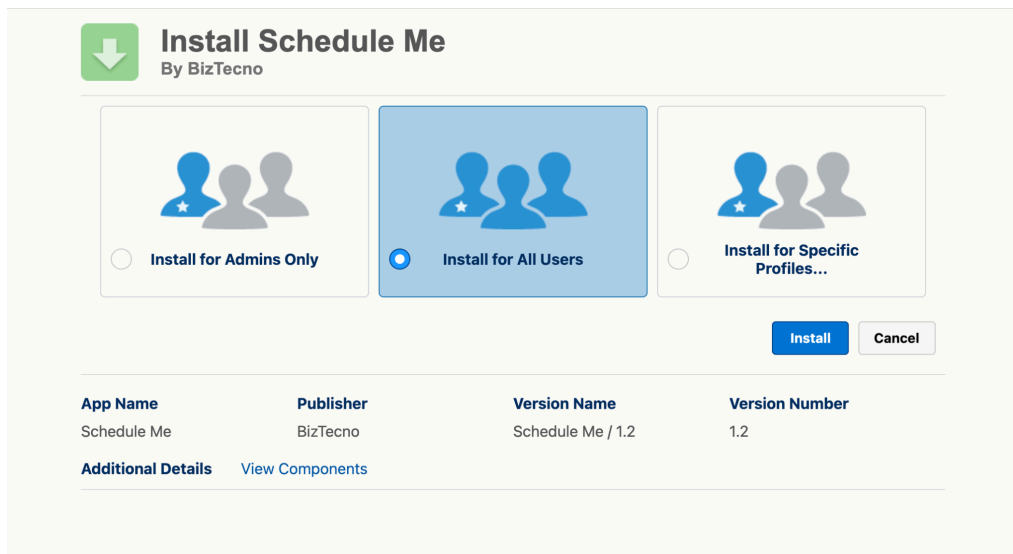


Schedule Me

(Installation Guide)

Install the application from Appexchange



Install Schedule Me
By BizTecnio

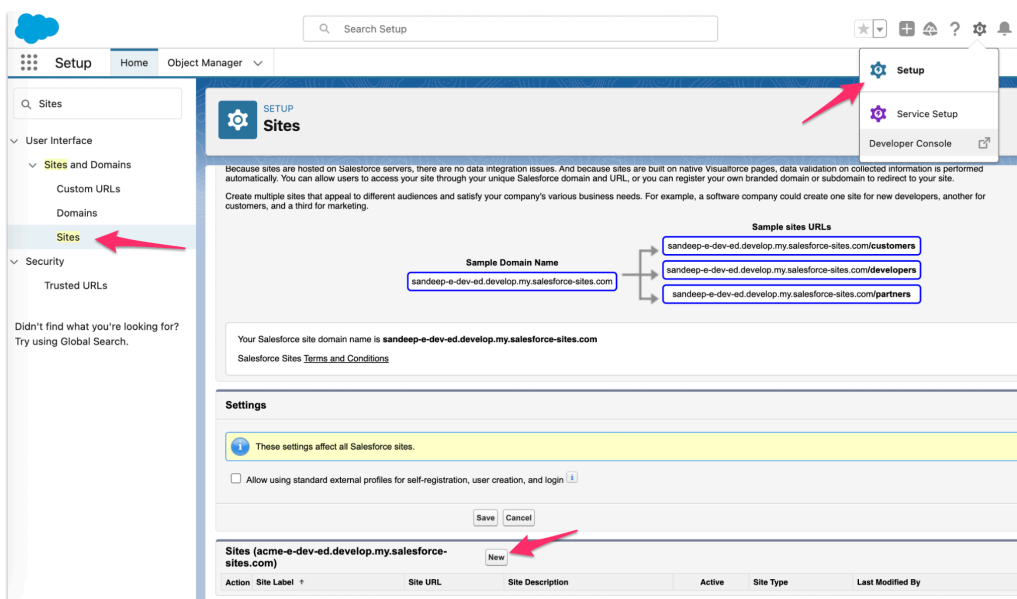
☐ Install for Admins Only
 ☒ Install for All Users
 ☐ Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
Schedule Me	BizTecnio	Schedule Me / 1.2	1.2

[Additional Details](#) [View Components](#)

