

Appointment Easy Installation Guide

Version 1





Thank you for choosing Appointment Easy with YesLocal Digital!

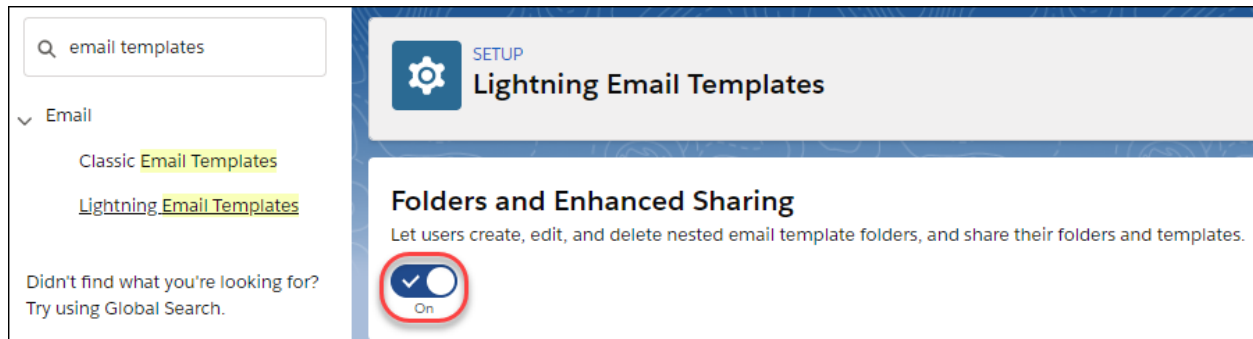
The Appointment Easy application is a calendar publishing and self-service appointment booking solution. It empowers app users to effortlessly publish their calendars online through Salesforce Experience Cloud. This enables end customers to conveniently book appointments at their own convenience, anytime and anywhere, as long as they have an internet connection. Additionally, the application provides the capability to set up appointment reminders and establish rules for appointment changes and cancellations, enhancing overall usability. Importantly, all data processing occurs entirely within the Salesforce platform.

The app is compatible with the following editions: Enterprise, Performance, Unlimited, Developer Editions, and select industry clouds, as it requires Salesforce Experience Cloud to function seamlessly.

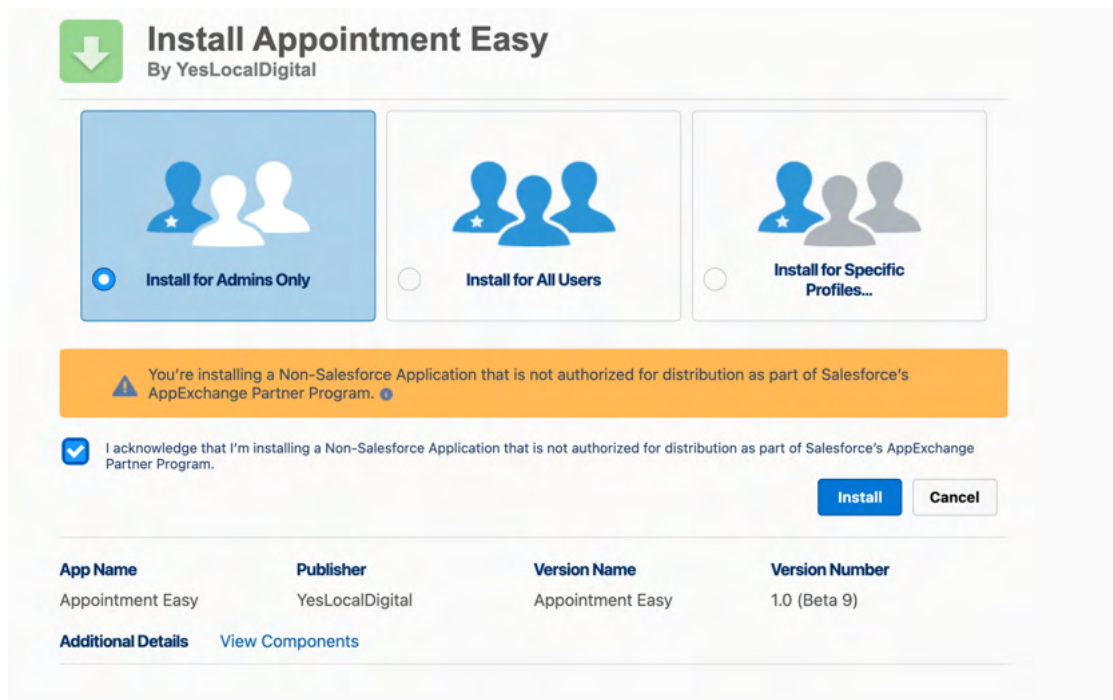
Installation Step

Here are the installation steps. Please note that Salesforce administrator access is required to complete the following steps:

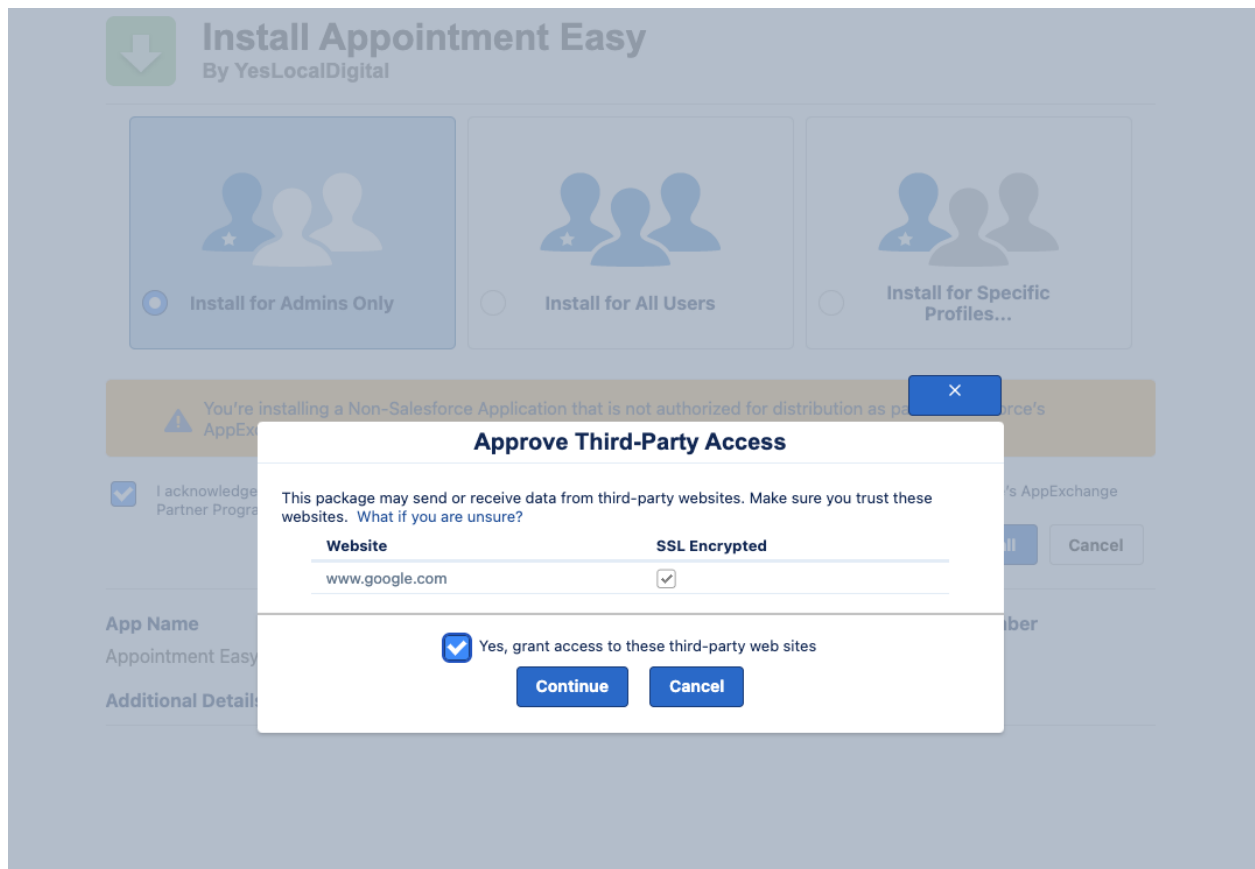
1. Enable **Folders and Enhanced Sharing** for Email Templates if you haven't. From Setup, enter 'Email Templates' in the Quick Find box, then select '**Lightning Email Templates**'. Ensure that Folders and Enhanced Sharing are enabled by clicking on the respective buttons.



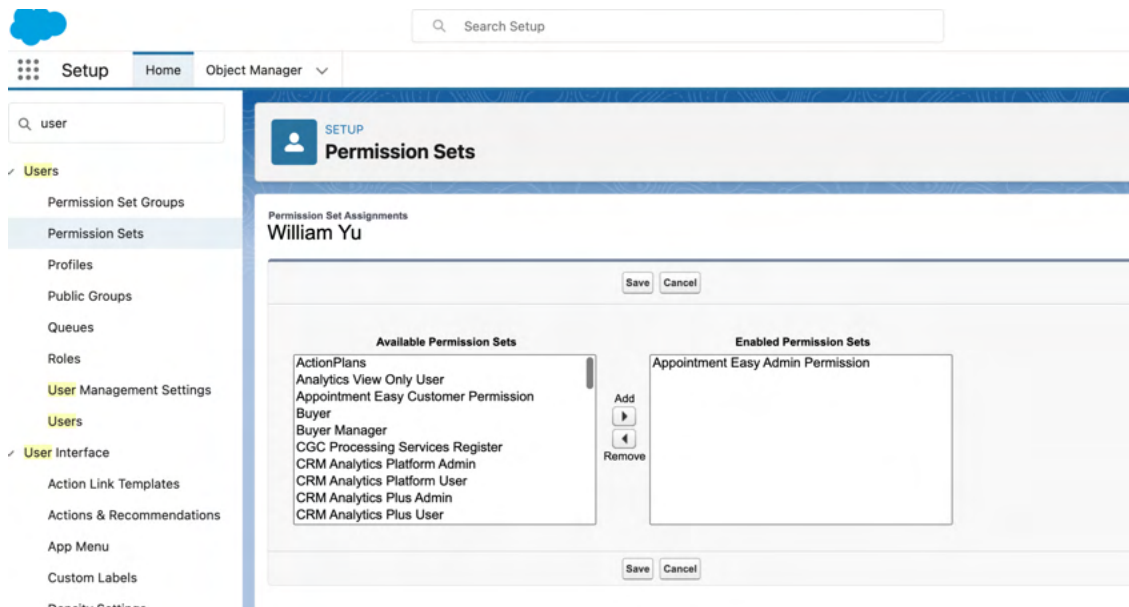
2. Install the AppointmentEasy package.



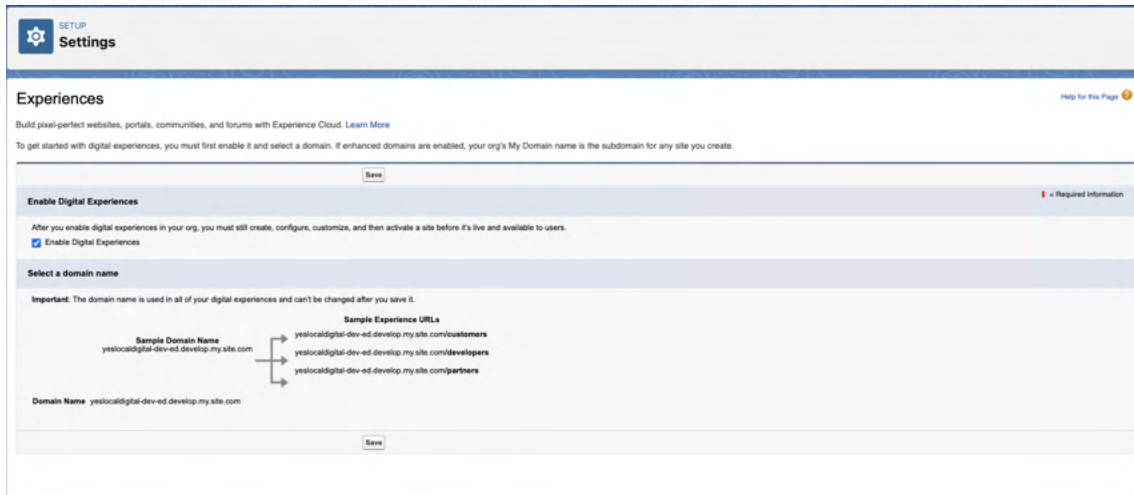
You will encounter a popup screen similar to the one shown below, this is for Google Recaptcha, Please tick '**Yes**' and continue the installation.



