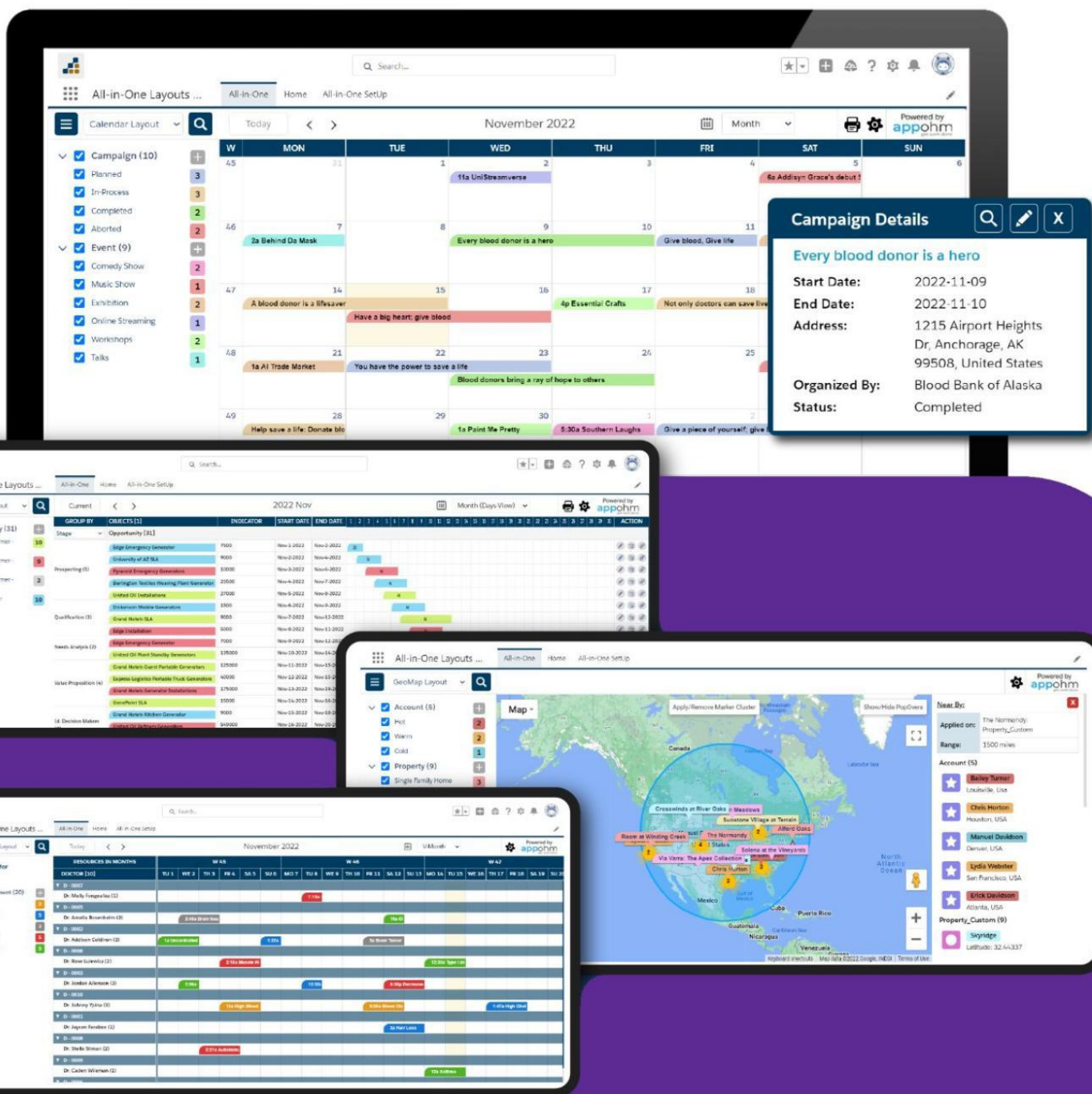


All-in-One Layouts by Appohm Technologies



Advanced Admin Guide

Table Of Content

Overview	2
Technical Specifications	2
User Permissions Needed	2
Lightning Component	4
Accessing All-in-One on Lightning App Page	5
Accessing All-in-One on Lightning Record Page	6
Embedding All-in-One on Classic Record Page	10
Publishing All-in-One via Force.com Sites	12
Publishing All-in-One via Communities	16
Support	19
	1

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 minutes 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 advanced admin configuration for All-in-One Layouts which includes providing permissions, publishing calendar on public sites and communities etc.

Technical Specifications

Salesforce.com supported versions:

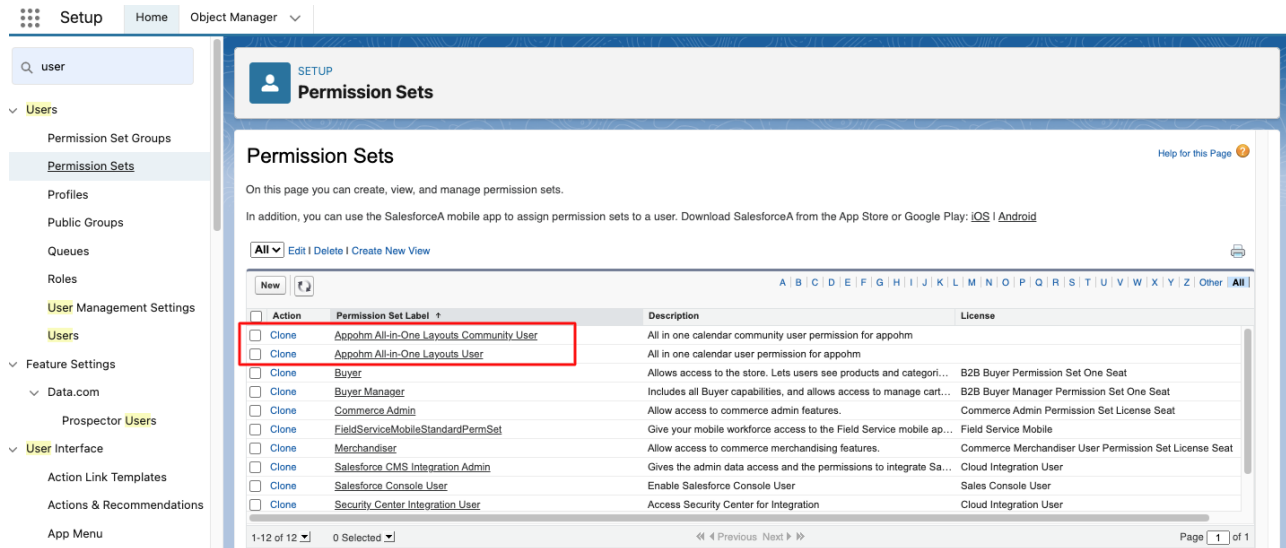
Enterprise Edition, Professional Edition, Unlimited Edition, Developer Edition.

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.

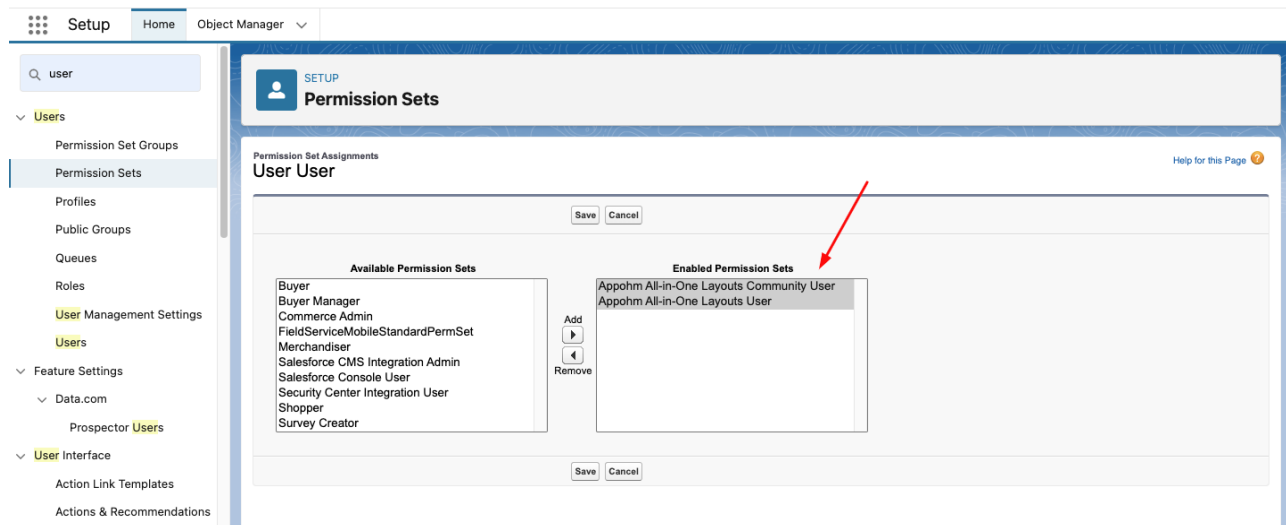
User Permissions Needed

Once the package is installed at the Client's org then there will be two permission sets given with the installed package.

In order to access the app, assign permission sets to users using All-in-One Layouts.



When added to the User record, Permission Set allows the creation and editing of configurations required for different layouts, subject to other object permissions and sharing rules.



After providing required permission sets to the user, One is able to access All-in-One Custom Objects.

All-in-One Custom object functions to help in determining sharing settings.

Object	Function	User Profile Permissions Needed
All-in-One Configurations	Main object used for storing sObject Configurations.	Read, Create, Edit, Delete, View All, Modify All
All-in-One Publish	Store Publish Configurations.	Read, View All

After assigning the “**Appohm All-in-One Layouts User**” permission set, User will be able to access All-in-One Layouts in both Classic and Lightning Experience.

