
Salesforce Scheduler Implementation Guide for Financial Services

Salesforce, Spring '24



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INTRODUCTION

This guide outlines the necessary steps to set up and use Salesforce Scheduler for Financial Services with retail banking examples.

Before You Begin

Before you begin your Salesforce Scheduler implementation, go through these resources.

- [Trailhead: Appointment Booking with Salesforce Scheduler](#): A series of modules that explain how to set up and use Salesforce Scheduler for customer appointments.
- [Videos: Salesforce Scheduler Expert Coaching Series](#): A series of videos that explain the basics of Salesforce Scheduler and how to use it.
- [Salesforce Site: Salesforce Scheduler Product Page](#): A page that contains information about the advantages of Salesforce Scheduler, the available license types, and the supported editions.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Steps to Implement Salesforce Scheduler

This guide is divided into the following major sections:

- [Business Information Setup](#) on page 2: Create records that represent entities and stakeholders for your business such as work locations, users, and appointment topics. Then, rename standard objects to meet your company's terminology.
- [Salesforce Scheduler Settings](#) on page 63: Enable Salesforce Scheduler settings such as concurrent scheduling, multi-resource scheduling, and appointment distribution to meet your business needs.
- [Appointment Booking Experience](#) on page 92: Salesforce Scheduler supports outbound and inbound appointments through various appointment booking experience channels: Salesforce Lightning Service Console, Experience Cloud sites, and your company websites. Use flows and APIs to create appointment booking experiences for these appointment booking experience channels.
- [Appointment Booking Experience Channels](#) on page 182: Add flows to Salesforce Lightning Service Console, Experience Cloud sites, and your company websites.
- [Usage and Troubleshooting](#) on page 198: Run flows to manage appointments, generate appointment URLs, book appointments using URLs, and troubleshoot flows.
- [Reference: Flow Screen Component Customizations](#) on page 221: Customize Salesforce Scheduler flows to meet your business needs. For example, autofill values, preselect options, and filter records in flow screens.

BUSINESS INFORMATION SETUP

Create records that represent entities and stakeholders for your business such as work locations, users, and appointment topics. Then, rename standard objects to meet your company's terminology.

Create Appointment Locations

Create service territories (appointment locations) to organize branch or office locations where your service resources operate from and meet customers. For retail banking, create a service territory for each branch that a bank operates from. You can also associate a service territory with its branch unit.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

Create Service Resources

Create service resources to represent appointment attendees (technicians) who attend appointments with clients. After you enable asset scheduling, you can also create service resources to represent rooms and equipment (assets) that are used for appointments.

After you create service resources, assign them to service territories to ensure that service resources are associated with the correct locations. Service resources assigned to a service territory are referred to as service territory members.


 **Note:** Asset Scheduling is available for an extra cost in Lightning Experience.

For retail banking, create service resource records for personal bankers with Technician as the resource type. Create service resource records for meeting rooms with Asset as the resource type.

Then, assign bankers to the service territories they work from and assign meeting rooms to the service territories to which they belong.

Create Appointment Topics

Create work type groups (appointment topics) to represent the functional domains or appointment categories. Create appointment subtopics and associate them with appointment topics to provide additional context.

 **Note:** You can select appointment subtopics (additional information) when you create appointment topics. So, it's recommended that you create appointment subtopics before you create appointment topics.

Here's are some examples of appointment topics and subtopics used in retail banking.

- Accounts
 - Savings
 - Checking
- Loans
 - Personal loan
 - Vehicle loan
- Credit Cards

- Safety deposit boxes

Create Appointment Templates

Create work types (appointment templates) to define key parameters, such as appointment duration, preparation and wrap-up buffers, and availability time frame. Work types also map skill requirements for work type groups to ensure that users can create appointments only with service resources who have the necessary skills. A work type links service territories (branch or office locations) to work type groups (appointment topics).

For retail banking, create a work type for each work type group because typically all the parameters and requirements across branches are the same. Then, assign the work type to all the branches that cater to the work type group. For example, create a work type for loans. Then, assign the work type to all the branches that offer loans.

If this approach doesn't work for your requirements, see [How Work Types, Work Type Groups, and Service Territories Work Together](#).

Create Skills

Create skills to define areas of expertise and ensure that service resources are added to appropriate appointments. You also use skill levels to define the level of expertise and assign start and end dates to skills.

Let's look at an example for retail banking. To ensure that credit card appointments are assigned only to trained bankers, create a skill called Credit Card Agent and assign it to all the trained bankers. If the training also has validity, add start and end dates for the skill for each banker. Then, add the Credit Card Agent skill to the Credit cards work type. When scheduling an appointment for the Credit cards work type, Salesforce Scheduler shows only bankers with the Credit Card Agent skill. Salesforce Scheduler also shows service resources only if the appointment date is between the start and end date of their skill.

Set Up Operating Hours and Shifts

Create operating hours to specify the hours of a day during which appointments can be scheduled. You can assign operating hours to service territories, service territory members, work types, work type groups for service territory members, and accounts. Salesforce Scheduler uses the Scheduling Policies and Salesforce Scheduler Settings that you specify to determine which operating hours must be used to calculate availability. Based on the policies and settings, Salesforce Scheduler uses the intersection of all the applicable operating hours to determine availability.

Salesforce Scheduler uses two models to specify availability for service resources: Operating Hours and Shifts. Use the operating hours model when service resources have fixed work hours. Use the shifts model when service resources have flexible work hours or when you want service resources to propose or set their own work hours. When you want to use shifts to determine availability, create shifts and don't define operating hours for service territory members.

Here's a table that lists the factors that determine availability of a service resource when users or customers book a service appointment.

| Operating Hours Assigned to Records | Operating Hours Model | Shifts Model |
|--|-----------------------------------|---|
| Service territory member operating hours | Optional (Used only if specified) | Not used |
| Shifts | Not used | Required |
| Service territory operating hours | Required | Optional (Must be specified. Usage is determined by scheduling policies.) |

| Operating Hours Assigned to Records | Operating Hours Model | Shifts Model |
|--|---|---|
| Work type operating hours | Optional (Used only if specified) | Optional (Used only if specified) |
| Account visiting hours | Optional (Usage is determined by scheduling policies) | Optional (Usage is determined by scheduling policies) |
| Operating Hours for Service Territory Members for Work Type Groups | Optional (Usage is determined by Salesforce Scheduler Settings) | Optional (Usage is determined by Salesforce Scheduler Settings) |

Here are the typical settings used in retail banking.

- Service resource operating hours: The working hours of bankers who have fixed work hours when you're using the operating hours model.
- Shifts: The working hours of bankers who have flexible work hours when you're using the shifts model.
- Service territory operating hours: The branch timings.
- Work type operating hours: The hours at which the associated work type group can be serviced at the associated service territories.
Let's look at an example. The SF Loans work type is associated with the Loans work type group and the San Francisco service territory. And appointments related to loans can be scheduled at the San Francisco branch only from 9:00 AM to 3:00 PM on all weekdays. Then, create operating hours for 9:00 AM to 3:00 PM for all weekdays and assign it to the SF Loans work type.
- Account visiting hours: The hours during which customers are available for appointments.
- Operating hours for service territory members for work type groups: Specify the hours that a service resource can work on specific appointment topics. For example, a banker in a branch handles accounts and loans from 10 AM to 12 PM and credit cards from 1 PM to 3 PM.

Set Up Holidays

Create holidays and link the holidays to the service territories to avoid bookings on days when the service territory is closed.

For retail banking, create holidays and link them to all the applicable branches.

Rename Standard Object Labels

To use your company's terminology, you can change the tab names and field names of Service Resource, Service Territory, Service Appointments, Work Type Group, and Work Type. Salesforce Scheduler also uses this terminology in the appointment booking experience created using flows.

Let's look at some examples of how to rename labels for retail banking.

| Salesforce Scheduler Terminology | Retail Banking Terminology |
|----------------------------------|----------------------------|
| Service Resource | Banker |
| Service Territory | Branch |
| Service Appointment | Meeting |
| Work Type Group | Meeting Topic |

| Salesforce Scheduler Terminology | Retail Banking Terminology |
|----------------------------------|----------------------------|
| Work Type | Meeting Template |

Data Model

To learn more about the objects in Salesforce Scheduler, see [Salesforce Scheduler Data Model Overview](#) and [Salesforce Scheduler Standard Objects](#).

Salesforce Scheduler Object Fields

To learn about the object fields that Salesforce Scheduler uses, see [Salesforce Scheduler Standard Objects](#).

[Launch the Salesforce Scheduler Setup App](#)

The Salesforce Scheduler Setup app provides all the Salesforce Scheduler resources in one place (in the form of object tabs) and makes it easier for administrators to create, configure, and manage those resources. Assign the Salesforce Scheduler Setup app to the user profile of your admin who will create and manage Salesforce Scheduler resources.

[Set Up Service Territories in Salesforce Scheduler](#)

Create and configure service territories to organize your service resources and ensure that they're assigned to appointments near their home branch.

[Set Up Service Resources in Salesforce Scheduler](#)

Create service resources to represent your employee attendees.

[Set Up Work Type Groups and Work Types in Salesforce Scheduler](#)

Streamline appointment scheduling by creating work type groups (appointment topics) and work types (appointment templates).

[Create Skills in Salesforce Scheduler](#)

To get started with skills for Salesforce Scheduler, create basic skills in your org. When you assign skills to service resources or mark them as required on work types, you can add details like skill level and duration.

[Set Up Operating Hours in Salesforce Scheduler](#)

Operating hours represent the time slots during which appointments can be scheduled. For example, if a bank allows mortgage appointments at a branch only Monday through Wednesday, from 8 AM to 2 PM, create operating hours for the mortgage work type that reflect this requirement.

[Manage Shifts in Salesforce Scheduler](#)

Shifts enable service resources to set up and update their frequently changing work hours. Service resources can set up shifts for different work hours for the same service territory, set up shifts beyond their service territory's operating hours, and even set up shifts for more than one service territory.

[Set Up Holidays in Salesforce Scheduler](#)

Service territories can be non-operational due to state or regional holiday, or due to unforeseen circumstances. Territory managers can create holidays and link the holidays to the service territories to avoid bookings on days when the service territory is closed. For example, territory managers can create a holiday for Independence day or for a day when there's heavy snowfall predicted due to which the branch has to close temporarily. Appointments that are already booked for an unplanned holiday require rescheduling.

[How Salesforce Scheduler Determines Available Time Slots](#)

When users schedule a service appointment, Salesforce Scheduler uses multiple factors, such as field values, scheduled appointments, absences, Scheduler Settings, and Scheduling Policies to determine available time slots.

[Change Labels in Flow Screens](#)

To use your company's terminology, change the tab names and field names of Service Resource, Service Territory, Service Appointments, Work Type Group, and Work Type.

Launch the Salesforce Scheduler Setup App

The Salesforce Scheduler Setup app provides all the Salesforce Scheduler resources in one place (in the form of object tabs) and makes it easier for administrators to create, configure, and manage those resources. Assign the Salesforce Scheduler Setup app to the user profile of your admin who will create and manage Salesforce Scheduler resources.

1. Ensure that the Salesforce Scheduler admin profiles in your org have access to the Salesforce Scheduler Setup app.
 - a. From Setup, in the Quick Find box, enter *App Manager*, and then select **App Manager**.
 - b. In Lightning Experience App Manager, click the dropdown arrow next to Salesforce Scheduler Setup, and then select **Edit**.
 - c. In App Settings, click **User Profiles**.
 - d. Move the desired user profiles to Selected Profiles and save the changes.
2. From the App Launcher, find and open the Salesforce Scheduler Setup app.
By default, the Salesforce Scheduler Setup app includes these tabs:
 - Salesforce Scheduler Setup Assistant
 - Service Territories
 - Service Resources
 - Work Type Groups
 - Work Types
 - Operating Hours
 - Service Appointments



Tip: If you can't see an object tab, ensure that the tab visibility for that object is set to Default On in your user profile.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To view apps:

- View Setup and Configuration

To manage apps:

- Customize Application

Set Up Service Territories in Salesforce Scheduler

Create and configure service territories to organize your service resources and ensure that they're assigned to appointments near their home branch.

1. [Enable Maps and Location Services in Salesforce Scheduler](#)
Salesforce Scheduler uses maps and location services to search for appointment locations (service territories).
2. [Extend Location Search](#)
Enable location search to let users search for and select appointment locations when scheduling appointments.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

3. [Configure State and Country Picklists](#)

Set up state and country picklists to let users select states and countries from a predefined, standardized list instead of entering state and country data into text fields.

4. [Create Service Territories in Salesforce Scheduler](#)

Create service territories to organize your service resources and ensure that the service resources are assigned to appointments near their home branch.

5. [Guidelines for Managing Service Territories in Salesforce Scheduler](#)

Learn how to manage your service territories.

Enable Maps and Location Services in Salesforce Scheduler

Salesforce Scheduler uses maps and location services to search for appointment locations (service territories).

1. From Setup, in the Quick Find box, enter *Maps*, select **Maps and Location Settings**, and then select **Edit**.
2. Select **Enable Maps and Location Services (powered by Google)**.
3. Select **Enable autocomplete on standard address fields (Lightning Experience and mobile app only)**.



Note: You can only select this option after you've selected the **Enable Maps and Location Services (powered by Google)** option.

4. Save your changes.
5. From Setup, in the Quick Find box, enter *Data Integration*, and then select **Data Integration Rules**.
6. Click **Geocodes for Service Territory Address**, and then click **Edit Rule Settings**.
7. Select **Update all records (recommended)**.
8. Save your changes.

Extend Location Search

Enable location search to let users search for and select appointment locations when scheduling appointments.

1. In Setup, add these URLs as trusted URLs. For details, see [Manage Trusted URLs](#).
 - For a production org, enter `https://location.force.com`.
 - For a sandbox org, enter `https://test-location.force.com`.

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Configure State and Country Picklists

Set up state and country picklists to let users select states and countries from a predefined, standardized list instead of entering state and country data into text fields.

State and country picklists ensure that you have consistent data. It also makes it easier to use this data for reports. See [Implementing State and Country Picklists](#) for more information.

Note:

- If you implement state and country picklists after setting up service territories and appointments, you must update the state and country in all service territories created before the implementation.
- Updating the state and country in all service territories created before the implementation also ensures no errors related to locations while saving changes to flow templates.
- When you edit existing appointments, update the state and country before saving. If you don't update the state and country before saving, it can result in unexpected behavior.

Create Service Territories in Salesforce Scheduler

USER PERMISSIONS

| | |
|--|-------------------------------|
| To view the Service Territories tab and service territories: | Read on service territories |
| To create or clone service territories: | Create on service territories |
| To edit service territories: | Edit on service territories |
| To delete service territories: | Delete on service territories |
| To view service territory locations: | Read on service territories |
| To create, update, or delete service territory locations: | Edit on service territories |
| To view service territory members: | Read on service territories |
| To create, update, or delete service territory members: | Edit on service territories |
| To assign operating hours to service territories: | Edit on service territories |

Create service territories to organize your service resources and ensure that the service resources are assigned to appointments near their home branch.

Service territories typically represent geographical areas where your resources work. However, you can create functional territories, such as loan processing or account onboarding. You can also organize service territories into hierarchies.

Associate each service territory (location) to a work type (appointment template) via a service territory work type. This ensures that each template is associated with the appropriate branch.

EDITIONS

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EDITIONS


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 **Tip:** If you build a hierarchy of service territories, create the highest-level territories first. A hierarchy of service territories can have up to 10,000 territories.

1. On the Service Territories tab, click **New**.
2. Enter a name and description for your territory, such as a branch location.
3. Select **Active** to be able to add members to the territory or associate it with appointments.
4. Enter an address.
This address is the location of the appointment as used in the location search in the appointment flow.
5. If your territory is part of a larger territory, select a parent territory if necessary.
6. Select operating hours for the territory, which indicate when appointments within the territory take place.

 **Important:** When you use Shift Management, service territory's operating hours are used only if you select the Use service territory's operating hours with shifts scheduling policy. For more information, see [Define Shift Rules in Scheduling Policy](#) on page 45.


 **Note:** Select a set of operating hours without any concurrent time slots. Any concurrent time slots in the service territory's operating hours aren't available for selection during appointment scheduling. Only the concurrent time slots in the service territory member's operating hours are available.

7. Save your changes.
8. To assign resources to your territory, use the Service Territory Members related list or click **Assign Service Resources**.

Service territory members are resources who are available to work within the territory. If you haven't created resources yet, you can also define a resource's territories from the resource's detail page.

Resources use their territory's operating hours by default, but you can define different hours for resources.

When you add a member, indicate whether the territory is the member's primary or secondary territory. The primary territory is typically the territory where they work most often—for instance, near their home branch—while secondary territories are territories where they can be assigned to appointments if needed. A resource can have only one primary territory for a date range. There's no restriction on the number of secondary territories for the resource.

 **Example:** Create a hierarchy of territories to represent the areas where your team works in California. Include a top-level territory named California, three child territories named Northern California, Central California, and Southern California, and a series of third-level territories corresponding to California counties. Assign resources to each county territory to indicate who is available to work in that county.

Salesforce Scheduler uses coordinates to show service territories when users create appointments. The Geocodes for Service Territory Address data integration rule generates coordinates (latitude and longitude) based on the service territory address. To view the coordinates for service territories:

1. Click the Setup icon, and then select **Developer Console**.
2. In Query Editor, enter `SELECT Name, Latitude, Longitude from ServiceTerritory`.

 **Note:** To view the latest data, click **Refresh Grid**.

3. Click **Execute**.

If coordinates don't appear, confirm that the data integration rule is active. Then, update the address fields of the service territory so that the data integration rule generates the coordinates.

Guidelines for Managing Service Territories in Salesforce Scheduler

Learn how to manage your service territories.

Viewing Service Territories in Salesforce Scheduler

View service territories on the Service Territories tab. You can also view a service resource's territories on the Service Territories related list on the resource detail page.

Creating Service Territories in Salesforce Scheduler

Create service territories from the Service Territories tab in Salesforce. After you create a territory, you can add members to it via the Service Territory Members related list. Service territory members are resources who work within the territory, and associating them with a territory ensures that they're assigned to appointments near their home base.

Assigning Service Territories to Service Resources in Salesforce Scheduler

You can link a service resource to multiple territories to indicate where they are available to work. Assign territories to a resource via the Service Territories related list on the resource detail page, or via the Service Territory Members related list on the territory detail page.

When you assign a territory to a resource, use the Type field to indicate whether the territory is a primary or secondary territory for the resource.

- The primary territory is typically the territory where the resource works most often—for instance, near their home base. Resources can have only one primary territory.
- Secondary territories are territories where the resource can be assigned to appointments if needed. A resource can have more than one secondary territory.

Deleting Service Territories in Salesforce Scheduler

You can't delete a service territory with service appointments. If you try to delete it, you're prompted to assign the appointments to a different territory.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

Set Up Service Resources in Salesforce Scheduler

Create service resources to represent your employee attendees.

[Configure Who Can Be a Service Resource](#)

Service resources are individual users in your org who can attend appointments with clients. Before you can create service resources, create or identify users who you want to be available as service resources. Then, assign them the Salesforce Scheduler permission set license via a permission set to make them available for appointments.

[Create Service Resources in Salesforce Scheduler](#)

Service resources are individual users who can attend customer appointments. Create service resources so that you can assign appointments to them.

[Assign Service Territories to Service Resources in Salesforce Scheduler](#)

Assign service territories to service resources to ensure that appointment attendees are associated with all the locations where they're available.

[Guidelines for Managing Service Resources in Salesforce Scheduler](#)

Learn how to manage your service resources.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

[Enable Asset Scheduling in Salesforce Scheduler](#)

It's easier than ever to book rooms and equipment, such as MRI machines or dialysis chairs, with Asset Scheduling.

Configure Who Can Be a Service Resource

Service resources are individual users in your org who can attend appointments with clients. Before you can create service resources, create or identify users who you want to be available as service resources. Then, assign them the Salesforce Scheduler permission set license via a permission set to make them available for appointments.

1. Create a permission set with the Salesforce Scheduler permission set license.
 - a. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
 -  **Tip:** You can use the Salesforce Scheduler Setup Assistant tool to quickly open the Permission Sets page in Setup. On the Salesforce Scheduler Setup Assistant tab, under Get Started with Salesforce Scheduler, click **Set Up Permissions**.
 - b. Click **New**.
 - c. Enter a label, API name, and description for your permission set. To keep it simple, use *Salesforce Scheduler Resource*.
 - d. In the License list, select **Salesforce Scheduler**, and click **Save**.
 - e. On the permission set overview page, under System, click **System Permissions**.
 - f. Click **Edit**.
 - g. Enable the **Let a user be included in appointments in Salesforce Scheduler** permission.
 - h. Click **Save**.
2. Assign the Salesforce Scheduler Resource permission set to the users who you have created or identified to be available as service resources. Assigning the permission set automatically assigns the associated permission set license to the user.
 - a. On the Salesforce Scheduler permission set overview page, click **Manage Assignments**, and then click **Add Assignments**.
 - b. Select the users who you want to assign the Salesforce Scheduler Resource permission set to, and then click **Assign**.
 - c. Click **Done**.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create a permission set:

- Manage Profiles and Permission Sets

To assign a permission set license:

- Manage Users

Create Service Resources in Salesforce Scheduler

USER PERMISSIONS

| | |
|---|-----------------------------|
| To view the Service Resources tab and service resources | Read on service resources |
| To create service resources: | Create on service resources |
| To edit or deactivate service resources: | Edit on service resources |
| To view service resource skills: | Read on service resources |
| To create, edit, or delete service resource skills: | Edit on service resources |

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions


| | |
|---|---------------------------|
| To view, create, or edit resource absences: | Read on service resources |
| To delete resource absences: | Edit on service resources |

Service resources are individual users who can attend customer appointments. Create service resources so that you can assign appointments to them.

1. From the App Launcher, find and open the **Salesforce Scheduler Setup** app.
2. From the Service Resources tab, click **New**.

 **Tip:** To create a service resource using the Salesforce Scheduler Setup Assistant tool, go to the Salesforce Scheduler Setup Assistant tab, and under Set Up a Service Resource and Assign a Skill, click **Create a Resource**.

3. Select a user and enter a resource name—typically, the user's name.
4. Select **Active** so that you can assign the resource to appointments.
5. To use the resource for scheduling appointments in Salesforce Scheduler, select **Main**.

 **Note:** To consider service resources specified as Main for appointment booking, enable the Main Service Resource setting.

6. Select a resource type:

| Option | Description |
|-------------------|--|
| Technician | For individual users. This resource type is supported by default. |
| Agent | For individual users. Supported only if the Main Service Resource setting is enabled and the Main checkbox is selected. Typically used for service resources shared with Omni-Channel. |
| Asset | For rooms and equipment. Supported only if Asset Management is enabled. |

7. Save your changes.

Assign the new service resource to a service territory and add skills.

Assign Service Territories to Service Resources in Salesforce Scheduler

Assign service territories to service resources to ensure that appointment attendees are associated with all the locations where they're available.

1. On the service resource record page, click **Assign Service Territories**.
2. Click the plus icon to select one or more service territories.
3. Click **Next**.
4. For each of the service territories you selected, select a territory type. The default is primary.

The primary territory is typically the territory where a service resource works most often—for instance, near their home branch. Secondary territories are territories where service resources can be assigned to appointments if needed. A service resource can have only one primary service territory, but can have multiple secondary service territories.

5. Optionally, set start and end dates for any or all of the specified service territories.
6. Click **Save**.

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Available in: **Enterprise** and **Unlimited** Editions

 **Note:** To view all the service territories that a service resource is a member of, see the Service Territories related list on the service resource record page.

Guidelines for Managing Service Resources in Salesforce Scheduler

Learn how to manage your service resources.


View Service Resources in Salesforce Scheduler

View service resources on the Service Resources tab. In addition:

- Resources that are assigned to a service appointment appear in the Assigned Resources related list on the appointment detail page.
- Resources that belong to a service territory appear in the Service Territory Members related list on the territory detail page.

Create Service Resources in Salesforce Scheduler

Create service territories from the Service Territories tab in Salesforce. After you create a territory, you can add members to the territory via the Service Territory Members related list. Service territory members are resources who work within the territory and associating the members with a territory ensures that they're assigned to appointments near their home base. To create a service resource that represents a user, select the user in the User lookup field and select a Resource Type.

 **Note:** When Omni-Channel (Service Cloud) and Salesforce Scheduler coexist in an org and have a common service resource, always create two records for that service resource. One with the resource type as Agent for Omni-Channel and the other with the resource type as Technician for Salesforce Scheduler.

Assign Service Resources in Salesforce Scheduler

Assign a resource to a service appointment via the Assigned Resources related list on the appointment detail page. If needed, you can modify the related list layout from the Assigned Resources node in Setup. You can assign multiple resources to an appointment. To access assigned resource records, ensure that you've access to service appointments.

Deactivate Service Resources in Salesforce Scheduler

For tracking purposes, resources can only be deactivated, not deleted. To deactivate a user, deselect Active on their detail page. To deactivate a service resource, deselect Active on the service resource detail page. You can't create a service resource that's linked to an inactive user.

View Service Resource Schedules in Salesforce Scheduler

For tracking purposes, resources can only be deactivated, not deleted. To deactivate a user, deselect Active on their detail page. To deactivate a service resource, deselect Active on the service resource detail page. You can't create a service resource that's linked to an inactive user.

The Service Appointments related list shows all appointments that a service resource is assigned to, while the Absences related list on a service resource lets you define periods of time when a service resource is unavailable to work.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Enable Asset Scheduling in Salesforce Scheduler

It's easier than ever to book rooms and equipment, such as MRI machines or dialysis chairs, with Asset Scheduling.

[Provide User Profile Access to the Asset Field](#)

Grant field-level access to the Asset field on Service Resource to allow users to create or manage resources in Salesforce Scheduler.

[Update the Service Resource Page Layout for Asset Scheduling](#)

Give users access to Asset Scheduling on the Service Resource page.

[Update the Default Asset Sharing Setting \(Optional\)](#)

The default sharing setting for assets is Controlled by Parent, which requires a parent account and/or contact to be defined for an asset. However, assets do not always require parent accounts. To remove this restriction, change the default sharing setting.

[Create Assets in Salesforce Scheduler](#)

Create assets such as meeting rooms and equipment.

[Make Assets Available for Scheduling](#)

Add your assets as service resources to make them available for scheduling.

[View Maximum Schedulable Assets in Salesforce Scheduler](#)

Each active asset type resource is included in the schedulable asset limit for your organization. You can view your asset limits and usage counts in the Usage based entitlements report.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Asset Scheduling is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Provide User Profile Access to the Asset Field

Grant field-level access to the Asset field on Service Resource to allow users to create or manage resources in Salesforce Scheduler.

1. From Setup, open **Object Manager**.
2. Select **Service Resource**.
3. Select **Fields & Relationships**.
4. Select **Asset**.
5. Click **Set Field-Level Security**.
6. Select the **Visible** checkbox for all profiles that create or manage asset resources in Salesforce Scheduler, including the System Admin profile.
7. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Asset Scheduling is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Update the Service Resource Page Layout for Asset Scheduling

Give users access to Asset Scheduling on the Service Resource page.