3. From Setup -> Users -> Admin User -> Permission Set Assignment, add **'Appointment Easy Admin Permission'** to the admin user.



4. Go to Setup->Digital Experiences->Settings to **Enable Digital Experience** if you haven't.



Settings

Experiences

Build pixel-perfect websites, portals, communities, and forums with Experience Cloud. [Learn More](#)

To get started with digital experiences, you must first enable it and select a domain. If enhanced domains are enabled, your org's My Domain name is the subdomain for any site you create.

[Save](#)

Enable Digital Experiences ! Required Information

After you enable digital experiences in your org, you must still create, configure, customize, and then activate a site before it's live and available to users.

☒ Enable Digital Experiences

Select a domain name

Important: The domain name is used in all of your digital experiences and can't be changed after you save it.

Sample Domain Name
yeslocaldigital-dev-ed.develop.my.site.com

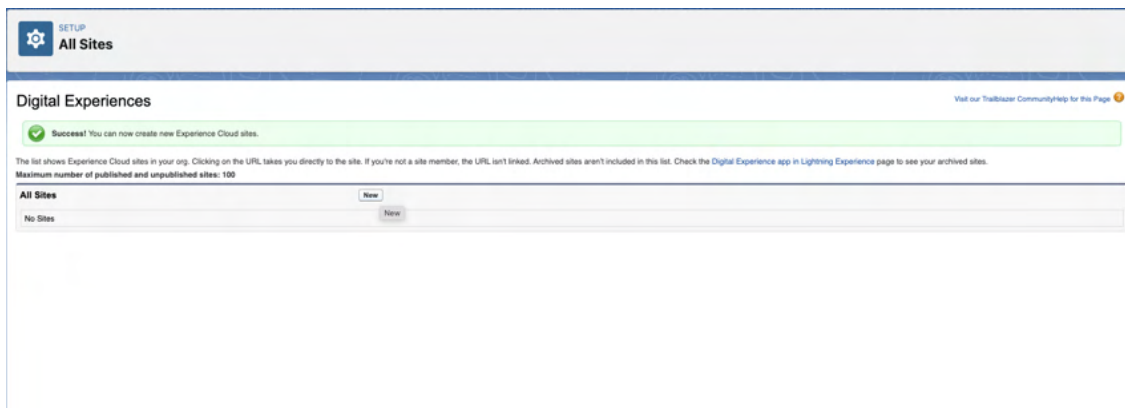
Sample Experience URLs

- yeslocaldigital-dev-ed.develop.my.site.com/customers
- yeslocaldigital-dev-ed.develop.my.site.com/developers
- yeslocaldigital-dev-ed.develop.my.site.com/partners

Domain Name yeslocaldigital-dev-ed.develop.my.site.com

[Save](#)

5. Create a new digital experience site



SETUP All Sites

Digital Experiences

[Visit our Trailblazer CommunityHelp for this Page](#)

 **Success!** You can now create new Experience Cloud sites.

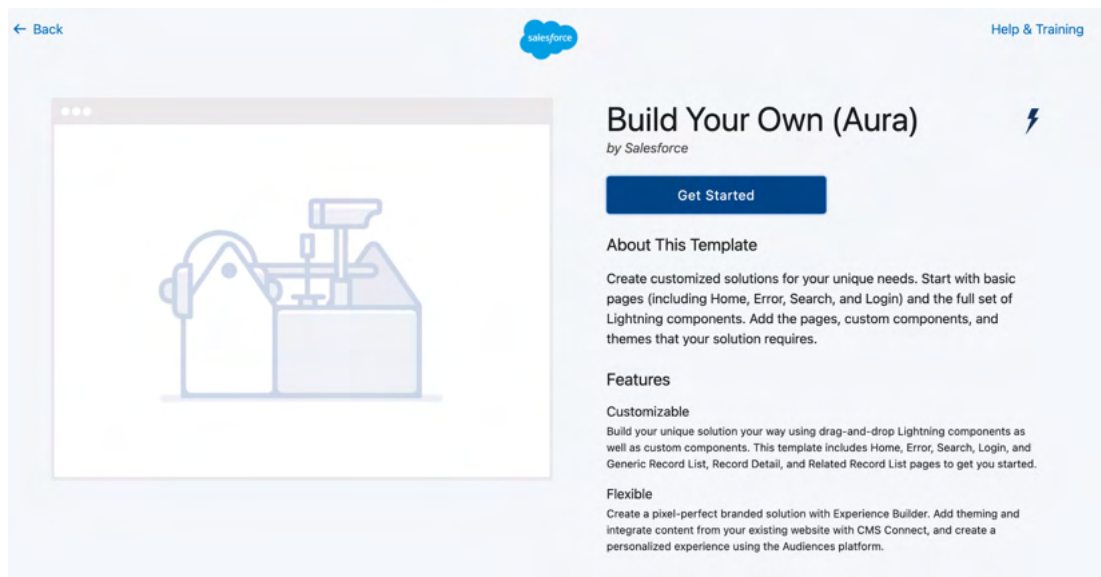
The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the Digital Experience app in Lightning Experience page to see your archived sites.

Maximum number of published and unpublished sites: 100

All Sites [New](#)

No Sites [New](#)

6. Choose the 'Build Your Own(Aura)' template.



Enter a name, for example, AppointmentEasy, and then click the **Create** button.



7. In Experience Cloud Builder, add a new standard page -> New Blank Page-> Flexible Layout called '**event-booking**'

Please follow these steps:

- Access the Experience Cloud Builder, locate the option to add a new standard page, and select "New Blank Page."
- Choose the flexible layout option, and assign the name 'event-booking' to the page.
- Save the changes to create the new standard page with the 'event-booking' name and flexible layout. This allows you to customize and design the page according to your specific needs for event booking functionality.

New Page

Give your page a name and a URL.

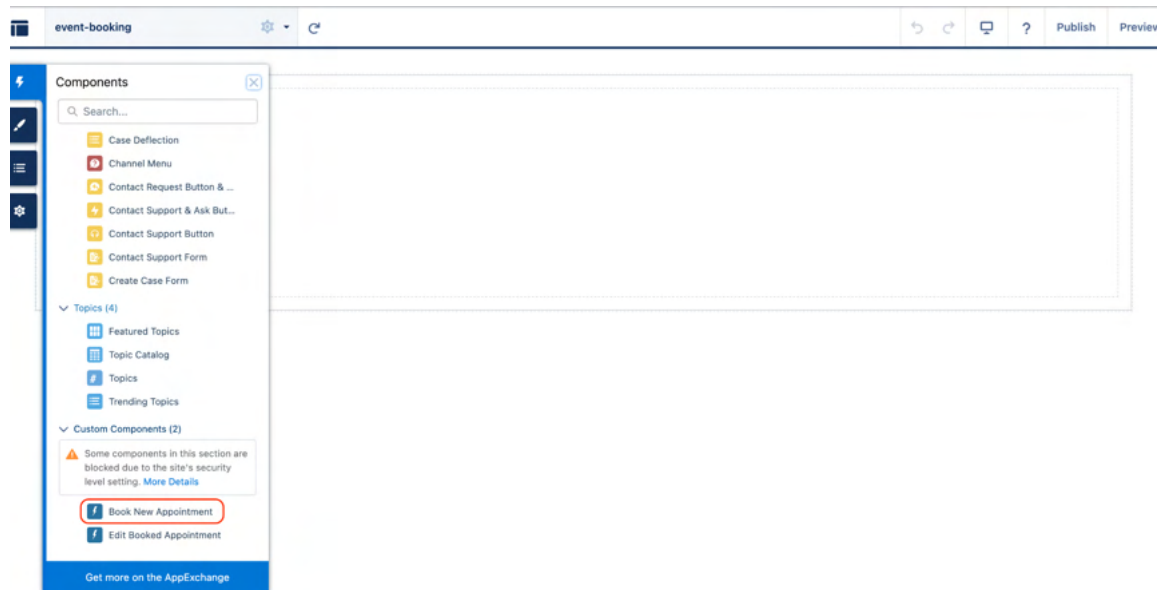
* Name

* URL

API Name ⓘ

[← Back](#)[Create](#)

Add 'Book New Appointment' custom component to event-booking page.



8. In Experience Cloud Builder, add a second new standard page -> New Blank Page -> Flexible Layout called '**edit-appointment**'

New Page

Give your page a name and a URL.

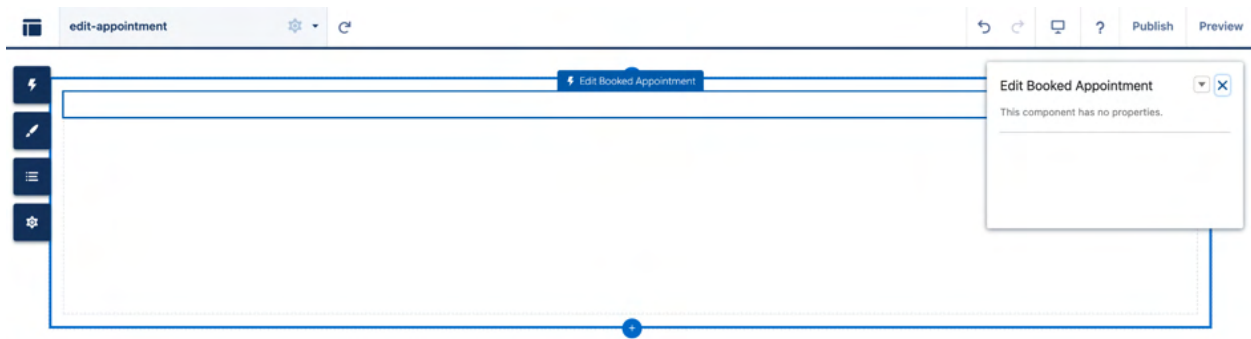
* Name

* URL

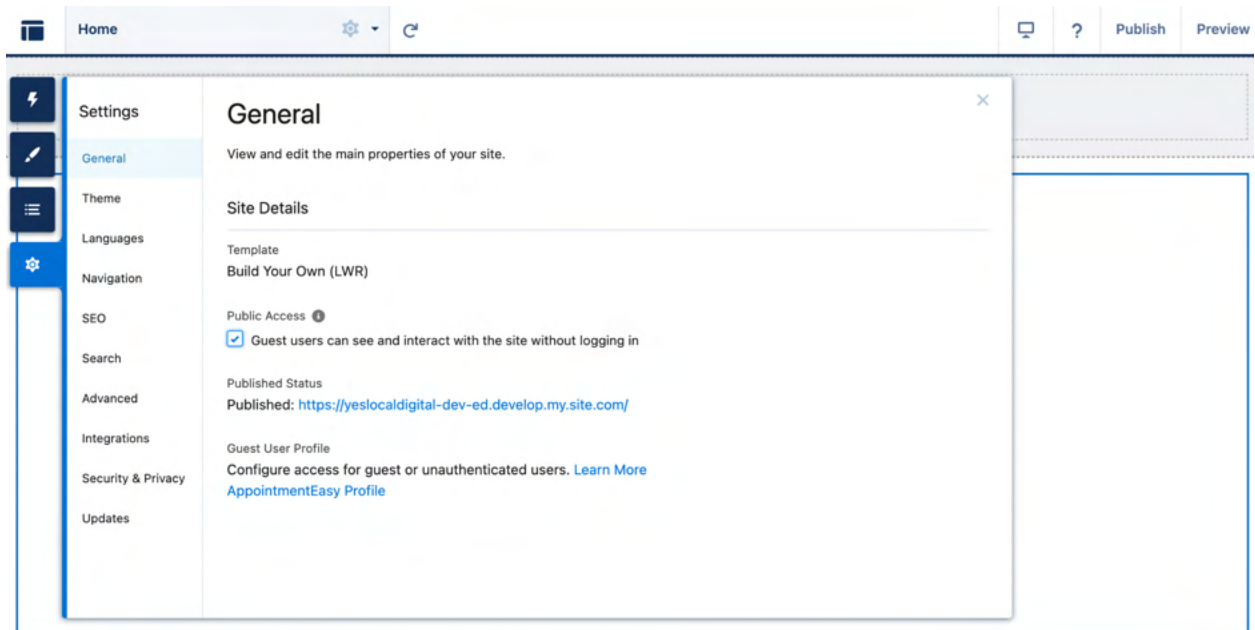
API Name ⓘ

[← Back](#)[Create](#)

