fields visible.
 - **Select Resource GroupBy Field** (To Group Resources - Account Records according to Example)
 - **Select Resource Item Configurations** (To Make a Relationship Between Items and Resources) Ex. (Event > Account ID) means Resource (Account) is related to Event by Account ID



The screenshot shows the 'Resource Layout Details' configuration window. It includes a section for 'Is Resource:' with a checked checkbox. Below this is a list of 'Select Resource Item Configurations' with four entries: 'Account : Account > Parent Account ID', 'My Events : Event > Related To ID', 'All Events : Event > Related To ID', and 'Opportunity : Opportunity > Account ID'. To the right, there is a 'Select Resource GroupBy Field:' dropdown menu currently set to 'Account Number'.

Support

If you have any issue or query, Visit our support.

Go to All-in-One Setup Tab and Click on “Support” icon to log a case. You will be redirected to the Appohm Support Channel.