“**Appohm All-in-One Layouts User**” permission set includes access for the following components:

The screenshot shows the Salesforce Setup interface for the 'Appohm All-in-One Layouts User' permission set. The 'Object Settings' tab is selected, showing a table of object permissions. The 'All-in-One Configurations' and 'All-in-One Publish' rows are highlighted with red boxes, indicating the specific permissions granted to this user.

Object Name	Object Permissions	Total Fields	Tab Settings
Account Brands	No Access	9	--
Accounts	No Access	37	--
Addresses	No Access	7	--
AI Insight Reasons	No Access	--	--
Aio.dsmc	--	--	--
AI Record Insights	No Access	--	--
All-in-One	--	--	Visible
All-in-One Configurations	Read, Create, Edit, Delete, View All, Modify All	35	--
All-in-One Publish	Read, View All	20	--
All-in-One SetUp	--	--	Visible
Alternative Payment Methods	No Access	21	--
API Anomaly Event Stores	No Access	14	--
App Analytics Query Requests	No Access	--	--



SETUP

Permission Sets

Permission Set

Appohm All-in-One Layouts User

[Video Tutorial](#) | [Help for this Page](#) [Clone](#)[Manage Assignments](#)[Permission Set Overview](#) > **Visualforce Page Access**

Items per page: 50 Items

View: All

Visualforce Page Access

Page 1 of 1

Visualforce Page Name

Installed Package

PlanViewCal.calAllCSS

All-in-One

PlanViewCal.calAllMain

All-in-One

PlanViewCal.calAllPersonalization

All-in-One

PlanViewCal.calAllPostInstallNotes

All-in-One

PlanViewCal.calAllSetUp

All-in-One



SETUP

Permission Sets

Permission Set

Appohm All-in-One Layouts User

[Video Tutorial](#) | [Help for this Page](#) [Clone](#)[Manage Assignments](#)[Permission Set Overview](#) > **Assigned Apps**

Items per page: 50 Items

View: All

Assigned Apps

Page 1 of 1

App Name

Installed Package

PlanViewCal.All-in-One Layouts (PlanViewCal__All_In_One_Calendar)

All-in-One

PlanViewCal.All-in-One Layouts App (PlanViewCal__All_In_One_Calendar_Lightning)

All-in-One

Lightning Component

All-in-One can be used in lightning app builder, community builder and sites using Lightning Component. Lightning Component uses Publish Configurations for Record fetching (Not in Record Pages).

Publish Configuration can only be created when there is Custom type Subject Configuration available in All-in-One Setup. Custom type configurations can be created using “Custom Filter” buttons available under Record Filter Criteria section for each Subject Configuration under Action Column.

Account

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)

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
	All Events	Event	Custom	Organization	Subject		Start Date Time	End Date Time
	All Tasks	Task	Custom	Organization	Status		Created Date	Last Modified D...
	Account	Account	Custom	Organization	Account Name		Created Date	Created Date
	Event01	Event	Standard	Organization	Event Name		Start date- time	End date- time
	Account 01	Account	Custom	Organization	Account Number		Created Date	Created Date
	Campaign 1	Campaign	Custom	Organization	Name		Start Date	End Date

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

Publish Configurations

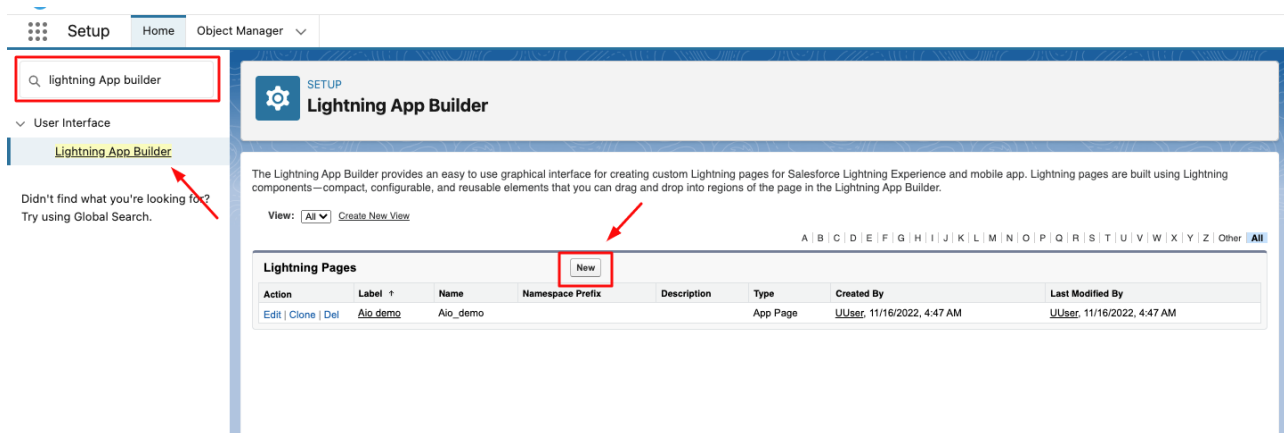
These configurations are available for Sites, Communities and Lightning Pages

Action	Publish Name	Page Title	Configurations	Layout Type	Layout Theme Type	Layout Theme Color	Active?
	Account	For Testing purpose	Account , Account 01	Calendar Layout	Dark Theme		✓

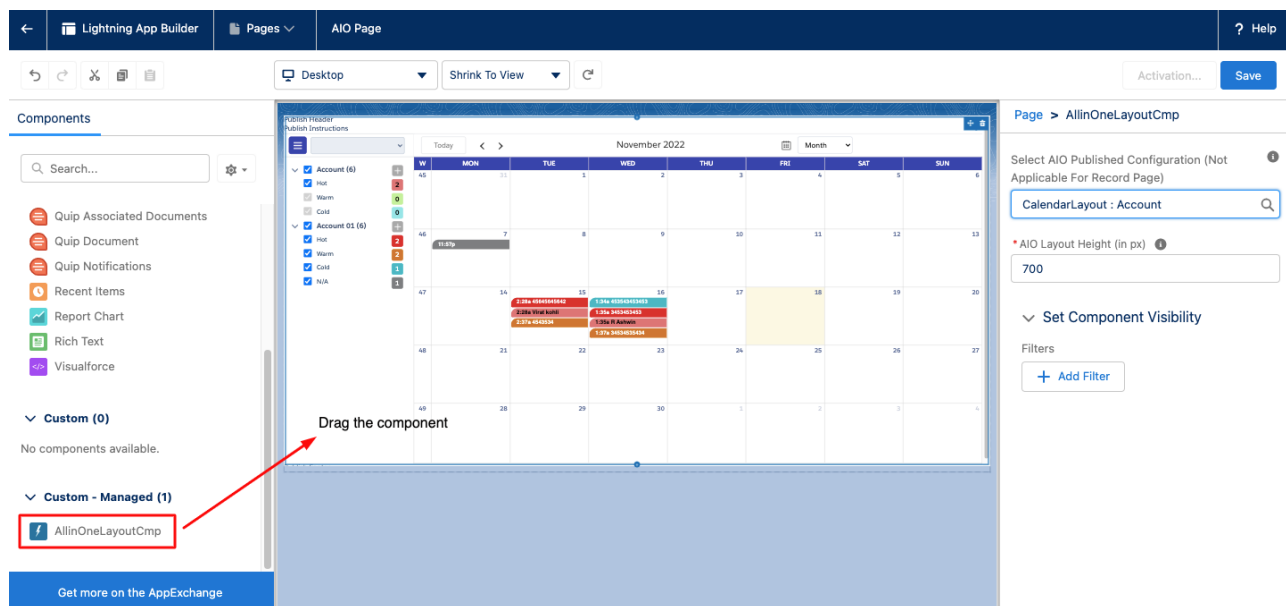
Accessing All-in-One on Lightning App Page

Following are the steps used to access All-in-One on **App Page**:

1. Switch to Lightning Experience.
2. Go to Setup.
3. Search 'Lightning App Builder' in Quick Find Box and Click on it.
4. Edit an Existing page or create a new page.



5. Drag AllinOneLayoutCmp to the work area.



6. Select “Select AIO Published Configuration” and “AIO Layout Height”.

The screenshot shows the Lightning App Builder interface for an AIO Page. The main canvas displays a calendar for November 2022. On the left, the Components panel lists various components, including 'AllinOneLayoutCmp' under the 'Custom - Managed (1)' section. On the right, the configuration panel for 'AllinOneLayoutCmp' is visible. It includes a 'Select AIO Published Configuration (Not Applicable For Record Page)' dropdown menu with 'CalendarLayout : Account' selected. Below this, the 'AIO Layout Height (in px)' is set to 700. A red arrow points to the 'Set Component Visibility' section, which includes a 'Filters' area with an 'Add Filter' button.