From “Setup” navigate to “Sites”. Click on “New” button



Setup Home Object Manager

Search Setup

Setup Service Setup Developer Console

Sites

Sample sites URLs

Sample Domain Name

sandeep-e-dev-ed.develop.my.salesforce-sites.com

sandeep-e-dev-ed.develop.my.salesforce-sites.com/customers

sandeep-e-dev-ed.develop.my.salesforce-sites.com/developers

sandeep-e-dev-ed.develop.my.salesforce-sites.com/partners

Your Salesforce site domain name is **sandeep-e-dev-ed.develop.my.salesforce-sites.com**

Salesforce Sites [Terms and Conditions](#)

Settings

These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login

Save Cancel

Sites (acme-e-dev-ed.develop.my.salesforce-sites.com)

New

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
--------	------------	----------	------------------	--------	-----------	------------------

In the “New Site” form, enter the following details

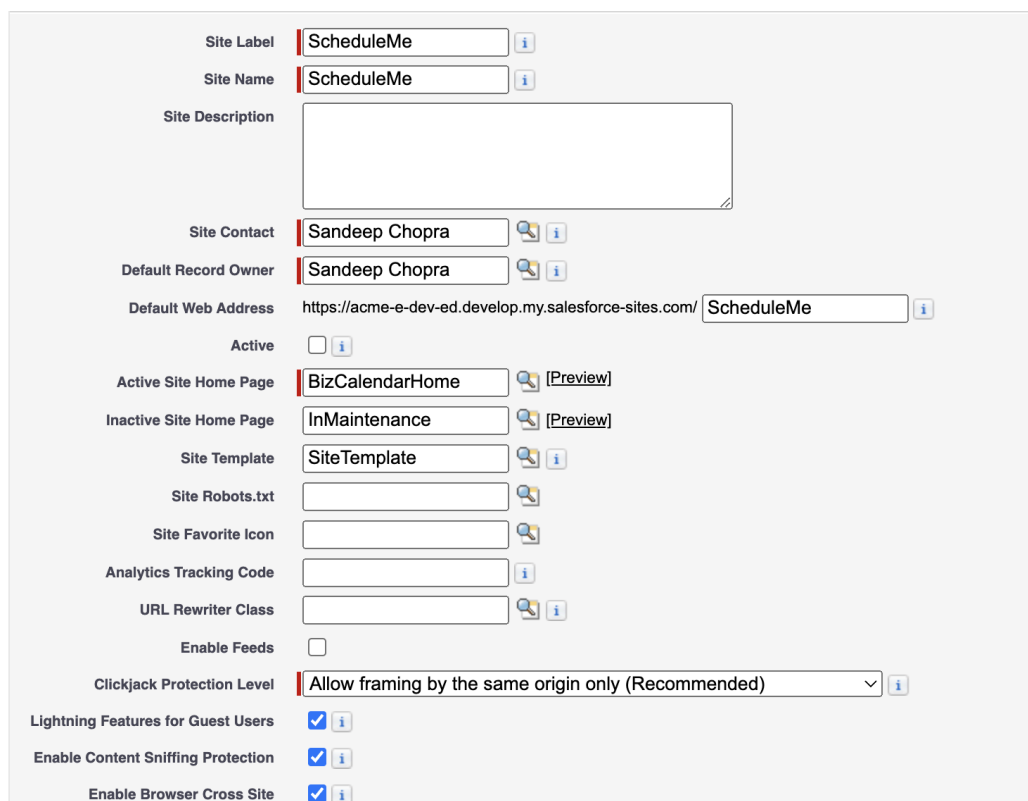
Site Label : ScheduleMe

Site Name : ScheduleMe

Default Web Address : ScheduleMe

Active Site Home Page : BizCalendarHome

Leave the other settings as it is. The form should look like the following. Click on “Save”



Site Label	ScheduleMe	
Site Name	ScheduleMe	
Site Description		
Site Contact	Sandeep Chopra	
Default Record Owner	Sandeep Chopra	
Default Web Address	https://acme-e-dev-ed.develop.my.salesforce-sites.com/ ScheduleMe	
Active	☐	
Active Site Home Page	BizCalendarHome	[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	☒	

Click on the button “Public Access Settings”

Site Details

ScheduleMe

[« Back to List: Sites](#)