1. From Setup, open **Object Manager**.
2. Select **Service Resource** and then select **Page Layouts**.
3. Select **Service Resource Layout**.
4. From the palette, drag the Asset field into the Service Resource Detail section.
5. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Asset Scheduling is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Update the Default Asset Sharing Setting (Optional)

The default sharing setting for assets is Controlled by Parent, which requires a parent account and/or contact to be defined for an asset. However, assets do not always require parent accounts. To remove this restriction, change the default sharing setting.

1. From Setup, in the Quick Find box, enter *Sharing Settings*, then select **Sharing Settings**.
2. Under Organization-Wide Defaults, click **Edit**.
3. For Asset, change Default Internal Access from **Controlled by Parent** to **Public Read Only**, **Public Read/Write**, or **Private**, depending on your requirements.
4. Save your changes.

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Asset Scheduling is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Create Assets in Salesforce Scheduler

Create assets such as meeting rooms and equipment.

1. From the App Launcher, find and select **Assets**.
2. On the Assets tab, click **New**.
3. Enter an asset name and other details as required.
 -  **Note:** You must select an account, a contact, or both.
4. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Asset Scheduling is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Make Assets Available for Scheduling

Add your assets as service resources to make them available for scheduling.

1. On the Service Resources tab, click **New**.
2. In the Resource Type picklist, select **Asset**.
3. In the Asset lookup field, select an asset.
4. Select **Active**.
5. Save your changes.
6. Set up skill assignments and service territory memberships for the asset.

 **Note:** Before you can delete an asset, deactivate the service resource associated with it.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Asset Scheduling is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

View Maximum Schedulable Assets in Salesforce Scheduler

Each active asset type resource is included in the schedulable asset limit for your organization. You can view your asset limits and usage counts in the Usage based entitlements report.

1. In Setup, enter *Company Profile* and select **Company Information**.
2. In Usage based entitlements, under the Resource column, search for Maximum Schedulable Assets in Salesforce Scheduler. The usage count is updated weekly.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Asset Scheduling is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Set Up Work Type Groups and Work Types in Salesforce Scheduler

Streamline appointment scheduling by creating work type groups (appointment topics) and work types (appointment templates).

1. [Customize Appointment Subtopics in Salesforce Scheduler](#)
Customize the appointment subtopics that users see below an appointment topic when creating appointments in Salesforce Scheduler.
2. [Create Work Type Groups in Salesforce Scheduler](#)
A work type group represents an appointment topic, such as home loan or investment. Create appointment topics that are relevant for your users.
3. [Create Work Types in Salesforce Scheduler](#)
Work types are templates that are included in a work type group —appointment topic— and service territory —branch location, saving you time and making standardizing your appointment scheduling easier. You can set parameters such as the default appointment duration, buffers before and after your appointment, and the appointment availability horizon.
4. [Customize Default Appointment Types in Salesforce Scheduler](#)
Customize the default appointment types that are available when users create appointments in Salesforce Scheduler.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

5. [Assign Work Types to Service Territories in Salesforce Scheduler](#)
Map each work type (appointment template) to a service territory (location).
6. [Assign Work Types to Work Type Groups in Salesforce Scheduler](#)
Map each work type (appointment template) to a work type group (appointment topic).
7. [Assign Work Type Groups to Work Types in Salesforce Scheduler](#)
Map each work type group (appointment topic) to a work type (appointment template).

Customize Appointment Subtopics in Salesforce Scheduler

Customize the appointment subtopics that users see below an appointment topic when creating appointments in Salesforce Scheduler.

Add picklist values to the Additional Information field on the Work Type Group object.

1. From Setup, open **Object Manager**.
2. Select **Work Type Group**.
3. Select **Fields & Relationships**, then **Additional Information**.
4. In the Additional Information Picklist Values section, click **New**.
5. Enter the values, such as *Checking or Savings Account*, *Credit Card*, and *Personal Loan*. Each value must be on its own line.
6. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

The screenshot shows the Salesforce Object Manager interface for the 'Work Type Group' object. The 'Additional Information' field is configured with a 'Picklist (Multi-Select)' data type. Below the field configuration, the 'Additional Information Picklist Values' section is highlighted with an orange box. This section contains a table with the following data:

| Action | Values | API Name | Default | Modified By |
|---|-----------------------------|-----------------------------|--------------------------|--------------------------------|
| Edit Del Deactivate | Checking or Savings Account | Checking or Savings Account | <input type="checkbox"/> | Amit Singh, 8/20/2020, 4:14 AM |
| Edit Del Deactivate | Credit Card | Credit Card | <input type="checkbox"/> | Amit Singh, 8/20/2020, 4:12 AM |
| Edit Del Deactivate | Personal Loan | Personal Loan | <input type="checkbox"/> | Amit Singh, 8/20/2020, 4:14 AM |

Below the table, there is an 'Inactive Values' section which currently shows 'No Inactive Values values defined.'

When creating or editing a work type group, you can select one or more additional information values. Users see those values when they select the work type group during appointment scheduling.

Create Work Type Groups in Salesforce Scheduler

USER PERMISSIONS

| | |
|--|----------------------------|
| To view the Work Type Groups tab and work type groups: | Read on work type groups |
| To create work type groups: | Create on work type groups |
| To edit or deactivate work type groups: | Edit on work type groups |
| To delete work type groups: | Delete on work type groups |
| To view work type group members (work types): | Read on work type groups |
| To create, edit, or delete work type group members: | Edit on work type groups |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

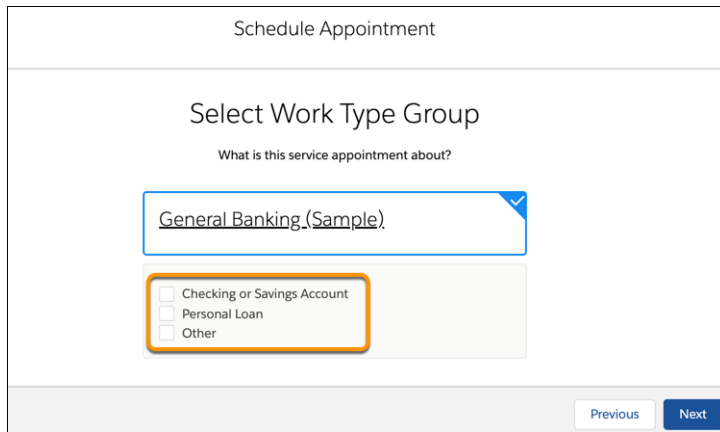
A work type group represents an appointment topic, such as home loan or investment. Create appointment topics that are relevant for your users.


1. On the Work Type Groups tab, click **New**.
2. Enter a Work Type Group name, such as *General Banking*.
3. Enter a description for the work type group.
Salesforce Scheduler shows this description in flow screens when a user is selecting a work type group.
4. Set group type to **Default**.
Capacity is a work type group that Field Service uses.
5. Select **Active**.
6. Under Additional Information, select one or more values. For information about how to add, modify, or delete these values, see [Customize Appointment Subtopics in Salesforce Scheduler](#) on page 17.

The screenshot shows the 'New Work Type Group' configuration page. It features several sections:

- Description:** A text input field for 'Work Type Group Name' containing 'General Banking' and a larger text area for 'Description'.
- Group Type:** A dropdown menu set to 'Default'.
- Active:** A checkbox that is checked.
- Additional Information:** A selection interface with two columns. The 'Available' column contains 'Credit Card'. The 'Chosen' column contains 'Checking or Savings Account' and 'Personal Loan', which are highlighted with an orange border.

The selected additional information values appear when users select this work type group during appointment scheduling.



 **Note:** The Other value is automatically added to each work type group for which you select one or more additional information values.

7. Save your changes.

Create Work Types in Salesforce Scheduler

USER PERMISSIONS

| | |
|--|--|
| To view the Work Types tab and work types: | Read on work types |
| To create work types: | Create on work types |
| To edit work types: | Edit on work types |
| To delete work types: | Delete on work types |
| To view service territory work types: | Read on service territories AND Read on work types |


EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Work types are templates that are included in a work type group —appointment topic— and service territory —branch location, saving you time and making standardizing your appointment scheduling easier. You can set parameters such as the default appointment duration, buffers before and after your appointment, and the appointment availability horizon.

1. On the Work Types tab, click **New**.
2. Enter a name and description.
Use a name that indicates the kind of records that can be created from the work type. For example, Mortgage or Account Opening.
3. If necessary, select operating hours for the work type.
If you don't select operating hours for a work type, the work type is considered to be always available.


 **Note:** Select operating hours without concurrent time slots. Only the concurrent time slots in the service territory member's operating hours are available for selection during appointment scheduling.

4. Enter an estimated duration for the appointment, and a duration type in minutes or hours.

 **Warning:** Don't specify more than 24 hours as estimated duration.

5. If necessary, specify the time interval between appointment start times.

For example, if you set the interval as 15 minutes, then appointments can be conducted every 15 minutes, such as 10:00 AM, 10:15 AM, and 10:30 AM, from the start of your work day. You can set a time interval from 5 through 720 minutes.

 **Note:** If you don't specify a value for this field, Salesforce Scheduler considers the value specified for the Appointment Start Time Interval field in the default scheduling policy.

6. If necessary, select an appointment category.

If you want the work type to be available for both drop-in and scheduled appointments, select an appointment category with both options selected.

7. If no appointment categories are available, then create an appointment category.

- a. Select **+ New Appointment Category**.

- b. Enter a name.

Enter a name that indicates the type of category. For example, Drop In or Scheduled.

- c. Select one or more category types, and then save your changes.

Drop In For customers who visit the branch without a prior appointment.


Scheduled For customers who schedule an appointment before visiting the branch.

The appointment category is also related to the service appointment record. If you don't create a category that supports only the drop-in appointments, Salesforce Scheduler automatically creates the drop-in category when a participant is added to an active waitlist. The Appointment Category field of the service appointment record is also updated to reflect the drop-in category.

For scheduled appointments, the Appointment Category field of the service appointment record remains empty even if you created a category to support only the scheduled appointments.


8. If necessary, specify meeting preparation and wrap-up time by specifying Block Time Before Appointment and Block Time After Appointment in minutes or hours.

During appointment scheduling, the number of available time slots is adjusted to accommodate the before and after buffer times.

 **Warning:** Don't specify more than 24 hours as buffer time.

 **Note:** Enable the [Block Resource Availability setting](#) to reflect the before and after appointment buffers on the Salesforce calendar.

9. If necessary, enter Timeframe Start, Timeframe Start Unit, Timeframe End, and Timeframe End Unit.

 **Note:** Timeframe Start and Timeframe End show time slots in a dynamic time frame based on when a user books an appointment. Salesforce Scheduler shows only time slots that start after the duration that's set in Timeframe Start and end before the duration that's set in Timeframe End. For example, you've set Timeframe Start to 2 days and Timeframe End to 5 days and a user schedules an appointment on Sep 13, 10:00 AM. Then, only time slots that start on or after Sep 15, 10:00 AM and end on or before Sep 18, 10:00 AM are shown.


10. Save your changes.

After a work type is created, add skills requirements for the work type on the Skill Requirements related list. Associate the work type with a service territory on the Service Territory Work Types related list and an appointment topic on the Work Type Group Members related list.

Customize Default Appointment Types in Salesforce Scheduler

Customize the default appointment types that are available when users create appointments in Salesforce Scheduler.

Salesforce Scheduler uses the values in the Default Appointment Type picklist—of the Work Type object—to show appointment types.

 **Note:** Lightning Design System provides utility icons that you can use on lightning pages. Salesforce Scheduler uses utility icons to show icons for appointment types.

To add picklist values to the Default Appointment Type picklist:

1. From Setup, click **Object Manager**.
2. Select **Work Type**.
3. Select **Fields & Relationships**, and then select **Default Appointment Type**.
4. In the Default Appointment Type Picklist Values section, click **New**.
5. Enter the values, such as *phone*, *at a branch*, or *video*. Each value goes on its own line. For value in each line, a picklist value is created. By default, the API name of a picklist value is the same as the picklist value. Salesforce Scheduler verifies whether the API name of a picklist value matches the name of a utility icon that Lightning Design System provides. If the names match, Salesforce Scheduler uses the icon with the same name. If the names don't match, Salesforce Scheduler uses the default lightning icon.
6. To edit the icons for appointment types, edit the API names and then enter the names of utility icons that you want to use.
7. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Assign Work Types to Service Territories in Salesforce Scheduler

Map each work type (appointment template) to a service territory (location).

1. From the Related tab on a service territory record page, click **New** on the Service Territory Work Types related list.
2. Select a work type.
3. Save your changes.

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Assign Work Types to Work Type Groups in Salesforce Scheduler

Map each work type (appointment template) to a work type group (appointment topic).

1. From the Related tab on a work type record page, click **New** on the Work Type Group Members related list.
2. Select a work type group.

 **Note:** Ensure that the work type group you select doesn't have an associated work type with the same service territory as of the work type record.

3. Save your changes.

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Assign Work Type Groups to Work Types in Salesforce Scheduler

Map each work type group (appointment topic) to a work type (appointment template).

1. From the Related tab on a work type group record page, click **New** on the Work Type Group Members related list.
2. Select a work type.

 **Note:** Ensure that the work type you select and other work types associated with the work type group aren't linked with the same service territory.

3. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Create Skills in Salesforce Scheduler

To get started with skills for Salesforce Scheduler, create basic skills in your org. When you assign skills to service resources or mark them as required on work types, you can add details like skill level and duration.

1. From Setup, in the Quick Find box, enter *skills*, and then click **Skills** under Salesforce Scheduler.
2. Click **New**.
3. Enter a name for the skill—for example, *Wealth Manager* or *Mortgage Specialist*.
4. Enter a description.
5. Click **Save**.

You can now assign the skill to service resources or list it as required on work types.

[Assign Skills to Service Resources in Salesforce Scheduler](#)

Assign skills to service resources to indicate their areas of expertise. Service resources are assigned appointments based on their skills.

[Assign Skills with Start and End Dates to Service Resources](#)

Assign skills with both start and end dates to service resources to track their certifications and areas of expertise.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Add Skill Requirements for Work Types in Salesforce Scheduler


Define skill requirements for work types to ensure that an appointment is assigned to a service resource with the right skills. A service resource can be assigned to an appointment only if the resource has all the skills that are required for the work type associated with that appointment. Adding skill requirements to work types saves you time and keeps your business processes consistent.

Assign Skills to Service Resources in Salesforce Scheduler

Assign skills to service resources to indicate their areas of expertise. Service resources are assigned appointments based on their skills.


1. On a service resource record page, click **Assign Skills**.

2. Select one or more skills.

 **Important:** Ensure that you select all the necessary skills. A service resource can be assigned to an appointment only if the resource has all the skills that are required for the work type associated with that appointment.

3. Click **Next**.


4. Enter a skill level from 0 through 99.99 based on how your business measures skill level.

 **Important:** Omni-Channel doesn't consider a skill value beyond 10. If you use the same resource for Salesforce Scheduler and Omni-Channel, then specify a value less than 10 for skills that are common to both products.

5. Enter a start date.

6. Save your changes.

The assigned skills now appear in the Skills related list tab on the service resource record page.

 **Tip:** To track a service resource's skills easily, upload photos of licenses and certifications in the Files related list on the service resource record page.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Assign Skills with Start and End Dates to Service Resources


Assign skills with both start and end dates to service resources to track their certifications and areas of expertise.

1. On a service resource record page, on the Skills related list, click **New**.


2. From the **Skills** list, select a skill.

3. Enter a skill level from 0 to 99.99 based on how your business measures skill level.

4. Enter a start date and an end date. For example, if a service resource must be recertified in a particular skill every six months, you can enter an end date that's six months later than the start date.

 **Note:** If the same skill is added with different sets of start and end dates, Salesforce Scheduler takes the first instance of the skill and calculates time slots.

5. Click **Save**. The service resource's skill now appears in their Skills related list.

 **Tip:** To make it easier to track a service resource's skills, upload photos of licenses and certifications in the Files related list on the service resource record page.

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Add Skill Requirements for Work Types in Salesforce Scheduler

Define skill requirements for work types to ensure that an appointment is assigned to a service resource with the right skills. A service resource can be assigned to an appointment only if the resource has all the skills that are required for the work type associated with that appointment. Adding skill requirements to work types saves you time and keeps your business processes consistent.

1. On a work type record page, on the Skill Requirements related list, click **New**.
2. In the Skill Required field, select a skill.

 **Note:** You must [create a skill](#) before you can add it as a requirement to a work type.

3. Enter a skill level from 0 to 99.99 based on how your business measures skill level.
4. Click **Save**. The skill now appears in the Skill Requirements related list on the record page.

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Set Up Operating Hours in Salesforce Scheduler

Operating hours represent the time slots during which appointments can be scheduled. For example, if a bank allows mortgage appointments at a branch only Monday through Wednesday, from 8 AM to 2 PM, create operating hours for the mortgage work type that reflect this requirement.




Operating hours serve as the basis to identify the availability of a resource for a work type at a service territory. Define clear time slots for service territories, work types, and service territory members to obtain the right availability for an appointment.

 **Note:** Scheduler automatically considers the daylight savings of the user's timezone and shows the time slots accordingly.

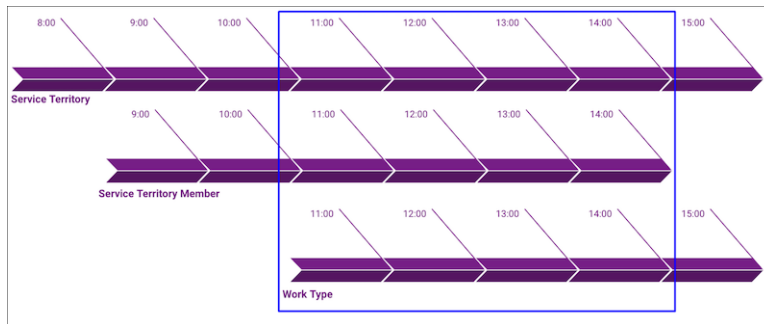
EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Element | Operating Hours | Example |
|--------------------------|--|---|
| Service Territory | Required | The 1 Market St. branch operates during 6 AM to 6 PM, Monday through Friday. |
| Service Territory Member | Optional  Note: If you don't assign operating hours to a service territory member, it automatically uses its service territory's operating hours. | Sara is a banker (service resource) and her operating hours at the 1 Market St. branch are 8 AM to 5 PM, Monday through Friday. |
| Work Type | Optional  Note: If you don't assign operating hours to a work type, it's considered to be always available. | Mortgage appointments at the 1 Market St. branch are allowed only Monday through Wednesday, from 8 AM to 2 PM. |
| Account | Optional  Note: Applicable only if the Enforce Account's Visiting Hours option is selected in the scheduling policy. | John, a customer, strictly takes morning appointments. Bankers' scheduling time with John can't have any evening slots. |

During appointment scheduling, availability of appointment time slots is determined based on an intersection of the time slots in operating hours of the service territory, service territory member, and work type. The availability of concurrent times slots (which is applicable only for service territory members) is also determined in the same fashion.



Example: Sara is a banker who mostly works in the 1 Market St. branch, but is occasionally assigned to appointments in a nearby branch at 101 Mission St. Her primary service territory is the 1 Market St. branch, and her secondary service territory is the 101 Mission St. branch.

Sara's operating hours in the 1 Market St. branch are 8 AM to 5 PM, Monday through Friday. However, because Sara can only support the 101 Mission St. branch at specific times during Monday through Thursday, her operating hours in that territory are 10 AM to 3 PM, Monday through Thursday. Both branches operate during the same hours: 6 AM to 6 PM, Monday through Friday. To reflect these hours in Salesforce, her Salesforce admin does the following:

1. Create three sets of operating hours from the Operating Hours tab, adding time slots for each day:
 - 6 AM to 6 PM Monday - Friday
 - 8 AM to 5 PM Monday - Friday
 - 10 AM to 3 PM Monday - Thursday
2. Add the first set of operating hours to the 1 Market St. and 101 Mission St. service territories via the Operating Hours field.
3. Add the second set of operating hours to Sara's service territory member record for the 1 Market St. service territory via the Operating Hours field.
4. Add the third set of operating hours to Sara's service territory member record for the 101 Mission St. service territory via the Operating Hours field.

Salesforce Scheduler now displays the hours Sara is available to work at each branch, and displays time slots based on her availability and each branch's operating hours.

1. [Add the Operating Hours Component to Record Pages](#)

Add the Operating Hours component to the service territory, service territory member, and work type record pages.

2. [Create Operating Hours in Salesforce Scheduler](#)


View, create, and modify operating hours and time slots on the Operating Hours tab in the Salesforce Scheduler Setup app. Or use the Operating Hours component on a work type, service territory, or service territory member record page.

3. [Assign Operating Hours to Service Territories, Service Territory Members, and Work Types](#)

Assign operating hours to a work type, service territory, or service territory member using the Operating Hours field on the respective record page.

Add the Operating Hours Component to Record Pages

Add the Operating Hours component to the service territory, service territory member, and work type record pages.

 **Note:** The total number of time slots you can add by using the Operating Hours component is limited to 200.

1. From Setup, in the Quick Find box, enter *App Builder*, and then select **Lightning App Builder**.
2. Click **Edit** for one of the following pages: **Service Territory Lightning Record Page**, **Service Territory Member Lightning Record Page**, or **Work Type Lightning Record Page**.
3. Drag the **Scheduler - Operating Hours** component onto the page.
4. Save your changes.
5. Activate the page.
6. Repeat for the other Lightning pages listed in step 2 as needed.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Create Operating Hours in Salesforce Scheduler

USER PERMISSIONS

| | |
|--|--|
| To view the Operating Hours tab and operating hours: | Read on operating hours |
| To create operating hours: | Create on operating hours, Read on Appointment Topic Time Slot |
| To update operating hours: | Edit on operating hours, Read on Appointment Topic Time Slot |
| To delete operating hours: | Delete on operating hours |
| To view time slots: | Read on operating hours |
| To update, create, or delete time slots: | Edit on operating hours |
| To assign operating hours to service resources: | Edit on service resources |
| To assign operating hours to service territories: | Edit on service territories |
| To assign operating hours to accounts: | Edit on accounts |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

View, create, and modify operating hours and time slots on the Operating Hours tab in the Salesforce Scheduler Setup app. Or use the Operating Hours component on a work type, service territory, or service territory member record page.

1. In the Salesforce Scheduler Setup app, on the Operating Hours tab, click **New**.

Alternatively, you can click **Add Time Slots** on the Operating Hours component on a service territory, work type, or service territory member record page. If you don't see the Operating Hours component on these record pages, see [Add the Operating Hours Component to a Lightning Page](#) on page 26.



Tip: You can navigate to a service territory member record in any of these ways:

- On the service resource record page, find the Service Territories related list, then click the member number.
- On the service territory record page, find the Service Territory Members related list, then click the member number for the territory member.

2. Enter a name for the operating hours and select a time zone.
3. To add a time slot, under Set Service Appointment Windows, click **Add Row**.



Note: The total number of time slots that you can add is limited to 200.

4. Select a day, start time, and end time for the time slot.

Add more rows as required.



Note: If the end time is on the next day, that time slot appears in the next day's column while scheduling an appointment. For example, the start time is 8:00 PM on Tuesday and the end time is 12:00 AM on Wednesday. The time slot appears in the column for Wednesday and not in the column for Tuesday.

5. If Concurrent Scheduling is enabled, you can also define time slots for concurrent appointments and specify the maximum number of appointments that can be made in a time slot. Under Set Concurrent Service Appointment Windows, click **Add Row**.



Note: Create concurrent time slots only for those operating hours that you plan to assign to service territory members. During appointment scheduling, only the concurrent time slots in the service territory member's operating hours are available for selection. Any concurrent time slots in the work type's or service territory's operating hours aren't available.

6. Select a day, start time, end time, maximum number of appointments, and appointment topic for the time slot.

Add more rows as required.

7. Save your changes.

Assign Operating Hours to Service Territories, Service Territory Members, and Work Types

Assign operating hours to a work type, service territory, or service territory member using the Operating Hours field on the respective record page.

1. On a work type, service territory, or service territory member record page, edit the Operating Hours field.



Tip: You can navigate to a service territory member record in any of these ways:

- On the service resource record page, find the Service Territories related list, then click the member number.
- On the service territory record page, find the Service Territory Members related list, then click the member number for the territory member.

2. Select a set of operating hours from the list.




Note: If you have a set of operating hours with concurrent time slots, assign it to the service territory member. If you assign it to a work type or service territory, the concurrent time slots aren't available during appointment scheduling.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

 **Note:** If you don't assign operating hours to a service territory member, it automatically uses its service territory's operating hours. And if you don't assign operating hours to a work type, it's considered to be always available.

3. Save your changes.

Manage Shifts in Salesforce Scheduler


Shifts enable service resources to set up and update their frequently changing work hours. Service resources can set up shifts for different work hours for the same service territory, set up shifts beyond their service territory's operating hours, and even set up shifts for more than one service territory.

Service territory managers can view, add, and edit Shifts to manage the availability of service resources in their service territory. Depending on your setup, you can create a role hierarchy in which a service territory manager creates shifts for service resources, and then the service resources confirm the shifts or vice versa.

Let's take an example of a bank branch that has a branch manager (service territory manager), retail bankers (service resources), and contractors for specialized skills (service resources).

In this example, the branch manager can have ultimate control. Depending on the hours that the retail bankers worked during previous weeks, the branch manager can create tentative shifts and ask the retail bankers to confirm them. The branch manager can even decide that the shift timings can or can't go beyond the service territory's operating hours. In scenarios where the branch manager doesn't want to consult with the retail bankers for their shifts, the manager can directly create confirmed shifts.

Contractors can have complete control of their own working hours. By using the experience cloud, they can choose to create shifts that accommodate different service territories on different days for different working hours. For example, a contractor whose expertise is in wealth management can set up shifts for three days a week in the San Francisco branch from 9 AM to 5 PM and for two days a week in the San Jose branch from 12 PM to 5 PM. Contractors can even choose to take appointments beyond the operating hours of a service territory.

 **Note:** For a contractor to create and manage shifts independently, a service territory along with the service territory member record must be available. Moreover, use of shifts without considering the service territories' operating hours must be configured.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Considerations for Shifts

Here are some things to keep in mind when you implement shifts.

Manage Your Shifts in Schedule View

Schedule view shows shifts grouped by service resources or by work type group in a calendar format. The view makes identifying tentative, published, and confirmed shifts easy. The view also shows service resources' absences and service territories' holidays.

Create Shifts in Salesforce Scheduler

Create shifts that vary daily or weekly. You can use shifts to assign service resources for periods that follow a flexible pattern. For example, different working hours at the same service territory or availability of the same service resource at different service territories.

Create Shifts in Bulk by Using a CSV File

Capture shift information in a CSV file, convert the CSV file to a JSON file, and then use Bulk API to create shifts in Salesforce Scheduler.

