



Appointment Scheduler App

- Usage Document



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1. About Appointment Scheduler

DemandBlue's Appointment Scheduler app is a Lightning App designed to empower your Sales/CSR/Field Service teams with quick & easy scheduling functionalities for the appointments or meetings where multiple team members (max of 5 teammates) are in attendance. With our appointment scheduler, you can now use your SF Calendars and your Event & User Objects to schedule these events.

The Availability Calendar is based on your Salesforce Calendar and will utilize the Lightning Calendar's sharing settings of the user.

The Availability Calendar displayed on this app is based on the logged-in user's time zone. The appointment can be scheduled for any time between 6 AM and 8 PM on the logged-in user's time zone. The duration of the appointment or meeting scheduled using this app is 30 minutes.

2. Setup

DemandBlue's Appointment Scheduler app does not require any user licenses. Once this app is installed on the org, it will be available to the users of the org based on the permissions granted by the administrator of the org.

Once the app is installed on your org, the following configurations need to be done.

2.1. User Page Layout

Add the Service Type Role picklist field to the User Page Layout. This field allows you to categorize the users based on the service type they are assigned to and the same can be used as a search filter for the resources on the app.

Single Sign On Information	
Federation ID	
Additional Information	
Service Type Role	--None--
Locale Settings	
Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Locale	English (United States)
Language	English

The Appointment Scheduler app includes the following service type roles. More roles can be added and/or edited to this picklist field.

- a. Sales Manager



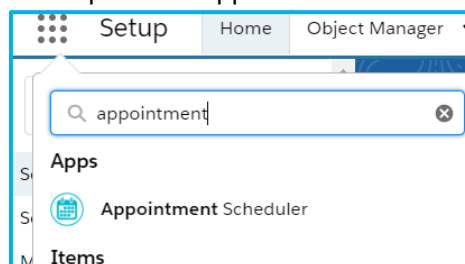
- b. Service Manager
- c. Supervisor
- d. Technician

2.2. Event Page Layout

Add the Meeting Host & Participants fields to the Event Page Layout and set these fields as Read-Only. The Meeting Host has the permission to make changes to the entire appointment and apply the updates to the appointment to all of the participants. Only the meeting host has the permission to delete the appointment entirely.

3. Scheduling using Appointment Scheduler

1. Use Salesforce App Launcher to open the “Appointment Scheduler” app.



2. To go a specific week’s availability calendar, select a date on “Go to date” field.

3. The availability calendar is based on the logged user’s time zone.



Availability Calendar

TimeZone:
America/Los_Angeles

Go to date:

- Service Type Role field is created on "User" object. This allows to filter the users list based on the service type the users are assigned to. If no, then the Service Type role is selected, where all resources (users) are available on Resources dropdown list. User scheduling the appointment can select up to a maximum of 5 resources.

Service Type Role:

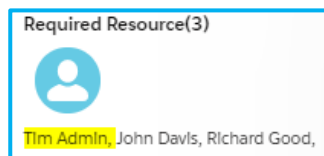
Select Progress

Add Resource:

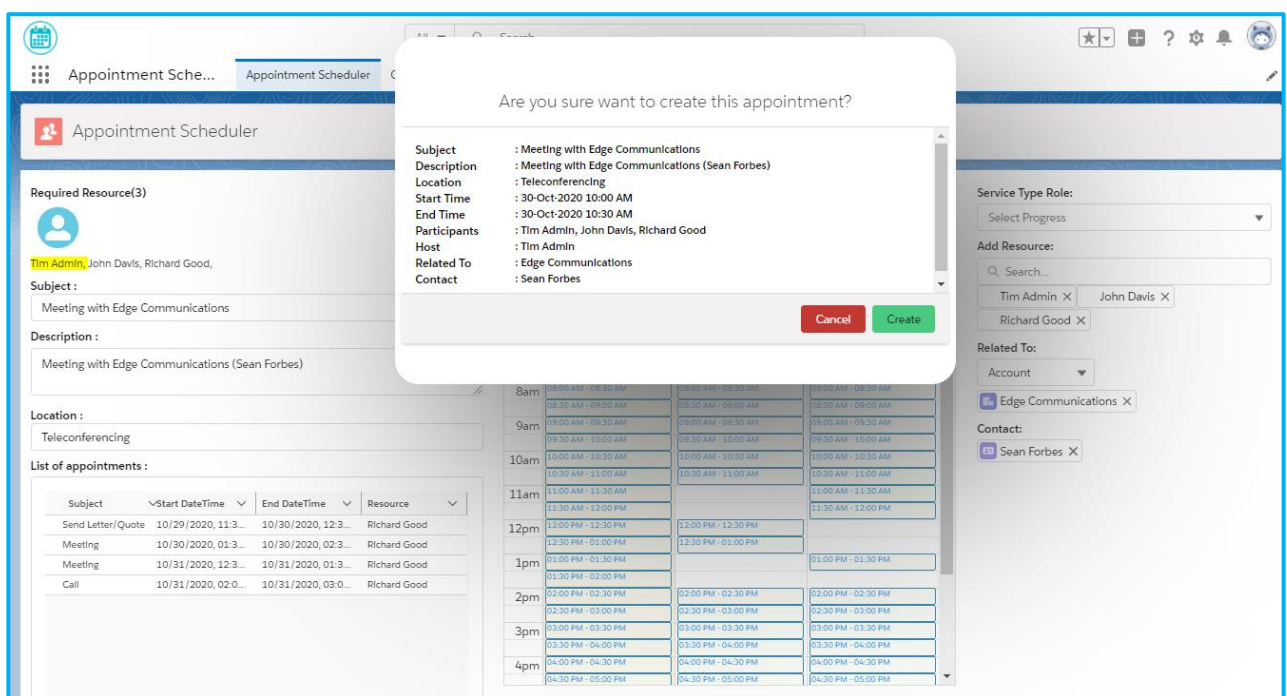
- After selecting resources,
 - Selected resources will be displayed on under Required Resource section (1).
 - Selected resources' existing appointment displayed on list of appointments (2).
 - Selected resources common availability time will be displayed on the calendar as 30 minutes slots (3).