Site Detail

Edit

Public Access Settings

Login Settings

URL Redirects

Deactivate

Site Label	ScheduleMe	Site Name	ScheduleMe
Site Description		Site Contact	John Smith
Active	☒	Login	Not Allowed
Active Site Home Page	bzt_sdm.BizCalendarHome [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	☐
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	☒ i
Enable Content Sniffing Protection	☒ i	Enable Browser Cross Site Scripting Protection	☒ i
Referrer URL Protection	☒ i	Allow only required cookies for this site	☐ i More Details
Guest Access to the Payments API	☐ i	Guest Access to the Support API	☐ i

Enable class access

Take your mouse over the link “Enabled Apex Class Access” and click on “Edit” button

Profile
[Help for this Page](#)

ScheduleMe Profile

Users with this profile have the permissions and page layouts listed below. [Administrators](#) can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the [Edit link](#) in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) |
[Enabled Apex Class Access \(0\)](#) |
[Enabled Visualforce Page Access \(16\)](#) |
[Enabled External Data Source Access \(0\)](#) |
[Enabled Named Credential Access \(0\)](#)

Enabled Apex Class Access
[Edit](#)
[Enabled Apex Class Access Help](#)

No Apex Classes enabled

User License	Guest User License	Custom Profile	☒
Description			
Created By	John Smith , 18/02/2024, 7:33 pm	Modified By	John Smith , 18/02/2024, 7:33 pm

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Order	Order Layout [View Assignment]
Account Brand	Account Brand Layout	Order Product	Order Product Layout [View Assignment]

Add application class to “Enabled Classes” section

Search for class name “bzt_sdm__BizEventController”, click on the arrow pointing right to add it to “Enabled Apex Classes”. Click on the “Save” button.

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

Save

Cancel

Available Apex Classes

SiteLoginController

SiteRegisterController

bzt_sdm.Application

bzt_sdm.BizEventController

bzt_sdm.BizEventSelector

bzt_sdm.BizEventService

bzt_sdm.BizEventServiceImpl

bzt_sdm.BizEventTriggerHandler

bzt_sdm.CalendarEmail

bzt_sdm.CustomNotificationImpl

bzt_sdm.DMLManager

bzt_sdm.IAppBO

bzt_sdm.IBizEventSelector

bzt_sdm.IBizEventService

Add

Remove

Enabled Apex Classes

--None--

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Salesforce site.

Save

Cancel

Available Apex Classes

SiteLoginController

SiteRegisterController

bzt_sdm.Application

bzt_sdm.BizEventSelector

bzt_sdm.BizEventService

bzt_sdm.BizEventServiceImpl

bzt_sdm.BizEventTriggerHandler

bzt_sdm.CalendarEmail

bzt_sdm.CustomNotificationImpl

bzt_sdm.DMLManager

bzt_sdm.IAppBO

bzt_sdm.IBizEventSelector

bzt_sdm.IBizEventService

bzt_sdm.IEmail

Add

Remove

Enabled Apex Classes

bzt_sdm.BizEventController

To set the Object permission in the profile, click on the “Edit” button

Profile

ScheduleMe Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) |
 [Enabled Apex Class Access \(1\)](#) |
 [Enabled Visualforce Page Access \(16\)](#) |
 [Enabled External Data Source Access \(0\)](#) |
 [Enabled Named Credential Access \(0\)](#) |
 [Enabled External Credential Principal Access \(0\)](#) |
 [Enabled Custom Metadata Type Access \(0\)](#) |
 [Enabled Custom Setting Definitions Access \(0\)](#) |
 [Enabled Flow Access \(0\)](#) |
 [Enabled Custom Permissions \(0\)](#)

Profile Detail

Edit

View Users

Name	ScheduleMe Profile		
User License	Guest User License	Custom Profile	✓
Description			
Created By	John Smith, 18/02/2024, 7:33 pm	Modified By	John Smith, 18/02/2024, 7:33 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Account	Account Layout [View Assignment]	Order	Order Layout [View Assignment]

Enable “Read” and “Create” permission on object “Biz Events”

Scroll to the section “Custom Objects” and enable “Read” and “Create” permission on object “Biz Events”. Click on the “Save” button once done.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Biz Events	☒	☒				

Set field level security

Scroll down to the section “Field-Level Security”. Under “Custom Field-Level Security” find the object “Biz Event” and click on “View” next to it.