Set Up Roles and Hierarchies for Shifts

Roles and hierarchies define who reports to whom and help define the approval process for shifts. You can assign users who own a specific role for various service territories. For example, Adam is a bank manager and John is a retail banker. You can create a territory manager role and a retail banker role, where the retail banker reports to the territory manager. Assign the territory manager role to Adam and the retail banker role to John. By using this hierarchy, Adam can create shifts and then ask John to confirm his availability by approving shifts.

Create Record Types for Shift Statuses

To make the required shift status options available for the roles that you created, create record types. For example, a service territory manager can create confirmed shifts or can create tentative shifts and then request the service resources to confirm them. For this process, you can create a record type called Territory Manager Status for the role of Territory Managers, and then select Tentative and Confirmed statuses. When territory managers create shifts, they can only view the Tentative and Confirmed options in the Status field.

Determine Appointment Time Slots with Shifts

To determine time slots with shifts, enable shift-related rules in the scheduling policy. To consider a service territory member's shifts instead of the service territory member's operating hours, enable the Use service territory member's shift option. However, if you want to consider the intersection of shifts and the service territory's operating hours, then enable the Use service territory's operating hours with shifts option along with the Use service territory member's shift option. To consider the account's operating hours along with the intersection, enable the Enforce Account's Visiting Hours option.

Set Up Approval Process for Shifts

Streamline updating shift statuses by enabling the approval process. With the approval process, service resources and territory managers receive email alerts when a shift is created, approved, or rejected.

Restrict Service Resources from Modifying Shifts for Two Weeks with an Apex Trigger

Service territory managers work with their service resources to plan shifts in advance. For example, you want to make an appointment booking available for two weeks starting from the current day. As a result, you want to prevent service resources from modifying their shifts during that period. To restrict a service resource from making any updates to shifts for two weeks, create an Apex trigger.

Restrict Working Hours Selectively

If you enable the Use service territory's operating hours with shifts scheduling policy, Salesforce Scheduler uses the intersection of shifts and service territory operating hours to determine the availability of all service resources. However, if you want to restrict working hours to service territory operating hours only for a few service resources, use triggers.

Considerations for Shifts

Here are some things to keep in mind when you implement shifts.

- The scope for Salesforce Scheduler Shifts is limited to setting up service resources' working hours.
- Before you create a shift, ensure that an active service territory member record exists.
- For optimized performance, we recommend that you limit the number of shifts per resource per day to four.
- Service resources who are Experience Cloud users can set their own shifts only if they have the [Customer Community Plus, Partner Community, or Channel Accounts license](#).
- Shifts don't support concurrent scheduling.
- To view and set up shifts, ensure that guest and community user profiles have access to the Shift object.
- When using shifts, we recommend that you set up one work type group for one work type in a service territory.
- Work.com Shift management and Salesforce Scheduler don't work in the same instance.
- Salesforce Workforce Engagement and Salesforce Scheduler don't work in the same instance.
- When you delete a shift that's used to create an appointment, the corresponding appointment isn't deleted automatically.
- If a period or day is specified as a service resource's absence or a service territory's holiday, a resource can still create shifts during that absence or holiday. But the time slots for that period or day aren't shown while booking an appointment.
- When you view shifts in the schedule view, we recommend that you keep the shift record count below 200. If more than 200 shifts exist, use filters to reduce the shift record count.

EDITIONS



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- If the Appointment Distribution option is enabled and the Use service territory member's shift option is selected in the scheduling policy, Scheduler shows the service resources by filtering. The resources are filtered based on the value in the Number of Resources to Show (Appointment Distribution) flow attribute. Salesforce Scheduler then considers the available shifts for the filtered service resources.
- If you try to edit or delete a confirmed recurring shift, Salesforce Scheduler warns you that the shift can already have existing appointments. The warning messages aren't shown if Salesforce Scheduler co-exists with one or more of these products in the same instance:
 - Field Service
 - Public Sector
 - Shift Management
 - Workforce Management
 - Volunteer Management
- When you edit or delete a recurring shift, the change affects all shifts of the recurring series. Salesforce Scheduler doesn't support editing or deleting only one shift from a recurring series.
- When you clone a shift from the shifts schedule view or the list view to create a shift, Salesforce Scheduler navigates to the record page of the new shift. To view the new shift in the view that you created the shift from, navigate back to that view.
- When you clone a shift, Salesforce Scheduler also clones the Engagement Channel Work Type and Shift Engagement Channel junction objects. To avoid errors while cloning a shift, ensure that you've required access to the work types and engagement channel types associated with the shift.
- When you create a recurring shift, Salesforce Scheduler shows a shift card—in the shifts schedule view—for each shift occurrence. All the compact layouts that appear when you hover over these shift cards show the start time and end time specified in the recurring shift record.
- The Shifts feature doesn't support languages that use right-to-left scripts.

Manage Your Shifts in Schedule View

Schedule view shows shifts grouped by service resources or by work type group in a calendar format. The view makes identifying tentative, published, and confirmed shifts easy. The view also shows service resources' absences and service territories' holidays.

1. From the App Launcher, click **Shifts**.
2. Navigate to any list view other than the Recently Viewed list view, such as the All Shifts list view or a custom list view.
3. Click the actions menu for the list view, and then select the name of the list view that contains the shifts that you want to see.
4. If necessary, define the filters to change the shifts that appear.
5. To view upcoming shifts in the calendar format, click , and then select . The shift schedule view appears.

EDITIONS

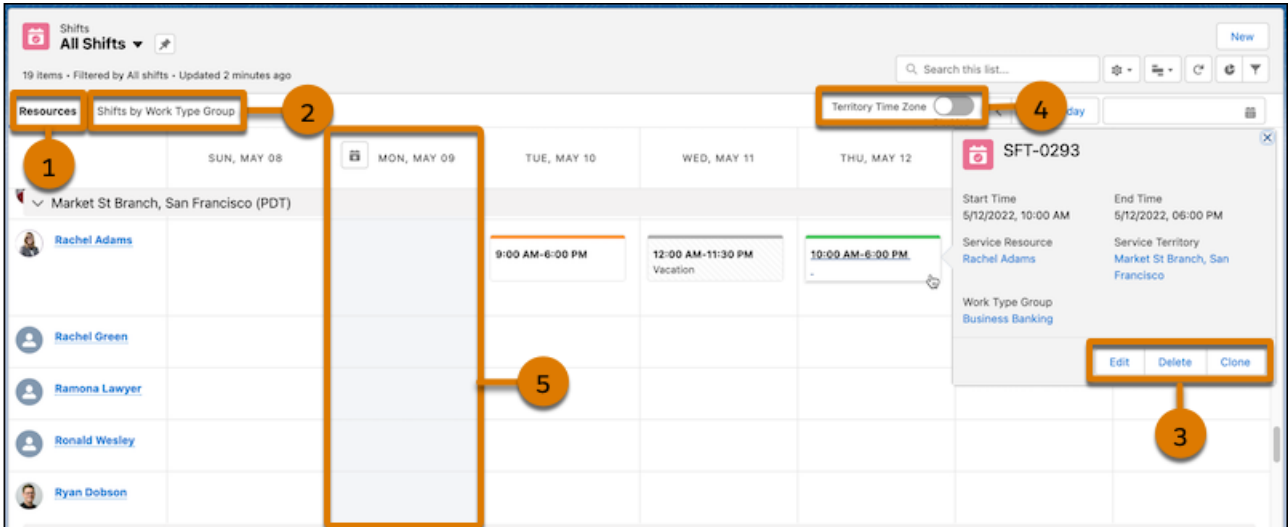
Salesforce Scheduler is available for an extra cost in Lightning Experience.





Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To view shifts:

- View on Shift, Job Profiles, Service Resource, and Service Territory



- To create a shift, click an empty space within the calendar.
 - To see a calendar of shifts that are assigned to each service resource, click the **Resources** tab (1). Salesforce Scheduler shows only active resources who are linked to the service territories for the specified time period.
 - To see a calendar of shifts that are assigned to each work type group, click the **Shifts by Work Type Group** tab (2).
 - To edit or clone a shift, hover over an existing shift, and then click **Edit** or **Clone** (3).
 - To see shift assignments in the time zone of the service territory, turn on **Territory Time Zone** (4).
 - To see the schedule in your time zone, turn off **Territory Time Zone** (4).
 - Resource absences and holidays have a gray background (5).
 - To configure the fields shown on the resource card, update the compact layout for the service resource object.
6. To configure the fields shown on the shift card, perform these steps.
- a. In the list view for Shifts, select a list view other than the Recently Viewed list view, such as the All Shifts list view or a custom list view.
 - b. Click , and then click **Select Fields to Display**.
 - c. To move a field from the Available Fields list to the Visible Fields list, select the field, and then click .
 - d. If you want to reorganize the sequence of fields, use  and .
 - e. Save your changes.

7. Identify a shift’s status by the non-customizable, horizontal, colored stripe.

| Option | Description |
|--------|-------------|
| Orange | Tentative |
| Blue | Published |
| Green | Confirmed |

Customizable background colors show or highlight shifts of different types.


Create Shifts in Salesforce Scheduler

Create shifts that vary daily or weekly. You can use shifts to assign service resources for periods that follow a flexible pattern. For example, different working hours at the same service territory or availability of the same service resource at different service territories.

1. From the App Launcher, click **Shifts**.

2. Perform an action:

- Click **New**.
- From the schedule view, click an empty space within the calendar.

 **Note:** If the Multiple Topics for Shifts setting is enabled, the option to create a shift isn't available in the Shift by Work Type Group tab of the schedule view.

3. Enter dates and times for the shift's start and end.

A second set of time fields shows the shift's start and end in the time zone of the service territory. Salesforce Scheduler shows the second set of time fields only when the user's timezone is different than the service territory's timezone.

If you create a shift with a service territory that has defined operating hours, the start time and end time of the shift defaults to the operating hours of the service territory. But if you create a shift without a service territory or with a service territory that doesn't have defined operating hours, the start time and end time of the shift default to 12 AM to 12 AM.

 **Note:** Ensure that the duration of recurring shifts is less than or equal to 24 hours.

4. Select a status:

| Option | Description |
|------------------|---|
| Tentative | The shift is tentatively defined. |
| Published | The shift manager assigns a service resource and publishes the shift. The assigned service resource is notified. |
| Confirmed | The assigned service resource acknowledges the shift and the scheduling engine considers the shift as confirmed. A shift is applied only when it's confirmed. |

5. Select a service territory and a service resource.

Ensure that the assigned service resource is a member of the service territory.

 **Note:** If you don't assign both a service resource and a service territory to the shift, Scheduler doesn't consider the shift.

 **Note:** Always select a service territory when you're creating a recurring shift.

6. Select a work type group.

By using work type groups, bankers can decide when they want to take appointments for specific skills. For example, a banker can decide to cover the appointments for retail banking in the morning and can provide advice to clients on SME loans in the afternoon.

 **Note:** If you don't select a work type group, Scheduler considers all work type groups for the shift.

If the Multiple Topics for Shifts setting is enabled, Salesforce Scheduler hides the work type and work type group fields. Instead, you can add a topic to a shift. For more information on how to add topics, see [Add Multiple Topics to a Shift](#).

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To view, create, and update shifts:


- View, create, and edit on Shifts, Service Territories, Service Resources, Service Territory Memberships


- From the Time Slot Type dropdown list, select **Normal**.


 **Note:** Salesforce Scheduler applies shifts only for the Normal time slot type.

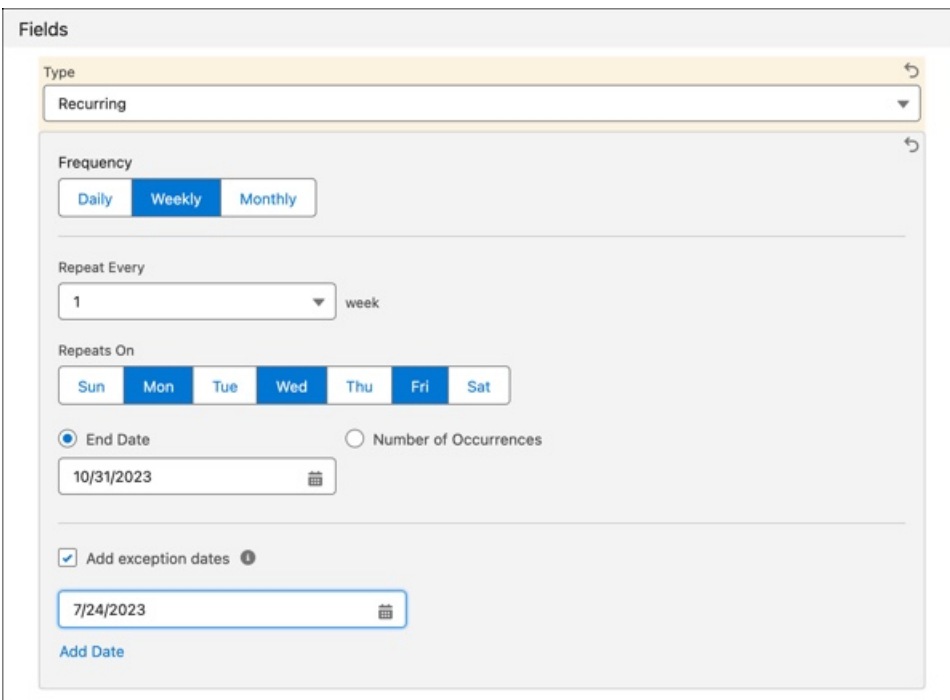
- Choose a background color if necessary.

- To create a recurring shift, from the Type dropdown list, select **Recurring**.

 **Note:** Starting with Winter '23, the Type field is shown in Salesforce by default. For existing instances, add a section with a single column in the Shift layout and add the Type field to the column. For more information about how to create a section, see [User Interface Elements for the Enhanced Page Layout Editor](#).

 **Note:** Starting with Winter '24, the Recurrence Pattern section appears in the shift layout by default. For existing instances, add the Recurrence Pattern field in the Shift layout under Shift Details. For more information, see [Customize Page Layouts with the Enhanced Page Layout Editor](#).

 **Important:** Salesforce Scheduler shows the recurring shift-related fields when you select Recurring in the Type field. Don't add the Recurrence Start Date and Recurrence End Date fields to the Shift object layout individually.




The screenshot shows the 'Fields' configuration panel for a recurring shift. The 'Type' dropdown is set to 'Recurring'. Under 'Frequency', 'Weekly' is selected. 'Repeat Every' is set to '1 week'. 'Repeats On' shows 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', and 'Sat' selected. 'End Date' is selected with a date of '10/31/2023'. 'Add exception dates' is checked with a date of '7/24/2023'.

- Define the frequency of the shift.


| Option | Description |
|----------------|---|
| Daily | Define the days on which the shift repeats. For example, every day, every alternate day, and every third day. |
| Weekly | Define the days of the week on which the shift repeats. For example, every Monday, Wednesday, Friday of every week, every Monday and Thursday, or every alternate week. |
| Monthly | Define which day of the month a shift repeats. For example, every first Monday of the month or every fifth day of every month. |

| Option | Description |
|------------------------------|---|
| End Date | Define the end date for the recurrence period if necessary. |
| Number of Occurrences | Define the number of times the shift repeats if necessary. |

Always either select an end date or specify the number of occurrences for the shift.

 **Note:** Salesforce Scheduler considers the recurrence period in the service territory's timezone. The period of recurrence is limited to 180 days. For example, you create a recurring shift on July 1, 2022. You can choose an end date that's either less than or equal to 180 days from July 1, 2022, or the number of occurrences that are repeated within 180 days from July 1, 2022.

11. To add the dates when you're unavailable between the shift recurrences, select **Add exception dates**. Then, add the dates in the boxes.

 **Note:** You can specify a maximum of 10 exception dates that are within the recurrence pattern duration. Salesforce Scheduler verifies if the exception dates are within the pattern duration, but doesn't verify whether the specified date has a shift recurrence. If you change the recurrence pattern and if the date specified as an exception earlier has a shift recurrence in the new pattern definition, then Scheduler excludes the date from the recurrence pattern. For example, you specified an exception date of July 19, 2023 (Wednesday) for a shift that recurs every Monday from July 10, 2023 until August 28, 2023. Salesforce Scheduler accepts this date as an exception, but it has no effect on the shift recurrence. However, if you update the recurrence pattern of the shift from every Monday to every Wednesday, then Scheduler considers July 19, 2023 as an exception to the shift recurrence definition.

12. Save your changes.

Create Shifts in Bulk by Using a CSV File

Capture shift information in a CSV file, convert the CSV file to a JSON file, and then use Bulk API to create shifts in Salesforce Scheduler.

 **Note:** Shifts are supported only in versions 54.0 and later.

1. Create a CSV file with these columns: `StartTime`, `EndTime`, `Status`, `ServiceTerritoryId`, `ServiceResourceId`, `OwnerId`, `TimeSlotType`, and `WorkTypeGroupId` (if necessary).

For more information about the fields that corresponds to the columns, see [Shift](#).

Here's an example of a CSV file with these fields:

```
StartTime,EndTime,Status,ServiceTerritoryId,ServiceResourceId,OwnerId,TimeSlotType,WorkTypeGroupId
2022-03-30T04:30:00.000Z,2022-03-30T16:30:00.000Z,Confirmed,0H5j000000EhCAG,0H5j000000s00CA2,0055j000006JjS7AK,Normal,0S5j000000HXZG44
```

- In the CSV file, create a row for each shift that you want to create.
 - In the `StartTime` and `EndTime` columns, enter the start time and end time in GMT format.
 - In the `Status` column, enter *Tentative*, *Published*, or *Confirmed*.
 - In the `TimeSlotType` column, enter *Normal*.
- [Sign in](#) to your Postman account or [sign up](#) for an account.
- [Set Up Postman](#).
- Create a bulk job.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

- a. In Collections, click **Salesforce Platform APIs > Bulk v2 > POST Create job**.
- b. Click **Headers**, and then add these values in the Headers table.

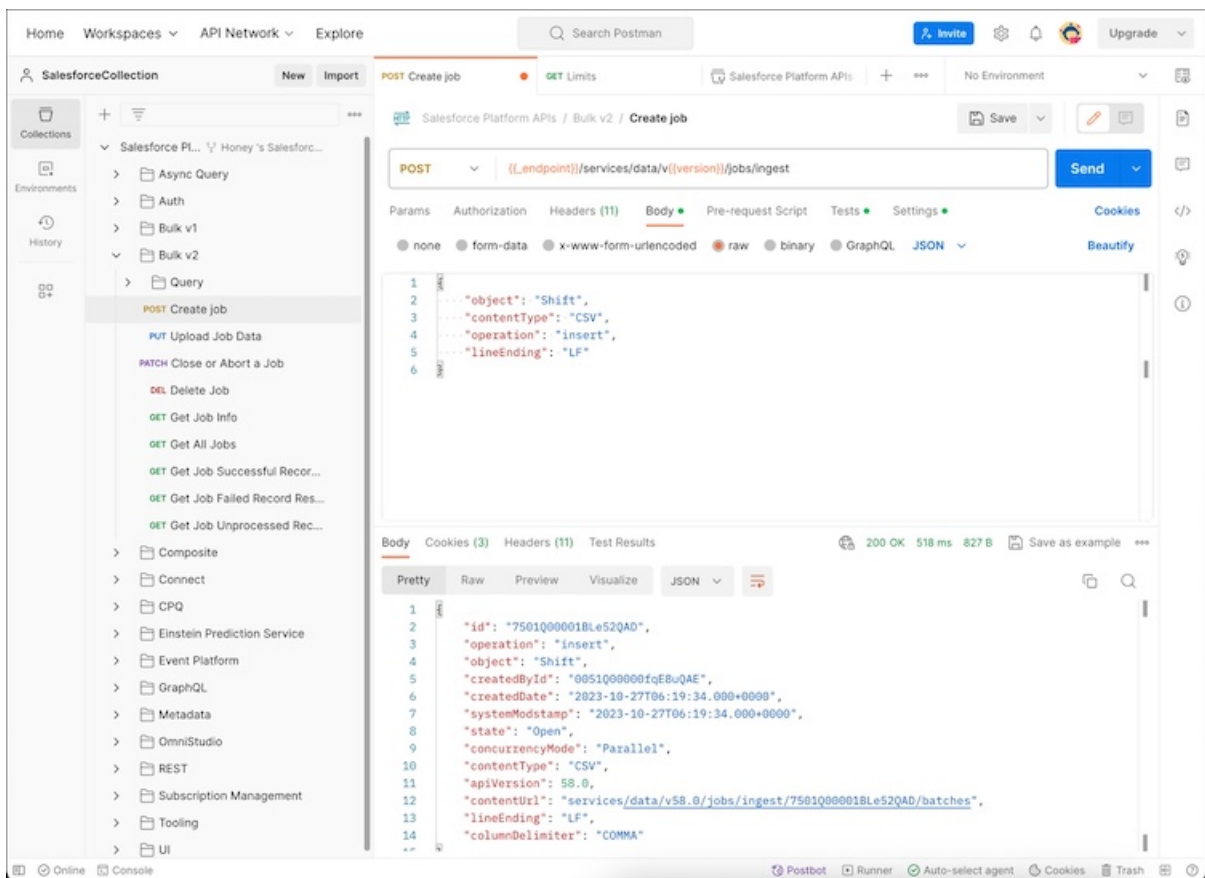
| Key | Value |
|--------------|---------------------------------|
| Content-Type | application/json; charset=UTF-8 |
| Accept | application/json |

- c. On the Body tab, enter this code.

```
{
  "object": "Shift",
  "contentType": "CSV",
  "operation": "insert",
  "lineEnding": "LF"
}
```

 **Note:** Different operating systems use different characters to mark the end of a line. For Unix, Linux, or OS X, use LF (line feed, '\n', 0x0A), and for Windows or DOS, use CRLF (carriage return followed by line feed, '\r\n', 0x0D0A).

- d. Save your changes, and then click **Send**.



The screenshot shows the Postman interface for a POST request to the endpoint `{(Endpoint)}/services/data/v{(version)}/jobs/ingest`. The request body is a JSON object:

```
{
  "object": "Shift",
  "contentType": "CSV",
  "operation": "insert",
  "lineEnding": "LF"
}
```

The response is a JSON object:

```
{
  "id": "7501Q000018Le52QAD",
  "operation": "insert",
  "object": "Shift",
  "createdById": "0051Q00000fQE8uQAE",
  "createdAt": "2023-10-27T06:19:34.000+0000",
  "systemModstamp": "2023-10-27T06:19:34.000+0000",
  "state": "Open",
  "concurrencyMode": "Parallel",
  "contentType": "CSV",
  "apiVersion": "58.0",
  "contentUrl": "services/data/v58.0/jobs/ingest/7501Q000018Le52QAD/batches",
  "lineEnding": "LF",
  "columnDelimiter": "COMMA"
}
```

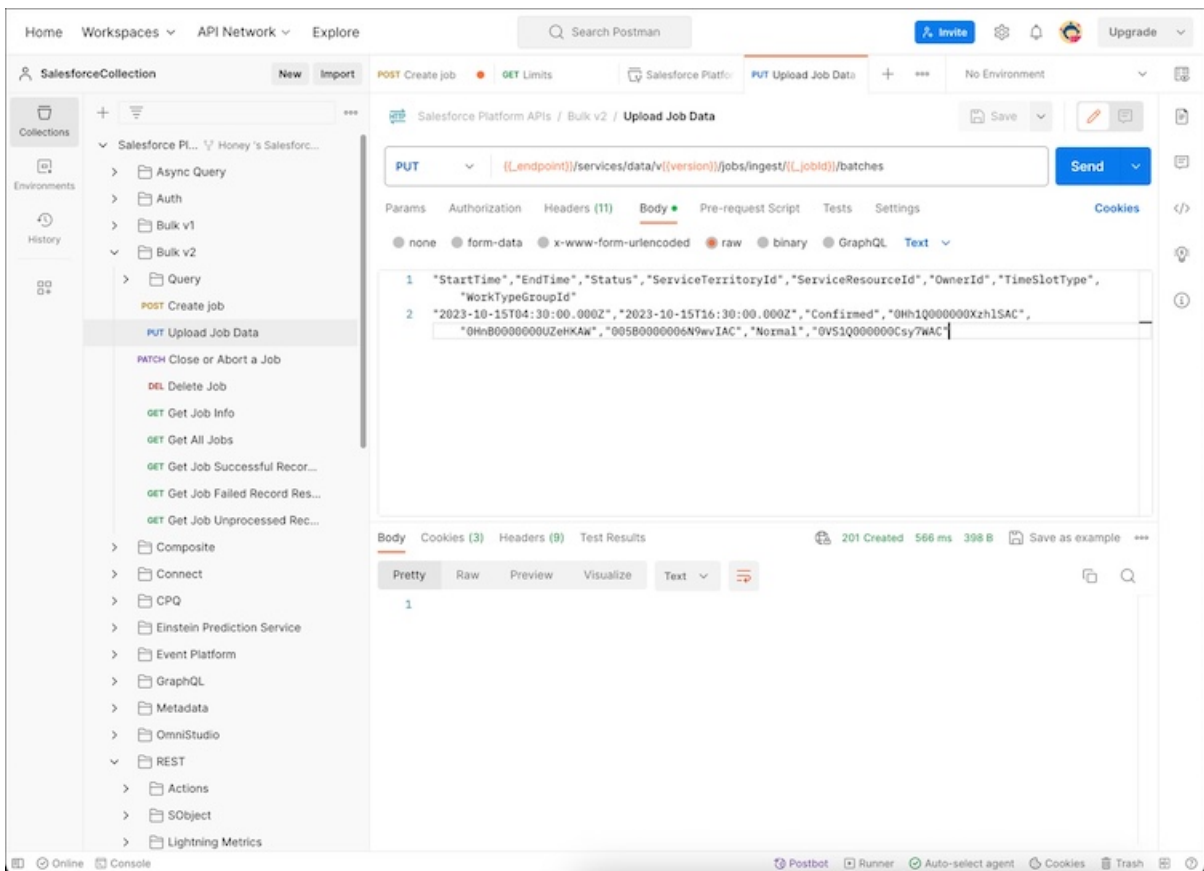
6. Upload the CSV data.
 - a. In Collections, click **Salesforce Platform APIs > Bulk v2 > Upload Job Data**.
 - b. Click **Headers**, and then add these values in the Headers table.

| Key | Value |
|--------------|------------------|
| Content-Type | text/csv |
| Accept | application/json |

- c. On the Body tab, enter this code.

```
"StartTime", "EndTime", "Status", "ServiceTerritoryId", "ServiceResourceId", "OwnerId", "TimeSlotType", "WorkTypeGroupId"
"2023-10-15T04:30:00.000Z", "2023-10-15T16:30:00.000Z", "Confirmed", "0Hh1Q00000Xzh1SAC", "0HhB000000ZzHAW", "005B0000006N9wIAC", "Normal", "0VS1Q000000CsY7wAC"
```

- d. Save your changes, and then click **Send**.



The response contains a status code of 201 `Created`, which indicates that Salesforce successfully received the job data.

7. Close the job and instruct Salesforce to start processing the data.
 - a. In Collections, click **Salesforce Platform APIs > Bulk v2 > Close or Abort a Job**.
 - b. Click **Headers**.