7. Save and Activate Page.

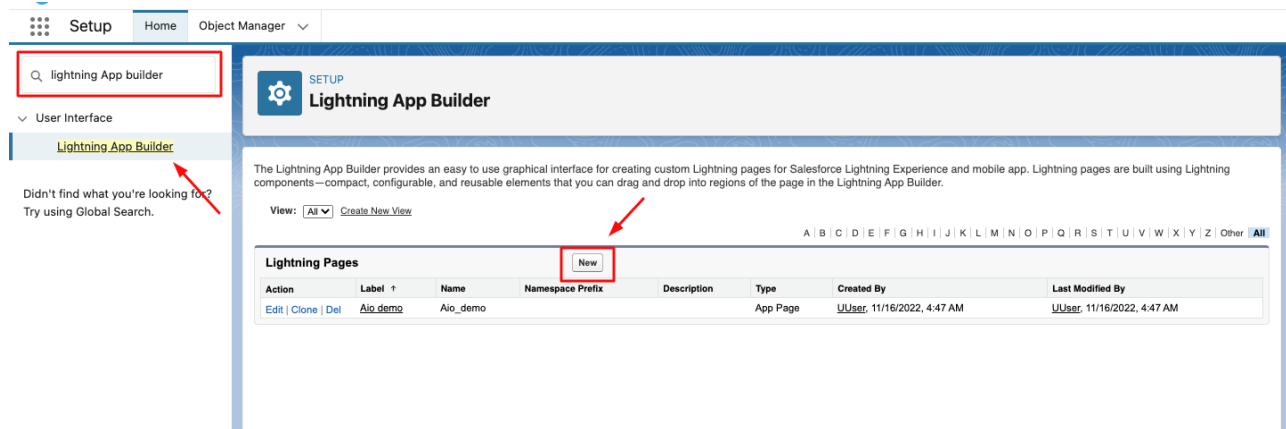
This screenshot shows the same Lightning App Builder interface as the previous one, but with the 'Activation...' and 'Save' buttons in the top right corner highlighted with a red box. A red arrow points from the 'AllinOneLayoutCmp' component in the Components panel to the 'Activation...' button. The configuration panel on the right remains the same, showing the 'CalendarLayout : Account' configuration and the 'AIO Layout Height' of 700.

There are two ways to access All-in-One on **Record Page** mentioned below:

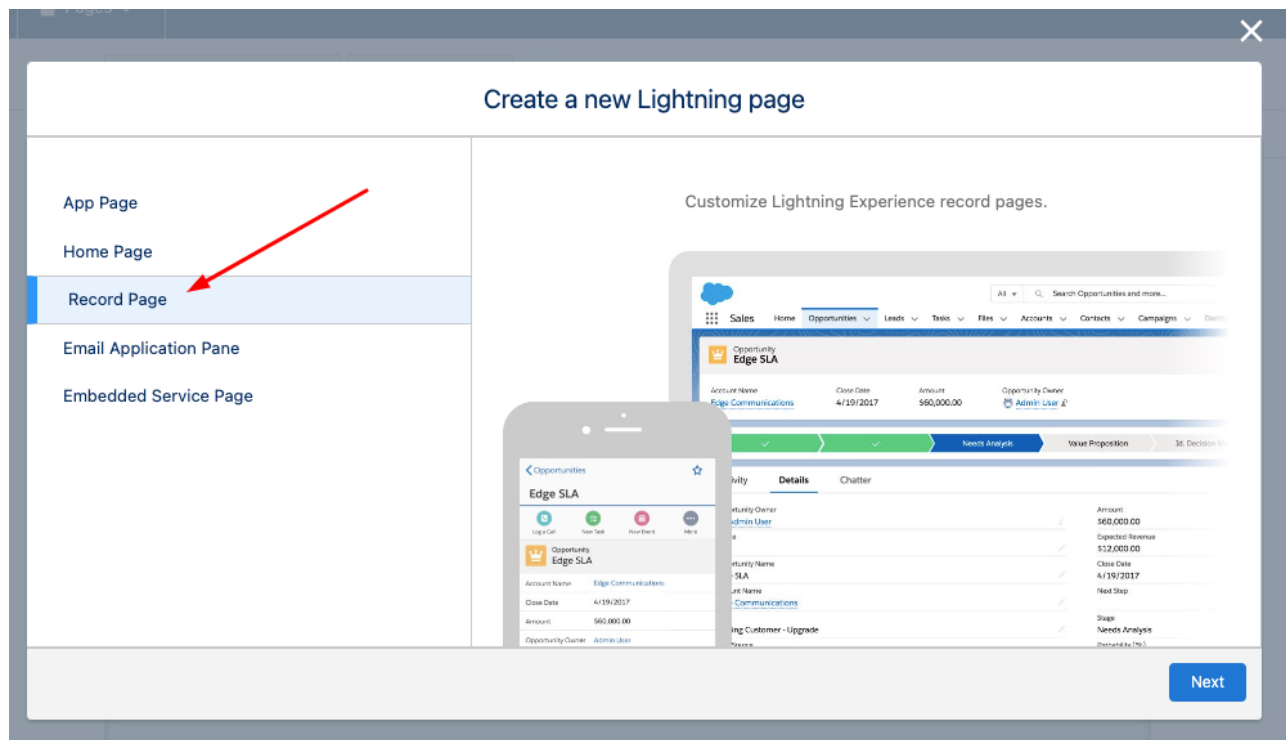
- Accessing All-in-One on **Lightning** Record Page
- Embedding All-in-One on **Classic** Record Page