Individual	[View]
Lead	[View]
Location	[View]
Object Milestone	[View]
Operating Hours	[View]
Operating Hours Holiday	[View]
Opportunity	[View]
Opportunity Contact Role	[View]
Custom Field-Level Security	
Biz Event	[View] 

In the next screen, click on the “Edit” button and enable “Read Access” and “Edit Access” for all fields. Click on “Save” button once done

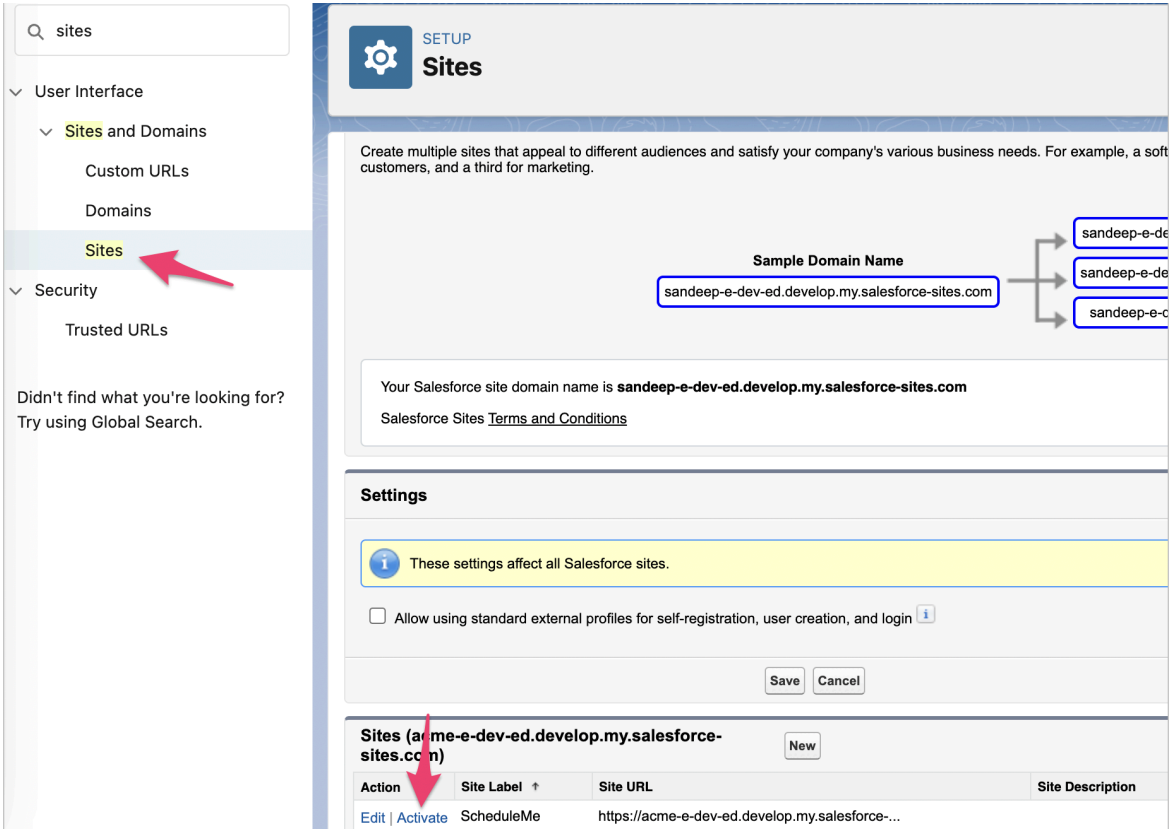
Biz Event Field-Level Security for profile
ScheduleMe Profile

[Help for this Page](#)

Save Cancel			
Field Name	Field Type	☐ Read Access	☐ Edit Access
ActivityDate	Date	☒	☒
Created By	Lookup	☒	☐
Customer Time Zone	Text	☒	☒
Description	Long Text Area	☒	☒
Email	Email	☒	☒
EndDate	Date	☒	☒
End Date Time	Date/Time	☒	☒
End Time	Time	☒	☒
FirstName	Text	☒	☒
IsAllDayEvent	Checkbox	☒	☒
Last Modified By	Lookup	☒	☐
LastName	Text	☒	☒
Name	Text	☒	☒
Owner	Lookup	☒	☒
Start Date	Date	☒	☒
Start Date Time	Date/Time	☒	☒
Start Time	Time	☒	☒
Status	Picklist	☒	☒
User	Text	☒	☒
Visible	Checkbox	☒	☒
Save Cancel			

Go Back to “Sites” view and activate the “ScheduleMe” Site

Click on the “Activate” link to activate the site.