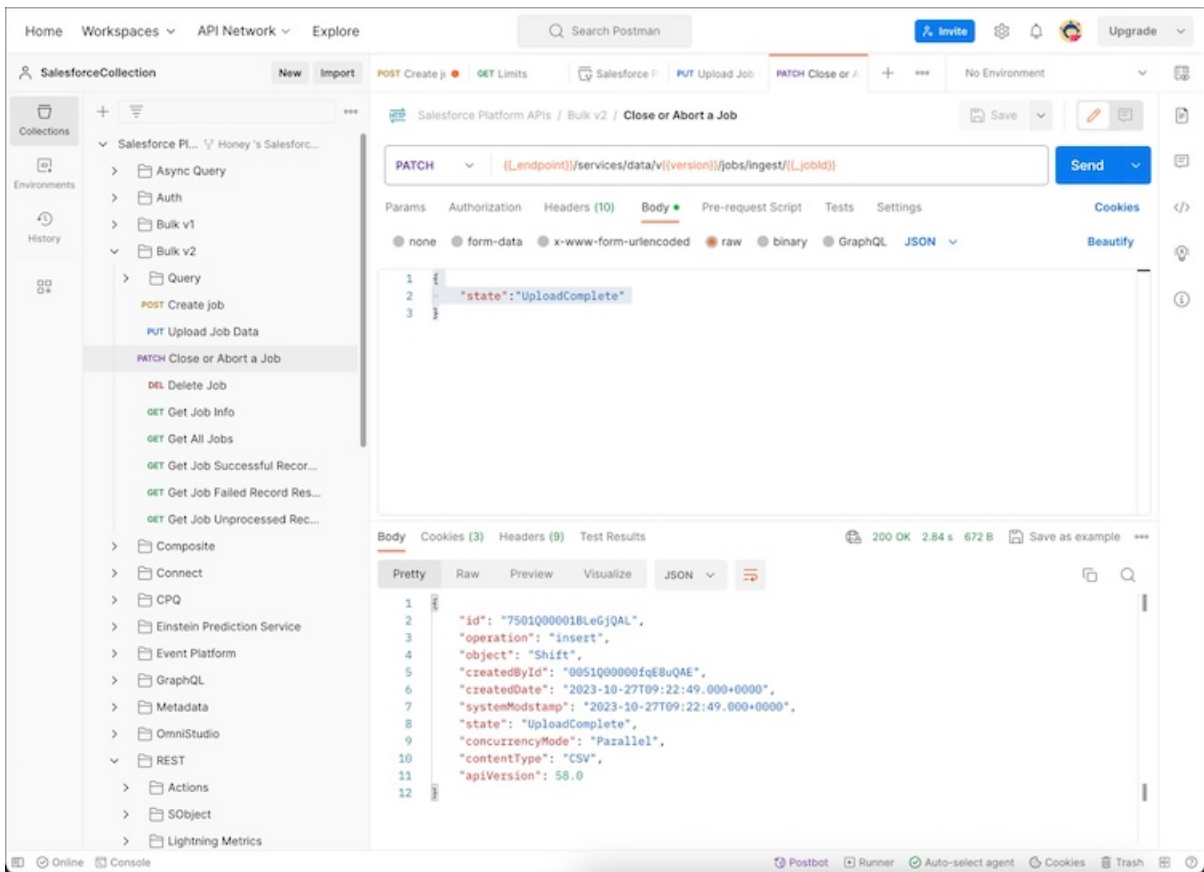
- c. In the Headers table, deselect the check box for the Accept key.
- d. Add these values.

| Key | Value |
|--------------|---------------------------------|
| Content-Type | application/json; charset=UTF-8 |
| Accept | application/json |

- e. On the Body tab, enter this code.

```
{
  "state": "UploadComplete"
}
```

- f. Click **Send**.



- 8. When the state is UploadComplete, check the rows that were processed successfully.
 - a. In Collections, click **Salesforce Platform APIs > Bulk v2 > Get Job Info**.
 - b. Click **Send**.

The screenshot shows the Postman interface with a GET request to the endpoint `{[Endpoint]}/services/data/v{[version]}/jobs/ingest/{[JobId]}`. The response is a JSON object with the following fields:

```

1  {
2    "id": "7501Q00001BLeGjQAL",
3    "operation": "insert",
4    "object": "Shift",
5    "createdById": "0051Q00000fqE8uQAE",
6    "createdDate": "2023-10-27T09:22:49.000+0000",
7    "systemModstamp": "2023-10-27T09:47:37.000+0000",
8    "state": "JobComplete",
9    "concurrencyMode": "Parallel",
10   "contentType": "CSV",
11   "apiVersion": 58.0,
12   "jobType": "V2Ingest",
13   "lineEnding": "LF",
14   "columnDelimiter": "COMMA",
15   "numberRecordsProcessed": 1,
16   "numberRecordsFailed": 1,
17   "retries": 0,
18   "totalProcessingTime": 220,
19   "apiActiveProcessingTime": 61,
20   "apexProcessingTime": 0
21 }

```

Here's a sample of the failed processing response.

```

{
  "id": "7501Q00001CFNesQAH",
  "operation": "insert",
  "object": "Shift",
  "createdById": "005B0000006N9wvIAC",
  "createdDate": "2023-10-12T10:16:53.000+0000",
  "systemModstamp": "2023-10-12T10:40:13.000+0000",
  "state": "Failed",
  "concurrencyMode": "Parallel",
  "contentType": "CSV",
  "apiVersion": 59.0,
  "jobType": "V2Ingest",
  "lineEnding": "CRLF",
  "columnDelimiter": "COMMA",
  "numberRecordsProcessed": 0,
  "numberRecordsFailed": 0,
  "retries": 0,
  "totalProcessingTime": 0,
  "apiActiveProcessingTime": 0,
  "apexProcessingTime": 0,
  "errorMessage": "ClientInputError : LineEnding is invalid on user data. Current LineEnding setting is CRLF"
}

```

Set Up Roles and Hierarchies for Shifts

Roles and hierarchies define who reports to whom and help define the approval process for shifts. You can assign users who own a specific role for various service territories. For example, Adam is a bank manager and John is a retail banker. You can create a territory manager role and a retail banker role, where the retail banker reports to the territory manager. Assign the territory manager role to Adam and the retail banker role to John. By using this hierarchy, Adam can create shifts and then ask John to confirm his availability by approving shifts.

However, to provide community and partner users permissions to share shifts, create public groups. For example, if contractors want to work with service territory managers for their availability in the service territory, you can define public groups for contractors and set up shift sharing rules for them.

[Create Roles and Hierarchies](#)

Create roles and hierarchies, and then assign users to the created roles.

[Create Public Groups](#)

Create public groups for external users.


[Configure Shift Sharing Rule](#)

To share shifts with external users, define shift sharing rules. For example, contractors are external users with whom a service territory manager shares shifts for approval. To share shifts, use the contractors public group and then select the roles in that group to whom you want to grant access.

Create Roles and Hierarchies

Create roles and hierarchies, and then assign users to the created roles.

1. From Setup, in the Quick Find box, enter *Roles*, and then select **Roles**.
2. Under Sample Role Hierarchy, for View other sample Role Hierarchies, ensure that you select Territory-based Sample.
3. Click **Set Up Roles**.
4. Under Your Organization's Role Hierarchy, under the role to which the territory manager reports, click **Add Role**.

 **Note:** For service resources, under the Territory manager role, click **Add Role**.

5. Enter a label for the role.
6. For the Role Name as displayed on reports field, enter a role name.
7. Save your changes.
8. Click **Assign Users to Role**.
9. Under the Available Users Search list, select the users to whom you want to assign the role. To move the selected users to the Selected Users list, click **Add**.
10. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

EDITIONS

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Create Public Groups

Create public groups for external users.

1. From Setup, in the Quick Find box, enter *Public Groups*, and then select **Public Groups**.
2. Click **New**.
3. Enter a label.
4. From the Available Members list, select the members who you want to assign to the group. To move the selected members to the Selected Members list, click **Add**.
5. Save your changes.

Configure Shift Sharing Rule

To share shifts with external users, define shift sharing rules. For example, contractors are external users with whom a service territory manager shares shifts for approval. To share shifts, use the contractors public group and then select the roles in that group to whom you want to grant access.

1. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**.
2. Under Sharing Rules, for Shift Sharing Rules, click **New**.
3. For the sharing rule, enter a label.
4. Under Step 3: Select which records to be shared, for the Shift: owned by members of dropdown list, select Public Groups, and then select a public group.
5. Under Step 4: Select the users to share with, from the Shared with dropdown list, select Roles, and then select a role.
6. Under Step 5: Select the level of access for the users, from the Access Level dropdown list, select Read/Write.
7. Save your changes.

Create Record Types for Shift Statuses

To make the required shift status options available for the roles that you created, create record types. For example, a service territory manager can create confirmed shifts or can create tentative shifts and then request the service resources to confirm them. For this process, you can create a record type called Territory Manager Status for the role of Territory Managers, and then select Tentative and Confirmed statuses. When territory managers create shifts, they can only view the Tentative and Confirmed options in the Status field.

1. In Setup, click **Object Manager**, and then select the Shift object.
2. Click **Record Types**.
3. Click **New**.
4. Enter a record type label.
5. For the profiles to whom you want this record type to be available, select **Make Available**.
6. Click **Next**, and then save your changes.
7. Under Picklist Available for Editing, next to Status, click **Edit**.
8. From the Available Values list, select the required status options for the selected profiles. To move the options to the Selected Values list, click **Add**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

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For example, for territory manager roles, the selected values can be tentative and confirmed for them to create tentative and confirmed shifts. For service resource roles, the selected values can be confirmed and published to create confirmed shifts and publish the confirmed shifts.

9. From the Default dropdown list, select a default value for the shift status.
10. Save your changes.

[Assign Record Types to Profiles](#)

Assign record types to profiles that have the corresponding roles. For example, you can assign the Territory Manager Status record type to the bank manager Adam who is assigned the role of a territory manager.

Assign Record Types to Profiles

Assign record types to profiles that have the corresponding roles. For example, you can assign the Territory Manager Status record type to the bank manager Adam who is assigned the role of a territory manager.

1. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Select a profile.
For example, if you want to assign a territory manager status record type, select a profile with the role of territory manager assigned to it.
3. Under Record Type Settings, for Shifts, click **Edit**.
4. From the Available Record Types list, select a record type. To move the selected record type to the Selected Record Types list, click **Add**.
5. If you select multiple records types, then under Default Record Type, select the default record type for the profile.
6. Save your changes.

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Determine Appointment Time Slots with Shifts

To determine time slots with shifts, enable shift-related rules in the scheduling policy. To consider a service territory member's shifts instead of the service territory member's operating hours, enable the Use service territory member's shift option. However, if you want to consider the intersection of shifts and the service territory's operating hours, then enable the Use service territory's operating hours with shifts option along with the Use service territory member's shift option. To consider the account's operating hours along with the intersection, enable the Enforce Account's Visiting Hours option.

Depending on the rules that you define in the scheduling policy, Salesforce Scheduler determines the availability of appointment time slots according to:

- Shift timings
- Intersection of time slots in operating hours of the service territory and shift timings
- Intersection of time slots in operating hours of the account and shift timings
- Intersection of time slots in operating hours of the service territory, operating hours of an account, and shift timings



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 **Important:**

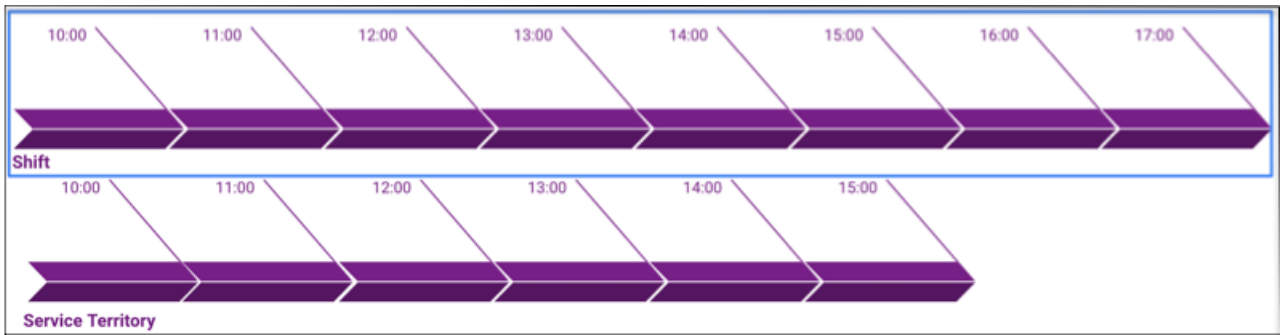
- If you enable the Use service territory member's shift option and the service resource doesn't have any shifts, no time slots are available.

| Use service territory member's shift | Use service territory's operating hours with shifts | Enforce Account's Visiting Hours | Salesforce Scheduler determines time slots based on |
|--------------------------------------|---|----------------------------------|--|
| Enabled | Disabled | Disabled | <p>Shifts.</p> <p>Example:</p> <ul style="list-style-type: none"> • Service territory's operating hours: 10 AM - 3 PM, Monday to Friday • Service resource's shifts: 10 AM - 4 PM. Monday to Friday • Available time slots: 10 AM - 4 PM, Monday to Friday <p> Note: Salesforce Scheduler doesn't consider the service territory's operating hours.</p> |
| Enabled | Disabled | Enabled | <p>The intersection of shifts and the account's operating hours.</p> <p>Example:</p> <ul style="list-style-type: none"> • Service territory's operating hours: 2 PM - 6 PM, Monday to Friday • Service resource's shifts: 10 AM - 4 PM. Monday to Friday • Account's operating hours: 10 AM - 12 PM, Monday to Friday • Available time slots: 10 AM - 12 PM, Monday to Friday <p> Note: Salesforce Scheduler doesn't consider the service territory's operating hours.</p> |

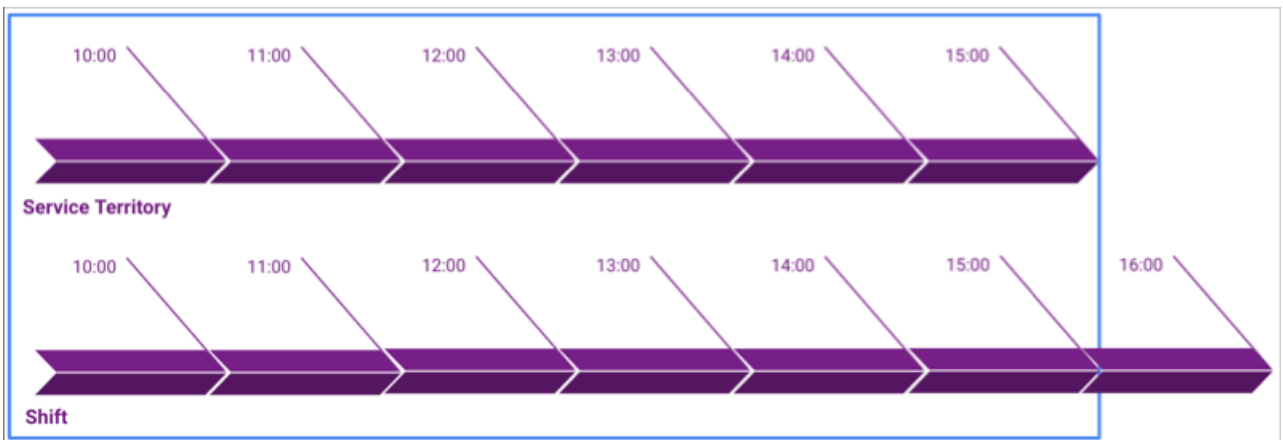
| Use service territory member's shift | Use service territory's operating hours with shifts | Enforce Account's Visiting Hours | Salesforce Scheduler determines time slots based on |
|--------------------------------------|---|----------------------------------|--|
| Enabled | Enabled | Disabled | <p>The intersection of shifts and service territory's operating hours.</p> <p>Example:</p> <ul style="list-style-type: none"> • Service territory's operating hours: 9 AM - 3 PM, Monday to Friday • Service resource's shifts: 8 AM - 4 PM. Monday to Friday • Available time slots: 9 AM - 3 PM, Monday to Friday |
| Enabled | Enabled | Enabled | <p>The intersection of shifts, service territory's operating hours, and account's operating hours.</p> <p>Example:</p> <ul style="list-style-type: none"> • Service territory's operating hours: 10 AM - 3 PM, Monday to Friday • Service resource's shifts: 10 AM - 4 PM. Monday to Friday • Account's operating hours: 10 AM - 12 PM, Monday to Friday • Available time slots: 10 AM - 12 PM, Monday to Friday |

 **Example:** Bruce, a contractor, specializes in loan management and manages his own availability independent of any branch. To reflect his availability, he creates shifts from 10 AM to 5 PM, Monday to Friday. The operating hours of the 1 Market St. branch are 10 AM to 3 PM, Monday to Friday. Salesforce Scheduler shows time slots that are based only on Bruce's shifts, and doesn't consider

the branch's operating hours.

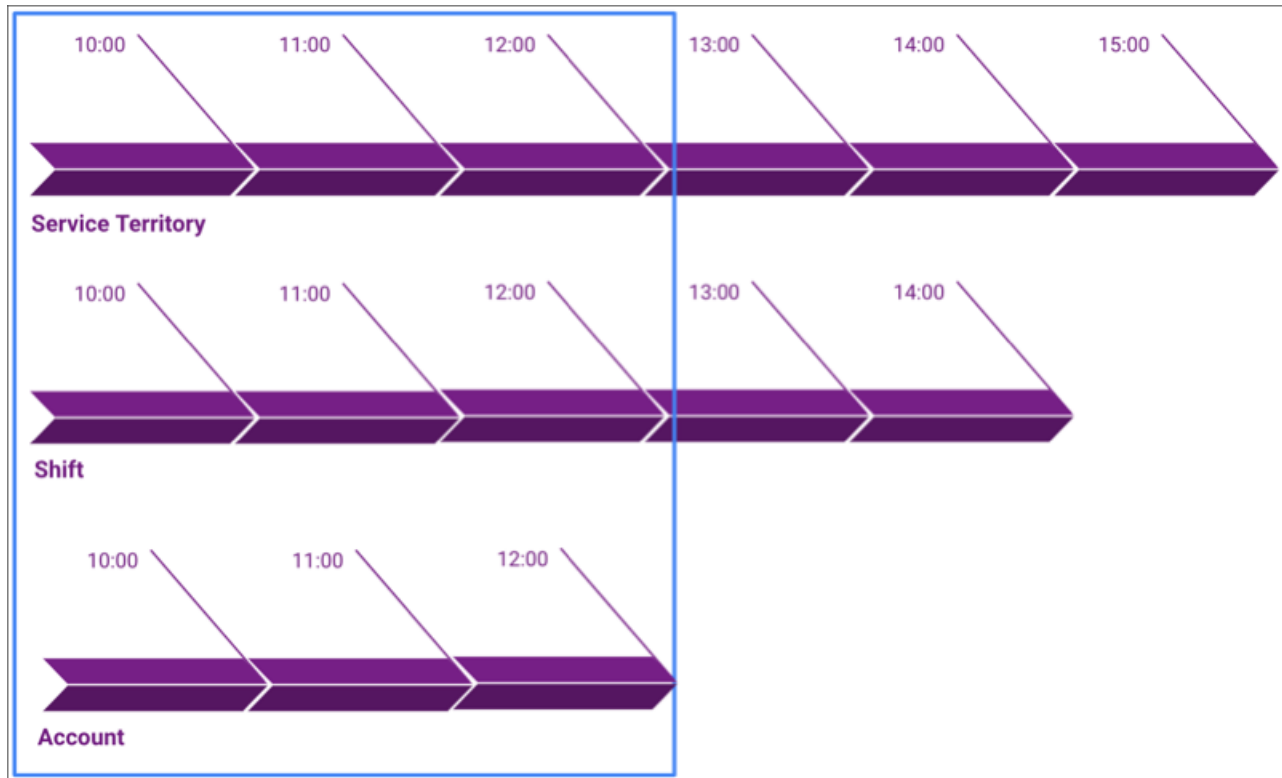


Example: John, a banker, works in the 1 Market St. branch. The operating hours of the 1 Market St. branch are from 10 AM to 3 PM, Monday to Friday. To schedule more appointments, John creates his shifts from 10 AM to 4 PM, Monday to Thursday. However, the branch manager has a strict policy to schedule appointments only during the branch's operating hours. Salesforce Scheduler now shows time slots from 10 PM to 3 PM for John based on his shifts and the branch's operating hours.



Example: John, a banker, works in the 1 Market St. branch. The operating hours of the 1 Market St. branch are 10 AM to 3 PM, Monday to Friday. Jane, a customer, only makes appointments between 10 AM and 12 PM. John has created shifts between 10 AM and 2 PM. When John wants to schedule an appointment with Jane, the available time slots are between 10 AM and 12 PM.

The time slots are determined based on the intersection of the branch's operating hours, John's shifts, and Jane's operating



[Define Shift Rules in Scheduling Policy](#)

To use shifts instead of the service territory member's operating hours when determining available time slots, enable shift-specific rules in the scheduling policy.

Define Shift Rules in Scheduling Policy

To use shifts instead of the service territory member's operating hours when determining available time slots, enable shift-specific rules in the scheduling policy.

1. From Setup, in the Quick Find box, enter *Scheduling Policies*, and then select **Scheduling Policies**.
2. Click **Edit** next to the scheduling policy you created.
If you don't create and use a custom scheduling policy in your flows or API calls, use the Default Appointment Scheduling Policy.
3. To use shifts instead of using the service territory member's operating hours, select **Use service territory member's shift**.
If you select this option, then the operating hours aren't considered regardless of whether the operating hours for the service territory member are defined.
4. To show the time slots based on the intersection of the service territory's operating hours and shifts, select **Use service territory's operating hours with shifts**.
You can only select the Use service territory's operating hours with shifts option after you've selected the Use service territory member's shift option.

EDITIONS

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5. Save your changes.

Set Up Approval Process for Shifts

Streamline updating shift statuses by enabling the approval process. With the approval process, service resources and territory managers receive email alerts when a shift is created, approved, or rejected.

Create a Queue

A queue defines the roles that receive email notifications. Create a queue to send email notifications to territory managers or services resources when the status of a shift is updated.

Create Email Templates

Define email templates for each status of a shift. For example, you can create email templates for creating, approving, or rejecting a shift.

Create an Approval Process

Create an end-to-end process for approving or rejecting shifts.

Create a Queue

A queue defines the roles that receive email notifications. Create a queue to send email notifications to territory managers or services resources when the status of a shift is updated.

1. From Setup, in the Quick Find box, enter *Queues*, and then click **Queues**.
2. Click **New**.
3. Enter a label for the queue.
4. Add an email for the queue if necessary.
5. Select **Send Emails to Members**.
6. Under Supported Objects, from the Available Objects list, select **Shift**.
7. To move the shift object to the Selected Objects list, click **Add**.
8. Under Queue Members, from the Available Members list, select the user roles to whom you want to assign the queue
9. To move the selected members to the Selected Members list, click **Add**.
For example, select **User: Territory Manager** to notify territory managers of the rejected or approved shifts.
10. Save your changes.

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USER PERMISSIONS

To create or change queues:

- Customize Application
AND
Manage Public List Views

To change queues created by other users:

- Customize Application
AND
Manage Public List Views and Manage Users

Create Email Templates

Define email templates for each status of a shift. For example, you can create email templates for creating, approving, or rejecting a shift.

1. From Setup, in the Quick Find box, enter *Classic Email Templates*, and then click **Classic Email Templates**.
2. Click **New Template**.
3. Select the type of template that you want to create, and then click **Next**.
4. Enter email template information:
 - a. Select **Available For Use**.
 - b. Enter a name for the email template.
 - c. Enter a subject for the email.
 - d. Enter the information for the body of the email.
5. Save your changes.

Create an Approval Process

Create an end-to-end process for approving or rejecting shifts.

1. From Setup, in the Quick Find box, enter *Approval Processes*, and then click **Approval Processes**.
2. From the Manage Approval Processes For dropdown list, select **Shift**.
3. Click the **Create New Approval Process** dropdown list, and then select **Use Standard Setup Wizard**.
4. Enter a name and a description for the approval process, and then click **Next**.
5. In the Specify Entry Criteria section, perform these steps:
 - a. From the Use this approval process if the following dropdown list, select **criteria are met**.
 - b. For each profile, make these selections:
 - Field: **Current User: Profile**
 - Operator: **equals**
 - Value: The profile that you want to add
 - c. Click **Add Filter Logic**, and then update the filter logic as required.
 - d. Click **Next**.
6. In the Specify Approver Field and Record Editability Properties section, perform these steps:
 - a. Under Record Editability Properties, ensure that **Administrators ONLY can edit records during the approval process** radio button is selected.
 - b. Click **Next**.
7. In the Select Notification Templates section, select the email notification template that you want to use for the For Approval Assignment Email Template field, and click **Next**.
8. In the Select Fields to Display on Approval Page Layout section, perform these steps:

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USER PERMISSIONS

To create approval processes:

- Customize Application

- a. Under the Available Fields list, select the fields that you want to show to the shift approver.
 - b. To move the selected fields to the Selected Fields list, click **Add**.
 - c. Under Approval Page Fields, select **Display approval history information in addition to the fields selected above**.
 - d. Click **Next**.
9. In the Specify Initial Submitters section, perform these steps:
- a. Under Initial Submitters, from the Submitter Type Search dropdown list, select **Owner**.
 - b. Under the Available Submitters list, select **Shift Owner**.
 - c. To move the selected submitter to the Allowed Submitters list, click **Add**.
 - d. Under Page Layout Settings, select **Add the Submit for Approval button and Approval History related list to all Shift page layouts**.
10. Save your changes.

[Add Email Alerts to the Approval Process](#)

Link the email templates that you created to the action in the approval process: Initial Submission Actions, Final Approval Actions, Final Rejection Actions, and Recall Actions.

[Add an Approval Step to the Approval Process](#)

Add an approval step to determine the records that can advance to that step and the approver, and whether to let an approver's delegate respond to the requests.

[Add Field Update to the Approval Process](#)

Field updates change the selected field after the approval process is complete. For example, when a territory manager approves a shift, the Status field of the shift is updated from tentative to confirmed. You can add field updates for Initial Submission Actions, Final Rejection Actions, and Recall Actions.

[Activate the Shift Approval Process](#)

After setting up the approval process, always activate the approval process.

Add Email Alerts to the Approval Process

Link the email templates that you created to the action in the approval process: Initial Submission Actions, Final Approval Actions, Final Rejection Actions, and Recall Actions.

1. From Setup, in the Quick Find box, enter *Approval Processes*, and then click **Approval Processes**.
2. Select the approval process to which you want to add the email alerts.
3. Under the selected action, click **Add New**, and then select **Email Alert**.
For example, under the Initial Submission Actions, click **Add New**, and then select **Email Alert**.
4. Enter a description for the email alert.
5. Select an email template for the approval process.
6. For the Recipient Type field, from the Search dropdown list, select **User**.
7. For the Recipients field, under the Available Recipients list, select the recipients for the email alert.
8. To move the selected recipients to the Selected Recipients list, click **Add**.
9. Save your changes.