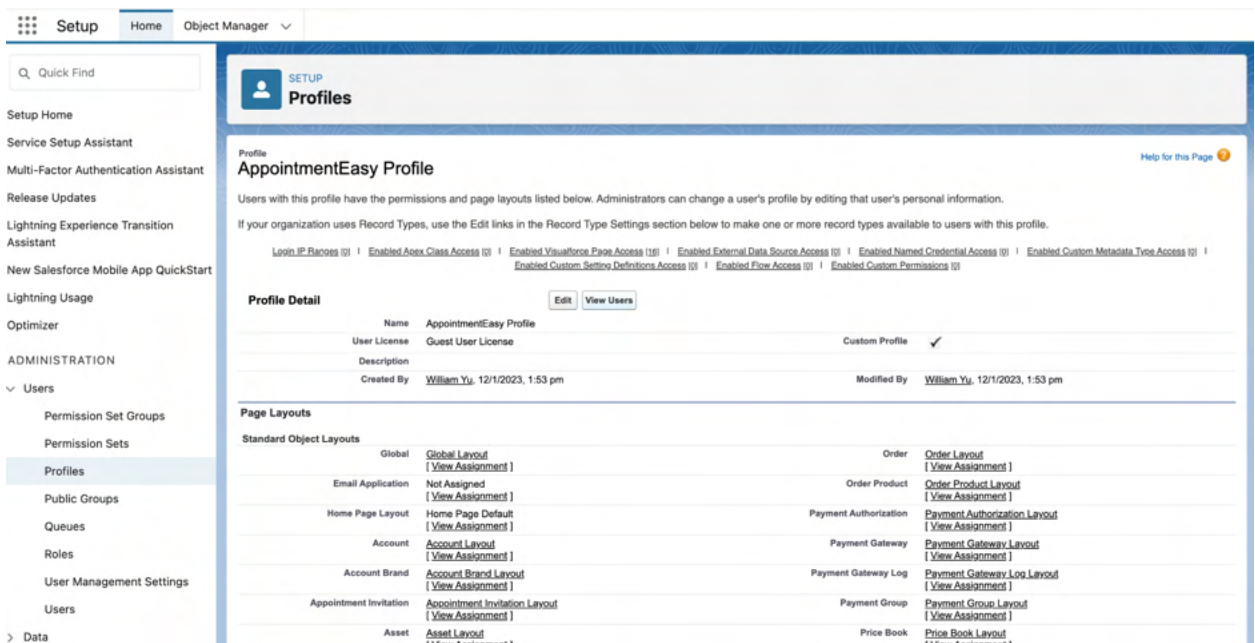
Add 'Edit Booked Appointment' custom component to the edit-appointment page.



Go to Settings-> General, Public Access, enable '**Guest users can see and interact with the site without logging in**'.



9. Edit guest profile by clicking the Guest User profile link, for example, **'AppointmentEasy Profile'** link in Settings General tab. Then click the 'View Users' button.



Click Edit link to the 'guest user' as shown:

SETUP Profiles

AppointmentEasy Profile

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Site Guest User AppointmentEasy	guest	appointmenteasy@00d2w00000ku8roeaz.org.force.com		✓	AppointmentEasy Profile

Edit - Record 1 - Site Guest User, AppointmentEasy

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

10. Make sure the **Time Zone** of the guest user reflects the current location.

SETUP Users

User Edit appointmenteasy Site Guest User

Save Cancel

General Information

First Name: YesLocal
 Last Name: Admin
 Alias: guest
 Email: contact@yeslocaldigital.
 Username: YesLocal Admin
 Nickname: appointmenteasy
 Division:

User License: Guest License
 Profile: appointmenteasy Profile
 Active: ☒
 Marketing User: ☐
 Salesforce CRM Content User: ☐
 Email Encoding: Unicode (UTF-8)
 Individual:

Single Sign On Information

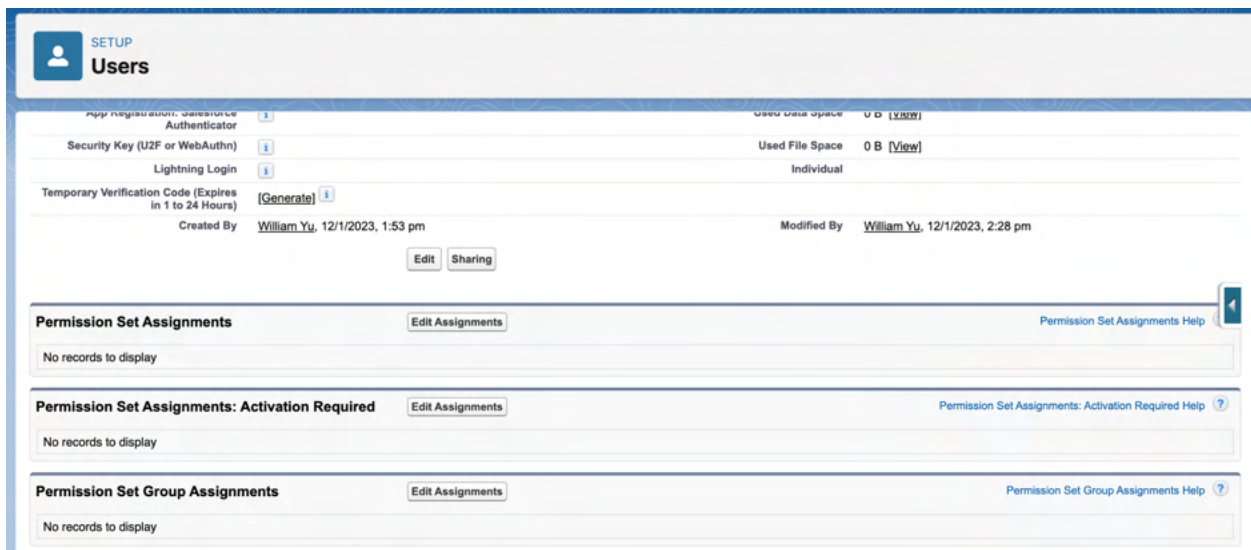
Federation ID:

Locale Settings

Time Zone: (GMT+10:00) Australian Eastern Standard Time (Australia/Sydney)
 Locale: English (Australia)
 Language: English

Save Cancel

11. Edit 'Permission Set Assignment'.



SETUP Users

App Registration, Resource Authenticator
Security Key (U2F or WebAuthn)
Lightning Login
Temporary Verification Code (Expires in 1 to 24 Hours) [Generate]

Used File Space 0 B [View]
Individual

Created By William Yu, 12/1/2023, 1:53 pm
Modified By William Yu, 12/1/2023, 2:28 pm

Edit Sharing

Permission Set Assignments Edit Assignments Permission Set Assignments Help

No records to display

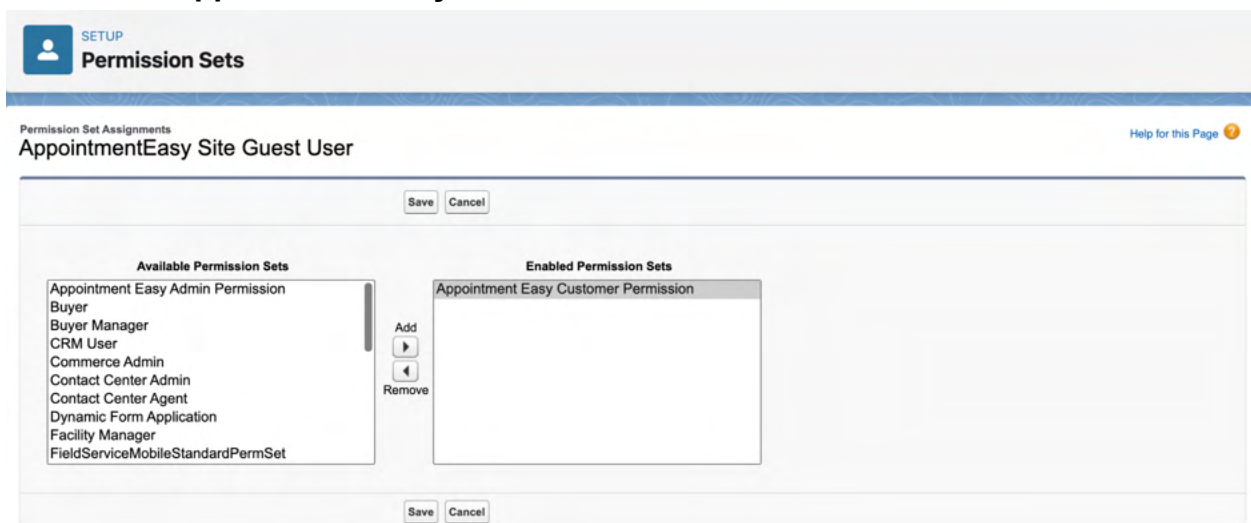
Permission Set Assignments: Activation Required Edit Assignments Permission Set Assignments: Activation Required Help

No records to display

Permission Set Group Assignments Edit Assignments Permission Set Group Assignments Help

No records to display

Add 'Appointment Easy Customer Permission' to the user, click 'Save'.



SETUP Permission Sets

Permission Set Assignments AppointmentEasy Site Guest User Help for this Page

Save Cancel

Available Permission Sets

- Appointment Easy Admin Permission
- Buyer
- Buyer Manager
- CRM User
- Commerce Admin
- Contact Center Admin
- Contact Center Agent
- Dynamic Form Application
- Facility Manager
- FieldServiceMobileStandardPermSet

Add Remove

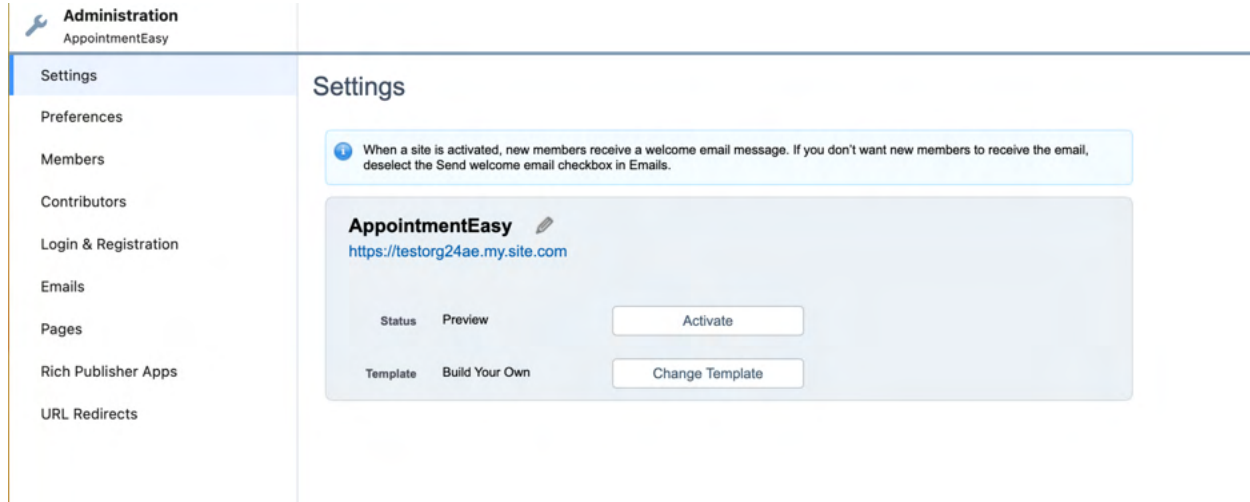
Enabled Permission Sets

- Appointment Easy Customer Permission

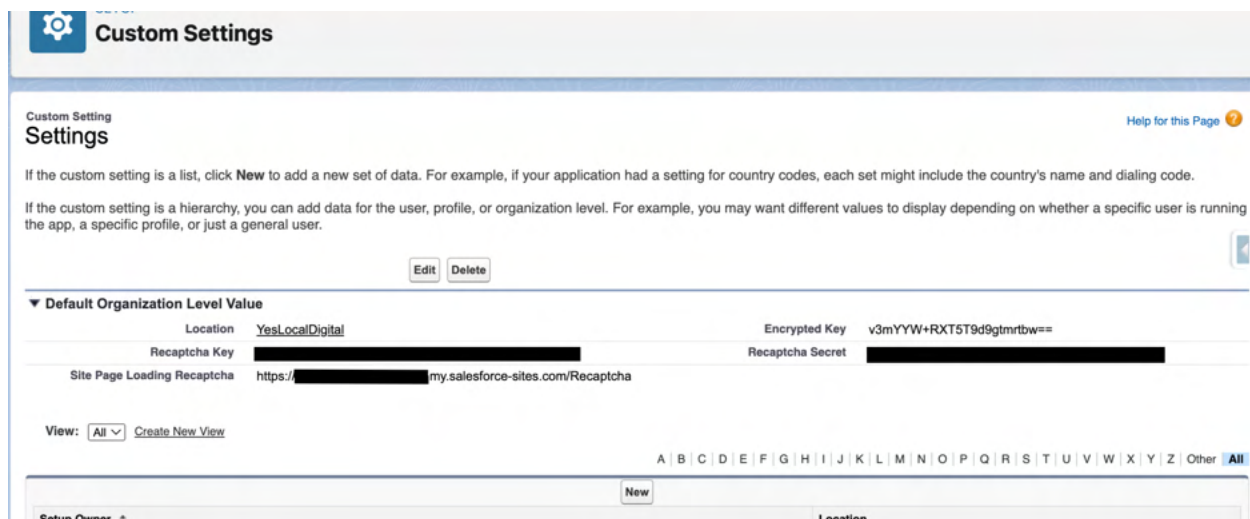
Save Cancel

12. Go back to Experience Cloud Builder, **publish** the new site.

13. In Experience Cloud Administration, Settings -> **Activate** the new site.



14. Add Encrypted Key. From Setup -> Custom Settings -> **Settings**, Click Manage link next to Settings. Click Edit button and configure a 24 bytes length Key on **Encrypted Key**, for example: v3mYYW+RXT5T9d9gtmrtdw==. This is for the protected reschedule link that is sent to the customer.