Accessing All-in-One on Lightning Record Page

1. Switch to Lightning Experience and Go to Setup.
2. Search 'Lightning App Builder' in Quick Find Box and Click on it.



3. Edit an Existing or Create a new Record Page.

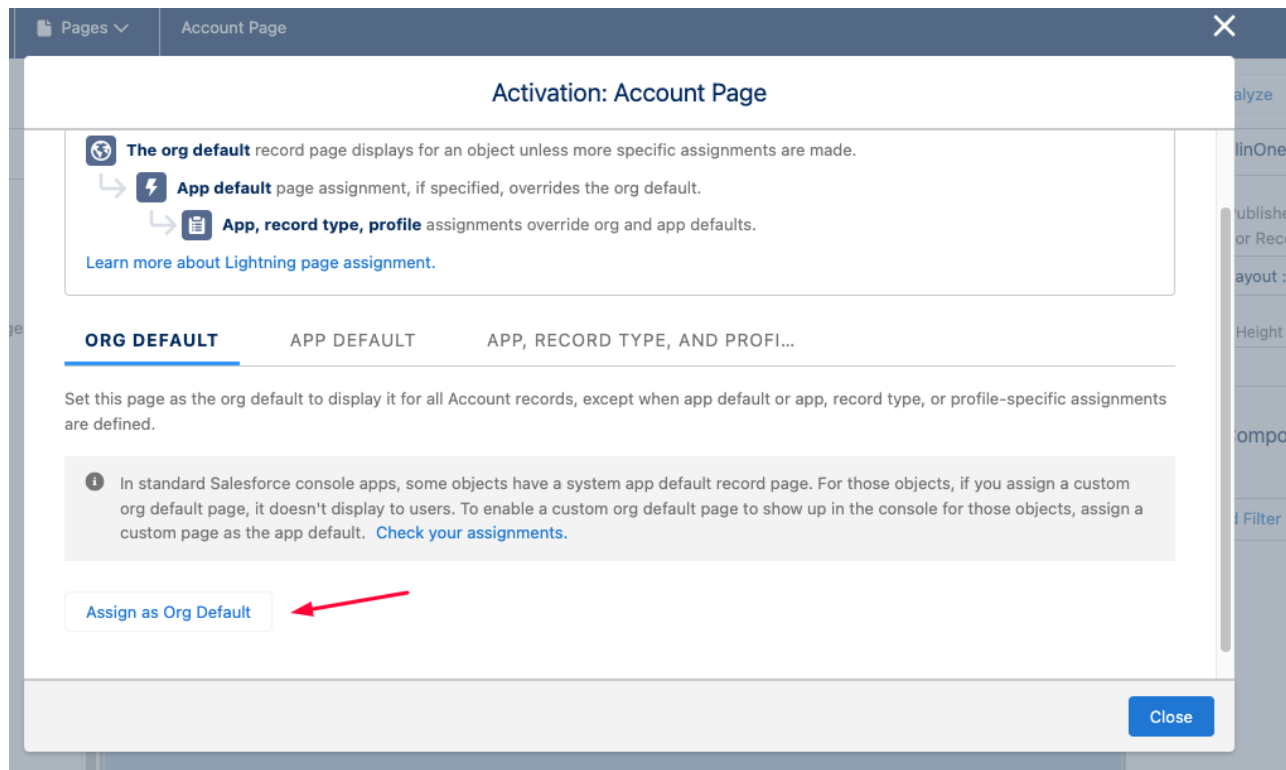


5. Select “Select AIO Published Configuration” and “AIO Layout Height.”

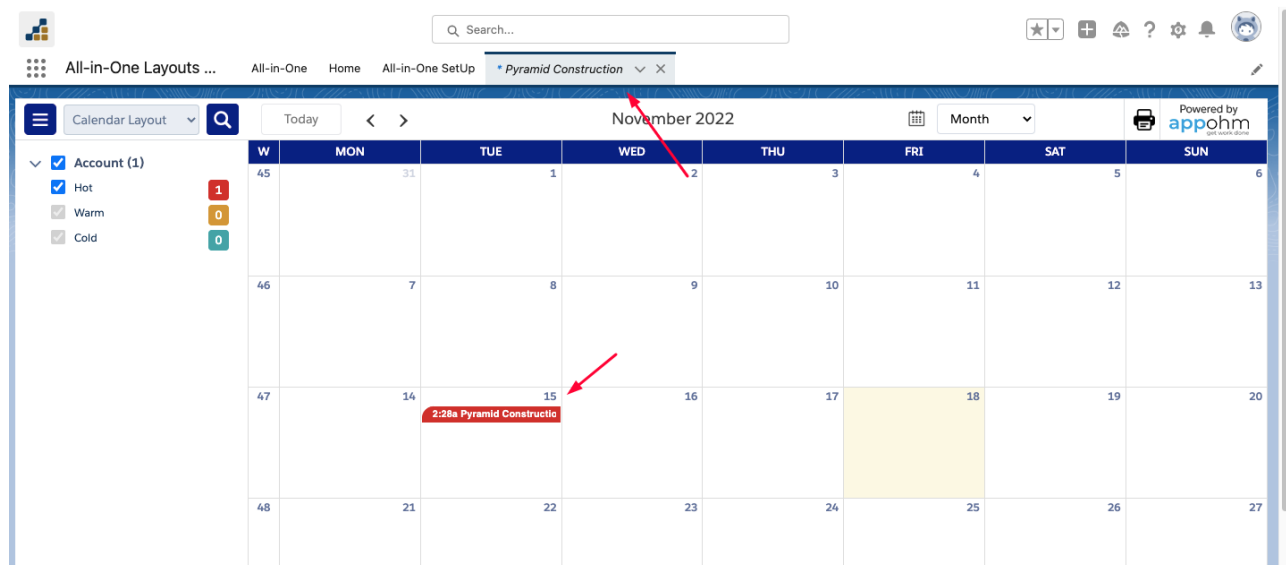
The screenshot shows the Lightning App Builder interface for the "Account Page". The main canvas displays a calendar layout for November 2022. On the left, the "Components" panel shows a search bar and a list of components: Rich Text, Salesforce Anywhere Messages, Tabs, Topics, Trending Topics, Twitter, Visualforce, Custom (0), and Custom - Managed (1). The "AllinOneLayoutCmp" component is selected under the "Custom - Managed (1)" section. On the right, the configuration panel for "AllinOneLayoutCmp" is visible. It includes a "Select AIO Published Configuration (Not Applicable For Record Page)" dropdown set to "CalendarLayout : Account". Below this, the "AIO Layout Height (in px)" is set to "700". The "Set Component Visibility" section is expanded, showing a "Filters" section with an "Add Filter" button. A red arrow points to the "AIO Layout Height" field.

6. Save and Activate the page.

This screenshot is identical to the previous one, showing the configuration for the "AllinOneLayoutCmp" component. However, the "Save" button in the top right corner of the configuration panel is now highlighted with a red box. A red arrow points to the "Save" button, indicating the next step in the process.

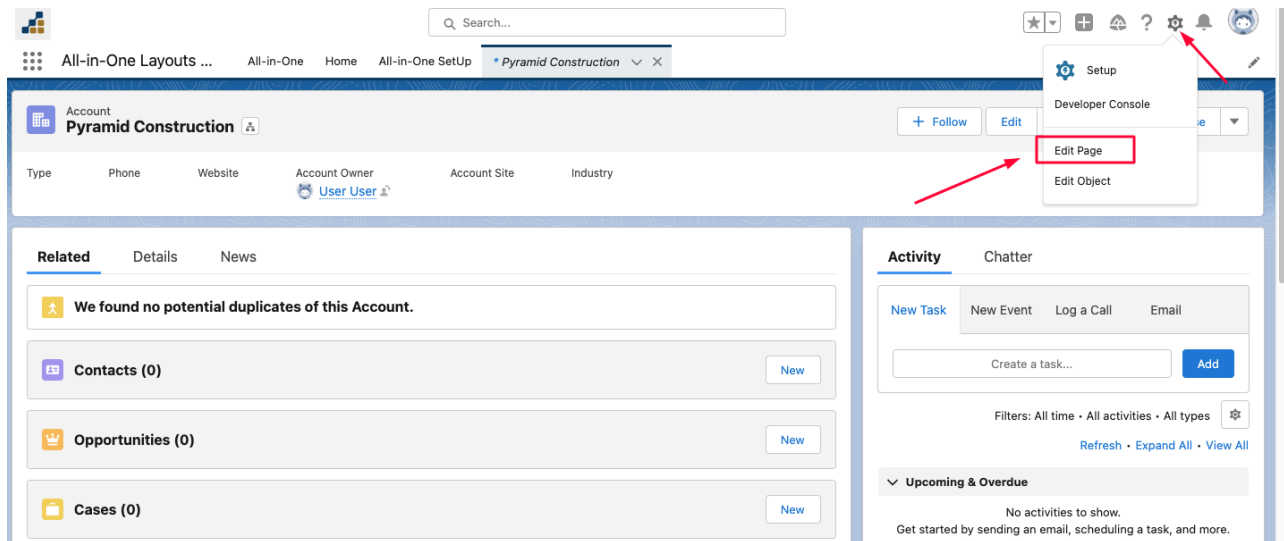


After activation, Go to any record of the “Account” object. Now you will be able to view only All-in-One Layouts on the record page and it will show that particular record along with its related object’s records.

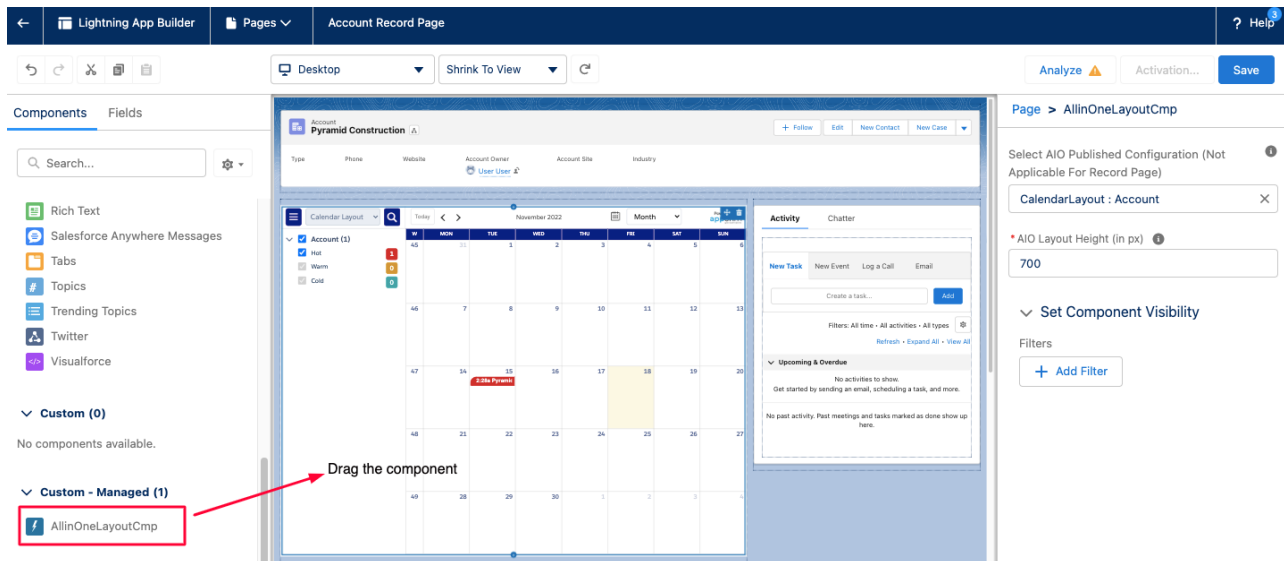


For adding All-in-One layout to a specific record page,

1. Go to the record page, Click on the “Gear” icon and Click on the “Edit page” link



2. Drag AllinOneLayoutCmp to the work area



3. Select “Select AIO Published Configuration” and “AIO Layout Height”

The screenshot shows the Lightning App Builder interface for the 'Account Record Page'. The main canvas displays a preview of the account record page layout, including a calendar and activity section. On the right sidebar, the configuration for the 'AllInOneLayoutCmp' component is shown. The 'Select AIO Published Configuration (Not Applicable For Record Page)' dropdown is set to 'CalendarLayout : Account'. The 'AIO Layout Height (in px)' field is set to 700. The 'Set Component Visibility' section is expanded, showing a filter configuration.

Page > AllInOneLayoutCmp

Select AIO Published Configuration (Not Applicable For Record Page)

CalendarLayout : Account

AIO Layout Height (in px)

700

Set Component Visibility

Filters

+ Add Filter

4. Save and Activate the page.

The screenshot shows the same Lightning App Builder interface as before, but with the 'Activation...' button highlighted in the top right corner. The configuration for the 'AllInOneLayoutCmp' component remains the same.

Page > AllInOneLayoutCmp

Select AIO Published Configuration (Not Applicable For Record Page)

CalendarLayout : Account

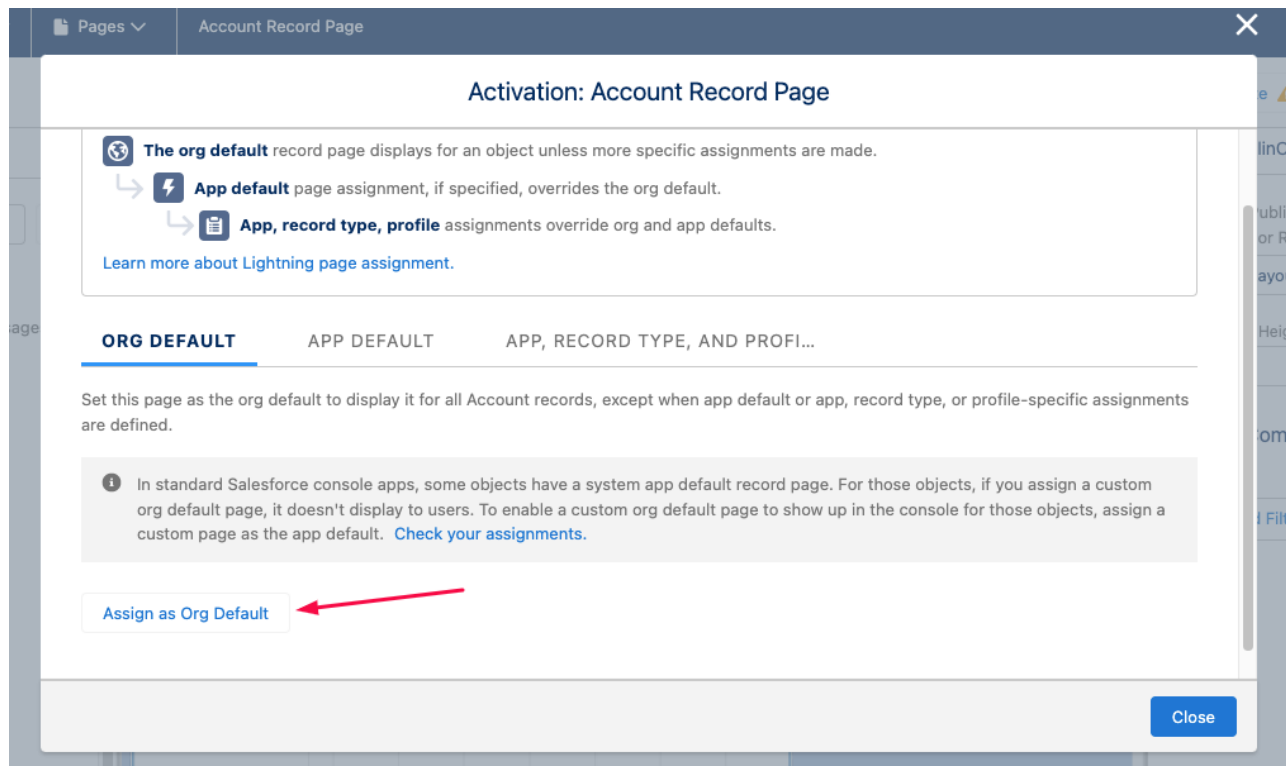
AIO Layout Height (in px)