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Add an Approval Step to the Approval Process

Add an approval step to determine the records that can advance to that step and the approver, and whether to let an approver's delegate respond to the requests.

1. From Setup, in the Quick Find box, enter *Approval Processes*, and then click **Approval Processes**.
2. Select the approval process to which you want to add the approval step.
3. Under Approval Steps, click **New Approval Step**.
4. Enter a name for the approval step, and then click **Next**.
5. Select the **All records should enter this step** radio button, and then click **Next**.
6. Select the **Automatically assign to queue** radio button, and then select a queue.
7. Save your changes.

Add Field Update to the Approval Process

Field updates change the selected field after the approval process is complete. For example, when a territory manager approves a shift, the Status field of the shift is updated from tentative to confirmed. You can add field updates for Initial Submission Actions, Final Rejection Actions, and Recall Actions.

1. From Setup, in the Quick Find box, enter *Approval Processes*, and then click **Approval Processes**.
2. Select the approval process to which you want to add the final approval action.
3. Under the selected action, click **Add New**, and then select **Field Update**.
For example, under the Initial Submission Actions, click **Add New**, and then select **Field Update**.
4. Enter a name for the field update.
5. From the Field to Update dropdown list, select **Status**.
6. Save your changes.

Activate the Shift Approval Process

After setting up the approval process, always activate the approval process.

1. From Setup, in the Quick Find box, enter *Approval Processes*, and then click **Approval Processes**.
2. Open the approval process that you created for shifts.
3. Activate the process.

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Restrict Service Resources from Modifying Shifts for Two Weeks with an Apex Trigger

Service territory managers work with their service resources to plan shifts in advance. For example, you want to make an appointment booking available for two weeks starting from the current day. As a result, you want to prevent service resources from modifying their shifts during that period. To restrict a service resource from making any updates to shifts for two weeks, create an Apex trigger.

```
//Because the next two weeks of time slots are visible to customers and are bookable,
//we want to prevent any updates to those shifts.
//This trigger doesn't allow to create a shift
//where either start time or end time falls under
// 1. Older than today's date
// 2. Two weeks after today's date

trigger TwoWeeksLimitTrigger on Shift (before insert,before update) {
    if(trigger.isInsert || trigger.isUpdate){
        if (Trigger.isBefore) {
            for(Shift shift : Trigger.New) {
                Date todayDate = date.today();
                Date twoWeekDate = todayDate.addDays(14);
                if(shift.StartTime < todayDate || shift.StartTime > twoWeekDate){
                    trigger.new[0].StartTime.addError('Customers are already booking slots
for this time period and so changing Shifts is not allowed.');
```

Restrict Working Hours Selectively

If you enable the Use service territory's operating hours with shifts scheduling policy, Salesforce Scheduler uses the intersection of shifts and service territory operating hours to determine the availability of all service resources. However, if you want to restrict working hours to service territory operating hours only for a few service resources, use triggers.

First, create a custom boolean field, *OvertimeEnabled*, to specify the resources that can work beyond the service territory operating hours. Next, change scheduling policies so that only shifts of service territory members are used to determine the availability of service resources for appointments. Then, create an Apex trigger on the Shift object that runs before a Shift is created and updated. The trigger validates shift timings and ensures that shift timings are within service territory operating hours for resources whose *OvertimeEnabled* field value is false.

1. From the object management settings for Service Resource, go to Fields & Relationships.
2. Click **New**.
3. Select **Checkbox**, and then click **Next**.
4. In the Field Label field, enter *OvertimeEnabled*, and then click **Next**.

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5. Set up field-level security and provide access to the necessary profiles, and then click **Next**.
6. Save your changes.
7. From Setup, in the Quick Find box, enter *Scheduling Policies*, and then select **Scheduling Policies**.
8. Select **Use service territory member's shift scheduling policy**, and then deselect **Use service territory's operating hours with shifts scheduling policy**.
9. From the object management settings for shift, go to Triggers.
10. Click **New**.
11. Replace the default code with this code.

```

trigger ShiftValidation on Shift (before insert, before update) {
    List<Shift> shifts = Trigger.new;

    Set<String> sr = new Set<String>();
    for(Shift shift: shifts) {
        sr.add(shift.ServiceResourceId);
    }

    List<ServiceResource> extendedSr = [SELECT Id FROM ServiceResource WHERE
OvertimeEnabled__c = False AND Id IN :sr];

    Set<String> srIds = new Set<String>();
    for(ServiceResource srl: extendedSr) {
        srIds.add(srl.Id);
    }

    Set<Shift> confirmedShifts = new Set<Shift>();
    Set<String> territoryIds = new Set<String>();
    //We will only run this validation for Shifts with Status Category = "Confirmed"
AND Service Resource can work extended hours
    for(Shift shift: shifts) {
        if(shift.StatusCategory == 'Confirmed' && srIds.contains(shift.ServiceResourceId))
        {
            confirmedShifts.add(shift);
            territoryIds.add(shift.ServiceTerritoryId);
        }
    }

    if(confirmedShifts.size() > 0) {
        //Get all Service Territory IDs along with their OperatingHourId
        ServiceTerritory[] territoryIdsWithOperatingHours = [SELECT Id, OperatingHoursId
FROM ServiceTerritory WHERE Id IN :territoryIds];

        Set<String> operatingHourIds = new Set<String>();
        for(ServiceTerritory st: territoryIdsWithOperatingHours) {
            //Service Territory may not have Operating Hour defined
            if(st.OperatingHoursId != null) {
                operatingHourIds.add(st.OperatingHoursId);
            }
        }

        //Get Timeslot information for all Operating Hours got in previous step. We
disregard all STM level concurrent timeslots (Shifts with MaxAppointments set to 1)

```

```

    TimeSlot[] timeSlots = [SELECT Id, DayOfWeek, StartTime, EndTime, OperatingHoursId
FROM TimeSlot WHERE MaxAppointments = 1 AND OperatingHoursId IN :operatingHourIds];

    //Complex data structure to store Working hours for all Service territories. We
will store empty inner map in case Service Territory does not have Operating Hour
defined
    Map<String, Map<String, TimeSlot>> serviceTerritoryWithTimeSlotsPerDay = new
Map<String, Map<String, TimeSlot>>();

    for(ServiceTerritory territory: territoryIdsWithOperatingHours) {
        Map<String, TimeSlot> timeSlotsPerDay = new Map<String, TimeSlot>();

        for(TimeSlot timeSlot: timeSlots) {
            if(timeslot.OperatingHoursId == territory.OperatingHoursId) {
                timeSlotsPerDay.put(TimeSlot.DayOfWeek.substring(0,3), TimeSlot);
            }
        }
        serviceTerritoryWithTimeSlotsPerDay.put(territory.Id, timeSlotsPerDay);
    }

    //Main validation logic for all confirmed shifts
    for(Shift s: confirmedShifts) {
        String dayOfShiftStart = ((Datetime) s.StartTime).format('E').substring(0,3);

        String dayOfShiftEnd = ((Datetime) s.EndTime).format('E').substring(0,3);

        Map<String, TimeSlot> slots =
serviceTerritoryWithTimeSlotsPerDay.get(s.ServiceTerritoryId);

        if(dayOfShiftStart != dayOfShiftEnd) {
            s.addError('Shift should be within Service Territory\'s Operating hours
');
        } else if(slots.get(dayOfShiftStart) == null || slots.get(dayOfShiftEnd) ==
null) {
            s.addError('Operating Hours for Service Territory not set up correctly');

        }else if(s.StartTime.time() < slots.get(dayOfShiftStart).StartTime ||
s.EndTime.time() > slots.get(dayOfShiftEnd).EndTime) {
            s.addError('Shift should be within Service Territory\'s Operating hours
');
        }
    }
}
}
}

```

12. Save your changes.

Set Up Holidays in Salesforce Scheduler

Service territories can be non-operational due to state or regional holiday, or due to unforeseen circumstances. Territory managers can create holidays and link the holidays to the service territories to avoid bookings on days when the service territory is closed. For example, territory managers can create a holiday for Independence day or for a day when there's heavy snowfall predicted due to which the branch has to close temporarily. Appointments that are already booked for an unplanned holiday require rescheduling.

[Considerations for Holidays](#)

Here are some things to keep in mind when you set up holidays.

[Create Holidays in Salesforce Scheduler](#)

Create holidays for a day or for specific hours of a day. For example, create a holiday called Independence day for July 4 or a holiday called Christmas Eve between 2 PM and 11 PM for December 25.

[Link Holidays to a Service Territory](#)

Link the holidays that you created to a service territory.

Considerations for Holidays

Here are some things to keep in mind when you set up holidays.

- Holiday is a timezone-agnostic object. Holidays automatically acquire the time zone of the associated service territory. For example, if you associate a holiday to the San Francisco branch, the holiday takes effect in Pacific Standard Time hours. But if the same holiday is assigned to the New York branch, it takes effect in Eastern Standard Time hours.
- If two service territories use the same operating hours, then if a holiday is linked to one of the service territories, it is automatically assigned to the other service territory. For example, San Francisco and San Jose branches use the same operating hours. If a holiday named Thanksgiving is linked to San Francisco, the same holiday is also applied for the San Jose branch.
- You can't create Holidays with Experience cloud.
- Recurring holidays aren't supported.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

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Create Holidays in Salesforce Scheduler

Create holidays for a day or for specific hours of a day. For example, create a holiday called Independence day for July 4 or a holiday called Christmas Eve between 2 PM and 11 PM for December 25.

1. From Setup, in the Quick Find box, enter *Holidays*, and then select **Holidays**.
2. Click **New**.
3. If you want to clone an elapsed holiday, click **Clone** next to the name of the elapsed holiday.
4. Type the holiday name, description, and date.
5. Perform an action:
 - If the holiday is for the whole day, select **All Day**.
 - If the holiday is for specific hours, deselect **All Day**, and then enter the start and end time for the holiday.
6. Deselect **Recurring Holiday**.
Salesforce Scheduler doesn't support recurring holidays.
7. Save your changes.

Link Holidays to a Service Territory

Link the holidays that you created to a service territory.

1. Click the **Service Territories** tab, and then select a service territory.
2. Click **New** for Upcoming Holidays.
3. If you want to view the complete list of holidays (upcoming and elapsed), click **View All**.

EDITIONS

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USER PERMISSIONS

To create holidays:

- Manage Business Hours Holidays

EDITIONS

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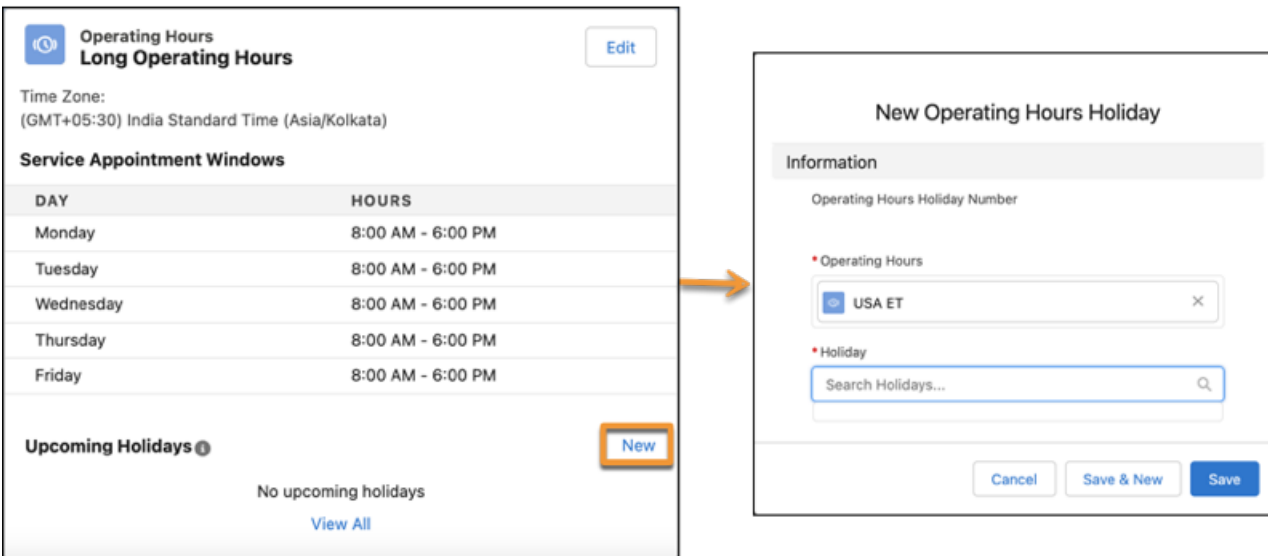
USER PERMISSIONS

To link holidays to a service territory:

- View Setup and Configuration

To view holidays:

- View Setup and Configuration



4. In the Holiday field, enter the name of the holiday, and then select the holiday.
Holidays linked to service territories are associated with the service territories' operating hours. To link a holiday directly to the operating hours, in the Related tab of an operating hours instance, click **New** for Operating Hours Holiday.
5. Save your changes.

How Salesforce Scheduler Determines Available Time Slots

When users schedule a service appointment, Salesforce Scheduler uses multiple factors, such as field values, scheduled appointments, absences, Scheduler Settings, and Scheduling Policies to determine available time slots.

How Salesforce Scheduler Determines Available Time Slots When There Are No Scheduled Appointments and No Conflicts with Service Resource Unavailability

Here are some factors that determine available time slots:

- Availability Start Time
- Availability End Time
- Block Time Before Appointment (in Work Type)
- Block Time After Appointment (in Work Type)
- Estimated Duration (in Work Type)
- Appointment Start Time Interval (in Work Type or Scheduling Policies)
- Scheduled Service Appointments
- Concurrent Scheduling (in Salesforce Scheduler Settings)
- Check Salesforce Calendar for Resource Availability (in Scheduling Policies)
- Check External Systems for Resource Availability (in Scheduling Policies)

EDITIONS

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- Resource Absence (in the Absences related list of Service Resource)

Here are some things to keep in mind.

- When you don't use shifts, Salesforce Scheduler determines availability based on operating hours of Service Territory, Service Territory Member, Work Type, and Account. For more information, see [Set Up Operating Hours in Salesforce Scheduler](#) on page 24.
- When you use shifts:
 - When you enable only the Use service territory member's shift option, Salesforce Scheduler determines availability based on shifts. If you enable the Enforce Account's Visiting Hours option in the scheduling policy, Salesforce Scheduler determines availability based on an intersection of shifts and operating hours of the account.
 - When you enable the Use service territory member's shift and Use service territory's operating hours with shifts options, Salesforce Scheduler determines availability based on an intersection of shifts and operating hours of the service territory. If you enable Enforce Account's Visiting Hours in the scheduling policy, Salesforce Scheduler determines availability based on an intersection of shifts and operating hours of service territory and account.

For more information, see [Manage Shifts in Salesforce Scheduler](#) on page 41.

- Timeframe Start and Timeframe End show time slots in a dynamic time frame based on when a user books an appointment. Salesforce Scheduler shows only those time slots that start after the duration that you set in Timeframe Start and end before the duration that you set in Timeframe End. For more information, see [Create Work Types in Salesforce Scheduler](#) on page 19.
- Salesforce Scheduler considers the start time interval that you specify in the work type record by default. If a start time interval isn't specified, Salesforce Scheduler considers the value specified for the Appointment Start Time Interval field in the scheduling policy.

Here's how Salesforce Scheduler determines the start time of the first time slot when a value isn't set for the Block Time Before Appointment field:

1. Salesforce Scheduler identifies Minutes Past the Hour of Availability Start Time. For example, if Availability Start Time is 8:20 AM, then Minutes Past the Hour of Availability Start Time is 20.
2. Salesforce Scheduler checks the value of Minutes Past the Hour of Availability Start Time modulo Appointment Start Time Interval (Minutes Past the Hour of Availability Start Time % Appointment Start Time Interval):
 - If the value of the modulo operation is 0, then Salesforce Scheduler uses the Availability Start Time as the start time of the first time slot. If Availability Start Time is 8:40 AM (Minutes Past the Hour of Availability Start Time = 40) and Appointment Start Time Interval is 20, then the value of modulo operation is 0 (40%20). As the value of the modulo operation is 0, the start time of the first time slot is 8:40 AM.
 - If the value of the modulo operation isn't 0, then Salesforce Scheduler uses this formula to calculate the first time slot:

$$\text{Start Time} = \text{Availability Start Time} + (\text{Appointment Start Time Interval} - (\text{Minutes Past the Hour of Availability Start Time} \% \text{Appointment Start Time Interval}))$$

If Availability Start Time is 8:45 AM (Minutes Past the Hour of Availability Start Time = 45) and the Appointment Start Time Interval is 30, then the value of the modulo operation is 15 (45%30). Here's how the start time of the first time slot is calculated:

$$\text{Start Time} = 8:45 \text{ AM} + (30 \text{ Minutes} - (45\%30) \text{ Minutes}) = 8:45 \text{ AM} + 30 \text{ Minutes} - 15 \text{ Minutes} = 9:00 \text{ AM}$$

Here's how Salesforce Scheduler determines the start time for the next time slots:

$$\text{Start Time} = \text{Start Time of Previous Slot} + \text{Appointment Start Time Interval}$$

When a value is set for the Block Time Before Appointment field, Salesforce Scheduler first calculates time slots without considering the Block Time Before Appointment field. Then, Salesforce Scheduler removes the time slots that can't provide sufficient block time before appointment. So, Salesforce removes all the time slots that meet this criteria:

$$\text{Time Slot Start Time} < \text{Availability Start Time} + \text{Block Time Before Appointment}$$

For example, if Availability Start Time is 8:45 AM and Block Time Before Appointment is 90 Minutes, then Salesforce Scheduler doesn't show any time slots that start before 10:15 AM.

Here's how Salesforce Scheduler determines the end time of the time slots:

```
End Time = Start Time + Duration
```


Salesforce Scheduler creates the next time slots only if this condition is met:

```
Time Slot End Time + Block Time After Appointment <= Availability End Time
```

What Happens to Available Time Slots When Scheduled Appointments Exist

When a user is scheduling an appointment, Salesforce Scheduler doesn't show time slots that have a conflict with existing appointments. All time slots that meet either of these criteria aren't available:

- `Time Slot End Time > Appointment Start Time of the Scheduled Appointment - Block Time Before Appointment of the Scheduled Appointment - Block Time After Appointment of the Appointment Being Scheduled`
- `Time Slot Start Time < Appointment End Time of the Scheduled Appointment + Block Time After Appointment of the Scheduled Appointment + Block Time Before Appointment of the Appointment Being Scheduled`

 **Note:** Block Time Before Appointment and Block Time After Appointment of existing scheduled appointments and of the appointment that's being scheduled can be different if a service resource caters to different work types.

If you disabled concurrent scheduling, the time slot for which an appointment is scheduled is also removed. If you enabled concurrent scheduling, the time slot for which an appointment is scheduled appears until the number of appointments for the time slot is less than Maximum Appointments. Keep in mind that shifts don't support concurrent scheduling.

What Happens to Available Time Slots When There Are Calendar Events and Absences

When an appointment is being scheduled, Salesforce Scheduler doesn't show time slots that have a conflict with service resource unavailability, such as:

- External System events
- Salesforce Calendar events with the Busy or Out of Office statuses
- Resource absences
- Holidays

When a user is scheduling an appointment, Salesforce Scheduler doesn't show time slots that have a conflict with the unavailability of service resources. All time slots that meet either of these criteria aren't available:

- `Time Slot End Time > Start Time of the Service Resource Unavailability - Block Time After Appointment of the Appointment Being Scheduled`
- `Time Slot Start Time < End Time of the Service Resource Unavailability + Block Time Before Appointment of the Appointment Being Scheduled`

Example: How Salesforce Scheduler Determines Available Time Slots

This example shows how Salesforce Scheduler populates time slots, how scheduled appointments affect time slots, and how events, such as Salesforce Calendar events, affect time slots.

Example: How Salesforce Scheduler Determines Available Time Slots

This example shows how Salesforce Scheduler populates time slots, how scheduled appointments affect time slots, and how events, such as Salesforce Calendar events, affect time slots.

EDITIONS

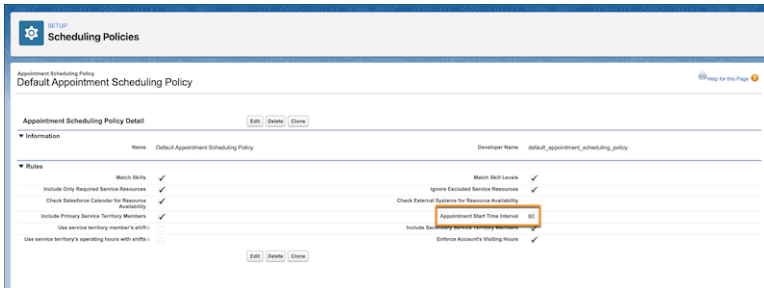
Salesforce Scheduler is available for an extra cost in Lightning Experience.

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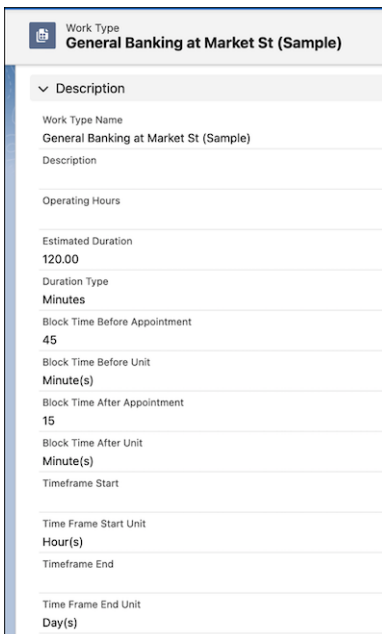
Settings That Affect Time Slots

Here are the sample values of fields and settings that affect the time slots:

- Availability Start Time: 8:30 AM (for Monday)
- Availability End Time: 6:00 PM (for Monday)
- Appointment Start Time Interval: 60 minutes



- Block Time Before Appointment: 45 minutes
- Block Time After Appointment: 15 minutes
- Estimated Duration: 120 minutes



Time Slots Available by Default

Based on the settings, these time slots are generated.

| Time Slot Number | Start Time | End Time |
|------------------|------------|----------|
| 1 | 10:00 AM | 12:00 PM |
| 2 | 11:00 AM | 01:00 PM |
| 3 | 12:00 PM | 02:00 PM |
| 4 | 01:00 PM | 03:00 PM |
| 5 | 02:00 PM | 04:00 PM |
| 6 | 03:00 PM | 05:00 PM |

Here's how Salesforce Scheduler determines the start time of the first time slot when a value isn't set for the Block Time Before Appointment field:

1. Salesforce Scheduler identifies Minutes Past the Hour of Availability Start Time. In this example, the Availability Start Time is 8:30 AM, so Minutes Past the Hour of Availability Start Time is 30.
2. Salesforce Scheduler checks the value of Minutes Past the Hour of Availability Start Time modulo Appointment Start Time Interval (Minutes Past the Hour of Availability Start Time % Appointment Start Time Interval). In this example, it's $30\%60 = 30$.
3. As the modulo value isn't 0, Salesforce uses this formula to calculate the Start Time of the first time slot:

$$\text{Start Time} = \text{Availability Start Time} + (\text{Appointment Start Time Interval} - (\text{Minutes Past the Hour of Availability Start Time} \% \text{Appointment Start Time Interval}))$$

$$\text{Start Time} = 8:30 \text{ AM} + (60 - (30\%60)) = 8:30 \text{ AM} + 30 \text{ Minutes} = 9:00 \text{ AM}.$$

Here's how Salesforce Scheduler determines the start time of the next time slots:

$$\text{Start Time} = \text{Start Time of Previous Slot} + \text{Appointment Start Time Interval}$$

So, the next time slots start at 10:00 AM, 11:00 AM, 12:00 PM, and so on.

As a value is set for the Block Time Before Appointment field, Salesforce Scheduler doesn't show time slots that meet this criteria:

$$\text{Time Slot Start Time} < \text{Availability Start Time} + \text{Block Time Before Appointment}$$

$$\text{Time Slot Start Time} < 8:30 \text{ AM} + 45 \text{ Minutes (9:15 AM)}$$

So, Salesforce Scheduler doesn't show any time slots that start before 9:15 AM.

Here's how Salesforce Scheduler determines the end time of the time slots.

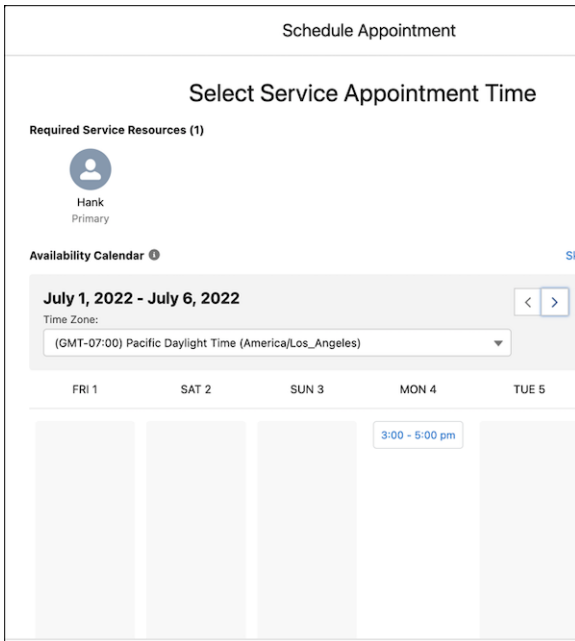
$$\text{End Time} = \text{Start Time} + \text{Duration}$$

In this example, as the Duration is 120 minutes, the time slots end 120 minutes after their start time.

Also, the sum of Last Time Slot End Time and Block Time After Appointment (5:00 PM + 15 Minutes = 5:15 PM) is less than Operating Hours End Time.

Time Slots Available When There's a Scheduled Appointment

When concurrent scheduling is disabled and an appointment is scheduled from 12:00 PM to 2:00 PM, here's the list of available time slots.



| Time Slot Number | Start Time | End Time |
|------------------|------------|----------|
| 1 | 03:00 PM | 05:00 PM |

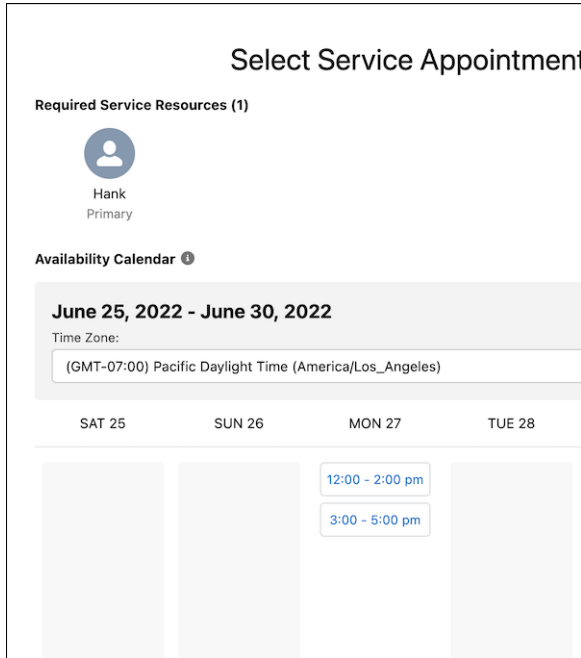
The other time slots that meet either of these criteria are no longer available:

- $\text{Time Slot End Time} > 12:00 \text{ PM} - 45 \text{ Minutes} - 15 \text{ Minutes (11:00 AM)}$

- Time Slot Start Time < 2:00 PM + 45 Minutes + 15 Minutes (3:00 PM)

Note: In this case, the scheduled appointment and the appointment that’s being scheduled belong to the same work type. So, Block Time Before Appointment and Block Time After Appointment are same for both the appointments.

