



Scheduling Assistant

Installation and Configuration Guide



System Requirements

Weather Company Scheduling Assistant is supported for all Salesforce editions. Lightning Experience must be enabled. The component is not supported in Salesforce Classic. Field Service Lightning is required.

The component is supported on all browsers that are supported for Lightning Experience (see [Supported Browsers for Lightning Experience](#) in the Salesforce documentation).

Installing the component

Prerequisite: Ensure that Field Service Lightning and Lightning Experience are enabled (see [Enable Field Service Lightning](#) and [Enable Lightning Experience](#)).

To install the component:

1. In the Salesforce AppExchange, go to the Scheduling Assistant listing and click **Get It Now**.
2. If prompted, log in to the AppExchange.
3. Specify component installation in production or a sandbox.
4. Review and agree to the terms and conditions, and click **Confirm and Install**.
5. Select the users or profiles for which you want to install the component and click **Install**.
6. If prompted, select the check box to grant access to third-party web sites.

For more information, see [Install a Package](#).

Configuring the component

Configure Salesforce to display the component when you create or edit a service appointment.

To configure the component:

1. Grant users the required permissions for the component. In **Setup > Permission Sets**, assign users the Weather Company Scheduling Assistant User permission set (see [Assign a Permission Set to Multiple Users](#)).
2. Override the default Service Appointments page with a custom Visualforce page that includes the component (see [Override Standard Buttons and Tab Home Pages](#)):
 - a. In **Setup > Object Manager**, click **Service Appointment** and click **Buttons, Links, and Actions**.
 - b. Edit the New and Edit items to override the default Salesforce page with the ServiceAppointmentRecordEdit Visualforce page.
3. In **Setup > Remote Site Settings**, add an entry for the URL of the custom form, in the format `https://MyDomain_Name--weathersched.Instance.visual.force.com` (see [Find your Instance](#)).

Restrictions

The component shows data for locations in the U.S. and Canada only. The user interface is available in English only.