15. Setup sharing rules. From Setup, enter Sharing Settings in the Quick Find box, then select Sharing Settings. Scroll to the bottom of the page. Click New button on related section '**Appointment Sharing Rules**' and added the following rule:

Click New button on related section '**Appointment Calendar Sharing Rules**' and added the following rule:

12

16. For email notifications, it is recommended to use **OrgWideAddress** or **Default Workflow User** to avoid mail blocked as **From Email Address**. If you want to set your 'Organization-Wide Addresses' as your sender, please add a new Org wide email address. 'Allow All Profiles to Use this From Address' should be checked. It will ask the user to verify the email using a link (otherwise email cannot be sent).


SETUP
Organization-Wide Addresses

Edit Organization-Wide Email Addresses

An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address.

Save
Save and New
Cancel

Organization-Wide Email Address

Display Name: YesLocal
Email Address: contact@yeslocaldigital.com.au
Purpose: User Selection and Default No-Reply Address
☒ Allow All Profiles to Use this From Address
☐ Allow Only Selected Profiles to Use the From Address
Profiles: System Administrator, Analytics Cloud Integration User, Analytics Cloud Security User, External Apps Login User, Minimum Access - Salesforce, Standard Platform User, Customer Community Login User, Cross Org Data Proxy User, Authenticated Website, Work.com Only User

Save
Save and New
Cancel


Search Setup

Setup
Home
Object Manager

Search: org

Email
Organization-Wide Addresses
Development
Org Shape

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


SETUP
Organization-Wide Addresses

Organization-Wide Email Addresses

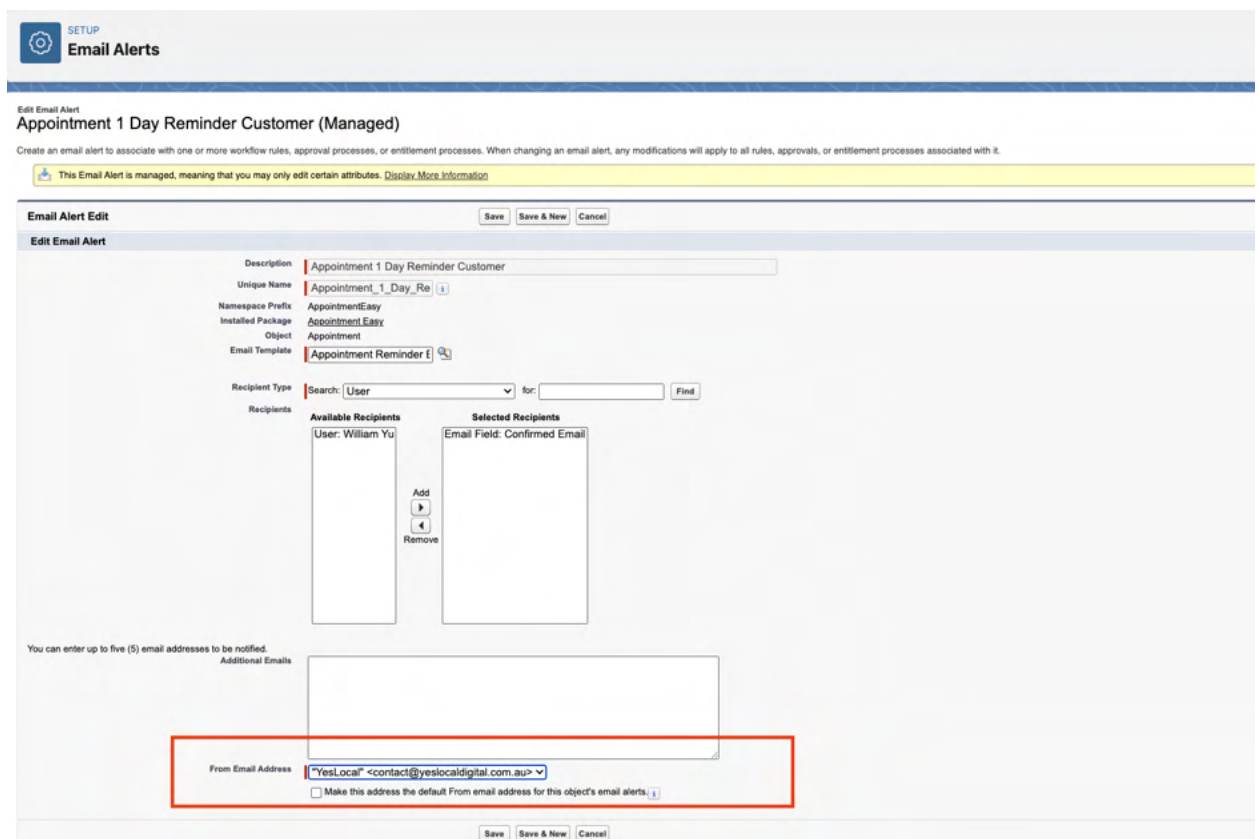
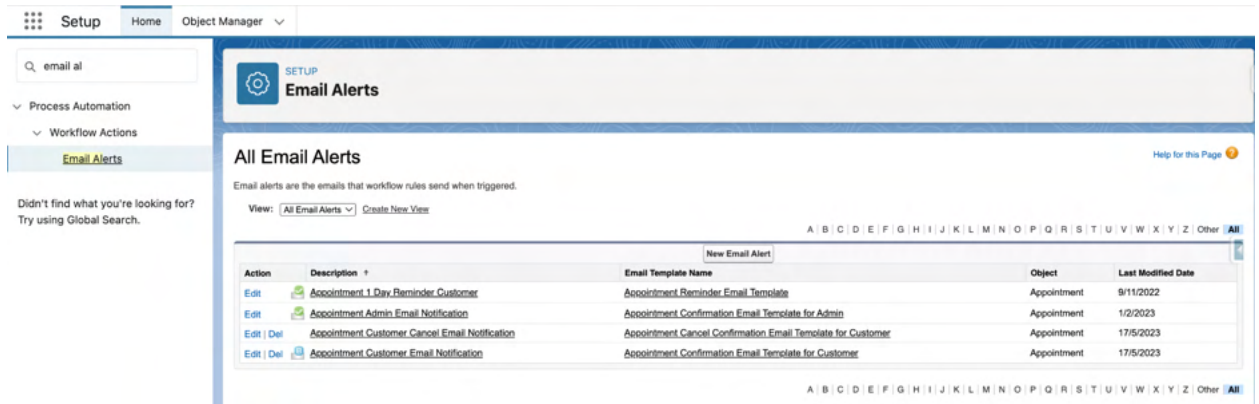
An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored address.

Organization-Wide Email Addresses for User Selection and Default No-Reply Use
Add
Previous Page
Next Page

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date	Purpose
Edit Del	YesLocal	contact@yeslocaldigital.com.au	All Profiles	Verified	14/12/2022	User Selection and Default No-Reply Address

Previous Page
Next Page

17. Go to Settings-> **Email Alerts** to setup **EmailFromAddress** and/or use a custom email template. It is recommended to use OrgWideAddress or Default Workflow User to avoid mail blocked. Please replace all 4 emails templates Email From Addresses so email notifications can be sent properly.



18. The customer will receive the email notification from the highlighted address.



Email Alert

Appointment Customer Email Notification (Managed)

[Help for](#)

This Email Alert is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Rules Using This Email Alert \(0\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)

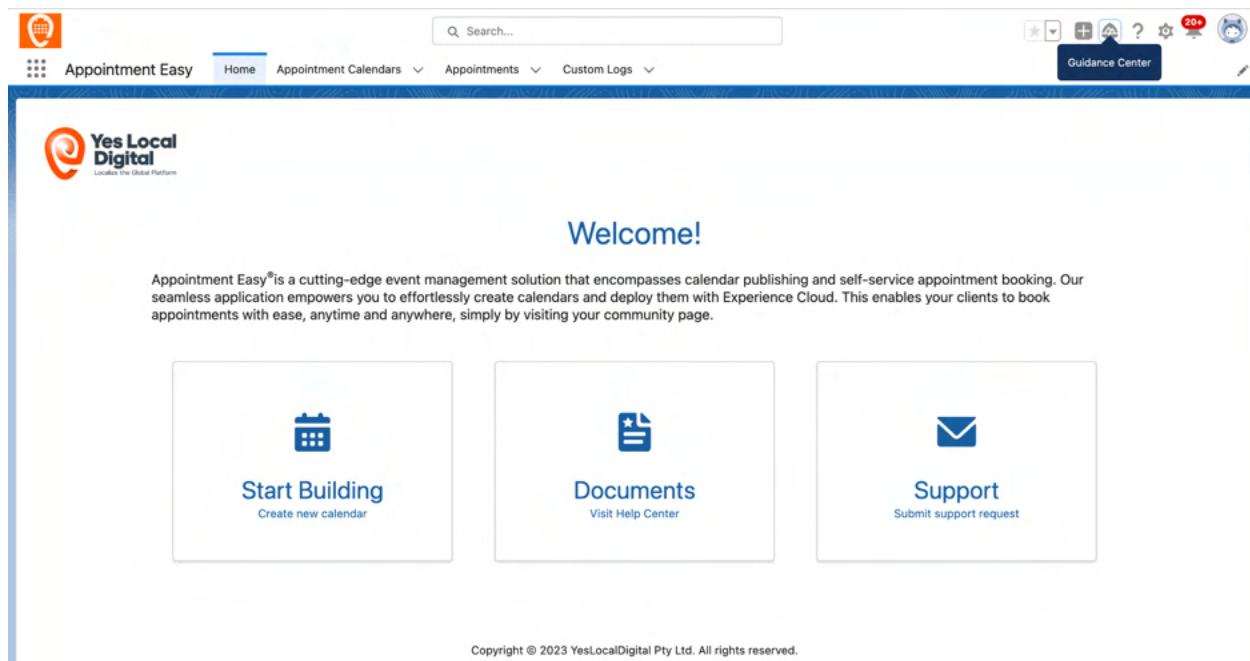
Email Alert Detail

[Edit](#) [Clone](#)