700

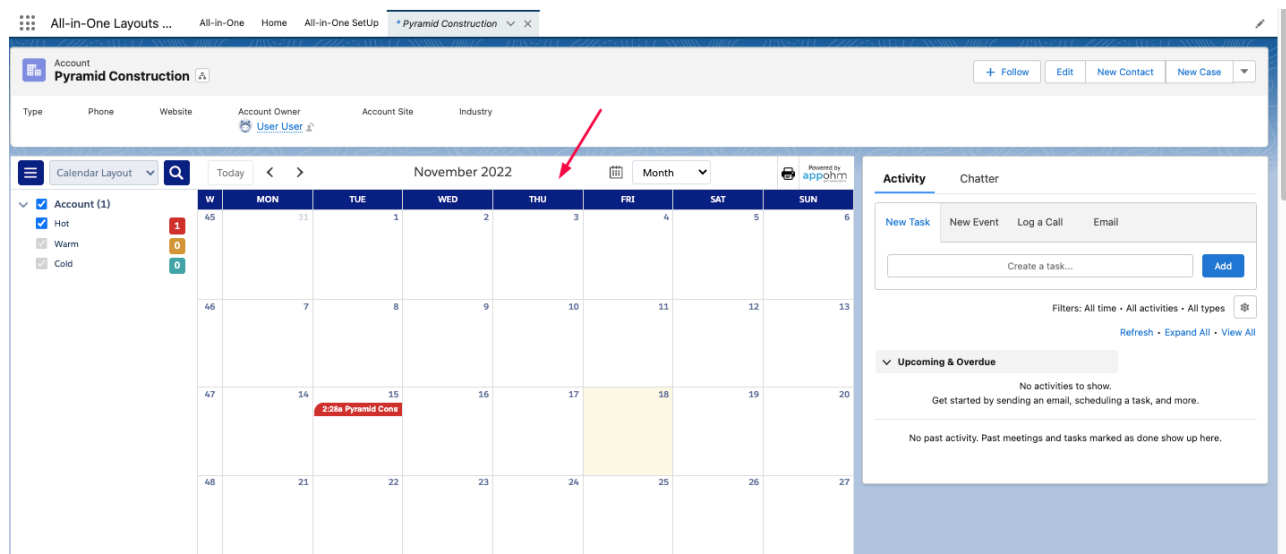
Set Component Visibility

Filters

+ Add Filter



After activation, Go to any record of “Account” object for which Record Page is set. Now you will be able to view All-in-One Layouts on the detail page and it will show that particular record along with its related object’s records.



Note: Related records will be shown on the layout only when the sObject List views are selected from the “Select Configuration” popup.

Embedding All-in-One on Classic Record Page

Salesforce administrators have the ability to embed All-in-One within a Visualforce component on an object page layout in Salesforce Classic.

Following are the steps required to embed All-in-One in Object record page:

1. Go to All-in-One Setup.
2. Click on the “**Copy**” icon of the particular sObject whose record page will acquire the All-in-One.

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
	All Events	Event	Custom	Organization	Subject		Start Date Time	End Date Time
	All Tasks	Task	Custom	Organization	Status		Created Date	Last Modified D...
	Account	Account	Custom	Organization	Account Name		Created Date	Created Date
	Event01	Event	Standard	Organization	Event Name		Start date- time	End date- time
	Account 01	Account	Custom	Organization	Account Number		Created Date	Created Date
	Campaign 1	Campaign	Custom	Organization	Name		Start Date	End Date

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

3. Go to Classic Setup and in the Quick Find Box, search Visualforce Pages.

Visualforce pages

Expand All | Collapse All

Build

Develop

Visualforce Pages

Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications to optimize your users' productivity.

View: All Create New View

Action	Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit Del Security Info	ForgotPassword	ForgotPassword		56.0	Default Salesforce Sites Forgot Password Confirmation page	UUser	11/18/2022, 1:33 AM	UUser	11/18/2022, 1:33 AM
Edit Del Security Info	SiteLogin	SiteLogin		56.0	Default Salesforce Sites Login page	UUser	11/18/2022, 1:33 AM	UUser	11/18/2022, 1:33 AM
Edit Del Security Info	FileNotFound	FileNotFound		56.0	Default Lightning Platform Page/Data Not Found page	UUser	11/18/2022, 1:33 AM	UUser	11/18/2022, 1:33 AM

- Click on “New” to create a new visualforce page and Paste the copied code:

Visualforce Pages [Help for this Page](#)

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting user experiences for your application or to enhance existing applications to optimize your users' productivity.

View: All [Create New View](#)

[Developer Console](#) [New](#)

Action	Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
Edit Del Security	ForgotPassword	ForgotPassword		56.0	Default Salesforce Sites Forgot Password Confirmation page	UUser	11/18/2022, 1:33 AM	UUser	11/18/2022, 1:33 AM
Edit Del Security	SiteLogin	SiteLogin		56.0	Default Salesforce Sites Login page	UUser	11/18/2022, 1:33 AM	UUser	11/18/2022, 1:33 AM
Edit Del Security	FileNotFound	FileNotFound		56.0	Default Lightning Platform Page/Data Not Found page	UUser	11/18/2022, 1:33 AM	UUser	11/18/2022, 1:33 AM
Edit Del Security	SiteRegister	SiteRegister		56.0	Default Salesforce Sites User Registration page	UUser	11/18/2022, 1:33 AM	UUser	11/18/2022, 1:33 AM

Visualforce Page [Help for this Page](#)

Page Edit [Save](#) [Quick Save](#) [Cancel](#) [Where is this used?](#) [Component Reference](#) [Preview](#)

Page Information ! = Required Information

Label

Name

Description

Available for Lightning Experience, Experience Builder sites, and the mobile app ☒

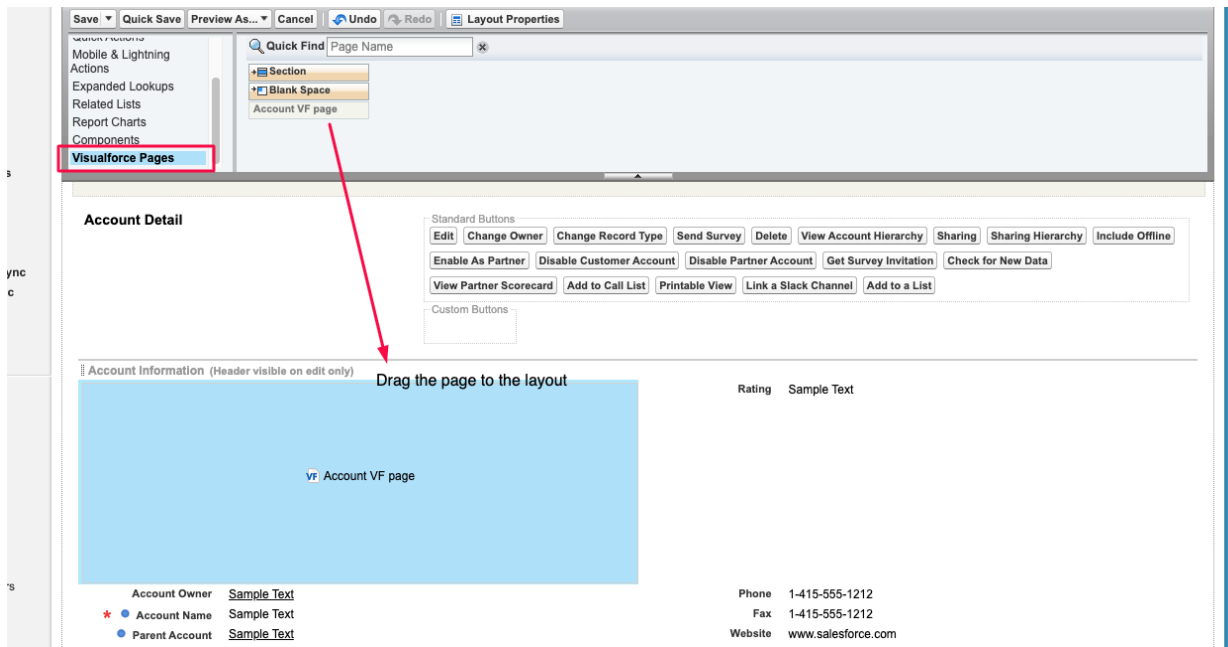
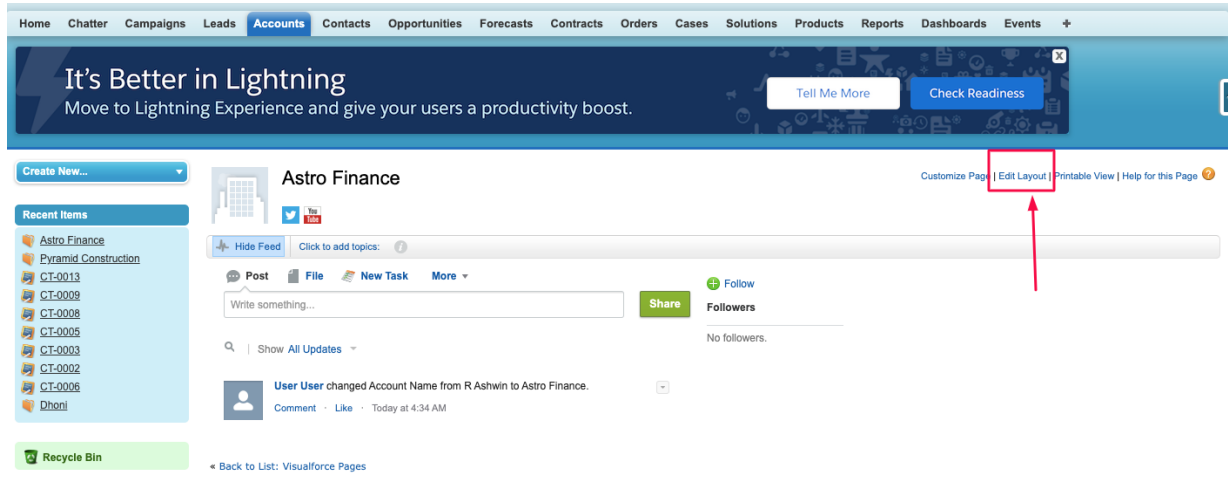
Require CSRF protection on GET requests ☐

