



Schedule Banking Appointments

Salesforce, Spring '24

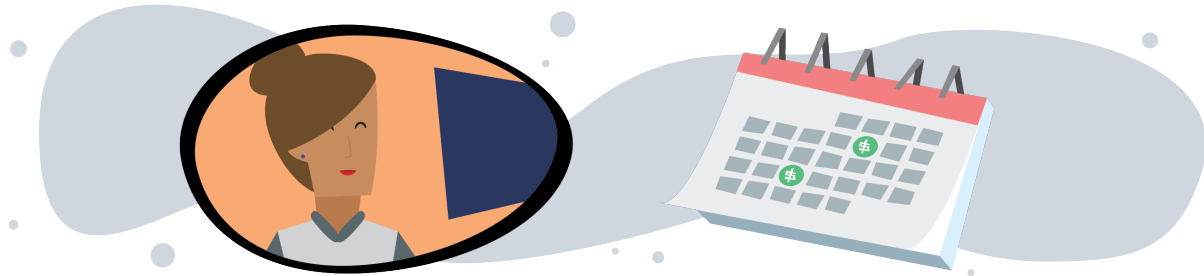


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SCHEDULE BANKING APPOINTMENTS

Implement scalable processes to let customers schedule banking appointments.



Get Started



Explore system architecture related to this solution.

- [Industry Blueprint for Retail Banking](#)
- [Reference Architecture for Retail Banking](#)
- [Solution Architecture for Retail Banking](#)



Take Trailhead modules related to this solution.

- [Salesforce Solution Kits: Quick Look](#)

As we look ahead, there's no script for how the world returns to work and customers go back into banks. Providing safe banking experiences to customers increases the opportunity to cultivate relationships and deliver products and services in a changed world. Enabling scheduling helps banks assign resources more efficiently and better address customers' shifting needs. As the world starts to socialize again, an increase in appointment requests is likely to strain resources.

This solution kit helps you:

- Enable customers to self-schedule appointments from your external site.
- Allow appointments by location based on bank capacity, resources, or assets managed.
- Solve for logistics and personalization to deliver efficient, personalized appointments using Salesforce data.

Required Products

- One or more of these clouds:
 - Financial Services Cloud
 - Sales Cloud
 - Service Cloud

Schedule Banking Appointments

- Industries, for example, Health, Manufacturing, Consumer Goods, Work.com, Experience Apps
- Salesforce Scheduler Permission Set License
 - One license per schedulable asset or resource

Salesforce Scheduler

Use Salesforce Scheduler as the basis for your appointment booking system. Salesforce Scheduler supports location- and capacity-controlled booking use cases. Let customers set appointments with specialized resources, such as a particular retail associate or based on skills needed.

Asset scheduling moves beyond solely resource-booked appointments to provide scheduling based on more complex needs. Allow customers to book based on factors such as bank capacity, private room availability, or in socially distanced time slots for in-bank transactions. Schedule unlimited assets in the same functionality provided for resource-based booking.

General Information

- Salesforce Scheduler isn't available for Platform User license with Resource Schedules.
- Salesforce Scheduler isn't available for orgs with Field Service installed.
- Lightning Experience must be turned on for the org before Salesforce Scheduler can be enabled.

Functionality Considerations

- Guest Site User Inbound Scheduling allows an unauthenticated user to schedule an appointment.
 - Enable a [Experience Cloud Site](#) or a [Salesforce Site](#).
 - If your scheduling process allows for unauthenticated scheduling, configure the Portal and Organizational Sharing for guest user access.
- External Sites using Embedded Services are able to expose the inbound scheduling without authentication of the customer via [Lightning Out Apps](#).
- To access Salesforce Scheduler, customers must be using a supported web browser.

Flow Builder Considerations

- Start from [Salesforce Scheduler Standard Flow Template](#). Configure a personalized experience by enhancing flow templates with Flow Lightning Components or Apex Actions.