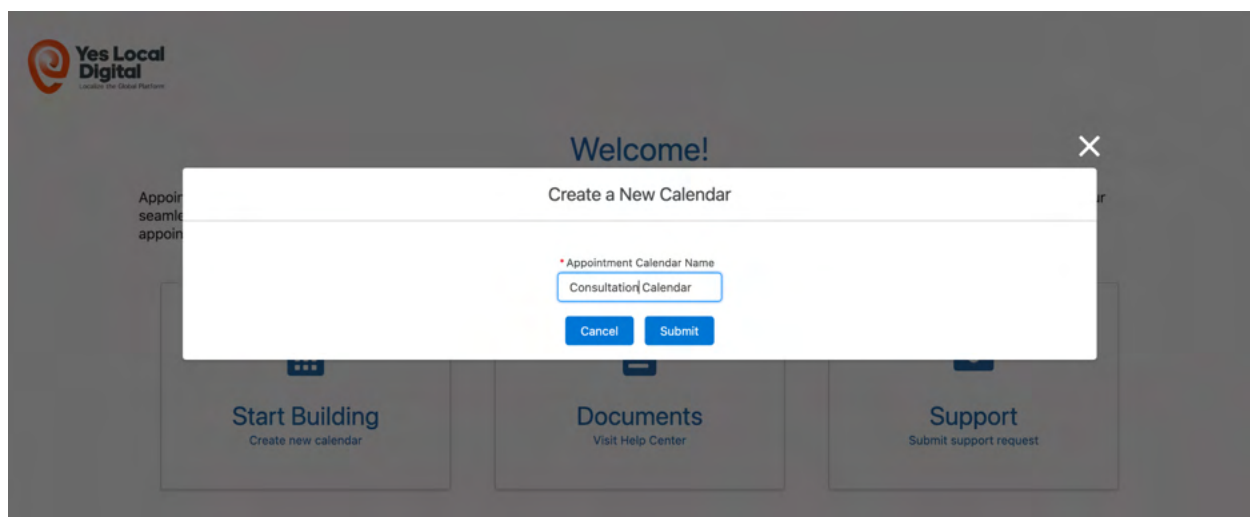
Description	Appointment Customer Email Notification	Email Template	Appointment Confirmation Email Template for Customer
Unique Name	Appointment_Customer_Email_Notification	Object	Appointment
Namespace Prefix	AppointmentEasy		
Installed Package	Appointment Easy		
From Email Address	"YesLocalOrg" <appointment@yeslocal.org>		
Recipients	Email Field: Confirmed Email		
Additional Emails			

Calendar Creation Step

19. From App launcher, change to Appointment Easy app and click '**Start Building**' icon to create a new calendar



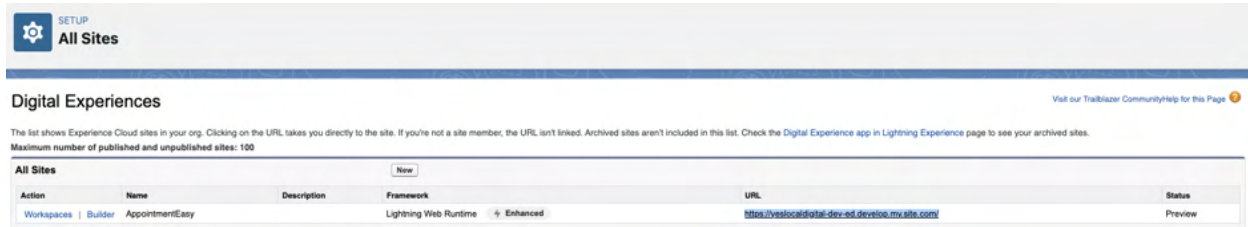
Add a calendar name, click Submit.



Congratulations on creating your first calendar! . Click Navigate button to configure the calendar 'Publish Settings'. You can always edit the settings by clicking the "Publish Setting" button on the Appointment Calendar Record detail page.

20. Fill in Calendar publish setting details:

Base URL is the new site URL. You can copy it from Setup -> Digital Experiences -> All Sites -> Your AppointmentEasy **site URL**:



SETUP All Sites

Digital Experiences [Visit our Trailblazer Community help for this Page](#)

The list shows Experience Cloud sites in your org. Clicking on the URL takes you directly to the site. If you're not a site member, the URL isn't linked. Archived sites aren't included in this list. Check the [Digital Experience app in Lightning Experience](#) page to see your archived sites.

Maximum number of published and unpublished sites: 100

All Sites [New](#)

Action	Name	Description	Framework	URL	Status
Workspaces Builder	AppointmentEasy		Lightning Web Runtime Enhanced	https://yeslocaldigital-dev-ed.devtso.my.site.com	Preview

If you follow this guide, the default page name for booking is: **event-booking**

The default gage name for rescheduling is: **edit-appointment**.

You can add additional description/instruction as well.

Calendar Name: Consultant Calendar

* BASE URL FOR RESCHEDULE SITE (e.g., `https://{community domain}.{ap**}.force.com/{site name}`)

`https://testorg26ae.my.site.com/`

* PAGE NAME FOR BOOKING A NEW APPOINTMENT * PAGE NAME FOR RESCHEDULING AN EXISTING APPOINTMENT

`event-booking` `edit-appointment`

DESCRIPTION/INSTRUCTION

Salesforce Sans ▼ 12 ▼ ■ ▼ B I U                

Add description/instruction for clients...

✓ [CUSTOMIZED SETTINGS](#)

SELECTED FIELDSET FOR CUSTOMER BOOKING PAGE

Default (AppointmentEasy__Default) ▼

INPUT FIELDS DISPLAYED

First Name
 * Last Name
 Mobile
 * Confirmed Email
 Note

APPOINTMENT ACTIVE MESSAGE

Salesforce Sans ▼ 12 ▼ ■ ▼ B I U                

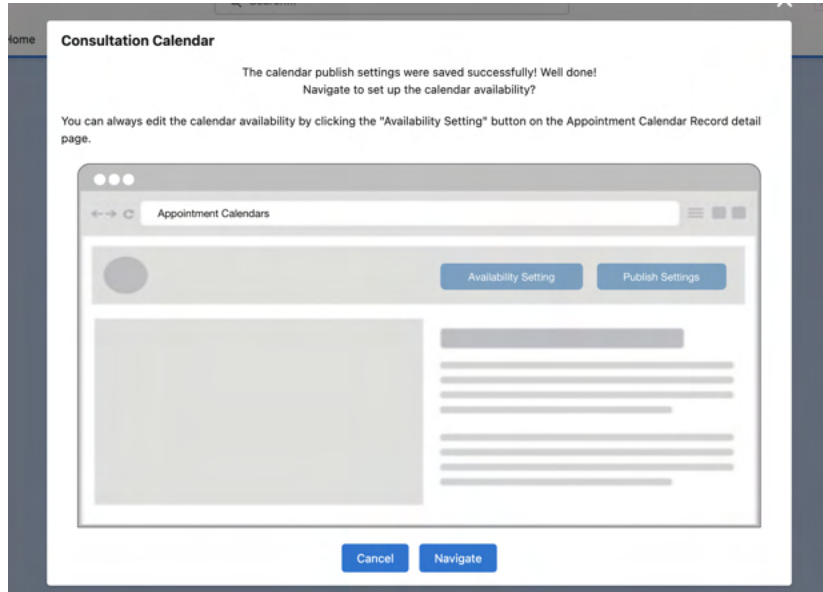
Dear {{name}},

Your appointment is currently confirmed and active. If you need to make any changes, you have two options available. To cancel your appointment, simply click on the 'Cancel Appointment' button. Alternatively, if you would like to reschedule, click on the 'Reschedule' button.

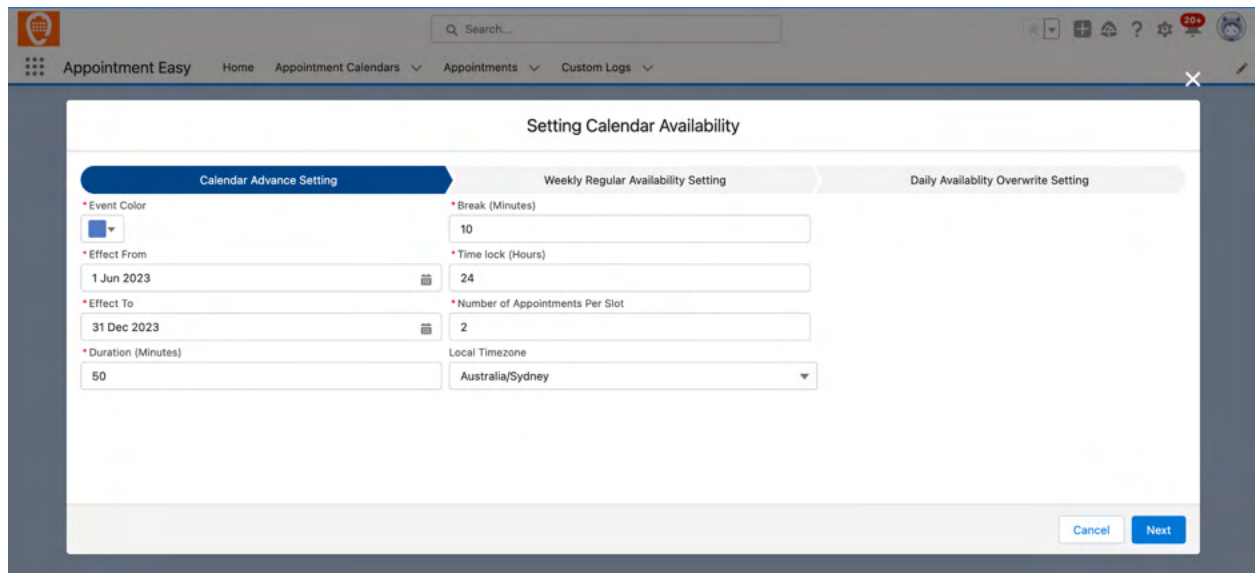
Cancel
Save

21. Click save and Navigate to the '**Availability Settings**' Overall settings. You can always edit the calendar availability by clicking the '**Availability Setting**' button on the

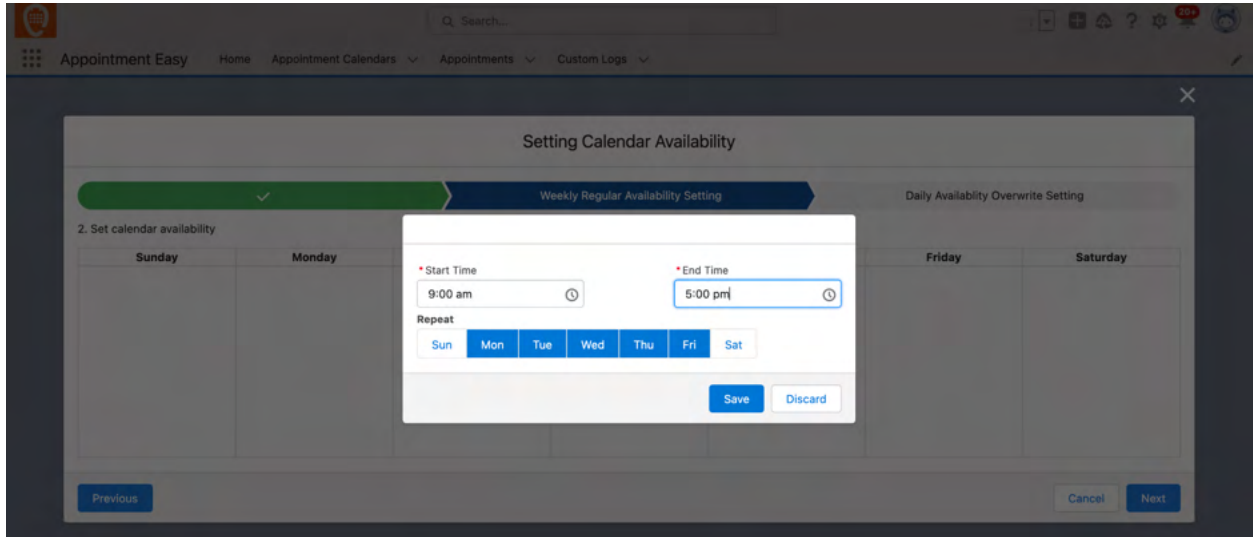
Appointment Calendar Record detail page.