The screenshot shows the Salesforce Setup interface for the 'Sites' section. On the left sidebar, under 'User Interface', the 'Sites' link is highlighted with a red arrow. The main content area is titled 'Sites' and includes a description: 'Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a soft customers, and a third for marketing.'

Below the description, there is a 'Sample Domain Name' field with the value 'sandeep-e-dev-ed.develop.my.salesforce-sites.com'. To the right of this field, three arrows point to three separate boxes, each containing the same domain name. Below this, a message states: 'Your Salesforce site domain name is sandeep-e-dev-ed.develop.my.salesforce-sites.com'. A link for 'Salesforce Sites Terms and Conditions' is provided.

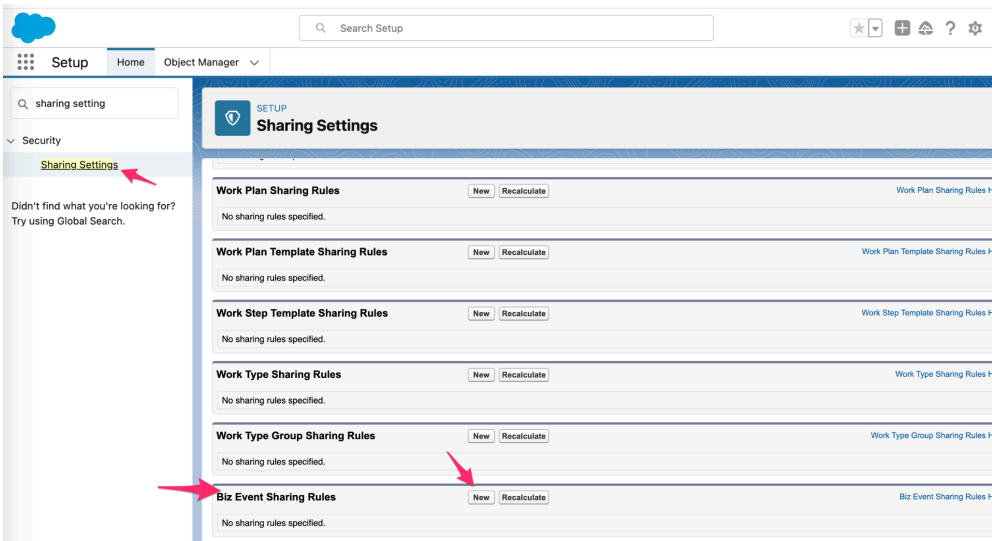
The 'Settings' section below contains a yellow information bar stating 'These settings affect all Salesforce sites.' and a checkbox labeled 'Allow using standard external profiles for self-registration, user creation, and login'. 'Save' and 'Cancel' buttons are at the bottom of the settings section.

At the bottom, a table lists existing sites. A red arrow points to the 'Edit' link for the first site. The table has columns: Action, Site Label, Site URL, and Site Description.

Action	Site Label	Site URL	Site Description
Edit Activate	ScheduleMe	https://acme-e-dev-ed.develop.my.salesforce-...	

Create a “Sharing Rule”

Navigate to “Setup” => “Sharing Settings”. Scroll down to the section “Biz Event Sharing Rules” and click the button “New”



The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' section. On the left sidebar, under 'Security', the 'Sharing Settings' link is highlighted with a red arrow. The main content area is titled 'Sharing Settings' and lists several sharing rule categories: Work Plan Sharing Rules, Work Plan Template Sharing Rules, Work Step Template Sharing Rules, Work Type Sharing Rules, Work Type Group Sharing Rules, and Biz Event Sharing Rules. Each category has a 'New' button and a 'Recalculate' button. A red arrow points to the 'New' button for 'Biz Event Sharing Rules'.

Create a Sharing Rule

Create a Sharing Rule with the following details

Name : ScheduleMeSharing
Rule Name : ScheduleMeSharing
Rule Type : Guest user access, based on criteria
Criteria
 Field : Visible
 Operator : Equals
 Value : True
Share with : ScheduleMe Site Guest User
Access Level : Read Only

Step 1: Rule Name

Label

ScheduleMeSharing

Rule Name

ScheduleMeSharing

Description

Step 2: Select your rule type

Rule Type

☐ Based on record owner
 ☐ Based on criteria
 ☒ Guest user access, based on criteria

Step 3: Select which records to be shared


 This sharing rule grants access to guest users without login credentials. By modifying the default set matching these criteria to anyone accessing the site, even without logging in. To secure your site and that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data.