When concurrent scheduling is enabled with the Maximum Appointments value set as 3 and an appointment is scheduled from 12:00 PM to 2:00 PM, here’s the list of available time slots.



| Time Slot Number | Start Time | End Time |
|------------------|------------|----------|
| 1 | 12:00 PM | 02:00 PM |
| 2 | 03:00 PM | 05:00 PM |

As only one appointment is scheduled for the 12:00 PM to 2:00 PM time slot, the time slot is still available for two more appointments.

Change Labels in Flow Screens

To use your company's terminology, change the tab names and field names of Service Resource, Service Territory, Service Appointments, Work Type Group, and Work Type.

When you rename tabs and labels, the changes appear in all the applications that use these objects. For example, the Service Appointment object is also used by Salesforce Field Service. When you change the Service Appointment object's tab name and labels, Field Service users also see the new tab name and labels.

1. From Setup, in the Quick Find box, enter *Rename Tabs and Labels*, and then select **Rename Tabs and Labels**.
2. From the Select Language dropdown list, select the language for which you want to change the labels.
3. Click the **Edit** button next to the entity, such as Service Appointments, that you want to rename.
4. Enter the singular and plural forms of the new name, and then select **Starts with vowel sound** if applicable.
5. Click **Next**.
6. Change the field labels if necessary, and then specify whether the new name starts with a vowel. For example, change Appointment Type to Category, and then deselect **Starts with vowel sound**.

 **Note:** To revert to the original tab names and field names, click the **Reset** button for the tab name.

7. Save your changes.

EDITIONS

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USER PERMISSIONS

To rename tabs and fields:

- Customize Application or Manage Translation

SALESFORCE SCHEDULER SETTINGS

Enable Salesforce Scheduler settings such as concurrent scheduling, multi-resource scheduling, and appointment distribution to meet your business needs.

Event Management

Use the Event Management setting to write appointments to Salesforce calendar. Service resources see their scheduled appointments as events on their Salesforce calendar. When you add the Service Appointment field to the Event page layout, the event details page shows a link to the corresponding service appointment in Salesforce Scheduler. Service resources can use the link to open the service appointment directly from the event on their Salesforce calendar. The Assigned Resources related list on the service appointment page also shows a link back to the event on the Salesforce calendar.

After you enable Event Management, you can also enable additional features that use Event Management.

Block Resource Availability

Enable Block Resource Availability if you want Salesforce Scheduler to show the before and after appointment buffers on a service resource's Salesforce calendar.

Multiple Attendee Event

Enable Multiple Attendee Event if you want Salesforce Scheduler to group individual events and show the list of service resources under a single event.

After you enable Event Management, to write events from Salesforce calendar to external calendars, use a calendar sync tool such as Einstein Activity Capture. If a calendar sync tool doesn't work for you, use the Publish Appointments as Platform Events setting.

For retail banking, enable Event Management so that bankers can view their service appointments on their Salesforce calendars. Because bankers must prepare and wrap up appointments to complete paperwork, enable Block Resource Availability so that their calendars aren't overbooked. When you use multi-resource scheduling, enable Multiple Attendee Event so that all the service resources assigned to an appointment under a single event.

When your users also use external calendars to track appointments, training, or any other events, it's recommended that you write Salesforce service appointments to those calendars.

Publish Appointments as Platform Events

When you enable the Event Management setting, Salesforce Scheduler writes service resources' appointments as events on their Salesforce calendar. To write events from Salesforce calendar to external calendars, use a calendar sync tool such as Einstein Activity Capture. If a calendar sync tool doesn't work for you, enable the Publish Appointments as Platform Events setting to trigger platform events when appointments are created, modified, or deleted in Salesforce Scheduler. Then, subscribe to the new AppointmentSchedulingEvent platform event and use an API to write the platform events to an external calendar.

Resource Appointment Sharing

When you enable the Resource Appointment Sharing setting, Scheduler automatically shares a newly created service appointment with all assigned service resources. This setting provides appropriate permissions to service resources to manage their service appointments.

EDITIONS

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For retail banking, enable Resource Appointment Sharing to enable bankers to view their service appointments.

Appointment Distribution

Appointment distribution lets you allocate appointments quickly and evenly among service resources. An equitable distribution of appointments ensures efficient use of service resources and increased productivity. Salesforce Scheduler uses service resources' utilization scores to identify and suggest the least occupied eligible service resources for appointments. For an anonymous appointment, the least occupied eligible resource is automatically assigned to the appointment.

For retail banking, use appointment distribution to list service resources based on their workload, with the least occupied resource at the top, and show a limited number of service resources. These settings help improve distribution of appointments across bankers.

Operating Hours for Service Territory Members for Work Type Groups

Salesforce Scheduler uses an intersection of operating hours of Service Territory, Service Territory Member, Work Type, and Account to determine service resource availability based on the scheduling policies and scheduler settings. If you want Salesforce Scheduler to also use work type groups to determine availability, enable the Operating Hours for Service Territory Members for Work Type Groups preference in Scheduler Settings. Then, enter work type groups for service territory member operating hours in service territory member records. This setting is enabled by default for orgs created after Summer '21.

For retail banking, enable this setting if you want to specify the hours that a banker can work on specific appointment topics from a branch. Here are a few examples:

- A banker handles Investment Banking and Retail Banking from 10:00 AM to 12:00 PM and Account Opening from 1:00 PM to 3:00 PM from the San Francisco branch.
- A banker works from two branches: San Francisco and San Jose. In San Francisco, the banker handles loans from 10 AM to 12:00 PM on Mondays, Tuesdays, and Wednesdays. In San Jose, the banker handles credit cards from 1:00 PM to 3:00 PM on Thursdays and Fridays.

Concurrent Scheduling

With concurrent scheduling, it's easy to schedule multiple customer appointments in the same time slot. For example, a doctor's office can let several patients book a Monday 1-2 PM appointment to ensure against downtime. Appointments appear as overlapping events on the Salesforce Calendar.

Multi-Resource Scheduling

Multi-resource scheduling lets users create appointments that include more than one required service resource. An appointment can have a maximum of five required service resources: one primary required service resource plus four required service resources, including asset resources.

For retail banking, you can include assets such as meeting rooms along with service resources for in-person appointments. There are also complex requirements in which your users and customers want to include multiple service resources in appointments. So, enable multi-resource scheduling.

Salesforce Scheduler Settings

[Write Salesforce Scheduler Appointments to Salesforce Calendar](#)

Use the Event Management setting to write appointments to Salesforce calendar. Service resources see their scheduled appointments as events on their Salesforce calendar. When you add the Service Appointment field to the Event page layout, the event details page shows a link to the corresponding service appointment in Salesforce Scheduler. Service resources can use the link to open the service appointment directly from the event on their Salesforce calendar. The Assigned Resources related list on the service appointment page also shows a link back to the event on the Salesforce calendar.

[Show Appointments as Events on Salesforce or External Calendars](#)

When you enable the Event Management setting, Salesforce Scheduler writes service resources' appointments as events on their Salesforce calendar. To write events from Salesforce calendar to external calendars, use a calendar sync tool such as Einstein Activity Capture. If a calendar sync tool doesn't work for you, enable the Publish Appointments as Platform Events setting to trigger platform events when appointments are created, modified, or deleted in Salesforce Scheduler. Then, subscribe to the new AppointmentSchedulingEvent platform event and use an API to write the platform events to an external calendar.

[Share Service Appointments with Assigned Service Resources](#)

When you enable the Resource Appointment Sharing setting, Scheduler automatically shares a newly created service appointment with all assigned service resources. This setting provides appropriate permissions to service resources to manage their service appointments.

[Appointment Distribution](#)

Appointment distribution lets you allocate appointments quickly and evenly among service resources. An equitable distribution of appointments ensures efficient use of service resources and increased productivity. Salesforce Scheduler uses service resources' utilization scores to identify and suggest the least occupied eligible service resources for appointments. For an anonymous appointment, the least occupied eligible resource is automatically assigned to the appointment.

[Determine Service Resource Availability by Work Type Groups](#)

Salesforce Scheduler uses an intersection of operating hours of Service Territory, Service Territory Member, Work Type, and Account to determine service resource availability based on the scheduling policies and scheduler settings. If you want Salesforce Scheduler to also use work type groups to determine availability, enable the Operating Hours for Service Territory Members for Work Type Groups preference in Scheduler Settings. Then, enter work type groups for service territory member operating hours in service territory member records. This setting is enabled by default for orgs created after Summer '21.

[Enable and Configure Concurrent Scheduling](#)

With concurrent scheduling, it's easy to schedule multiple customer appointments in the same time slot. For example, a doctor's office can let several patients book a Monday 1-2 PM appointment to ensure against downtime. Appointments appear as overlapping events on the Salesforce Calendar.

[Enable and Configure Multi-Resource Scheduling](#)

Multi-resource scheduling lets users create appointments that include more than one required service resource. An appointment can have a maximum of five required service resources: one primary required service resource plus four required service resources, including asset resources.

Write Salesforce Scheduler Appointments to Salesforce Calendar

Use the Event Management setting to write appointments to Salesforce calendar. Service resources see their scheduled appointments as events on their Salesforce calendar. When you add the Service Appointment field to the Event page layout, the event details page shows a link to the corresponding service appointment in Salesforce Scheduler. Service resources can use the link to open the service appointment directly from the event on their Salesforce calendar. The Assigned Resources related list on the service appointment page also shows a link back to the event on the Salesforce calendar.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, then select **Salesforce Scheduler Settings**.
2. Enable **Event Management**.



Note:

- Salesforce Scheduler doesn't create calendar events for assets, such as rooms or equipment, that are booked in an appointment.
- Salesforce Scheduler creates an event for each service resource assigned to an appointment.

This table shows how fields on the Event object map to the fields on the Service Appointment or Assigned Resource objects.

| Field on Event Object | Fields on Service Appointment or Assigned Resource Object |
|--|--|
| Event.Subject | ServiceAppointment.WorkTypeId and ServiceAppointment.Subject |
| Event.Description | ServiceAppointment.AdditionalInformation and ServiceAppointment.Comments |
| Event.StartDateTime | ServiceAppointment.SchedStartTime |
| Event.EndDateTime | ServiceAppointment.SchedEndTime |
| Event.Location | ServiceAppointment.Address |
| Event.WhatId (Related To field for Accounts and Opportunities) | ServiceAppointment.ParentRecordId |
| Event.Whoid (Name field for Leads) | ServiceAppointment.ParentRecordId |
| Event.OwnerId | AssignedResource.ServiceResourceId |
| Event.ShowAs | ServiceAppointment.Status |

3. If you want to link a Salesforce calendar event to the corresponding service appointment, add the Service Appointment field to the Event page layout:
 - a. From Setup, open **Object Manager**.
 - b. In the Quick Find box, enter *Event*, and then select **Event**.
 - c. Click **Page Layouts**, and then select **Event Layout**.

EDITIONS

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USER PERMISSIONS

To generate an event:

- Edit Events on Service Resource

- d. On the palette, select **Fields**.
- e. Drag **Service Appointment** to the Calendar Details section on the page.
- f. Save your changes.

The event details page shows a link to the corresponding Salesforce Scheduler service appointment.

The screenshot shows the Salesforce Event details page for "General Banking at Market St (Sample) Appointment with Rachel". The event is assigned to Amit Singh. In the "Calendar Details" section, a link for "Service Appointment SA-0012" is highlighted with an orange box.

The Assigned Resources related list on the service appointment page shows a link back to the Salesforce calendar event.

The screenshot shows the Salesforce Service Appointment details page for "SA-0012". It includes sections for "Service Appointment History", "Approval History", and "Assigned Resources". In the "Assigned Resources" section, a link for "General Banking at Market St (Sample) App..." is highlighted with an orange box.

Show Appointments with Before and After Buffer Time on Salesforce Calendar

Turn on Block Resource Availability to show the before and after appointment buffers on a service resource's Salesforce calendar.

Multiple Attendee Events


After enabling the Multiple Attendee Event setting, Scheduler groups individual events and lists all attendees (service resources) under a single event.

Show Appointments with Before and After Buffer Time on Salesforce Calendar

Turn on Block Resource Availability to show the before and after appointment buffers on a service resource's Salesforce calendar.

When creating a work type, you can specify meeting preparation and wrap-up time by specifying values in the Block Time Before Appointment and Block Time After Appointment fields. In Salesforce Scheduler, during appointment scheduling, the number of available time slots is automatically adjusted to accommodate the before and after buffer time. However, if the Block Resource Availability setting is disabled, the before and after appointment buffers aren't reflected on the service resource's Salesforce calendar. Enable the Block Resource Availability setting to reflect the before and after time blocks on the Salesforce calendar.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, and then select **Salesforce Scheduler Settings**.
2. Enable **Block Resource Availability**.

 **Note:** Enable the [Event Management setting](#) before you can enable Block Resource Availability.

Multiple Attendee Events

After enabling the Multiple Attendee Event setting, Scheduler groups individual events and lists all attendees (service resources) under a single event.

When the Multiple Attendee Event setting is enabled, each service resource can view the list of all service resources in the corresponding event. When this setting isn't enabled, Scheduler creates individual calendar events for each service resource that's assigned to a service appointment.

The primary service resource of the service appointment is called the event organizer in the Salesforce Calendar. The rest of the service resources who are invited to the event are called event attendees. Attendees can view and set reminders for the events in their respective calendars.

 **Note:** Attendees only refer to service resources and doesn't correspond to contact or leads.

In multi-resource scheduling, you can pull in service resources with specific expertise. For example, a wealth manager pulls in a real estate specialist for their client's investment discussion. In such scenarios where multiple resources are part of the appointment, it's easier to reschedule or modify a service appointment if you can view the complete list of attendees.

EDITIONS

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EDITIONS

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USER PERMISSIONS

To view event:

- Access Activities

To create event:

- Edit Events

For external users, to view other attendees in an event

- Organization-Wide Defaults for Users to Public Read Only for Default External Access

The screenshot shows a Salesforce Scheduler event page for 'Wealth Management'. At the top, there are buttons for 'New Contact', 'New Opportunity', and 'New Case'. Below this, the event details are displayed in a grid format:

- Location:** 1 Market Street San Francisco California 94105 United States
- Start:** 4/5/2022, 8:15 AM
- End:** 4/5/2022, 9:15 AM

The main content area is divided into 'Details' and 'Related' tabs. Under the 'Details' tab, there is a 'Calendar Details' section with the following information:

- Assigned To:** John Doe
- Subject:** Wealth Management
- All-Day Event:**
- Start:** 4/5/2022, 8:15 AM
- End:** 4/5/2022, 9:15 AM
- Related To:** MCU
- Name:** (blank)
- Attendees:** Accepted or Maybe: 1, Declined: 0, No Response: 1. Attendees listed: John Doe (Organizer), Jane Doe
- Private:**
- Service Appointment:** SA-0041

[Considerations for Multiple Attendee Events](#)

Here are some things to keep in mind for events that have multiple attendees.

[Prerequisites to Enable Multiple Attendee Event Setting](#)

Before you enable the Multiple Attendee Event setting in your production org, enable the setting in a sandbox and then test its features.

[Enable Multiple Attendee Event Setting](#)

To group individual events and view the list of all attendees (service resources) under a single event, enable the Multiple Attendee Event setting.

Considerations for Multiple Attendee Events


Here are some things to keep in mind for events that have multiple attendees.

- A multiple attendee event is created only when the primary service resource has the Edit Event permission.
- If a non-primary service resource doesn't have the Edit Event permission, then Scheduler doesn't add that service resource to the event.
- Attendees RSVP isn't supported for events that are linked to a service appointment.
- If a service appointment exists before you enable the Multiple Attendee Event setting, the events that are related to the appointment remain individual events and Scheduler doesn't show the other attendees. To view the complete list of attendees, modify the existing service appointment after enabling this setting.

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 **Note:** We recommend that you modify a service appointment but not the event associated with it. The changes that you make to the service appointment automatically reflect in the event details. For example, you can add additional resources to the service appointment to reflect them in the event as attendees. Adding attendees to the event doesn't modify the assigned resources of the service appointment. Moreover, we recommend that you use Scheduler APIs to modify service appointments.

Prerequisites to Enable Multiple Attendee Event Setting

Before you enable the Multiple Attendee Event setting in your production org, enable the setting in a sandbox and then test its features.

Ensure that you verify the customizations related to the Events that are associated with the service appointment logic. Here are some examples:

- Triggers on events that update the record
- Triggers on the assigned service resource or service appointment, which reads and updates events
- External integrations that use Events data

Here's a sample apex code to create an event with multiple attendees. Use this code in your sandbox, and then verify whether these event customizations work with the multiple attendee event feature.

```
Event multiEvent = new Event();

multiEvent.ownerId = '005xx000001Sv6FAAS'; //Event organizer
multiEvent.StartDateTime = Datetime.now();
multiEvent.EndDateTime = Datetime.now().addHours(1);
multiEvent.DurationInMinutes = 60;
multiEvent.Subject='Event with multiple attendees from Apex';

insert multiEvent;

//Create attendees
EventRelation firstAttendee = new EventRelation();
firstAttendee.eventId = multiEvent.Id;
firstAttendee.RelationId = '005xx000001SwuzAAC'; //additional attendee

insert firstAttendee;

EventRelation secondAttendee = new EventRelation();
secondAttendee.eventId = multiEvent.Id;
secondAttendee.RelationId = '005xx000001SvHGAA0'; //additional attendee

insert secondAttendee;
```

EDITIONS

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Enable Multiple Attendee Event Setting

To group individual events and view the list of all attendees (service resources) under a single event, enable the Multiple Attendee Event setting.

Before enabling Multiple Attendee Event, ensure that you fulfill all the [prerequisites](#) on page 70.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler Settings*, and then select **Salesforce Scheduler Settings**.
2. Enable **Event Management**, and then enable **Multiple Attendee Event**.

 **Note:** After you enable this setting, you can't disable it.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Show Appointments as Events on Salesforce or External Calendars

When you enable the Event Management setting, Salesforce Scheduler writes service resources' appointments as events on their Salesforce calendar. To write events from Salesforce calendar to external calendars, use a calendar sync tool such as Einstein Activity Capture. If a calendar sync tool doesn't work for you, enable the Publish Appointments as Platform Events setting to trigger platform events when appointments are created, modified, or deleted in Salesforce Scheduler. Then, subscribe to the new AppointmentSchedulingEvent platform event and use an API to write the platform events to an external calendar.

[Write Salesforce Scheduler Appointments to External Calendars](#)

Enable the Publish Appointments as Platform Events setting, subscribe to the AppointmentSchedulingEvent platform event, and then use APIs to write appointments to external calendars.

[Connect Your Salesforce Calendar with External Calendars](#)

Use Einstein Activity Capture app to connect Salesforce calendar with an external calendar, such as Microsoft® Outlook® or Google Calendar™. If you use Einstein Activity Capture, tell your users which calendar to use to edit events based on the sync direction you set.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

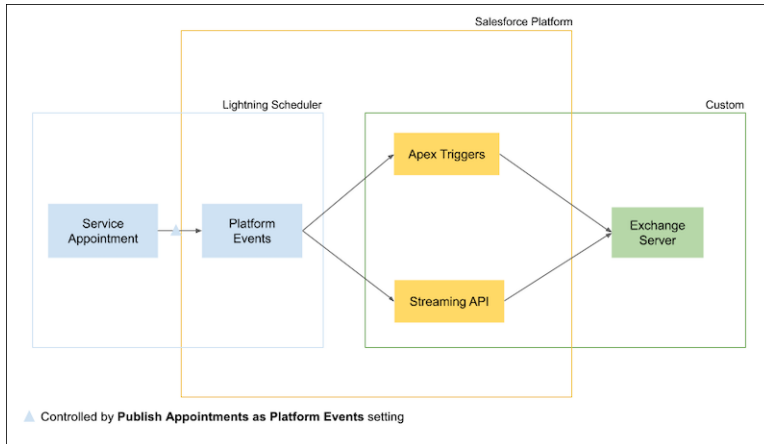
Write Salesforce Scheduler Appointments to External Calendars

Enable the Publish Appointments as Platform Events setting, subscribe to the AppointmentSchedulingEvent platform event, and then use APIs to write appointments to external calendars.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions



1. Enable the Publish Appointments as Platform Events setting to let new appointments or appointment updates trigger high-volume platform events.

- a. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, then select **Salesforce Scheduler Settings**.

- b. Enable **Publish Appointments as Platform Events**.

A platform event is published when:

- A service appointment with an assigned resource is created.
- A service appointment is deleted.
- An assigned resource is added or removed.
- When at least one of the following fields changes in the `SvcApptSchdEvent` event object. This event object represents the Service Appointment object.
 - `SchedStartTime`
 - `SchedEndTime`
 - `DurationInMinutes`
 - `WorkType`
 - `ServiceTerritory`
 - `Address`
 - `StatusCategory`
 - `AppointmentType`
 - `Phone`
 - `Subject`
 - `Comments`
 - `AdditionalInformation`
 - `Email`
 - `Contact`
- When at least one of the following fields changes in the `AsgnRsrcApptSchdEvent` event object. This event object represents the Assigned Resource object.
 - `ServiceResource`
 - `IsRequiredResource`
 - `IsPrimaryResource`

**Note:**

- A time slot blocked before or after an appointment doesn't trigger a platform event. Instead, these blocked time slots are added to the event payload itself.
- An Asset service resource booked in an appointment doesn't trigger a platform event.

2. Subscribe to the AppointmentSchedulingEvent platform event with Apex triggers, EMP Connector, a CometD client, or a third-party connector such as the Salesforce Platform Events Source Connector for Confluent Platform.
3. Implement APIs to write the platform event changes to your email server. For example, use Microsoft Graph REST API to publish the events in Microsoft® Outlook®.

For external calendars that support custom fields, we recommend that you store the service appointment IDs as custom fields for easy appointment updates.

Connect Your Salesforce Calendar with External Calendars

Use Einstein Activity Capture app to connect Salesforce calendar with an external calendar, such as Microsoft® Outlook® or Google Calendar™. If you use Einstein Activity Capture, tell your users which calendar to use to edit events based on the sync direction you set.

**Note:**

- Appointments created in Salesforce Scheduler are view-only on Salesforce calendar. Modify or cancel those appointments in Salesforce Scheduler.
- When you set the sync direction to bidirectional or Salesforce to external calendar, appointments created in Salesforce Scheduler appear as events on your external calendar. Modify or cancel those appointments in Salesforce Scheduler. Don't modify or cancel those events directly on the external calendar. Doing so can cause events to be out of sync with Salesforce calendar.
- Service Resources of type asset can't be synced with external calendars.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Sync Direction | Expected Behavior | Where to Edit Events? |
|---------------------------------|---|-----------------------|
| Salesforce to external calendar | <ul style="list-style-type: none"> • Events created or edited in Salesforce Scheduler appear on Salesforce calendar and sync to external calendars. • Events created or edited on external calendars don't appear on or sync to Salesforce calendar, and they aren't considered when determining the availability of service resources in Salesforce Scheduler. | Salesforce Scheduler |
| External calendar to Salesforce | <ul style="list-style-type: none"> • Events created or edited on an external calendar appear on and sync to Salesforce calendar, and they're considered when determining the | External calendar |

| Sync Direction | Expected Behavior | Where to Edit Events? |
|----------------|--|-----------------------|
| | <p>availability of service resources in Salesforce Scheduler.</p> <ul style="list-style-type: none"> Events created or edited in Salesforce Scheduler don't sync to external calendars. | |
| Bidirectional | <ul style="list-style-type: none"> Events created in Salesforce Scheduler appear on Salesforce calendar and sync to external calendars. Events created or edited on an external calendar appear on and sync to Salesforce calendar, and they're considered when determining the availability of service resources in Salesforce Scheduler. | Salesforce Scheduler |

Share Service Appointments with Assigned Service Resources

When you enable the Resource Appointment Sharing setting, Scheduler automatically shares a newly created service appointment with all assigned service resources. This setting provides appropriate permissions to service resources to manage their service appointments.

[Considerations for Sharing Appointments with Service Resources](#)

Here are some things to keep in mind when you enable the Resource Appointment Sharing setting.

[Enable Resource Appointment Sharing](#)

To enable appointment sharing with service resources, enable the Resource Appointment Sharing setting.

[Appointment Sharing](#)

This topic explains how appointment sharing works when you enable the resource appointment sharing feature.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Considerations for Sharing Appointments with Service Resources

Here are some things to keep in mind when you enable the Resource Appointment Sharing setting.

- To share service appointments, a community user must have a Customer Community Plus or higher license. Customer Community users, who can either be a service resource or the owner of a service appointment, don't have the advanced sharing capabilities.
- The service appointment sharing feature only works for new and modified appointments.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Enable Resource Appointment Sharing

To enable appointment sharing with service resources, enable the Resource Appointment Sharing setting.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler Settings*, and then select **Salesforce Scheduler Settings**.
2. Enable **Resource Appointment Sharing**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Appointment Sharing

This topic explains how appointment sharing works when you enable the resource appointment sharing feature.

Service Appointment Sharing for Regular Scheduling

In an outbound appointment where the service resource creates the service appointment, the service resource has complete access to the appointment by default. In other scenarios where the scheduler of an appointment isn't its service resource, the appointment is shared with the service resource.

For example, when an authenticated customer or a guest user creates a service appointment, Scheduler automatically shares the appointment with the assigned service resource. Scheduler also provides all access to the service resource to manage the appointment. Similarly, a customer call center agent can log in to the Salesforce portal or a partner assistant can log in to a community portal to book an appointment for another service resource. In both these scenarios, Scheduler automatically shares the appointments with the assigned service resources.


EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Service Appointment Sharing for Multi-Resource Scheduling

A user or a service resource creates a multi-resource service appointment with two other service resources, one optional and another required. In this scenario, the required service resource receives the read and write permissions to the service appointment whereas the optional resource receives only the read permission.

 **Note:** Only those service resources that have both read and write permissions to the service appointment can modify the service appointment.