22. Setup Calendar Availability: Calendar general setup:



Setup weekly availability:



Setting Calendar Availability

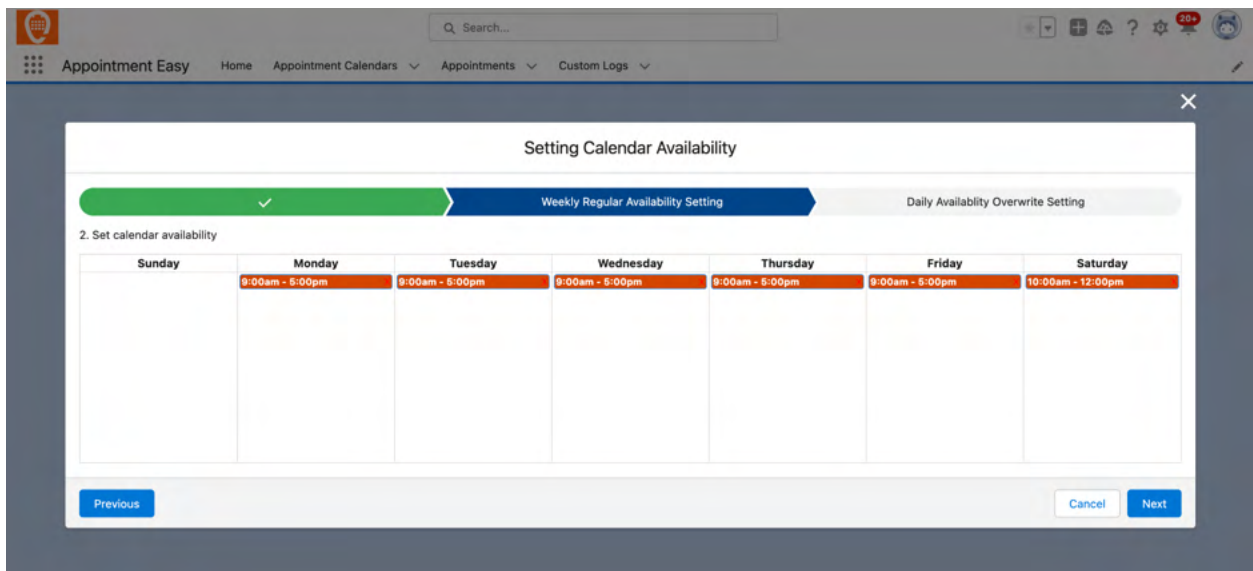
2. Set calendar availability

Start Time: 9:00 am

End Time: 5:00 pm

Repeat: Sun, Mon, Tue, Wed, Thu, Fri, Sat

Save Discard



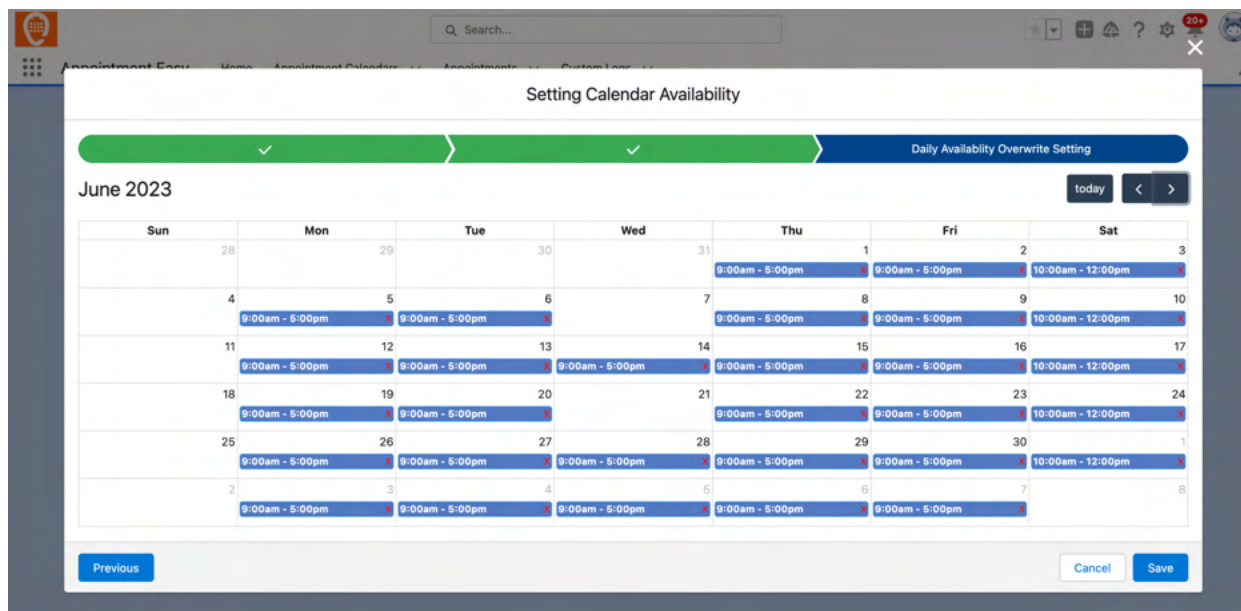
Setting Calendar Availability

2. Set calendar availability

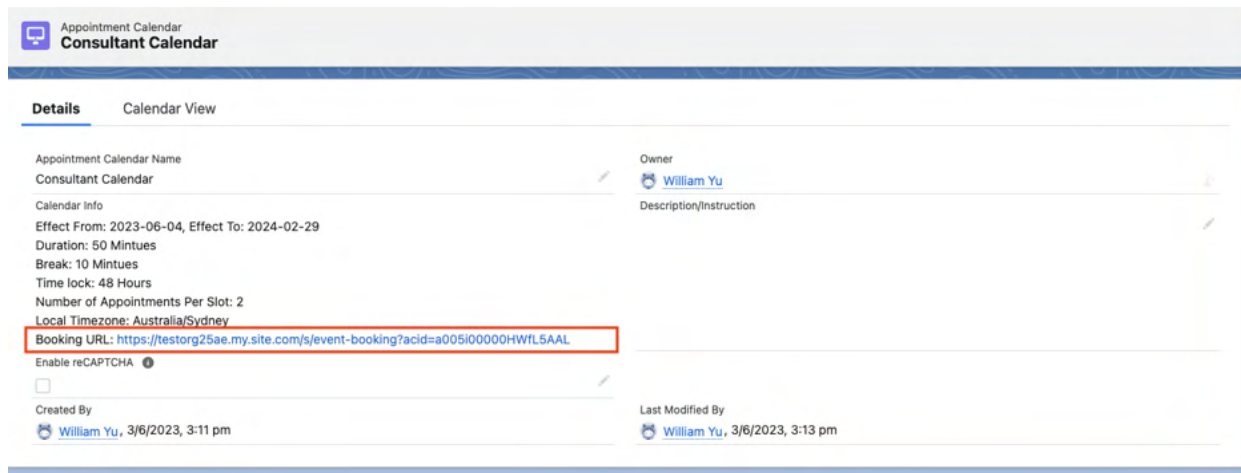
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	9:00am - 5:00pm	9:00am - 5:00pm	9:00am - 5:00pm	9:00am - 5:00pm	9:00am - 5:00pm	10:00am - 12:00pm

Previous Cancel Next

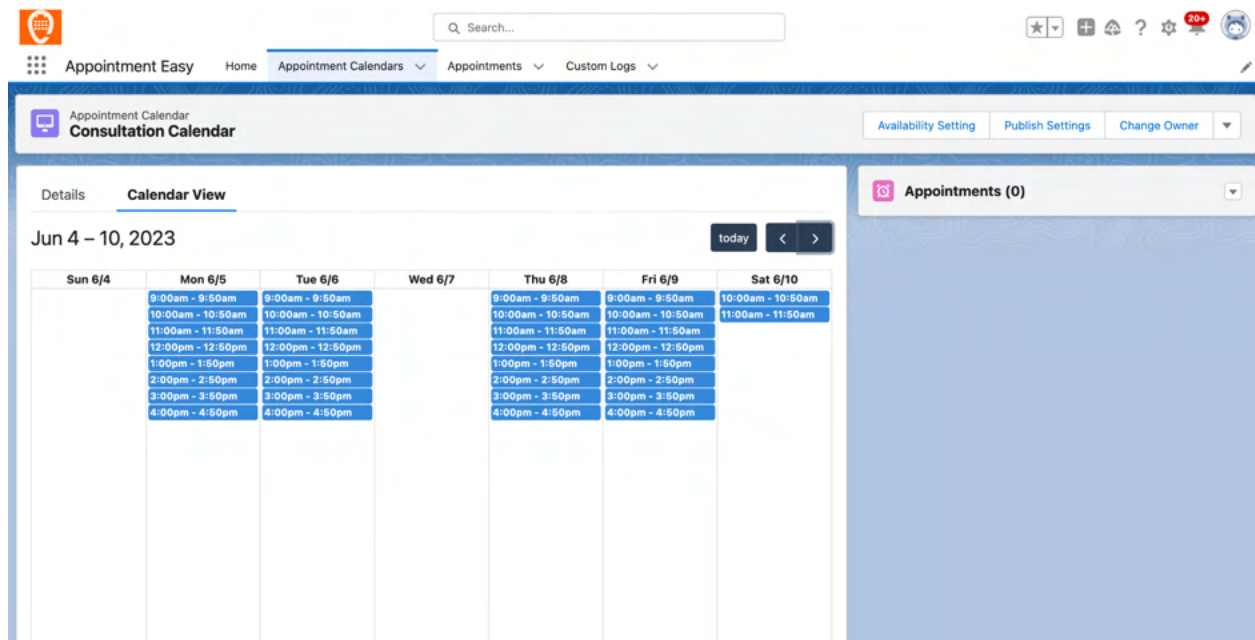
Setup any optional daily availability overwrite and Save.



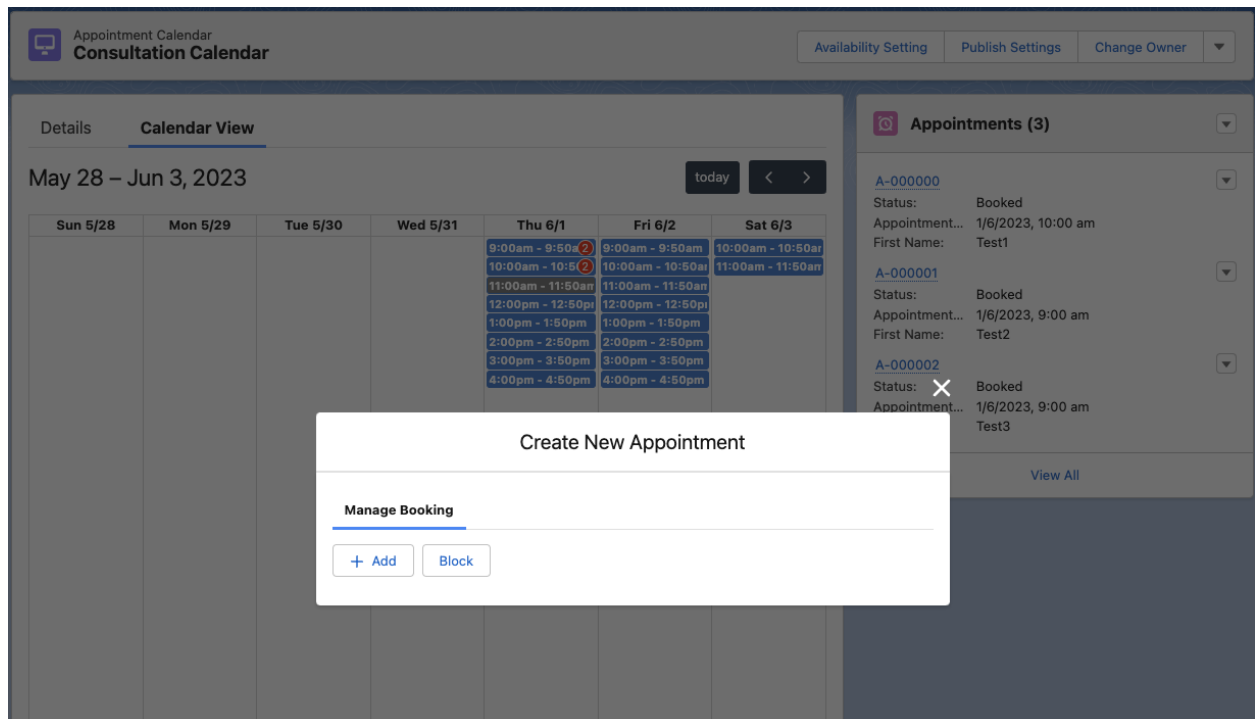
23. Congratulations! Your calendar is now ready online for booking! You can get the calendar booking URL from the Calendar details page. You can change the calendar availability settings and publish settings by clicking the buttons on top.



24. For admin users, you can manage the calendar and its appointments by clicking the individual slot from '**Calendar View**' subtab:



Admin user can add manual booking, block the available slot or cancel existing booking manually.