Use API or customer components to support use cases where mobile responsiveness and multiple timezone booking requirements are critical. When designing custom API solutions, review templates for workflow considerations.
- Scheduler flows can be used in Communities and Embedded Services, or they can be extended through custom Lightning Components and APIs.

 **Tip:** To customize standard flow templates, first clone the template from the flow designer.

Outbound Scheduling

- Invoke outbound (employee-driven) scheduling flow from account, opportunity, and lead record pages in Salesforce using the Schedule Appointment Lightning Action.

Inbound Scheduling

- Invoke inbound (customer-driven self-service) scheduling flow.
- Authenticated customers can schedule and modify appointments in an Experience Cloud site, or externally from a company website. Enable Salesforce Identity to let end-customers authenticate with Salesforce to book and schedule appointments.

General Limits

- [Salesforce Scheduler limits](#) and limitations apply.
- For guest users, times are displayed using the site's default time zone, not the customer's current time zone.

Implement This Solution

[Workflow](#)

Learn how data flows through the configurations when you schedule banking appointments.

[Design Considerations](#)

Keep these design considerations in mind when you schedule banking appointments.

[Configurations](#)

Use these configurations to schedule banking appointments.

SEE ALSO:

[Salesforce Scheduler Developer Guide](#)

[Create and Manage Inbound Appointments in Salesforce Scheduler](#)

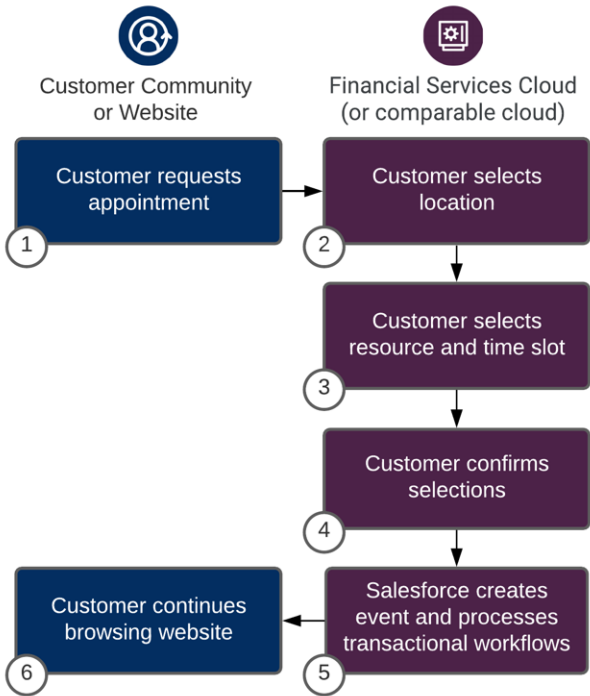
[Create and Manage Outbound Appointments in Salesforce Scheduler](#)

[Set Up Inbound Scheduling](#)

Workflow

Learn how data flows through the configurations when you schedule banking appointments.

Workflow



1. The customer requests to book an appointment.
2. The customer is prompted to select a location.
3. The customer is prompted to select a resource and a time slot.
4. The customer confirms their selections.
5. Salesforce creates an event and processes transactional workflows.
6. The customer continues browsing the website.

Related Content



Take the next steps in this implementation.

- [Design Considerations](#)
- [Configurations](#)

Design Considerations

Keep these design considerations in mind when you schedule banking appointments.

Discovery

1. Craft a central vision by deciding on the scope of your changes, identifying a team, and defining key performance indicators.
2. Identify which tools offer the functionality or levels of customization that meet your requirements.
 - Consider the functional, performance, and scalability requirements.
3. Identify use cases and scenarios. Consider the following.

Who

Customers, guests, or unauthenticated users.

What

- Resources are people or assets. People to schedule can include cashiers, sales reps, and curbside service agents. Assets can include room capacity, parking spaces, office spaces, or tangible items.
- Consider whether resources have skills.