Visualforce Markup **Version Settings**

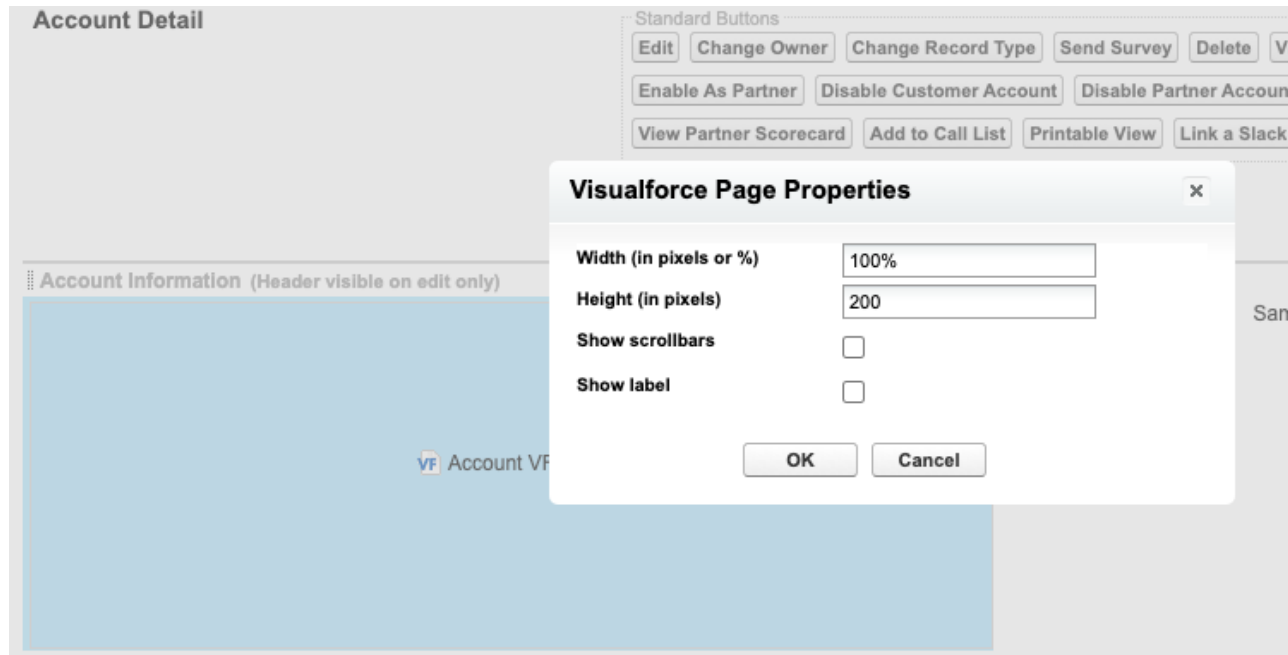
```
<apex:page standardController="Account" docType="html-5.0" sidebar="false" showHeader="false"><apex:include pageName="PlanViewCal_calA
```

This is the actual page code

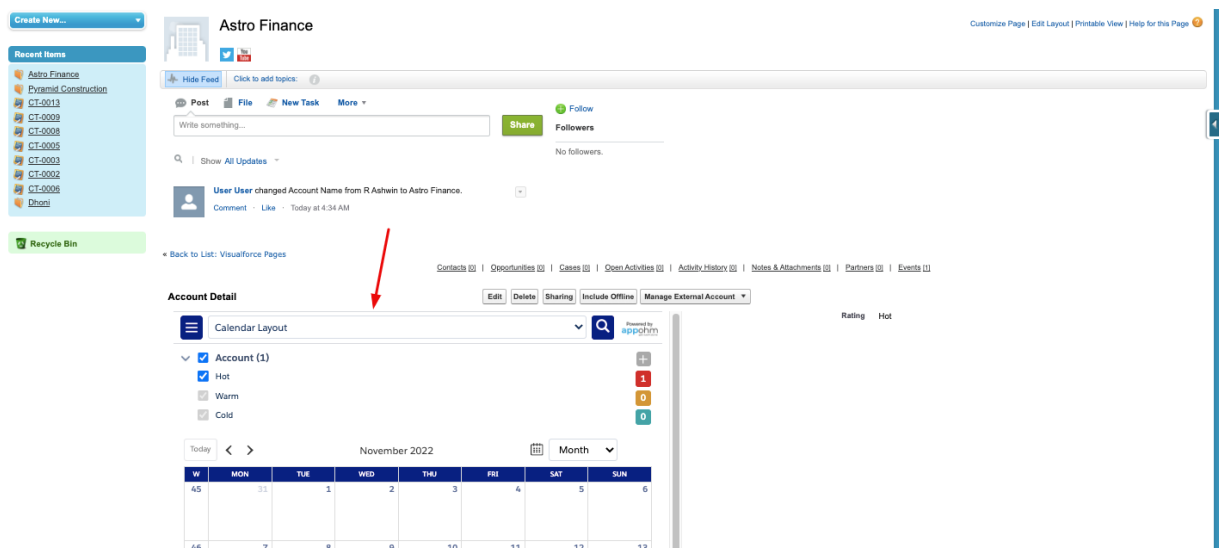
5. Save the page.
6. Go to records of that particular sObject and choose any one record to view the embedded All-in-One.
7. On the record detail page, click on “Edit Layout” in order to drag the Visualforce page to the page layout.



Use the “Wrench” icon in the upper right corner of the blue component area to control the size of the embedded component. Suggested dimensions are 100% width and 500-pixel height. This makes for a usable calendar that does not take up too much screen space. Be sure to set this as a 1-column section.



8. After saving the layout, you will be redirected back to the record.



Publishing All-in-One via Force.com Sites

This feature allows you to create a read-only version of All-in-One and display this on a Force.com site page.

All-in-One Layouts are available via a public URL without the need for Salesforce authentication. Be sure the data you are sharing in this method does not include information that should not be made available to the public.

With the Site, you can only display the Calendar and GeoMap layout of All-in-One.

To create a Site All-in-One Layouts, first create the Force.com site page you will use to display the calendar.

To set up a Force.com site for use with All-in-One:

1. Click Your Name>>Setup>>Develop>>**Sites**.
2. If this is the first time this feature is being used, you will be asked to register a custom Force.com domain for your organization. This cannot be changed.
3. Create a new Force.com site for use with All-in-One.

Force.com sites have certain limits depending on an organization's Salesforce edition. For more information visit: https://help.salesforce.com/articleView?id=sites_limits.htm&type=5

4. Enter a Site Label.
5. Select a User as the Site Contact.

6. Enter an Active Site Home Page. Use the lookup to select the **calAllMain** template. This template is installed with your All-in-One package.

SETUP
Sites

Site Label: All-in-One

Site Name: All_in_One

Site Description:

Site Contact: User User

Default Record Owner: User User

Default Web Address: http://java-speed-8759-dev-ed.scratch.my.salesforce-sites.com/

Active: ☒

Active Site Home Page: calAllMain (Preview)

Inactive Site Home Page: InMaintenance (Preview)

Site Template: SiteTemplate

Site Robots.txt:

Site Favorite Icon:

Analytics Tracking Code:

URL Rewriter Class:

Enable Feeds: ☐

Clickjack Protection Level: Allow framing by the same origin only (Recommended)

Lightning Features for Guest Users: ☒

Enable Content Sniffing Protection: ☒

Enable Browser Cross Site Scripting Protection: ☒

Referrer URL Protection: ☒

Allow only required cookies for this site: ☐ More Details

Redirect to custom domain: ☒

Cache public Visualforce pages: ☒ More Info

It is important to select the right site template for the Active Site Home Page. See the next image for help.