Appointment Calendar

Consultation Calendar

Availability SettingPublish SettingsChange Owner

DetailsCalendar View

May 28 – Jun 3, 2023

today<>

Sun 5/28	Mon 5/29	Tue 5/30	Wed 5/31	Thu 6/1	Fri 6/2	Sat 6/3
				9:00am - 9:50am (2)	9:00am - 9:50am	10:00am - 10:50am
				10:00am - 10:50am (2)	10:00am - 10:50am	11:00am - 11:50am
				11:00am - 11:50am	11:00am - 11:50am	

Appointments (3)

A-000000

Status: Booked

Appointment... 1/6/2023, 10:00 am

First Name: Test1

A-000000

Status: Booked

1/6/2023, 9:00 am

Test2

...

Status: Booked

1/6/2023, 9:00 am

Test3

View All

Create New Appointment

Manage Booking

Name: Test4 Yu

Appointment From: 01/06/2023, 10:00 am

Appointment To: 01/06/2023, 10:50 am

Email: william.yu17+111@gmail.com

Phone: 04311

Cancel

Name: Test1 WY

Appointment From: 01/06/2023, 10:00 am

Appointment To: 01/06/2023, 10:50 am

Email: william.yu17@gmail.com

Phone: 043

Cancel

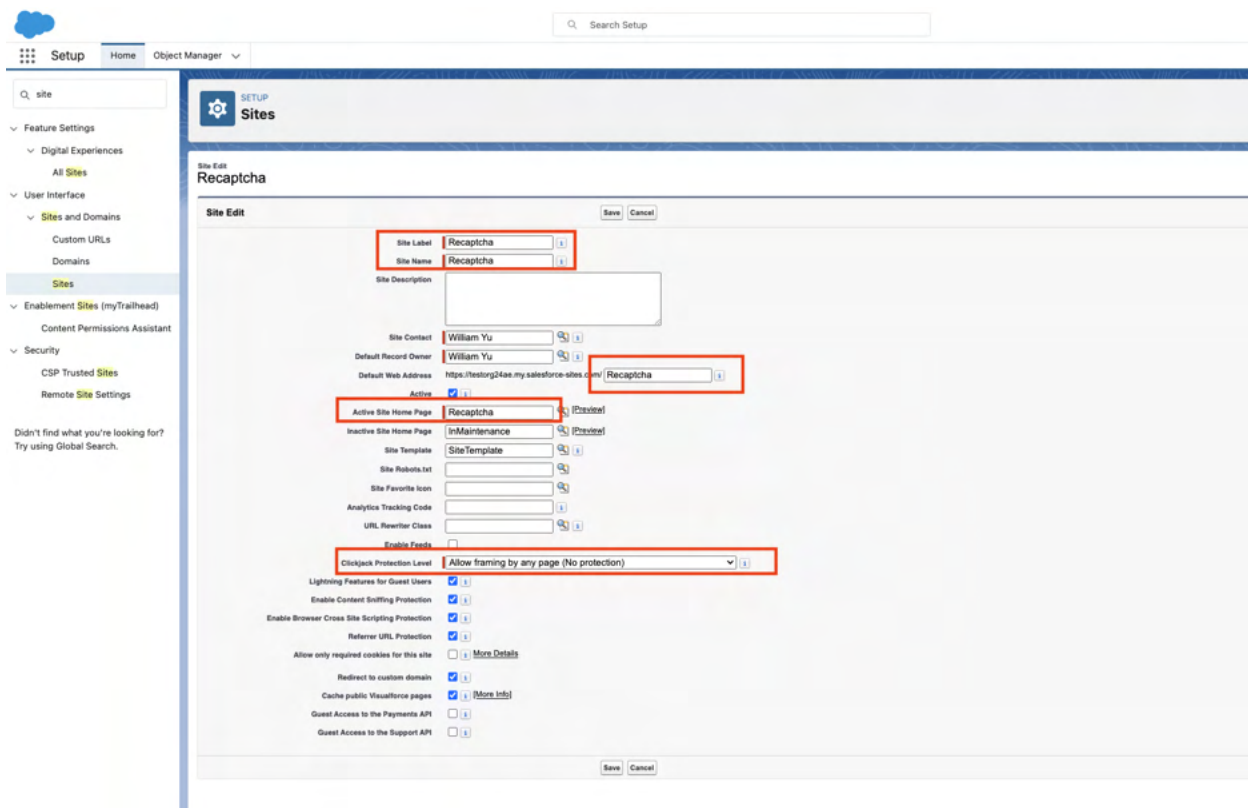
For Premium version customers, the following are the optional steps:

Enable reCaptcha to enhance the security

1. Settings -> Sites - Register my Salesforce Site Domain if you haven't.

Go to Sites, create a new site then

- Set **Site Label** and **Site Name** as Recaptcha.
- Set **Path** for **Default Web Address** as Recaptcha.
- Tick **Active** checkbox.
- set **Active Site Home Page** as **Recaptcha** page.
- Set **Clickjack Protection Level** as “Allow framing by any page (No protection)” and Save. Copy the whole link including domain name and Path which will be used later (<https://yourDomain.my.salesforce-sites.com/>):



The screenshot shows the Salesforce Setup interface with the 'Sites' section selected. The 'Recaptcha' site is being edited. The following fields are highlighted with red boxes:

- Site Label:** Recaptcha
- Site Name:** Recaptcha
- Default Web Address:** https://testorg24aa.my.salesforce-sites.com/Recaptcha
- Active:** ☒
- Active Site Home Page:** Recaptcha
- Clickjack Protection Level:** Allow framing by any page (No protection)

Other visible fields include Site Description, Site Contact (William Yu), Default Record Owner (William Yu), Site Template (SiteTemplate), Site Robots.txt, Site Favorite Icon, Analytics Tracking Code, URL Rewriter Class, and various security checkboxes like 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, Redirect to custom domain, Cache public Visualforce pages, Guest Access to the Payments API, and Guest Access to the Support API.

2. Click **Public Access Settings** button on the Site page and it will redirect you to Recaptcha Profile.


SETUP
Profiles

Profile

Recaptha 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 \[0\]](#) |
 [Enabled Visualforce Page Access \[12\]](#) |
 [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	Recaptha Profile		
User License	Guest User License	Custom Profile	☒
Description			

Click **View Users** and find the “**Recaptha Site Guest User**” user


SETUP
Users

Permission Set Assignments Edit Assignments [Permission Set Assignments Help](#)

Action	Permission Set Label	Date Assigned	Expires On
Del	Appointment Easy Recaptcha Permission	22/6/2023	

Permission Set Assignments: Activation Required Edit Assignments [Permission Set Assignments: Activation Required Help](#)

No records to display

Permission Set Group Assignments Edit Assignments [Permission Set Group Assignments Help](#)

No records to display

Permission Set License Assignments Edit Assignments [Permission Set License Assignments Help](#)

No records to display

Public Group Membership New Group [Public Group Membership Help](#)

No records to display

Queue Membership New Queue [Queue Membership Help](#)

No records to display

Installed Mobile Apps

No records to display

Managed Packages Assign Licenses [Managed Packages Help](#)

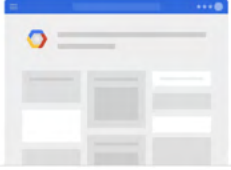
Action	Package Name	Status	Expiration Date
Remove	Appointment Easy	Active	19/9/2023

Assign **Permission Set - Appointment Easy Recaptcha Permission** and **Managed Package - Appointment Easy license** to this user.

3. Register your **Google reCAPTCHA** <https://www.google.com/recaptcha/>.
 V3 Admin Console -> Click “+” sign to register a new site. Add your site (yourDomain.my.salesforce-sites.com) as below.

Google reCAPTCHA

← Register a new site



Now enterprise ready!

Enterprise adds advanced features like MFA, spam/fraud protection & Google Cloud integration.

- ✓ Up to 1,000,000 assessments/month at no cost
- ✓ No Credit Card required

[Switch to create a classic key](#)

Label ⓘ

Testorg24 Recapcha

18 / 50

reCAPTCHA type ⓘ

☒ Score based (v3) Verify requests with a score

☐ Challenge (v2) Verify requests with a challenge

Domains ⓘ

✕ testorg24ae.my.salesforce-sites.com

+ Add a domain, e.g. example.com

✓ [GOOGLE CLOUD PLATFORM](#)

[CANCEL](#) [SUBMIT](#)

4. Get the **Recaptcha Key** and **Recaptcha Secret**.

Google reCAPTCHA

Adding reCAPTCHA to your site



Success - you're all set up with Enterprise!

- ✓ Manage settings in the Google Cloud Project
- ✓ Up to 1,000,000 assessments/month at no cost

Visit the [Google Cloud Platform project](#) hosting your reCAPTCHA Enterprise keys to enable advanced features.

Use this site key in the HTML code your site serves to users. [See client side integration](#)

 COPY SITE KEY

6LfveRImA...XNdP-Jj7X

Use this secret key for communication between your site and reCAPTCHA. [See server side integration](#)

 COPY SECRET KEY

6LfveRImA...DvTFFmHd2

[GO TO SETTINGS](#)

[GO TO ANALYTICS](#)

5. From Setup-> **Custom Settings**, Click **Manage** link next to **Settings**.


SETUP
Custom Settings

Custom Settings

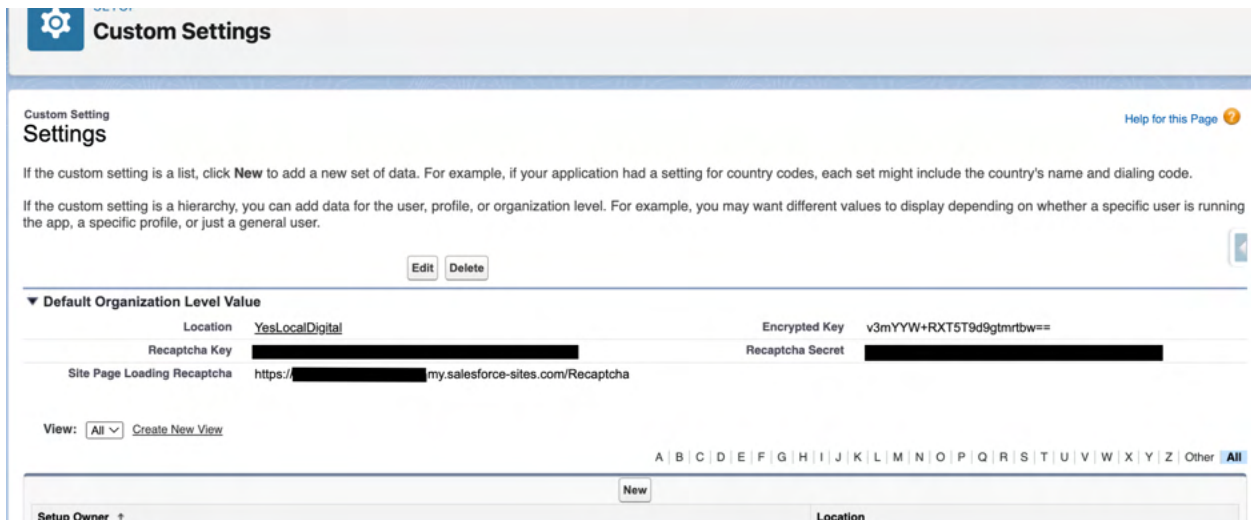
Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: All [Create New View](#) [Get Usage](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Settings	Public	Hierarchy	AppointmentEasy		1,120	1	1120

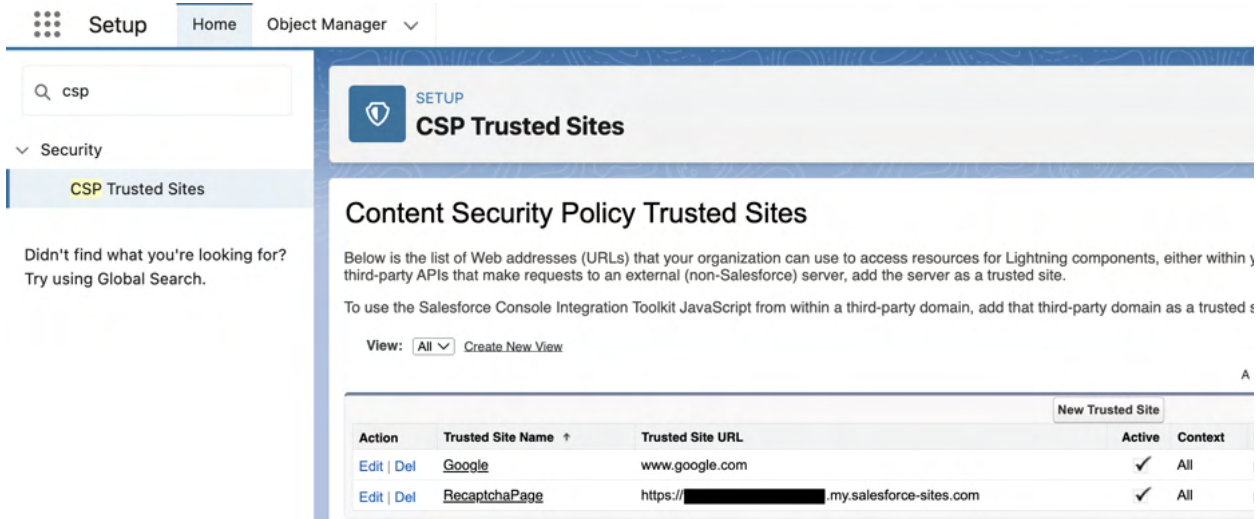
6. Click **Edit** button to config **Recaptcha Key** & **Recaptcha Secret** from your Google account, and paste your whole URL (<https://yourDomain.my.salesforce-sites.com/Recaptcha>) on **Site Page Loading Recaptcha**.