Criteria

Field	Operator	Value	
Visible	equals	True	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...

Additional Options

☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with

ScheduleMe Site Guest User

Step 5: Select the level of access for the users

Access Level

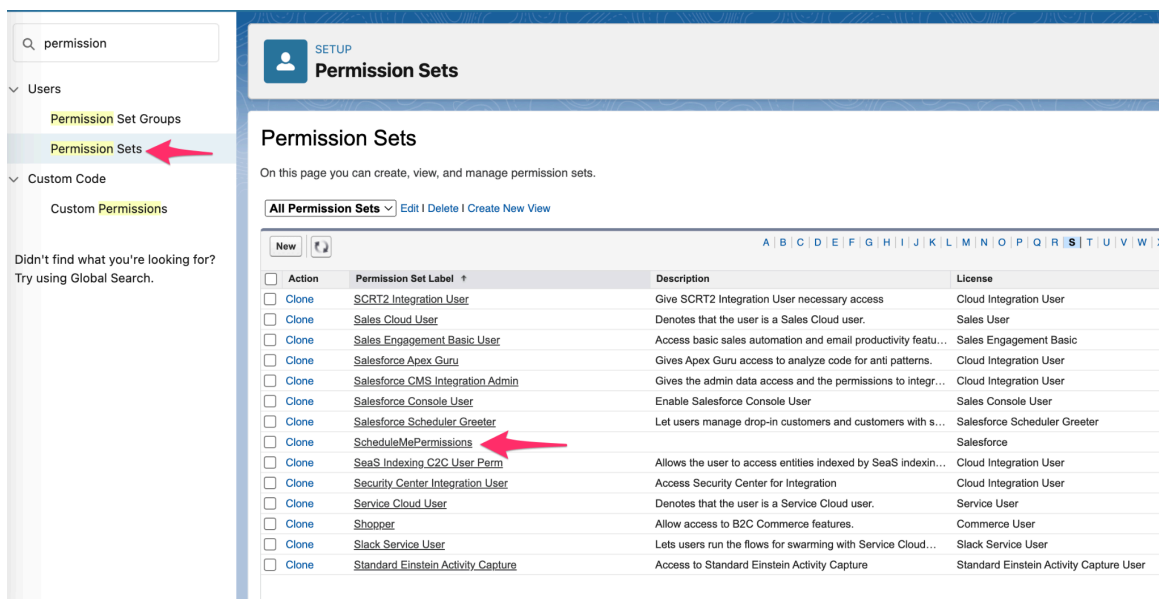
Read Only

Save

Cancel

Apply application permission set

Navigate to Setup => "Permission Sets" and click on the permission set "ScheduleMePermissions".
 Apply to all users who will use the application



Q permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

SETUP

Permission Sets

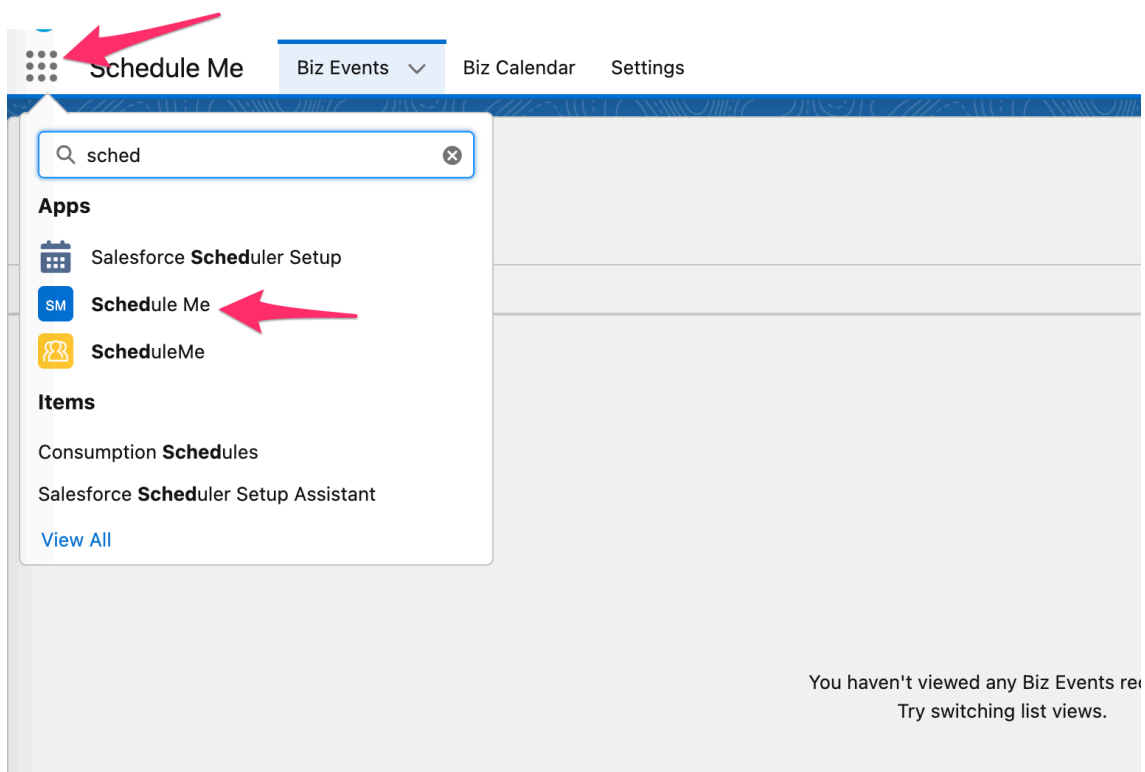
On this page you can create, view, and manage permission sets.