Active: ☒

Active Site Home Page: calAllMain (Preview)

Inactive Site Home Page: InMaintenance (Preview)

Site Template: SiteTemplate

7. Optional: Select a template for Inactive Site Home Page (the page users will see if the page is unable to load). The “InMaintenance” template is a standard Force.com template available in your organization.
8. You may choose to check the Active checkbox now to activate the site. Alternatively, when you are ready to make the site public, click Activate on the Site Edit or Site Details pages.
9. Save your changes.

Return to the Site Details page and click the **Public Access Settings** button to open the Profile page for the site's user.

On the Sites Profile page, edit the site user access to objects in the org.

Profile
allinone Profile

Find Settings | Edit Properties

Profile Overview | Assigned Users

Description
User License: Guest User License
Custom Profile: ☒
Created By: Developer A/C 3/10/2019 12:30 PM
Last Modified By: Developer A/C 7/2/2020 1:41 PM

Apps

Settings that apply to Salesforce apps, such as Sites, and custom apps built on the Lightning Platform. [Learn More](#)

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Named Credential Access
Permissions to authenticate against named credentials

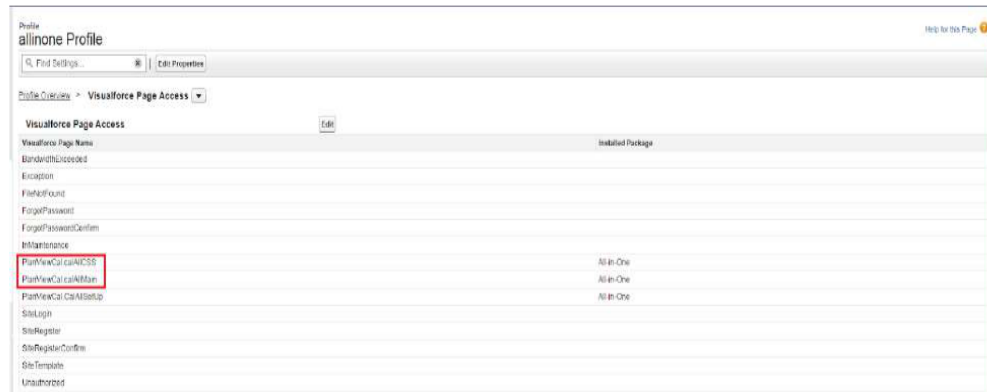
The site user will need "Read" access to all All-in-One objects. You will also need to enable "Read" access to any objects that the All-in-One are based on.

Profile Overview > Object Settings

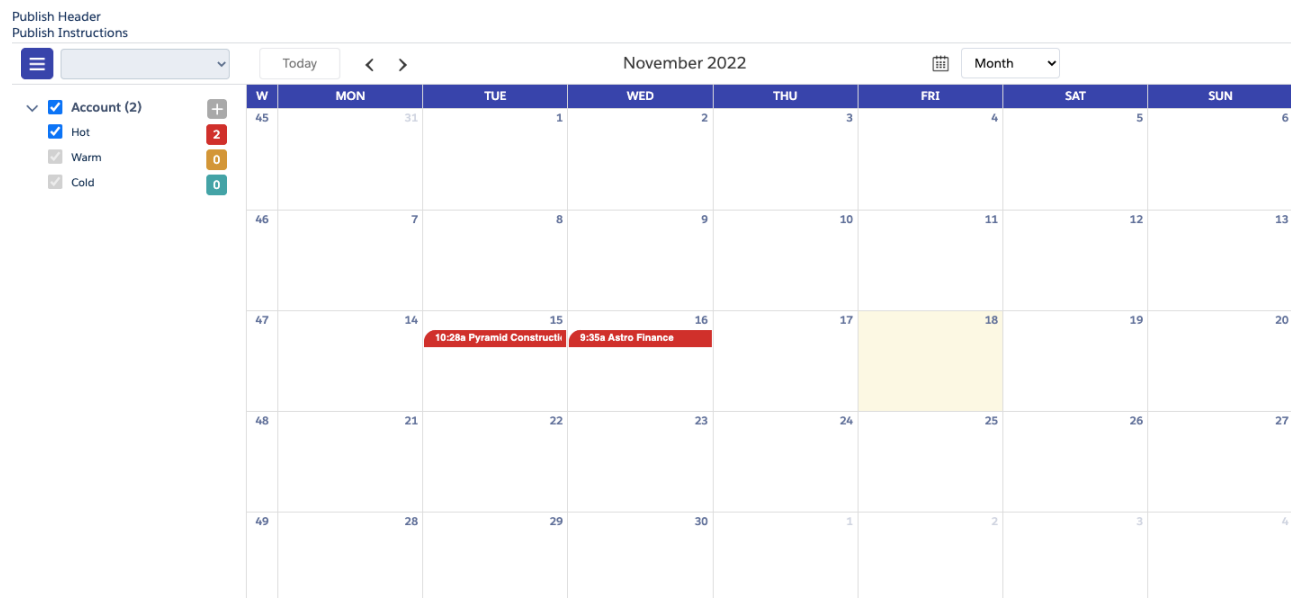
All Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings	Page Layouts
Account Brands	No Access	9	Tab Hidden	Account Brand Layout
Accounts	Read	41	Tab Hidden	Account Layout
All-in-One	—	—	Tab Hidden	—
All-in-One App Page	—	—	Tab Hidden	—
All-in-One Configurations	Read, Create, Edit, Delete, View All, Modify All	32	—	All-in-One Configuration Layout
All-in-One Publist	Read, Create, Edit, Delete, View All, Modify All	19	—	All-in-One Publist Layout
All-in-One Setup	—	—	Tab Hidden	—
App Launcher	—	—	Default On	—
Appointments	Read, Create, Edit, View All	10	—	Appointment Layout
Approval Requests	—	—	Tab Hidden	—
Asset Relationships	—	10	—	Asset Relationship Layout
Assets	No Access	25	Tab Hidden	Asset Layout
Authors	No Access	10	—	Author Layout
Automobiles	No Access	5	—	Automobile Layout
Budgets	—	—	Tab Hidden	—
Books	No Access	9	—	Book Layout
Buses	No Access	12	—	Bus Layout
Business Licenses	—	—	Tab Hidden	—
Campaign Members	—	30	—	Campaign Member Page Layout
Campaigns	Read	40	Tab Hidden	Campaign Layout
Cases	No Access	34	Tab Hidden	Case Layout
Class Workspaces	—	—	Tab Hidden	—
Contacts	Read	29	Tab Hidden	Contact Layout

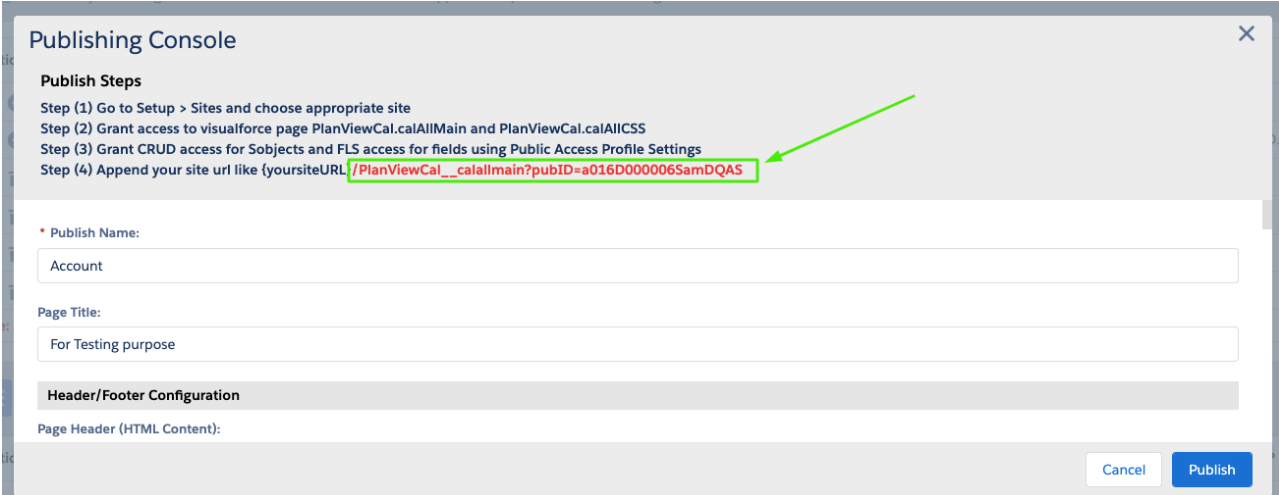
Enable access to All-in-One Objects



To check that your new site has been properly configured for use with All-in-One, enter the Default Web Address of your site in a browser window and append your site URL like {yoursiteURL}/calallmain?pubID={18-digit All-in-OnePublishId}.



Note: From any of your publish configuration, you can get this ID.

The image shows a 'Publishing Console' dialog box with a close button (X) in the top right corner. It contains a 'Publish Steps' section with four instructions. Step (4) includes a URL snippet highlighted in a red box, with a green arrow pointing to it from the right. Below the steps are input fields for 'Publish Name' (containing 'Account') and 'Page Title' (containing 'For Testing purpose'). A 'Header/Footer Configuration' section is partially visible, showing a 'Page Header (HTML Content):' label. At the bottom right are 'Cancel' and 'Publish' buttons.