The screenshot displays the 'Appointment Scheduler' interface. On the left, the 'Required Resource(3)' section shows three resources: Tim Admin, John Davis, and Richard Good. A red box labeled '1' highlights this section. Below it, the 'List of appointments' table shows three appointments, with the 'End Date/Time' column highlighted by a red box labeled '2'. The main area features an 'Availability Calendar' for the dates Oct 28 - 30, 2020. A red box labeled '3' highlights the calendar grid. On the right, the 'Service Type Role' section shows a dropdown menu and a list of related resources, including Tim Admin, John Davis, and Richard Good.

- Select a meeting host for the appointment by clicking on a required resource on the appointment. The name of the meeting host will be highlighted in Yellow color.
 - When multiple resources are selected, host is mandatory.
 - When a single resource is selected, host is not mandatory.



7. Subject field is mandatory to schedule an appointment.
8. Description, Location, Related To and Contact fields are not mandatory.
9. When a standard object record is selected on the "Related To" field, the contact search will be limited only to that selected related to record.
10. Enter the required details on appointment scheduler app, select a date and then click on an available time slot from the availability calendar to schedule an appointment.
11. Once a time slot is selected, a confirmation popup will be displayed to verify the appointment details. Click "Create" to create and schedule the appointment.



12. Now, the scheduled appointment will be displayed on the Calendar of the participants.
13. Open that appointment (event) from the Salesforce Calendar. Two new fields have been added to the Event standard object.
 - a. Meeting Host - field shows the name of the host. Only the meeting host has the ability to change the meeting date & time and to cancel the entire meeting.
 - b. Participants - field shows all the attendees of that appointment/event.

Note: Please update the Event page layout and add the above 2 new fields.



The screenshot displays the 'Appointment Scheduler' interface within a Salesforce-like environment. At the top, there's a navigation bar with 'Appointment Scheduler' and a 'Calendar' dropdown. Below this, the event title 'Meeting with Edge Communications' is shown, along with buttons for 'New Contact', 'New Opportunity', and 'New Case'. The event details include 'Location: Teleconferencing', 'Start: 10/30/2020, 10:00 AM', and 'End: 10/30/2020, 10:30 AM'. The 'Details' tab is active, showing a list of fields and their values. Two red boxes highlight specific information: one around 'Meeting Host: Tim Admin' and another around 'Participants: Tim Admin; Richard Good; John Davis'.

Field	Value
Assigned To	Richard Good
Subject	Meeting with Edge Communications
Name	Sean Forbes
Related To	Edge Communications
Meeting Host	Tim Admin
Created By	Richard Good, 10/28/2020, 6:30 AM
Description	Meeting with Edge Communications (Sean Forbes)
Location	Teleconferencing
Start	10/30/2020, 10:00 AM
End	10/30/2020, 10:30 AM
All-Day Event	☐
Participants	Tim Admin; Richard Good; John Davis
Last Modified By	Richard Good, 10/28/2020, 6:30 AM

14. A participant can be removed from the meeting, when the host deletes that particular event from the participant's calendar.
15. To schedule a new appointment, press F5 key on the Appointment Scheduler to refresh the app and proceed with scheduling a new appointment.

With just a few simple steps, you, as a member of Sales/CSR/Field Service team, can quickly & easily schedule your appointments with multiple attendees without any scheduling conflict. This app incorporates communication and collaboration among the attendees/participants where the meeting host can update an event (namely Subject, Location, and Description) and it is available to all of the participants of the meeting.

DemandBlue's Appointment Scheduler app is absolutely free and can be installed from the Salesforce AppExchange. Please [click here](#) to install this app now.