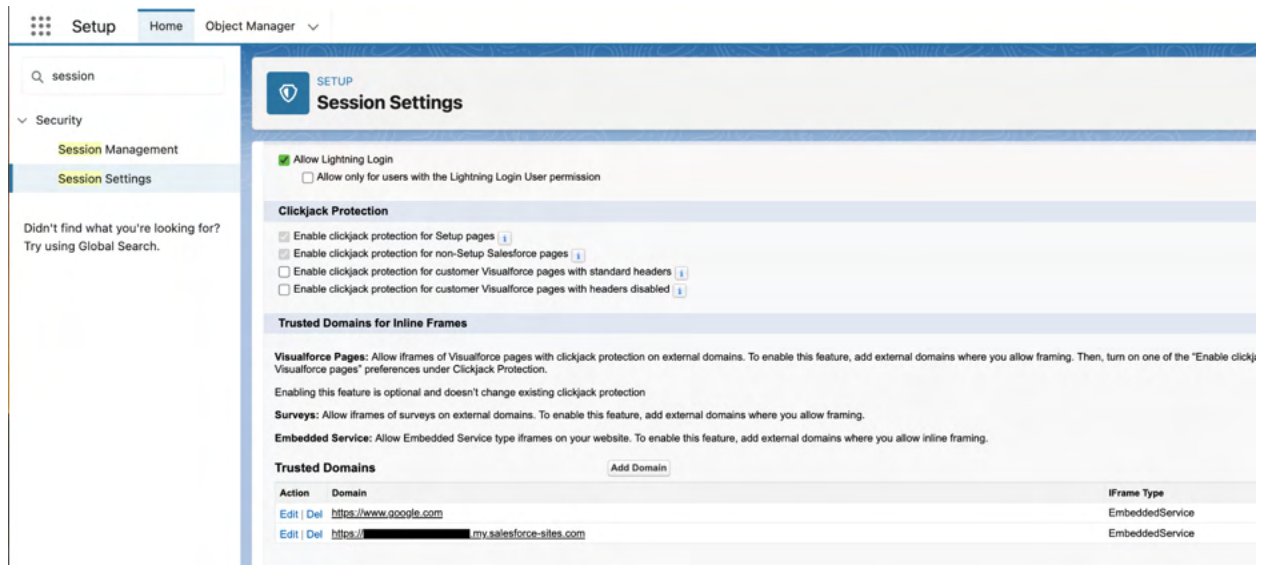
7. From Setup-> CSP Trusted Sites, add two CSP sites and tick the option “Allow site for frame-src”:

www.google.com

yourDomain.my.salesforce-sites.com



8. From Setup-> Session Settings: Add two Trusted Domains on Session Settings:



9. Check “Enable reCAPTCHA” on Calendar to enable Google reCAPTCHA verification.

Enable Custom Landing Page and Field sets

1. You can tailor your custom landing page messages in 'Publish Settings'.

Calendar Name: Consultant Calendar

CUSTOMIZED SETTINGS

SELECTED FIELDSET FOR CUSTOMER BOOKING PAGE Default (AppointmentEasy__Default) ▼	INPUT FIELDS DISPLAYED First Name * Last Name - Mobile * Confirmed Email - Note
---	---

APPOINTMENT ACTIVE MESSAGE

Salesforce Sans ▼
12 ▼
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⌕
⌕
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🔗
ℹ️

Dear {{name}},

Your appointment is currently confirmed and active. If you need to make any changes, you have two options available. To cancel your appointment, simply click on the 'Cancel Appointment' button. Alternatively, if you would like to reschedule, click on the 'Reschedule' button. blah..Active

APPOINTMENT LOCKED MESSAGE

Salesforce Sans ▼
12 ▼
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ℹ️

Dear {{name}},

Your appointment is currently confirmed and active. If you need to cancel or reschedule your appointment, you can conveniently do so online at least {{lockHours}} in advance. Should you have any questions, please feel free to reach out to us directly. We're here to assist you. blah..Locked

APPOINTMENT CANCELLED MESSAGE

Cancel
Save

2. You can also create a custom fieldset with custom fields for landing form. Go to Settings-> Object Manager-> search 'Appointment', select Appointment Object (AppointmentEasy Appointment c). Then go to Field sets to create a custom field set.

SETUP > OBJECT MANAGER

Appointment

custom

Save Cancel Undo Redo Field Set Properties

Quick Find Appointment Name

Age	Appointment Ref	Confirmed Email	Deleted	First Name	Last Modified Date	Master Record Id	Preference
Appointment Calendar	Appointment To	Created By	Encrypt Id	Gender	Last Name	Mobile	Record ID
Appointment From	Appointment To Text	Created Date	Event link - Google	Last Activity Date	Last Referenced Date	Note	Status
Appointment From ...	Color	Custom Edit URL	Event link - Outlook	Last Modified By	Last Viewed Date	Owner	System Modstamp

Drag any of the fields above into the list below.

In the Field Set

- First Name
- Last Name
- Mobile
- Confirmed Email
- Note
- Gender
- Age
- Preference

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Triggers

Flow Triggers

Validation Rules

- Make sure to clone the default 'Appointment Easy Customer Permission' to 'Appointment Easy Customer Custom Permission' and add the custom fields access to the permission set.

Permission Sets

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

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Edit Delete Create New View

New

Action	Permission Set Label	Description
☐ Clone	ActionPlans	
☐ Clone	Analytics View Only User	User permissions for View-only licensed apps.
☐ Clone	Appointment Easy Admin Permission	
☐ Del Clone	Appointment Easy Customer Custom Permission	
☐ Clone	Appointment Easy Customer Permission	



SETUP
Permission Sets

Permission Set
Appointment Easy Customer Custom Permission

✖
Clone
Delete
Edit Properties
Manage Assignments

Permission Set Overview > Object Settings ▾ **Appointments** ▾

Save
Cancel

Appointments

Tab Settings

Available	Visible
☐	☐ ⓘ

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☐
Delete	☐
View All	☐
Modify All	☐

Field Permissions

Field Name	Read Access	Edit Access
Age	☒	☒
Appointment Calendar	☒	☒
Appointment From	☒	☒
Appointment From Text	☒	☒
Appointment Ref	☒	☐
Appointment To	☒	☒
Appointment To Text	☒	☒
Color	☒	☐
Confirmed Email	☒	☒
Created By	☒	☐
Custom Edit URL	☒	☐
Encrypt Id	☒	☒
Event link - Google	☒	☐
Event link - Outlook	☒	☐
First Name	☒	☒

4. Assign the new permission set to the site guest user.



SETUP

Users

[Permission Set Assignments \(2\)](#) |
 [Permission Set Assignments Activation Required \(3\)](#) |
 [Permission Set Group Assignments \(2\)](#) |
 [Permission Set License Assignments \(2\)](#) |
 [Public Group Membership \(2\)](#) |
 [Queue Membership \(2\)](#) |
 [User Skills \(2\)](#) |
 [Installed Mobile Apps \(2\)](#)

User Detail

Edit

Sharing

Name

appointmenteasy Site Guest User

Alias

guest

Email

appointmenteasy@00d50000new5eheat.org.force.com

Username

appointmenteasy@00d50000new5eheat.org.force.com

Nickname

appointmenteasy

Division

Time Zone

(GMT+10:00) Australian Eastern Standard Time (Australia/Sydney)

Locale

English (Australia)

Language

English

Federation ID

App Registration: One-Time Password Authenticator

App Registration: Salesforce Authenticator

Security Key (U2F or WebAuthn)

Lightning Login

Temporary Verification Code (Expires in 1 to 24 Hours)

(Generate)

Created By

William Yu, 19/6/2023, 1:03 pm

User License

Guest License

Profile

appointmenteasy Profile

Active

☒

Marketing User

☐

Mobile Push Registrations

[View](#)

Salesforce CRM Content User

☐

Email Encoding

Unicode (UTF-8)

Used Data Space

0 B [View](#)

Used File Space

0 B [View](#)

Individual

Modified By

William Yu, 19/6/2023, 1:16 pm

Permission Set Assignments

Edit Assignments

Action

Permission Set Label

Date Assigned

Expires On

Del

Appointment Easy Customer Custom Permission

19/6/2023

Del

Appointment Easy Customer Permission

19/6/2023

5. Choose the new field sets in the publish settings.

Calendar Name: Consultant Calendar

Salesforce Sans ▼ 12 ▼ 

B *I* U           

Add description/instruction for clients...

▼ CUSTOMIZED SETTINGS

SELECTED FIELDSET FOR CUSTOMER BOOKING PAGE

custom (undefined__custom) ▼

INPUT FIELDS DISPLAYED

First Name
Last Name
Mobile
Confirmed Email
Note
Gender
Age
Preference

APPOINTMENT ACTIVE MESSAGE

Salesforce Sans ▼ 12 ▼ 

B *I* U           

Dear {{name}},

Your appointment is currently confirmed and active. If you need to make any changes, you have two options available. To cancel your appointment, simply click on the 'Cancel Appointment' button. Alternatively, if you would like to reschedule, click on the 'Reschedule' button. blah..Active

APPOINTMENT LOCKED MESSAGE

Cancel

Save



Frequently asked questions (FAQ)

1. What can I do if an error mentions 'feature is currently unavailable'?

These functions are for the premium version only, please contact us to activate your premium features.

2. Why is the calendar not loading in the Digital Experience site?

LWR site may not support the calendar components, we highly recommend to use Aura site to avoid any inconvenience.

3. Why is the calendar loading but no event is shown?

Make sure the Sharing Settings for Appointment/Appointment Calendar are assigned to the correct site guest user.

4. Why are the newly added input fields not shown in the booking appointment page for the customer?

Please make sure the users or the site users have enough access(Read/White) to the new fields. You can add these fields in the profiles, or in a new Permission Set and assign it to the users.

5. Why does the customer or admin not receive the notification email?

There might be a few different reasons.

- ☐ Email Deliverability is updated to 'All email';
- ☐ If 'From Email Address' is 'Current User's email address' on AppointmentEasy Email Alerts, check if the user(or site user, or site guest user) email address is valid;
- ☐ If 'From Email Address' is 'Default Workflow User's email address' on AppointmentEasy Email Alerts, check if the Default Workflow User email address is valid;
- ☐ If 'From Email Address' is an 'Organization-Wide Addresses' on AppointmentEasy Email Alerts, check if the Organization-Wide Addresses email address is valid and verified;
- ☐ Email send limitation in your org is hit.

6. How can I update the sender name of the notification email?

Use 'Organization-Wide Addresses' with a preferred name on AppointmentEasy Email Alerts.

7. Am I able to update the email templates to the customer and admin?

Absolutely yes! Create your own email template and update 'Email Template' on the AppointmentEasy Email Alerts.

8. Why is the reCAPTCHA not working as expected?

There might be a few different reasons.

- ☐ Check the domain is correctly added on your Google reCAPTCHA configuration;
- ☐ Make sure the Google reCAPTCHA site key and consumer key are correctly copied on Custom Settings - AppointmentEasy settings;
- ☐ Check the Appointment Easy Recaptcha Permission Set is assigned to the Recaptcha site user;
- ☐ Check domains are added on CSP and Session Settings;
- ☐ 'Allow framing by any page' on Digital Experience sites.

9. Where can I find the detailed messages for the appointment booking issue?

Check for Custom Log records with detailed log and timestamp.