



MoCa

Mobile Calendar for Salesforce App

Setup & Admin Guide

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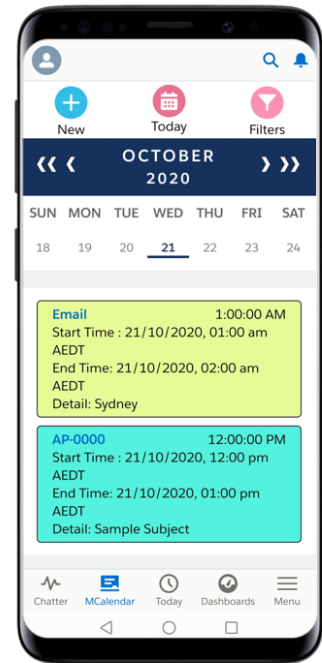
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1. Introduction

MoCa is a Salesforce native calendar application interface built for the needs of Salesforce mobile app users and organizations aiming to display records on a calendar interface on Salesforce App.

- Application has been built leveraging the lightning web component framework and pure JavaScript
- Application allows the users to filter the records based on object type and to create new records directly from the interface through custom links.
- Application allows the users to switch the calendar weekly or over a 28day period forward or backward and to land back on the current day using the Today button



2. Highlights

- Display all records(both standard and custom object records) in calendar view
- Display records not just based on ownership.
- Custom color coding
- Dynamic filters rendered based on object type
- Ability to navigate to new record creation page.

3. Price

MoCa is a free Salesforce application available to install through Salesforce AppExchange. It is available to install in Developer, Enterprise, Professional and Unlimited editions. Please Install it for all users.

4. Setup

4.1. Pre-requisites

To leverage the application, please make sure following are rightly configured

- 1) [My Domain](#) is configured ahead, this allows *Mcalendar* tab to be displayed to users.
- 2) Make sure *Mcalendar* tab is visible to the right users. (change tab settings in profile)
- 3) Make sure all users have access to apex class '*CS_MoCa.MobileCalendarHandler*'
- 4) Make sure all users have access to Custom Metadata '*CS_MoCa.MobileCalendarConfig*'

4.2. Setup

4.2.1. Add Mcalendar to Salesforce App

To enable users to leverage *Mcalendar* on Salesforce App, Navigate to Setup -> Salesforce Navigation-> Add '*Mcalendar*' > Save

Admin Tip

Mcalendar tab when configured as one of the top 5 tabs in salesforce mobile app navigation, will be available at finger tips in Salesforce app .

4.2.2. Configure Custom Metadata

MoCa mainly works with the data from *MobileCalendarConfig* Custom Metadata. It is quite important to get this configured right. Below list describes each field and provides the sample values configured for the Event object. Event record comes as a part of the package. Make sure you *do not create duplicate metadata* records

- **Create New**
 - API Name – create_new__c
 - Type – Boolean
 - Description - Checkbox to capture the requirement to create new records from mobile calendar
 - Help Text - Enable it create records from mobile calendar
 - Sample Value – True
- **Create New Link**
 - API Name – Create_new_Link__c
 - Type – Text
 - Description - holds the reference URL to create new record
 - Help Text - Please provide the reference URL to create a new record
 - Sample Value – /lightning/o/Event/new
- **Detail Field Api Name**
 - API Name – Detail_Field_Api_Name__c
 - Type – Text
 - Description - holds the field API name of the standard/custom field which holds the detail information.
 - Help Text - Provide the API Name of the field which holds the detail information(eg: subject, description etc.). Ideal to provide fields of datatype text/picklist (String)
 - Sample Value – description, detail__c
- **EndTime Api Name**
 - API Name – EndTime_Api_Name__c
 - Type – Text
 - Description - holds the enddatetime field API name
 - Help Text - provide the enddatetime field API name
 - Sample Value – enddatetime, end_date_time__c
- **StartTime Api Name**
 - API Name – StartTime_Api_Name__c
 - Type – Text

- Description - holds the startdatetime field API name
- Help Text - provide the startdatetime field API name
- Sample Value – startdatetime

- **FilterID Field Api Name**
 - API Name – FilterID_Field_Api_Name__c
 - Type – Text
 - Description - holds the API name of the filter field(User lookup) which holds the UserID. The data in the field is used to match with current logged in user to display records in their calendar
 - Help Text - Provide the API name of the User lookup field to be used as filter Id. (eg: OwnerId, assignedto__c, createdbyId etc)
 - Sample Value – OwnerId

- **NameField Api Name**
 - API Name – NameField_Api_Name__c
 - Type – Text
 - Description - holds the API name of the name attribute of any record. This can be either 'name' or any other attribute of the records which needs to display as the name on the block. Ideal to provide a fields of data type text.
 - Help Text - Provide the API name of the Name field. (eg: name, casenumber etc)
 - Sample Value – Name

- **Object Api Name**
 - API Name – Object_Api_Name__c
 - Type – Text
 - Description - hold the object API name
 - Help Text - Provide the Object API name (eg: Event, custom_object__c)
 - Sample Value – Event

- **Show On Calendar**
 - API Name – Show_On_Calendar__c
 - Type – Boolean
 - Description - Boolean attribute to capture whether or not to display records on calendar.
 - Help Text - Enable to display records of this object/config on calendar
 - Sample Value – True

- **Style**
 - API Name – style__c
 - Type – Text
 - Description - holds the inline style attribute for the display block. created to capture elements such as background-color and text size
 - Help Text - provide the inline css string for the display block (eg: background-color: #FFFFFF)
 - Sample Value – background-color: #FFF333

Note

Cross-Check for Duplicate metadata records. One record should only be configured for one object

5. FAQs

1. Can I change the TAB name of MCalendar?

create a new lightning tab and refer to component “CS_MoCa:mobileCalendar”

2. How many records can I configure in metadata?

No Limitations on the number of records(Objects) to be configured. Just don't overload, and do consider the mobile experience of the end user

3. What should I do if I don't want to use color coding ?

Just Leave the style attribute on metadata empty. By default, the color would be inherited from parent.

4. Does Cloud Sloka Support the application?

We do not support the application; however, we can answer your queries if any, drop us an email at support@cloudsloka.com.au

5. How can I reach out to Cloud Sloka representative?

Visit us at www.cloudsloka.com.au or drop us an email at inquiry@cloudsloka.com.au Our representative will be happy to assist you.