How

- Inbound Scheduler; Customer Self-Service to booking.
- Outbound Scheduler; Scheduled by associates on behalf of a customer request.
- Identify Accepted Channels: Website, Chat, chatbot, Self-Service Portal, Customer Portal, or SMS.

Where


- Is the appointment virtual, in-store, for a parking spot, a scheduled room, or in some other location?
- Consider locations, time zones, and other localized information.

Key Cross-Cloud Considerations

By implementing an appropriate [cross-cloud engagement data model](#) with Salesforce Scheduler, you can unlock REST and SOAP API access across Commerce Cloud, Service Cloud, and Marketing Cloud. Seamlessly pass data attribute properties to systems for the workflows and use cases.

Salesforce Platform Keys

- Contact ID or Person Contact ID: Represents the business contact or the contact related to a person account.
- Account ID: Represents the account with which a contact is associated.
- Lead ID: By default, a lead is created when a guest books an appointment. To verify the correct human profile for the scheduled engagement, we recommend converting leads to an account and contact or to a person account.



 **Note:** Lead use can result in poor cross-cloud data quality. Converting leads to contacts creates duplicate keys in Marketing Cloud. To avoid duplicate records, never synchronize or send to leads via Marketing Cloud Connect. To better facilitate the data orchestration if the Marketing Cloud Connect feature is needed, use account and contact data or the person account. To learn more about data modeling, review the [Cross-Cloud Engagement Data Models](#) solution kit.

Performance and Scalability Considerations

- When using both Asset Scheduling and Event Management, calendar sync doesn't occur for appointments assigned to an asset-based service resource because there's no underlying user record.
- Resource absences can be used to block availability for the asset-based service resource. For example, if the asset was unavailable due to other factors, like required maintenance.

- You can't set the owner of a service appointment to the underlying user of an asset-based service resource because there's no underlying user.
- When planning to use Salesforce Scheduler and an integration to Event Synchronizing, use Einstein Activity Capture to sync contacts and events between Microsoft or Google applications and Salesforce.
- Salesforce doesn't recommend using Lightning Sync with Outlook. Users can incur limitations above 30,000 requests per hour. Starting in Winter '21, Lightning Sync isn't available to new Salesforce customers.
- Note high volume use cases up front to best design technical architectures and platform events or API strategies to facilitate high volume concurrent customer requests. For more on limit considerations, refer to the Salesforce Developer Limits and Allocations Quick Reference.
- Salesforce applies a limit on the number of API calls per 24-hour period. The limit is based on the Salesforce edition type and number of licenses. Consider timezone limitations on guest users.

Related Content


	<p>Review earlier steps in this solution.</p> <ul style="list-style-type: none"> • Workflow
	<p>Take the next steps in this implementation.</p> <ul style="list-style-type: none"> • Configurations

Configurations

Use these configurations to schedule banking appointments.

Prerequisites

- The appointment time slots are determined based on your Salesforce Scheduler data model configurations. Before setting up Salesforce Scheduler, set up these items.
 - Setup for Service Resources, Assets, Service Territory Members, Work Type Groups, Work Types, Work Type Group Members, and Service Territory Work Types.
- If your use case requires Guest Scheduling, configure Guest Profile Access. Set the default timezone for the guest user profile for the Scheduler. Extra customization is required to support the timezone mapping for guest appointments passed via APIs when flow templates don't support use cases.
- Set Organization Wide Sharing for external access to default to Public Read Only on the following objects.
 - Work Type
 - Work Type Group
 - Service Resource
 - Service Territory
 - User
- To allow a guest to schedule appointments, update the [Guest User Profile](#) to allow guests users to:
 - Run Flows