Service Appointment Sharing for Independent Contractors

When outbound flow for community users and the Resource Appointment Sharing setting is enabled, independent contractors can create and manage appointments in Experience Cloud. These independent contractors can add other contractors to the service appointment and depending on the sharing settings, the other contractors can also manage the service appointment. For example, Peter is an independent wealth adviser (contractor) who uses Experience Cloud to book an appointment. In this appointment, he adds two more independent contractors: Tony (a real estate investment specialist) and Paul (a mutual funds specialist). Peter adds Tony as the required resource and Paul as an optional resource. Because Tony is the required resource, he can modify the appointment. If either Tony or Peter makes Paul the required resource, Paul too can modify and manage the appointment.

Appointment Distribution

Appointment distribution lets you allocate appointments quickly and evenly among service resources. An equitable distribution of appointments ensures efficient use of service resources and increased productivity. Salesforce Scheduler uses service resources' utilization scores to identify and suggest the least occupied eligible service resources for appointments. For an anonymous appointment, the least occupied eligible resource is automatically assigned to the appointment.

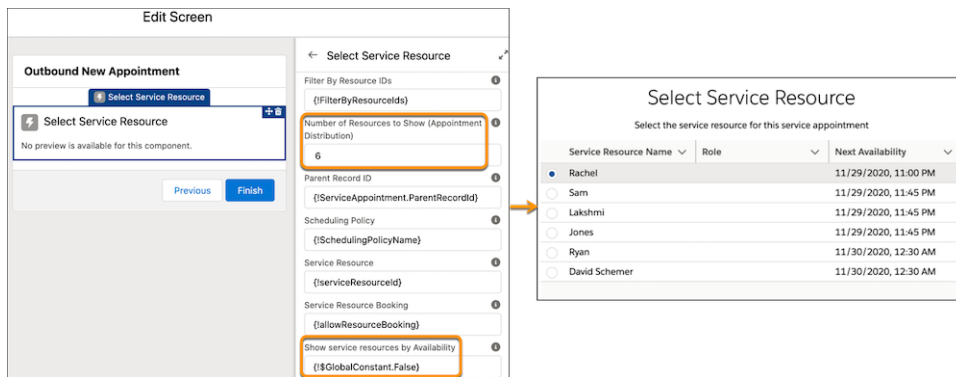
To enhance the scheduling experience for users when appointment distribution is enabled, you can:

- Optimize the performance by defining the maximum number of eligible service resources you want to show for scheduling. Scheduling is a performance-intensive process. As the number of eligible resources increases, Salesforce Scheduler takes longer to fetch the resource list.

Use the new Number of Resources to Show (Appointment Distribution) attribute in flows. This attribute is available in the Select Service Resource, Service Resource Availability, Select Service Appointment Time, and Select Service Resource and Service Appointment Time screen components. If you're using APIs, use the `resourceLimitApptDistribution` parameter. This parameter is available in the `getAppointmentCandidates` REST API and the `available-territory-slots` Connect API.

- List the service resources based on their workload, with the least occupied resource at the top.

Set the new Show service resources by Availability attribute to `False`. This attribute is available in the Select Service Resource, Service Resource Availability, and Select Service Resource and Service Appointment Time screen components. By default, it's set to `True` and it sorts the resources by the earliest next availability date and time.



Enable Appointment Distribution

Enable the Appointment Distribution and Aggregate Resource Use settings. Then define an appointment assignment policy to calculate resource utilization and link the assignment policy to your scheduling policy.

How Appointment Distribution Works

These topics explain how appointment scheduling works when appointment distribution is enabled.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Enable Appointment Distribution

Enable the Appointment Distribution and Aggregate Resource Use settings. Then define an appointment assignment policy to calculate resource utilization and link the assignment policy to your scheduling policy.

[Appointment Distribution Implementation Considerations](#)

Learn about the limitations for appointment distribution, and plan your implementation accordingly.

[Enable Appointment Distribution Settings](#)

To enable appointment distribution, enable the Appointment Distribution and Aggregate Resource Use settings. The Appointment Distribution setting provides access to the appointment distribution feature. And the Aggregate Resource Use setting starts the utilization score calculation for service resources. A utilization score is required for appointment distribution to work as expected.

[Define an Appointment Assignment Policy](#)

Define an appointment assignment policy and specify the parameters that are used to calculate the utilization score for service resources.

[Link Your Appointment Assignment Policy to a Scheduling Policy](#)

Link your appointment assignment policy to the scheduling policy that your flows use for appointment scheduling.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Appointment Distribution Implementation Considerations

Learn about the limitations for appointment distribution, and plan your implementation accordingly.

- For appointment distribution to work as expected, set the Time Slot Preload Multiplier attribute to 1. For more information, see [Flow Screen Component: Select Service Appointment Time](#).
- For appointment distribution to work effectively, after enabling the required settings, give the system a few weeks to capture sufficient data for calculating utilization scores for service resources.
- To prevent incorrect utilization scores, service resource absences and the date from when a resource becomes eligible for an appointment aren't considered in the utilization calculation. For example, a resource is on leave for the first half of a week and the utilization calculation frequency is set to weekly in the appointment assignment policy. That resource can be incorrectly treated as one of the least utilized resources for that week. The same scenario applies for a resource who joins the organization mid-week.
- For an appointment assignment policy, 1 day is the minimum period that's considered when calculating the utilization score even if you specify a smaller From and To range for the Parameter-Based option. For weekly or monthly frequency, the applicable week or month that's considered for calculating the utilization score is based on the user locale.
- In addition to Salesforce Scheduler, Salesforce has Field Service and several other products that create service appointment records. Let's say you've two or more of these products in the same org. If a service resource takes appointments from every product, then every appointment is considered for calculating the utilization score for that service resource.
- If the Appointment Distribution option is enabled and the Use service territory member's shift option is selected in the scheduling policy, Scheduler shows the service resources by filtering. The resources are filtered based on the value in the Number of Resources to Show (Appointment Distribution) flow attribute. Scheduler then considers the available shifts for the filtered service resources.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Enable Appointment Distribution Settings

To enable appointment distribution, enable the Appointment Distribution and Aggregate Resource Use settings. The Appointment Distribution setting provides access to the appointment distribution feature. And the Aggregate Resource Use setting starts the utilization score calculation for service resources. A utilization score is required for appointment distribution to work as expected.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler Settings*, and then select **Salesforce Scheduler Settings**.
2. Enable **Appointment Distribution**, and then enable **Aggregate Resource Use**.

Define an Appointment Assignment Policy

Define an appointment assignment policy and specify the parameters that are used to calculate the utilization score for service resources.

1. From Setup, in the Quick Find box, enter *Assignment Policies*, and then select **Assignment Policies**.
2. Click **New**.
3. Enter a name for the policy.
4. From the Policy Type list, select **Load Balancing**.
5. Select a utilization count type.

Total Appointment Duration

Calculates a service resource's utilization score based on the total duration of scheduled appointments for that resource.

Number of Appointments

Calculates a service resource's utilization score based on the total number of scheduled appointments for that resource.

6. Select a utilization calculation frequency.

Parameter-Based

Calculates the utilization score for the number of days that are displayed on the time slot screen. For APIs, the utilization score is calculated for the duration specified in the `getAppointmentCandidates` or `available-territory-slots` API.

Monthly

Calculates service resources' utilization scores for the entire month during which the appointment is schedule. (This date isn't the date of appointment.) For an anonymous appointment, the utilization scores are calculated for the entire month that the selected appointment time slot falls in.

For example, if you're scheduling an appointment on July 8, all appointments in the month of July are considered for calculating the utilization score. For an anonymous appointment, if you select an appointment time slot on August 10, all appointments in the month of August are considered.

Weekly

Calculates service resources' utilization scores for the entire week during which the appointment is scheduled. (This date isn't the date of appointment.) For an anonymous appointment, the utilization scores are calculated for the entire week that the selected appointment time slot falls in.

For example, if you're scheduling an appointment on July 8, all appointments in that week are considered for calculating the utilization score. For an anonymous appointment, if you select an appointment time slot on August 10, all appointments in that week are considered.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

7. Save your changes.

Link Your Appointment Assignment Policy to a Scheduling Policy

Link your appointment assignment policy to the scheduling policy that your flows use for appointment scheduling.

1. From Setup, in the Quick Find box, enter *Scheduling Policies*, and then select **Scheduling Policies**.
2. Next to the scheduling policy that you want to link the appointment assignment policy to, click **Edit**.
3. In the Assignment Policy field, enter the name of the appointment assignment policy that you want to link to the scheduling policy.
4. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

How Appointment Distribution Works

These topics explain how appointment scheduling works when appointment distribution is enabled.

How the Resource Utilization Score Is Calculated

Salesforce Scheduler tracks all service appointments and their assigned resources, and it stores resources' utilization scores in the Appointment Schedule Aggregate object. The utilization score calculation is an asynchronous process. When a service appointment is created, modified, or canceled, the assigned service resource's utilization score is automatically updated. If you mark a future appointment complete or can't complete, the service resource is relieved and the utilization score is updated.

Depending on the utilization count type that you selected when defining your appointment assignment policy, the utilization score is calculated. The utilization count type provides two options for calculating the utilization score: the number of minutes a service resource is occupied for or the number of appointments a service resource is assigned. To select the frequency at which the utilization is calculated, define a value for the utilization calculation frequency in your appointment assignment policy. You can choose from Weekly, Monthly, and Parameter-based duration options.

Scheduling is a performance-intensive process. As the number of eligible resources increases, Salesforce Scheduler takes longer to fetch the resource list. To optimize the performance, Salesforce Scheduler shows the 10 least occupied eligible resources. To change the default number of service resources shown, change the value for the Number of Resources to Show (Appointment Distribution) flow attribute. If every one of these 10 resources is booked for a time slot, that time slot isn't displayed when scheduling an appointment.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Appointment Distribution with Regular Scheduling

During an appointment scheduling process, Salesforce Scheduler fetches and shows a list of all the eligible service resources for the selected work type and service territory. However, when appointment distribution is enabled, based on the utilization calculation frequency, Salesforce Scheduler uses the service resources' utilization score for a specific period to suggest the least occupied resources.

- **Utilization Calculation Frequency: Weekly**

Salesforce Scheduler checks eligible service resources' utilization scores for the current week and identifies the least occupied resources for the week. Then Salesforce Scheduler checks the resources' availability for the next 31 days and, by default, sorts them based on their earliest availability date. To sort the resources based on their workload with the least occupied resource at the top, set the Show Service Resources by Availability flow attribute to *False*.

 **Note:** To define the maximum number of least occupied resources to show, use the Number of Resources to Show (Appointment Distribution) flow screen attribute.

- **Utilization Calculation Frequency: Monthly**

Salesforce Scheduler checks eligible service resources' utilization scores for the current month and identifies the least occupied resources for the month. The rest of the behavior is the same as it is for weekly.


- **Utilization Calculation Frequency: Parameter-Based**

Salesforce Scheduler checks eligible service resources' utilization scores for the next 31 days from the current date and identifies the least occupied resources for the month. The rest of the behavior is the same as it is for weekly.

Appointment Distribution with Anonymous Scheduling

During an anonymous appointment scheduling process, Salesforce Scheduler fetches all the eligible service resources for the selected work type and service territory and shows their time slots on the time slot screen. However, when appointment distribution is enabled, Salesforce Scheduler uses service resources' utilization scores to find and show the time slots for the least occupied resources. When the user selects a time slot, the least occupied resource on that time slot is automatically assigned to the appointment.

The utilization score that's considered for identifying the least occupied resources depends on the utilization calculation frequency. For anonymous scheduling, we recommend that you use parameter-based frequency. To identify the least occupied resources for that period, Salesforce Scheduler checks resources' utilization scores for the number of days shown on the Time Slot screen. It then shows the available time slots pertaining to those resources.

 **Note:** For the weekly or monthly frequency, the actual date range that's used to calculate the utilization scores can be different from the range that's displayed on the Time Slot screen. That means some of the displayed time slots can be based on obsolete utilization scores. Therefore, to avoid incorrect resource allocation, we don't recommend using weekly or monthly frequency with anonymous scheduling.

Appointment Distribution with Multi-Resource Scheduling

Salesforce Scheduler considers equal duration of time for each service resource when calculating utilization for multi-resource appointments. For example, three service resources are scheduled for a multi-resource appointment for 30 minutes. When calculating the resource utilization, Salesforce Scheduler considers each of these resources busy for 30 minutes out of the total time duration selected for utilization calculation.

Appointment Distribution with Concurrent Scheduling

Salesforce Scheduler multiplies the concurrent appointment time slot by the number of people the appointment is scheduled for when calculating utilization for concurrent appointments. For example, a service resource has a scheduled concurrent appointment with three people for a work type for 1 hour. When calculating the resource utilization, Salesforce Scheduler considers the service resource for 3 hours out of the total time duration selected for utilization calculation.

Determine Service Resource Availability by Work Type Groups

Salesforce Scheduler uses an intersection of operating hours of Service Territory, Service Territory Member, Work Type, and Account to determine service resource availability based on the scheduling policies and scheduler settings. If you want Salesforce Scheduler to also use work type groups to determine availability, enable the Operating Hours for Service Territory Members for Work Type Groups preference in Scheduler Settings. Then, enter work type groups for service territory member operating hours in service territory member records. This setting is enabled by default for orgs created after Summer '21.

You can use this preference to specify the hours that a service resource can work on specific appointment topics. For example, a banker in a branch handles Investment Banking and Retail Banking from 10 AM to 12 PM and Account Opening from 1 PM to 3 PM.

You can also use this preference to define a subset of topics that a service resource can work on from a service territory. For example, a doctor consults for the Apollo Clinic in two locations. In San Francisco, the doctor sees patients for pulmonology consultations every weekday from 10 AM to 12 PM. The doctor, who also specializes in immunology and allergy medicine, consults at the Oakland clinic every weekday from 2 PM to 4 PM.

After you enable the preference, here's how to set the operating hours for service territory members:

- If you want a service resource to be available for a set of work type groups for specific operating hours, enter the operating hours and select the work type groups.
- If you want a service resource to be considered as available for all work type groups, then enter operating hours and don't select any work type groups.
- If you want a service resource to be considered as unavailable for a day, don't enter operating hours for that day.

If you don't create any operating hours for a service territory member, Salesforce Scheduler considers the resource as available for all work type groups.

[Prerequisites for Setting Operating Hours for Resources Working on Appointment Topics](#)

To enable the Operating Hours for Service Territory Members to Work on Appointment Topics preference, your organization must meet certain prerequisites.

[Enable Operating Hours for Service Territory Members for Work Type Groups](#)

To set hours for resources working on appointment topics, enable the Operating Hours for Service Territory Members for Work Type Groups preference.

[Determine Service Resource Availability by Work Type Groups: Example](#)

Learn how Salesforce Scheduler populates time slots when you use the Operating Hours for Service Territory Members for Work Type Groups preference.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Prerequisites for Setting Operating Hours for Resources Working on Appointment Topics

To enable the Operating Hours for Service Territory Members to Work on Appointment Topics preference, your organization must meet certain prerequisites.

This feature uses the new Appointment Topic Time Slot junction object that's now to be used in all development. Salesforce Scheduler flows also use this junction object.

These prerequisites apply only to existing orgs. All new orgs have this feature enabled by default.

- Migrate existing data using the developer console. Here's an example Apex code that migrates the work type groups and the time slot associations.

EDITIONS

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```
public class AppointmentTopicTimeSlotDataLoader {
    public static void retrieveAndInsertRecords(){
        List<AppointmentTopicTimeSlot> appointmentTopicTimeSlotList = new
List<AppointmentTopicTimeSlot>();
        List<TimeSlot> timeSlots = [SELECT Id, WorkTypeGroupId FROM TimeSlot WHERE
WorkTypeGroupId!=null];
        system.debug('Total No. of TimeSlot Records having WorkTypeGroup: '+
timeSlots.size());
        for(TimeSlot TS : timeSlots){
            AppointmentTopicTimeSlot ATTS = new AppointmentTopicTimeSlot (TimeSlotId =
TS.Id,
                                                                    WorkTypeGroupId
= TS.WorkTypeGroupId);
            appointmentTopicTimeSlotList.add(ATTS);
        }
        insertRecords (appointmentTopicTimeSlotList);
    }

    private static void insertRecords(List<AppointmentTopicTimeSlot>
appointmentTopicTimeSlotList){
        Database.SaveResult[] saveResults = Database.insert(appointmentTopicTimeSlotList,
false);
        Integer attsInserted = 0;
        for (Database.SaveResult sr : saveResults) {
            if (sr.isSuccess()) {
                attsInserted = attsInserted+1;
                system.debug('Record successfully inserted. AppointmentTopicTimeSlot
ID: ' + sr.getId());
            }
            else {
                for(Database.Error err : sr.getErrors()) {
                    System.debug('The following error has occurred.');
```

```
                    System.debug(err.getStatusCode() + ': ' + err.getMessage());
                    System.debug('AppointmentTopicTimeSlot fields that affected this
error: ' + err.getFields());
                }
            }
        }
    }
}
```