Publishing Console

Publish Steps

Step (1) Go to Setup > Sites and choose appropriate site

Step (2) Grant access to visualforce page PlanViewCal.calAllMain and PlanViewCal.calAllCSS

Step (3) Grant CRUD access for Subjects and FLS access for fields using Public Access Profile Settings

Step (4) Append your site url like {yoursiteURL} **/PlanViewCal__calallmain?pubID=a016D000006SamDQAS**

• Publish Name:

Account

Page Title:

For Testing purpose

Header/Footer Configuration

Page Header (HTML Content):

Cancel Publish

Publishing All-in-One via Communities

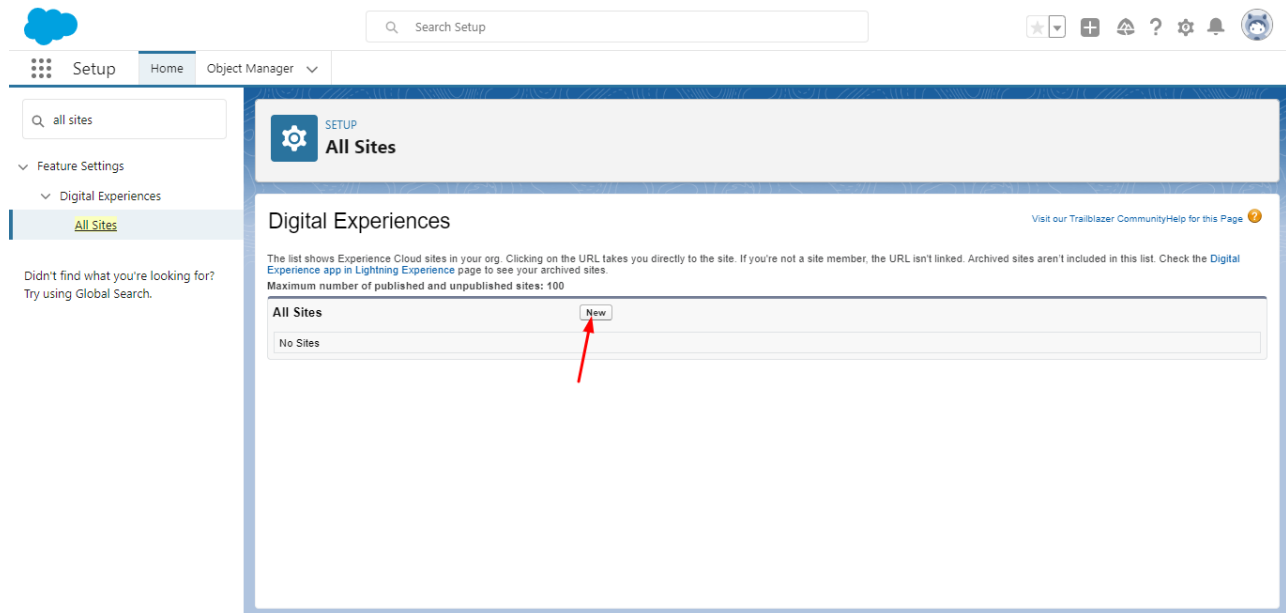
This feature allows you to create a read-only version of All-in-One and display this on the Community.

With the Community, you can only display the Calendar and GeoMap layout of All-in-One.

To have access to All-in-One Layouts on Community, first create the Community you will use to display the calendar.

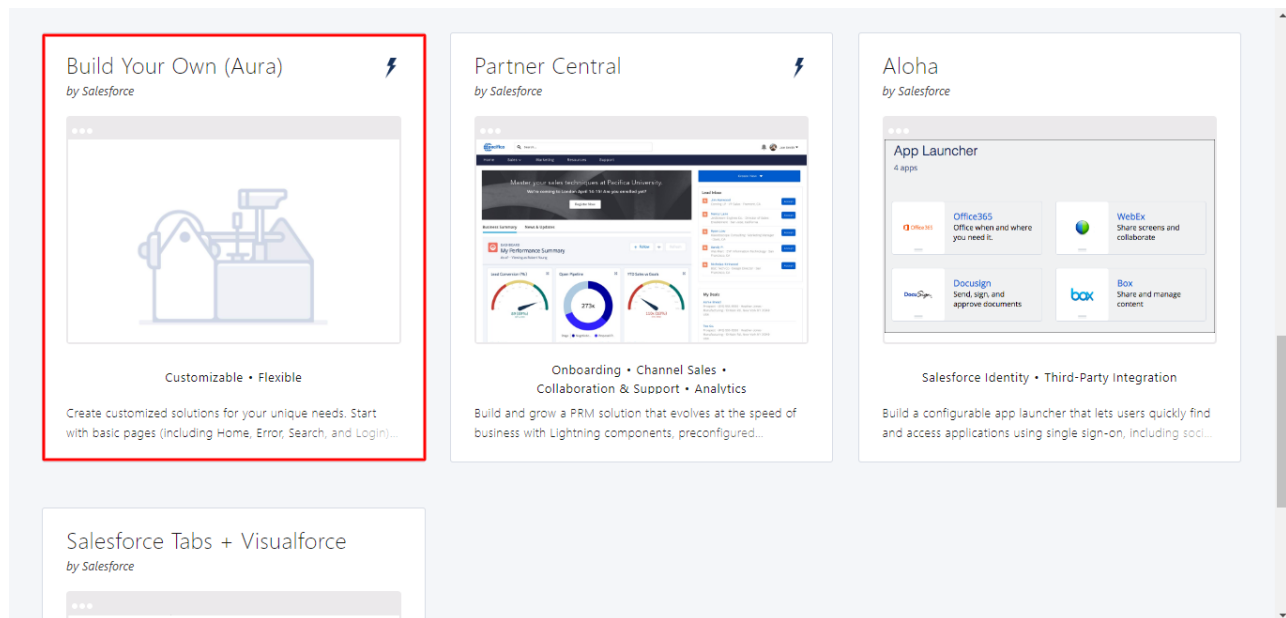
Following are the steps to set up the community:

1. Go to Setup >> Digital Experience>> All Sites
2. Click on “New” to create a community and use it with All-in-One.

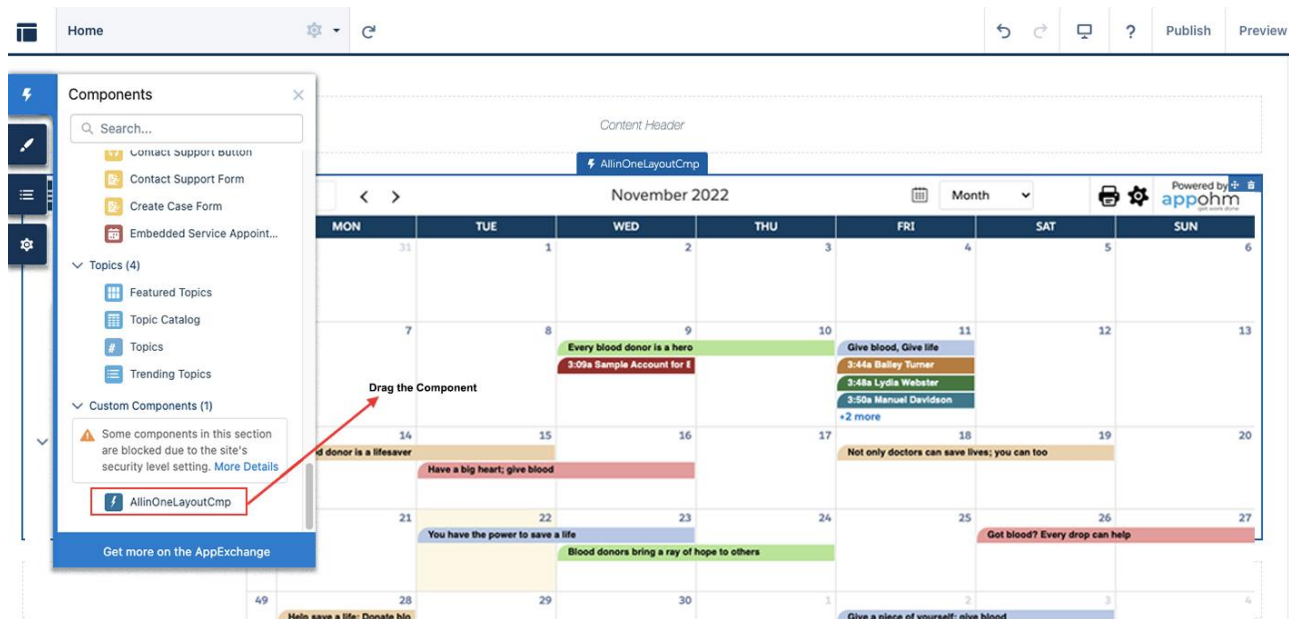


3. Choose the type of Community you want to create.

In this case, Create a community of the type “**Build Your Own (Aura)**” Community.



4. After creating the community, you will be redirected to the Community Builder.
5. On Builder, Click on “Components” and drag the All-in-One custom component to the content space.



- Then, Select AIO Published Configuration and AIO Layout Height (in px) from the settings.

The screenshot shows the All-in-One Layouts interface. On the left, there's a sidebar with filters for 'All-Accounts (6)' and 'Campaign (10)'. The main area displays a calendar for November 2022. A settings panel on the right is open, showing the configuration for 'AllinOneLayoutCmp'. The 'CalendarLayout' is set to 'Aio Sites' and the 'AIO Layout Height (in px)' is set to '700'.

- The Community User can log into the community in order to access All-in-One. After

The screenshot shows the Publish Header interface. On the left, there's a sidebar with filters for 'Account 01 (6)' and 'Campaign 1 (0)'. The main area displays a calendar for November 2022. The calendar shows various events and their durations, such as '11:57p' on Monday, November 7th, and several events on Wednesday, November 16th.

Following these steps, Users will be able to access All-in-One Layouts on Community.

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.