- Edit Events
 - [Create sharing rules for guest users.](#)
 - Determine which records to expose to your site’s guests.
 - Set create criteria-based record-sharing rules to match your business process for the following objects.
 - Service Resource
 - Service Territory
 - Work Type
 - Work Type Group
 - Optionally, configure field level security for the Asset field on the Service Resource object.
 - The Asset field becomes available only when your Salesforce org has an Asset Scheduling license enabled and provisioned in the instance.
 - Grant Edit permission to profiles that book appointments, including guest profiles.
 - Add the Asset field to the page layout for the Service Resource object.
-  **Note:** Unauthenticated users need defined sharing rules to access records required for the Inbound New Guest Appointment flow. This flow includes Embedded Services hosted in an Experience Cloud site or external site.

Technical Architecture

Choose how you want to customize, extend, or enhance Salesforce Scheduler from available implementation approaches. Study the data model alongside Scheduler and Candidates API functionality.

Appointment scheduling can be enabled using low-code or high-code methods. However, each option offers trade-offs and advantages. Review capabilities and limitations of tools available on the Salesforce platform to help define the best approach to support your business process. Consider the available skills of your team as you make your choices.

Keep in mind other ways to extend the Salesforce Scheduler.

- Chatbots
- Email and SMS
- Event Management and Sync

Declarative Low Development Appointment Setup


- This option requires minimal development, but styling options are limited and testing is completed manually.
- Use the Standard Flow Template configuration with configurable customizations from Flow Builders.
- Use the Embedded Service component to add Salesforce Scheduler in a Salesforce Experience Builder site.
- To enable Salesforce Scheduler, use Experience Builder and Lightning Template with standard embedded services component configuration. Use the Embedded Service components in a Scheduler component, Live Agent Chat, or chatbot.

Low Development Appointment Setup

- Enable Salesforce Scheduler on an external website. Testing is completed manually.
- This option allows for moderate customizations.
- Use Scheduler through the Embedded Service component.
- Add a Lightning Out dependency app to your external website that gives unauthenticated users access to the Inbound New Guest Appointment standard flow template.

Moderate Development Appointment Setup

- In this option, use custom code and APIs to customize and host Salesforce Scheduler on an external website. Testing can be automated.
- To make it available to guest users on your external website, add the `ltng:allowGuestAccess` interface to your Lightning Out dependency app.
 - This interface lets you build your app with Aura components and deploy it anywhere and to anyone. If a user is authenticated with the Lightning Out endpoint, the session must be set in `$Lightning.use()`.


 **Note:** The `ltng:allowGuestAccess` interface is only usable in orgs that have Communities enabled. The Lightning Out app is associated with all site endpoints that you defined in the org.

High Development Appointment Setup

- Create a custom scheduler component on an external website and automate testing.
- Use a Lightning Out dependency app to apply Lightning Web Components or Aura components to manage screens and scheduling processes.
- Use REST API to gain full style control. The `getAppointmentCandidates()` and `getAppointmentSlots()` functions retrieve the appropriate candidates and appointment slots.
- Use Salesforce Scheduler Resources in Connect REST API to create service appointments, assign resources, and create leads. Further customize the user experience to filter or sort Service Territories using `radius`, `latitude`, `longitude`, `sortBy`, and `sortOrder` properties.

Virtual Meeting Experience

AppExchange packages provide options for extending Salesforce Scheduler capabilities, such as providing virtual customer engagements.

 **Note:** AppExchange solutions are reflective of third-party applications outside of Salesforce. Customers make their own determinations when picking a particular AppExchange provider. Select a partner that best meets your business needs.

Screenmeet

- [Installing Screenmeet in your Salesforce Org](#)
- [APEX API Reference](#)

Recursive Labs

- [Data Sheet](#)

SightCall

Glance

- [Glance for Salesforce Setup Guide](#)

Related Content



Review earlier steps in this solution.

- [Workflow](#)

- [Design Considerations](#)

SEE ALSO:

[Salesforce Architect Blog: Introducing the Architect Decision Guides](#)