All Permission Sets Edit Delete Create New View

New

Action	Permission Set Label	Description	License
Clone	SCRT2 Integration User	Give SCRT2 Integration User necessary access	Cloud Integration User
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
Clone	Sales Engagement Basic User	Access basic sales automation and email productivity featu...	Sales Engagement Basic
Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns.	Cloud Integration User
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integr...	Cloud Integration User
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Salesforce Scheduler Greeter	Let users manage drop-in customers and customers with s...	Salesforce Scheduler Greeter
Clone	ScheduleMePermissions		Salesforce
Clone	SeaS Indexing C2C User Perm	Allows the user to access entities indexed by SeaS indexin...	Cloud Integration User
Clone	Security Center Integration User	Access Security Center for Integration	Cloud Integration User
Clone	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
Clone	Shopper	Allow access to B2C Commerce features.	Commerce User
Clone	Slack Service User	Lets users run the flows for swarming with Service Cloud...	Slack Service User
Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

Open Schedule Me application from application launcher



Schedule Me Biz Events Biz Calendar Settings

Q sched

Apps

- Salesforce Scheduler Setup
- Schedule Me**
- ScheduleMe

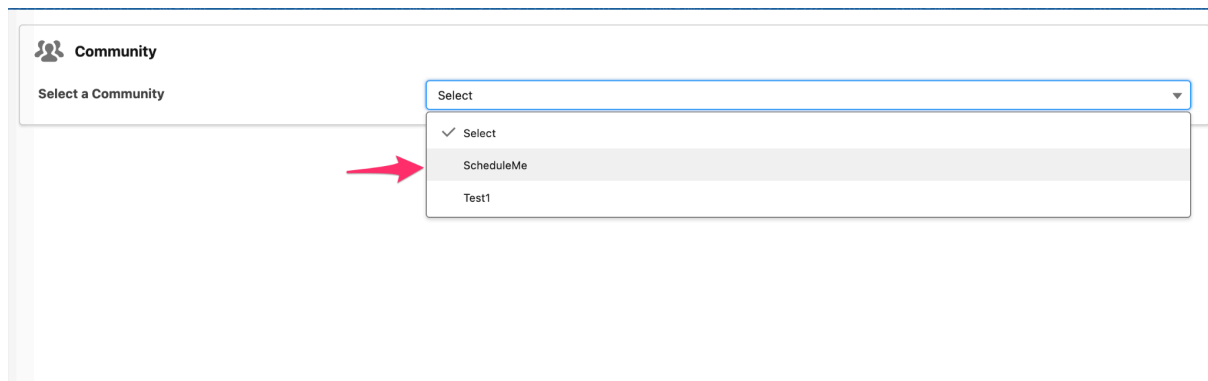
Items

- Consumption Schedules
- Salesforce Scheduler Setup Assistant
- [View All](#)

You haven't viewed any Biz Events re
Try switching list views.

Set the Community name in the application

Navigate to the “Settings” tab and select the community “ScheduleMe”



Generate your calendar url

Navigate to the “Biz Calendar” tab and click on the button “Click to Generate Your Calendar Url”.