```

        system.debug('Total No. of AppointmentTopicTimeSlot records successfully inserted:
'+ attsInserted);
    }
}

```

- Delete all time slots with work type groups.
- Back up all customizations including triggers or validations.
- At a minimum, you must provide the read permission to the new Appointment Topic Time Slot object for users scheduling appointments. Users with communities licenses will also need at least the read permission.
- Give users edit access to the Anonymous Booking field on the Service Appointment object.
 1. From Setup, open **Object Manager**.
 2. In the Quick Find box, enter *Service Appointment*, and then select **Service Appointment**.
 3. Click **Fields & Relationships**, and select **Anonymous Booking**.
 4. Click **Set Field-Level Security**.
 5. Select **Visible** for all user profiles that schedule appointments.
 6. Save your changes.

Enable Operating Hours for Service Territory Members for Work Type Groups

To set hours for resources working on appointment topics, enable the Operating Hours for Service Territory Members for Work Type Groups preference.

Note:

- Before enabling the preference, make sure that you complete all the [prerequisites](#) on page 82.
- This feature uses the new Appointment Topic Time Slot junction object that's now to be used in all development. Related Salesforce Scheduler flows also use this junction object.
- After you enable this setting, you can't disable it.
- All the new orgs are provided with this setting enabled by default.
- When you enable this setting, there's no loss of functionality.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, and then select **Salesforce Scheduler Settings**.
2. Enable **Operating Hours for Service Territory Members for Work Type Groups**.
3. Click **Enable** in the pop-up.
4. Transfer the customizations that you backed up.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Determine Service Resource Availability by Work Type Groups: Example

Learn how Salesforce Scheduler populates time slots when you use the Operating Hours for Service Territory Members for Work Type Groups preference.

Ryan is a banker who specializes in Investment Banking, Business Banking, and General Banking. He works from the Market Street branch, which is open from 9:00 AM to 5:00 PM from Monday to Friday. Each appointment is for 60 minutes.

The Appointment Start Time Interval is 60 minutes, and Block Time Before Appointment and Block Time After Appointment are set to 0.

Here are his work hours for appointment topics.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

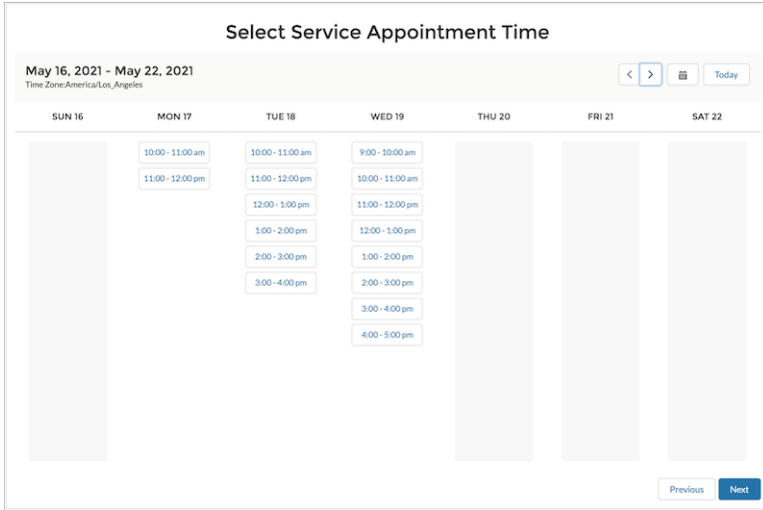
| Day | Time | Appointment Topics |
|-----------|----------------------|--|
| Monday | 10:00 AM to 12:00 PM | <ul style="list-style-type: none"> Business Banking General Banking |
| Monday | 1:00 PM to 3:00 PM | <ul style="list-style-type: none"> General Banking Investment Banking |
| Tuesday | 10:00 AM to 4:00 PM | <ul style="list-style-type: none"> Business Banking Investment Banking |
| Wednesday | 9:00 AM to 5:00 PM | All appointment topics |
| Thursday | 9:00 AM to 5:00 PM | General Banking |
| Friday | No Appointments | No Appointments |

| Operating Hours Ryan_MarketStreet_OH | | |
|---|---------------------|---|
| Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles) | | |
| Service Appointment Windows | | |
| DAY | HOURS | WORK TYPE GROUP |
| Monday | 10:00 AM - 12:00 PM | Business Banking, General Banking |
| Monday | 1:00 PM - 3:00 PM | Investment Banking, General Banking |
| Tuesday | 10:00 AM - 4:00 PM | Business Banking, Investment Banking |
| Wednesday | 9:00 AM - 5:00 PM | |
| Thursday | 9:00 AM - 5:00 PM | General Banking |

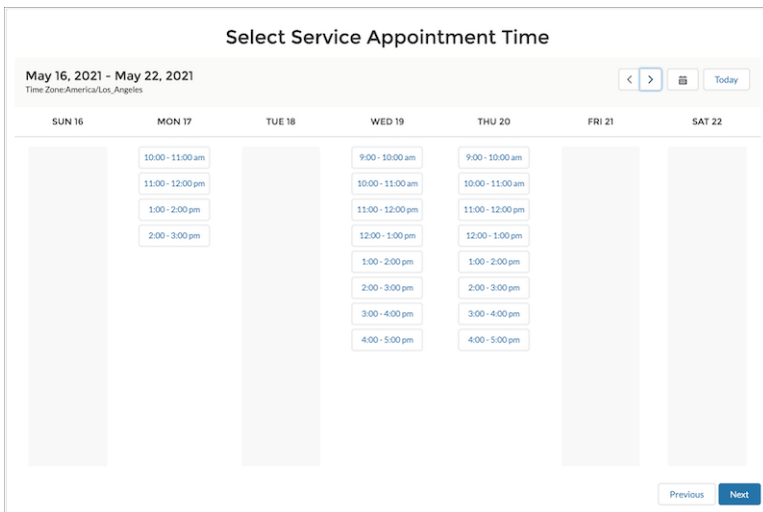
Let's take a closer look at some work hours.

- As Ryan accepts Business Banking and General Banking appointments from 10:00 AM to 12:00 PM on Monday, we select both Business Banking and General Banking in the work type group column.
- As Ryan accepts all types of appointments on Wednesday from 9:00 AM to 5:00 PM, we don't select any work type group.
- As Ryan doesn't accept any appointments on Friday, we don't create any work hours for Friday.

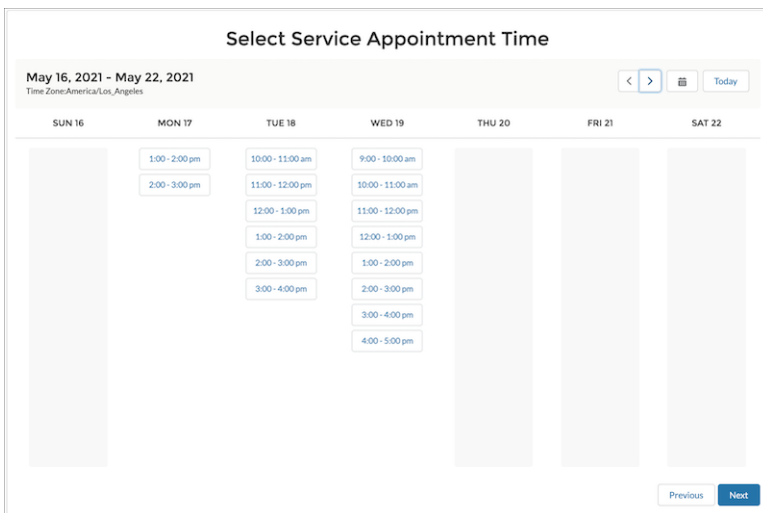
Here are the time slots that appear when a customer books an appointment with Ryan for Business Banking.



Here are the time slots that appear when a customer books an appointment with Ryan for General Banking.



Here are the time slots that appear when a customer books an appointment with Ryan for Investment Banking.



Enable and Configure Concurrent Scheduling

With concurrent scheduling, it's easy to schedule multiple customer appointments in the same time slot. For example, a doctor's office can let several patients book a Monday 1-2 PM appointment to ensure against downtime. Appointments appear as overlapping events on the Salesforce Calendar.

[Considerations for Concurrent Scheduling](#)

Here are some things to keep in mind when you implement concurrent scheduling.

[Update Field-Level Security for the Time Slot Object](#)

Update the field-level security on the Work Type Group and Max Appointment fields on the Time Slot object for all user profiles involved in scheduling.

[Enable Concurrent Scheduling](#)

Enable Concurrent Scheduling to let users schedule multiple appointments within the same time slot.

[Define Time Slots for Concurrent Scheduling](#)

Define time slots for concurrent appointments and specify the maximum number of appointments that can be made in a time slot.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Considerations for Concurrent Scheduling

Here are some things to keep in mind when you implement concurrent scheduling.

- Concurrent time slots are applicable only to service territory members; they aren't applicable to service territories or work types. As a result, when viewing a service territory or work type record, you don't see the concurrent time slots in their operating hours. And during appointment scheduling, only the concurrent time slots in the service territory member's operating hours are available for selection. Any concurrent time slots in the work type's or service territory's operating hours aren't available.
- The minimum number of concurrent appointments is 2; the maximum is 1,000.
- For concurrent scheduling to work smoothly, we recommend that you set Estimated Duration in all work types to Appointment Start Time Interval. For example, if you've set your Appointment Start Time Interval scheduling policy rule to 30 minutes, set Estimated Duration in your work types to 30 minutes.
- After a concurrent appointment is scheduled, deleting service resources, modifying work type durations, or modifying the appointment to remove assigned service resources can result in unexpected behavior.
- After a concurrent appointment is scheduled for a time slot, if you change the appointment start time or end time, then Salesforce Scheduler doesn't show the time slot even if the maximum number of appointments isn't reached. The changes to start time and end time don't affect already-scheduled concurrent appointments.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Update Field-Level Security for the Time Slot Object

Update the field-level security on the Work Type Group and Max Appointment fields on the Time Slot object for all user profiles involved in scheduling.

1. In Setup, in the Quick Find box, enter *Object Manager*, and select **Object Manager**.
2. Select **Time Slot**.
3. Select **Fields & Relationships**.
4. Select **Maximum Appointments**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

5. Click **Set Field-Level Security**.
6. Select the **Visible** checkbox for all profiles, including the System Administrator.
7. Save your changes.
8. Click **Back to Time Slot Fields**.
9. Select **Work Type Group**.
10. Click **Set Field-Level Security**.
11. Select the **Visible** checkbox for all profiles, including the System Administrator.
12. Save your changes.

Enable Concurrent Scheduling

Enable Concurrent Scheduling to let users schedule multiple appointments within the same time slot.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, and then select **Salesforce Scheduler Settings**.
2. Enable Concurrent Scheduling.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Define Time Slots for Concurrent Scheduling

Define time slots for concurrent appointments and specify the maximum number of appointments that can be made in a time slot.

1. On the Operating Hours tab, select the operating hours record you want to configure concurrent scheduling for.
2. On the record page, click **Edit**.
3. To add a time slot for concurrent appointments, under Set Concurrent Service Appointment Windows, click **Add Row**.
4. Select a day, start time, end time, maximum number of appointments, and appointment topic for the time slot.

Add more rows as required.



Note: Concurrent time slots are applicable only to service territory members; they aren't applicable to service territories or work types. As a result, when viewing a service territory or work type record, you don't see the concurrent time slots in their operating hours. And during appointment scheduling, only the concurrent time slots in the service territory member's operating hours are available for selection. Any concurrent time slots in the work type's or service territory's operating hours aren't available.

5. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Enable and Configure Multi-Resource Scheduling

Multi-resource scheduling lets users create appointments that include more than one required service resource. An appointment can have a maximum of five required service resources: one primary required service resource plus four required service resources, including asset resources.

[Considerations for Multi-Resource Scheduling](#)

In multi-resource scheduling, a primary service resource anchors the appointment and must be marked required. The primary service resources are the only service resources whose skills are matched to the skill requirements for an appointment. Other required service resources are matched to the appointment based on their availability and the primary resource's service territory. Resources not marked required are considered optional.

[Enable Multi-Resource Scheduling](#)

Turn on Multi-Resource Scheduling to let users schedule groups of resources, as well as assets, for customer appointments.

[Update Field-Level Security for Multi-Resource Scheduling](#)

Update the field-level security settings on the Primary Resource field on the Assigned Resource object for all user profiles that need to access multi-resource scheduling.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Considerations for Multi-Resource Scheduling

In multi-resource scheduling, a primary service resource anchors the appointment and must be marked required. The primary service resources are the only service resources whose skills are matched to the skill requirements for an appointment. Other required service resources are matched to the appointment based on their availability and the primary resource's service territory. Resources not marked required are considered optional.

This table summarizes how matching is done for different types of service resources when multi-resource scheduling is enabled.

Table 1: Service Resource Types in Salesforce Scheduler

| Matches On | Primary Service Resource | Required Service Resource | Optional Service Resource |
|----------------------------|--------------------------|---------------------------|---------------------------|
| Skill Requirements | Yes | No | No |
| Service Territory | Yes | Yes | No |
| Availability in Time Slots | Yes | Yes | No |

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

When anonymous scheduling is enabled, Salesforce Scheduler automatically selects a service resource for an appointment. As a result, even if multi-resource scheduling is enabled, Salesforce Scheduler can't assign multiple resources to an anonymous appointment.

Enable Multi-Resource Scheduling

Turn on Multi-Resource Scheduling to let users schedule groups of resources, as well as assets, for customer appointments.

 **Note:** To schedule assets, your org must have the Asset Scheduling license.

1. From Setup, in the Quick Find box, enter *Salesforce Scheduler*, and then select **Salesforce Scheduler Settings**.
2. Enable Multi-Resource Scheduling.
3. Save your changes.

Update Field-Level Security for Multi-Resource Scheduling

Update the field-level security settings on the Primary Resource field on the Assigned Resource object for all user profiles that need to access multi-resource scheduling.

1. In Setup, in the Quick Find box, enter *Object Manager*, and select **Object Manager**.
2. Select **Assigned Resource**.
3. Select **Fields & Relationships**.
4. Select **Primary Resource**.
5. Click **Set Field-Level Security**.
6. Select the **Visible** checkbox for all profiles that need access to multi-resource scheduling in Salesforce Scheduler, including the System Administrator.
7. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

SALESFORCE SCHEDULER IMPLEMENTATION GUIDELINES

Learn about the limits and limitations that exist for Salesforce Scheduler and plan your implementation accordingly.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Limited Support on Mobile Devices

- Salesforce Scheduler standard flow templates don't support multi-resource scheduling on a mobile device.
- You can't use Salesforce Scheduler in the Salesforce mobile app. Instead, we recommend using the mobile browser when you're working with Scheduler on a mobile device. For more information, see [Supported Browsers and Devices for Lightning Experience](#).
- Outbound flows aren't supported on a mobile device.

Flow-Specific Limitations

- Salesforce Scheduler standard flow templates support Chinese, Danish, Dutch, English, Finnish, French, German, Italian, Japanese, Korean, Norwegian, Portuguese, Russian, Spanish, Swedish, and Thai.
- The By name and the By previously scheduled service appointments options don't show asset service resources (or assets). Proceed by selecting the By work type group, appointment type, or service territory option, and then select an asset on the page that shows the list of available service resources.

Select Service Resources

Parent Record ID
Rachel Adams (Sample)

Find a service resource

- By name
- By work type group, appointment type, or service territory
- By previously scheduled service appointments

Search Service Resources...

Admin User (Sample)
true
Technician
Last service appointment : Jun 15, 2020

Ryan Dobson (Sample)
true
Technician
Last service appointment : Jun 1, 2020

- On the flow screen where you select a service territory, the operating hours are shown in the time zone of the service territory's operating hours and not in the user's time zone.

Limitations with Event Management, Concurrent Scheduling, and Multi-Resource Scheduling

- Concurrent scheduling and multi-resource scheduling don't work together.
- Multi-resource scheduling supports a maximum of five required service resources, including asset service resources (or assets).

Salesforce Scheduler Implementation Guidelines

- With multi-resource scheduling enabled, Salesforce Scheduler flows don't work when added to the sidebar of a record page.
- When anonymous scheduling is enabled, Salesforce Scheduler automatically selects a service resource for an appointment. As a result, even if multi-resource scheduling is enabled, Salesforce Scheduler can't assign multiple resources to an anonymous appointment.
- To use the Event Management setting for inbound appointment flows, always use a community license that provides access to the Event object.
- When Event Management is enabled, you can't edit Salesforce calendar events that are created via Salesforce Scheduler service appointments.

Service Appointment must always be the parent object. Don't directly edit a Salesforce calendar event. Instead, update the corresponding Service Appointment record, which, in turn, updates the event record.

- When Event Management is enabled, the subject field for the Event object is limited to 255 characters. However, if both Event Management and Block Resource Availability are enabled, Scheduler appends Block time before: or Block time after: in the subject field. Therefore, the limit for the subject field becomes 234 characters. Any character beyond the specified limits is truncated.
- Salesforce Scheduler doesn't support multi-day scheduling. In other words, you can't schedule appointments that span more than one day.

Limitations for Scheduling Appointments for Cases

- Only partners and customer care reps can book an appointment for cases.
- Salesforce Scheduler doesn't support booking an appointment for asset-related cases.
- When you book an appointment for a case related to an account, Salesforce Scheduler doesn't consider the account preferences and operating hours defined for the account.
- When you book an appointment for a case that's related to an account or a contact, the booked appointment doesn't show the details of the corresponding account or contact.
- You can't add Service Appointments to the Related tab of a case record page.

APPOINTMENT BOOKING EXPERIENCE

Salesforce Scheduler supports outbound and inbound appointments through various appointment booking experience channels: Salesforce Lightning Service Console, Experience Cloud sites, and your company websites. Use flows and APIs to create appointment booking experiences for these appointment booking experience channels.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Determine How to Build Your Appointment Booking Experience

Here's how Salesforce Scheduler is typically used to manage appointments.

- Internal users manage appointments from Salesforce Lightning Service Console.
- Contractors and partners manage appointments from Experience Cloud sites.
- Customers manage appointments from Experience Cloud sites and company websites.

Use inbound and outbound flows to create appointment booking experiences for your stakeholders who use Salesforce Lightning Service Console and Experience Cloud sites. Use Salesforce APIs and the Inbound New Guest Appointment flow to create appointment booking experiences for stakeholders who use your company websites.

Let's look at how different stakeholders use various appointment booking channels in retail banking and how to build the appointment booking experience for them.

| Stakeholders | Appointment Booking Experience Channels Used | How to Build Appointment Booking Experience |
|---|--|---|
| Bankers, customer service agents, and branch managers | Salesforce Lightning Service Console | Flows |
| Authenticated customers | Experience Cloud sites | Flows |
| Authenticated customers | Company websites | APIs |
| Potential Customers (guest users) | Experience Cloud sites | Flows |
| Potential Customers (guest users) | Company websites | <ul style="list-style-type: none">• The Inbound New Guest Appointment flow• APIs |
| Contractors | Partner Experience Cloud sites | Flows |

Objects that Support Appointment Booking

Salesforce Scheduler enables your users and customers to book appointments for accounts, person accounts, leads, and opportunities. So, identify the objects for which you want to enable booking appointments.

Appointment Booking Experience

Here's the list of objects for which users and customers book appointments in retail banking.

- Person accounts and accounts (customers)
- Leads (potential customers)
- Opportunities

Scheduling Policies

Create scheduling policies to enforce rules that help your users identify the best service resources and time slots for appointments. When you apply a scheduling policy to your scheduling process, it ensures that an appointment meets the criteria defined by the scheduling policy rules. Salesforce Scheduler provides a scheduling policy called Default Appointment Scheduling Policy. By default, all Salesforce Scheduler flows and API calls use Default Appointment Scheduling Policy. To use different sets of rules with different flows and API calls, create custom scheduling policies and associate them with flows or use them in API calls.

Here's the list of scheduling policy rules and their definitions.

Table 2: Scheduling Policy Rules

| Name | Definition | Usage |
|---|--|--|
| Include Primary Service Territory Members | Allow service resources who are primary or relocated members of a service territory to be assigned for appointments. This option affects both primary and relocation types of service territory members. When you deselect this option, the primary and relocated members of the service territory are excluded from the list of service resources during appointment scheduling. | At a minimum, ensure that you select these options for a scheduling policy: Include Primary Service Territory Members or Include Secondary Service Territory Members. |
| Include Secondary Service Territory Members | Allow service resources who are secondary members of a service territory to be assigned for appointments. | At a minimum, ensure that you select these options for a scheduling policy: Include Primary Service Territory Members or Include Secondary Service Territory Members. |
| Match Skills | Allow only required service resources who have certain skills to be assigned for appointments. | - |
| Match Skill Levels | Allow only required service resources who have certain skills and skill levels to be assigned for appointments. | Always enter skill levels when you assign skills to service resources and work types. If you don't enter skill levels when Match Skill Levels is enabled, then Salesforce Scheduler doesn't consider the skills for skill matching and doesn't show the service resources when scheduling appointments. Select this rule and the Match Skills rule to enforce skill-level matching. |

Appointment Booking Experience

| Name | Definition | Usage |
|---|--|---|
| Include Only Required Service Resources | Allow only required service resources to be assigned for appointments. | Ensure that the account contains at least one resource preference (an account to service resource junction object) that's set as <code>Required</code> . If no service resources have a resource preference set as <code>Required</code> for the account, then no service resources are shown. |
| Ignore Excluded Service Resources | Prevent excluded service resources from being assigned for appointments. | <p>Any service resources with a resource preference (an account to service resource junction object) that's set as <code>Excluded</code> for the account aren't shown. Service resources with <code>Preferred</code>, <code>Required</code>, or no account resource preference are shown.</p> <p>Users can still schedule appointments with excluded resources by selecting either the By name or the By previously scheduled service appointments option on the Select Service Resources page.</p> |
| Enforce Account's Visiting Hours | Prevent users from scheduling appointments outside of an account's visiting hours. | Only time slots that are within the account record's operating hours are shown. The account must have operating hours defined for visiting hours to be enforced. If the account doesn't have operating hours defined, all available time slots for a service resource are shown. |
| Appointment Start Time Interval | Required. The time interval in minutes between appointment start times. For example, if you set the interval as 15, appointments can then begin at the top of the hour and at 15-minute intervals thereafter (10:00 AM, 10:15 AM, 10:30 AM). Valid values are 5, 10, 15, 20, 30, 45, 60, 90, 120, 150, 180, 240, 300, 360, 420, and 480. | The default appointment start time interval is 30 minutes. |
| Check Salesforce Calendar for Resource Availability | Consider Salesforce calendar events when determining the availability of service resources for appointments. | For more information, see Check Salesforce Calendar to Determine Resource Availability on page 103. |
| Check External Systems for Resource Availability | Consider external calendar events when determining the availability of service resources for appointments. | Select your custom Apex class that reads external calendar events and passes the details to the provided <code>ServiceResourceScheduleHandler</code> Apex interface. For more information, see Check External Calendars to Determine Resource Availability on page 110. |

Appointment Booking Experience

| Name | Definition | Usage |
|---|--|--|
| Use service territory member's shift | Consider shifts of service territory members when determining the availability of service resources for appointments. | Create regular or recurring shifts for each service resource. For more information, see Create Shifts in Salesforce Scheduler . |
| Use service territory's operating hours with shifts | Consider the intersection of shifts and service territory operating hours when determining the availability of service resources for appointments. | Only time slots that are within shifts and service territory operating hours are shown. To enforce operating hours for a service territory, ensure that you define them first. |

Here are a few examples of how you can use scheduling policy rules in retail banking.

- **Include Only Required Service Resources:** Promote the assignment of personal bankers to appointments. For each account, set the account's personal banker as required. Then, select **Include Only Required Service Resources**. When your users or customers book an appointment, Salesforce Scheduler shows the personal banker when the personal banker is available. If the personal banker isn't available, then Salesforce Scheduler shows all other available bankers. For more information, see [Add Service Resource Preferences to Accounts](#) on page 102.
- **Include Primary Service Territory Members and Include Secondary Service Territory Members:** When you want bankers to take appointments only from their primary service territory, select **Include Primary Service Territory Members** and deselect **Include Secondary Service Territory Members**.
- **Match Skills and Match Skill Levels:** Ensure that only bankers who have the necessary skills and skill levels are assigned to appointments. For more information, see [Create Skills](#) on page 22.
- **Enforce Account's Visiting Hours:** Ensure that bankers book appointments only during customers' preferred hours. Enable **Enforce Account's Visiting Hours** in the scheduling policy used for outbound appointments.
- **Use service territory member's shift and Use service territory's operating hours with shifts:** When you want to use flexible work hours for bankers or when you want them to set or propose their own work hours, select **Use service territory member's shift**. If you want Salesforce Scheduler to also use branch operating hours to determine availability when you use shifts, select **Use service territory's operating hours with shifts**. For more information, see [Manage Shifts in Salesforce Scheduler](#) on page 28.
- **Check External Systems for Resource Availability:** Prevent bankers from being overbooked. Write Salesforce Scheduler appointments to external calendars and then select **Check External Systems for Resource Availability**. For more information, see [Write Salesforce Scheduler Appointments to External Calendars](#) on page 71 and [Check Calendars to Determine Availability of Service Resources](#) on page 103.

[Appointment Booking Experience Using Flows](#)

Salesforce Scheduler provides standard flow templates that allow your users and customers to schedule, modify, and cancel appointments. You can create multiple instances of these flows and customize them to meet your requirements. Salesforce Scheduler also provides flow screen components and actions. You can also use these components to create custom flows.

[Appointment Booking Experience Using APIs](#)

Salesforce Scheduler provides various developer resources such as REST APIs, Connect REST APIs, Salesforce Platform Events, and Apex classes to create and manage appointment booking experiences.

[Define Rules for Finding Appropriate Service Resources in Salesforce Scheduler](#)

Use a scheduling policy to enforce rules to help your users find the best service resources for an appointment. The scheduling policy ensures that an appointment meets the criteria that the policy rules define. For example, it considers service resources' skills and service territory membership when searching for service resources. You can modify the Salesforce Scheduler Default Appointment Scheduling Policy or create custom scheduling policies and associate them with flows or use them in API calls.

Appointment Booking Experience

[Add Service Resource Preferences to Accounts for Salesforce Scheduler](#)

To promote assignment of required service resources and prevent assignment of excluded service resources to service appointments, designate service resources as required or excluded on accounts.

[Check Calendars to Determine Availability of Service Resources](#)

During an appointment scheduling process, Salesforce Scheduler can check Salesforce calendar events and even external systems to determine the availability of service resources.

[Flow Screen Components and Actions Provided in Salesforce Scheduler](#)

Salesforce Scheduler provides additional flow screen components and actions to create flows and modify flows.

[Customize Standard Flow Templates](#)

The flows in Salesforce Scheduler are installed as standard flow templates. You can customize any of the flows to suit your business needs.

[Add Components to Salesforce Scheduler Flow Screens](#)

Add components to flow screens to display additional information or to capture additional inputs. For example, add labels and logos for branding.

[Skip the Service Territory Selection Screen](#)

If you want to use virtual territories or set a default service territory, modify the flow to set a default service territory and skip the Select Service Territory screen. You can skip the service territory selection screen for the Outbound New Appointment, Inbound New Appointment, and Inbound New Guest Appointment flows and their instances. You can also show the service territory address on the review screen if necessary.

[Customize Flow Screens](#)

You can customize flow screens to meet your business needs. For example, you can change labels to use your company's terminology and change the preselected values.

[Enable Automatic Resource Assignment and Anonymous Scheduling](#)

You can enable automatic service resource assignment to let users schedule appointments without selecting service resources. Customers or guest users don't always know the names of service resources. And sometimes they don't care about which resource they're assigned. After you enable automatic resource assignment, service resources are automatically assigned based on the time slots users select. Also, you can hide the assigned resources' names on the appointment summary page to protect their privacy.

[Manage Time Zones for Appointments](#)

Preset a default time zone for appointment time slot pages or dynamically set a time zone for them. Enable the time zone dropdown list on time slot pages to let users schedule appointments in the time zones they prefer.

[Add Validation Rules to Service Appointment Fields](#)

Add validation rules to ensure that user inputs meet your requirements. You can also use validation rules to override the default error messages. For example, you can add a validation rule that enables users to save an appointment only after they enter a subject.

[Update Flows to Refresh Inputs](#)

Configure your Salesforce Scheduler flows to ensure that when users go back to a page and make changes during appointment scheduling, the changes are reflected on the subsequent pages. Otherwise, if a user doesn't select the right value on a previous page, they must cancel the scheduling process and start over.

[Debug a Salesforce Scheduler Flow as Another User](#)

Test and debug a flow as another user without logging in as that user. You can troubleshoot a flow by seeing the flow's debug log as a user sees it.

[Manage Objects' Data Translations](#)

You can manage data translation for Work Type Group, Service Territory, and Service Resource objects. Use data translation to build Scheduler's appointment booking experience in multiple languages. For example, you can translate the work type group names and their description to Spanish for a customer who uses the website in Spanish to schedule appointments.

Appointment Booking Experience Using Flows

Salesforce Scheduler provides standard flow templates that allow your users and customers to schedule, modify, and cancel appointments. You can create multiple instances of these flows and customize them to meet your requirements. Salesforce Scheduler also provides flow screen components and actions. You can also use these components to create custom flows.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Select Flow Templates

Select the flow templates based on the stakeholders who manage service appointments and the actions they perform. Internal users, authenticated customers, or guest users can manage service appointments.

Here's the list of default flows provided by Salesforce Scheduler.

| Flow | Purpose |
|--|---|
| Outbound New Appointment | Walks a user through creating an outbound appointment with one or more employees (service resources) and a customer or a prospect. Launched from an account, case, opportunity, or lead and referrals record page. |
| Outbound Modify Appointment | Walks a user through modifying an existing outbound appointment. Launched from a service appointment record page. |
| Inbound New Appointment | Walks an authenticated customer through creating an appointment with one or more employees. Can be added to and launched from an Experience Cloud site or a website. |
| Inbound Modify Appointment | Walks an authenticated customer through modifying an existing appointment. Can be added to and launched from an Experience Cloud site or a website. |
| Inbound Cancel Appointment | Walks an authenticated customer through canceling an existing appointment. Can be added to and launched from an Experience Cloud site or a website. |
| Inbound New Guest Appointment | Walks an unauthenticated or guest customer (a lead or prospect) through creating an appointment with one or more employees. Can be added to and launched from an Experience Cloud site or a website. |
| Generate Appointment Invitation | Walks a user through creating an appointment invitation with one or more service resources (employees or contractors) or assets. Can be added to and launched from a service resource record page. |
| Book Appointment from Invitation | Walks a user through scheduling an appointment with the service resource (employee or contractor) or the asset that's selected in the shared appointment invitation URL. This flow is launched from the appointment invitation URL, which is created by using the Generate Appointment Invitation flow. |
| Create Waitlist | Walks a user through creating a waitlist (virtual queue) with one or more work types and service resources for a service territory. Launched from the Waitlist tab. |
| Send Appointment Invitation to Actionable List Members | Walks a user through creating an appointment invitation for internal and credentialed external users, and sends that invitation to the selected members of the actionable list. |

| Flow | Purpose |
|--|--|
| Reassign Multiple Service Appointments | Walks a user through reassigning multiple service appointments of a service resource to other service resources. Launched from the Service Appointments tab or a service resource record's page. |

Let's look at some examples of users and customers who use flows to book service appointments in retail banking.

- Bankers, customer service agents, and branch managers use outbound flows to manage appointments and the Generate Appointment Invitation flow to create an invitation URL.
- Authenticated customers use inbound flows to manage appointments and the Book Appointment from Invitation flow to book appointments from an invitation URL.
- Guest customers use the Inbound New Guest Appointment flow and the Book Appointment from Invitation flow to book appointments.

Customize Flows

Here are some of the ways in which you can customize flows.



- [Add components to Salesforce Scheduler flow screens](#) on page 158
- [Customize flow screen components](#) on page 160
- Set default values and skip screens. For example, [Skip the Service Territory Selection Screen](#) on page 159.
- Autofill Fields in screens. For example, [Autofill Fields in the Appointment Review Screen](#) on page 224.
- [Enable automatic resource assignment and anonymous scheduling](#) on page 172
- [Manage time zones for appointments](#) on page 174
- Add validation rules to service appointment fields.

Here are some examples of flow customization requirements that are common across all flows used in retail banking.

- Add bank logos (flow screen components) for branding.
- Preselect values for the most commonly used appointment types.
- Enable automatic resource assignment and anonymous scheduling for new users (guest users).
- Use the fields on the compact layout to provide additional information about bankers such as their areas of expertise and the languages they speak.
- Show images on service resource cards.
- Add validation rules to ensure that customers enter valid information such as phone numbers and email addresses when they schedule appointments.

Flow Customization Plan Example For Retail Banking

Let's look at an example of a flow customization plan for retail banking.

| Stakeholder | Object | Flows | Channels | Additional Customization Requirements |
|---|---|---|---|--|
| Bankers, customer service agents, and branch managers | Accounts, Person Accounts, Leads, and Opportunities | Flows: Outbound New Appointment, Outbound Modify Appointment, Generate Appointment Invitation | Salesforce Lightning Service Console and Experience Cloud sites | — |
| Authenticated customers | Accounts, Person Accounts, and Opportunities | Inbound New Appointment, Inbound Modify Appointment, Inbound Cancel Appointment, Book Appointment from Invitation | Salesforce Lightning Service Console and Experience Cloud sites | Filter work type groups to show only appointment topics supported for authenticated customers. |
| Guest customers | Leads  Note: Salesforce Scheduler creates a lead record when you use the Inbound New Guest Appointment flow. | Inbound New Guest Appointment | Experience Cloud sites and Company websites | <ul style="list-style-type: none"> Filter work type groups to show only appointment topics supported for guest customers. Enable automatic resource assignment and anonymous scheduling. |
| Guest customers | Leads  Note: Salesforce Scheduler creates a lead record when you use the Inbound New Guest Appointment flow. | Book Appointment from Invitation | Experience Cloud sites | <ul style="list-style-type: none"> Filter work type groups to show only appointment topics supported for guest customers. |

Appointment Booking Experience Using APIs

Salesforce Scheduler provides various developer resources such as REST APIs, Connect REST APIs, Salesforce Platform Events, and Apex classes to create and manage appointment booking experiences.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Build Custom Appointment Scheduling Experiences Using Salesforce Scheduler APIs

Use Salesforce Scheduler APIs to build custom appointment booking experiences. For example, use APIs for simple appointment booking, automatic resource assignment, and anonymous appointment booking. For more information, see [Build Custom Appointment Booking Experiences Using Salesforce Scheduler APIs](#) and [Salesforce Scheduler Business APIs](#).

Create Service Appointments and Retrieve Service Resources and Time Slots Using Apex Classes

Salesforce Scheduler provides the ConnectApi namespace (also called Connect in Apex) and LxScheduler namespace. The ConnectApi namespace (also called Connect in Apex) provides classes for creating and updating service appointments. The LxScheduler namespace provides an interface and classes for retrieving service resources and time slots to create an appointment. For more information, see [Salesforce Scheduler Apex Classes](#).

Notify Subscribers About Appointment Creation, Modification, and Deletion Using Platform Events

Use the AppointmentSchedulingEvent to notify subscribers when an appointment schedule is added, updated, or deleted. For more information, see [Platform Events for External Calendars](#).

Integrate Salesforce Scheduler with external calendars and determine the availability of service resources

Use Salesforce Scheduler Apex interface and classes to integrate Salesforce Scheduler with external calendars and determine the availability of service resources. For more information, see [Apex Classes for External Calendars](#).

Manage Objects' Data Translation

You can manage data translation for Work Type Group, Service Territory, and Service Resource objects. Use data translation to build Scheduler's appointment booking experience in multiple languages.

When you create custom scheduling experiences using APIs and SOQL queries, you can use data translation to provide scheduling experience in different languages. For retail banking, you can use data translation when banks operate across multiple countries and cater to customers who speak different languages. For more information, see [Manage Objects' Data Translations](#) on page 178.

API Customization Plan Example For Retail Banking

Let's look at an example of how to use APIs for retail banking.

| Stakeholder | Object | Use Case | Channels |
|-------------------------|--|--|------------------|
| Authenticated customers | Accounts, Person Accounts, and Opportunities | <ul style="list-style-type: none"> • Create a Single-Resource Appointment • Modify a Service Appointment | Company websites |

Define Rules for Finding Appropriate Service Resources in Salesforce Scheduler

Use a scheduling policy to enforce rules to help your users find the best service resources for an appointment. The scheduling policy ensures that an appointment meets the criteria that the policy rules define. For example, it considers service resources' skills and service territory membership when searching for service resources. You can modify the Salesforce Scheduler Default Appointment Scheduling Policy or create custom scheduling policies and associate them with flows or use them in API calls.

[Select Scheduling Policy Rules to Enforce](#)

If you don't create and use a custom scheduling policy in your flows or API calls, the Default Appointment Scheduling Policy is used. You can edit the Default Appointment Scheduling Policy and select the rules that you want to enforce during appointment scheduling.

[Create and Use Custom Scheduling Policies in Salesforce Scheduler](#)

You can use one or more custom scheduling policies in Salesforce Scheduler flows or API calls. For example, you can create two scheduling policies with different appointment start time intervals. Then, customize your flow to invoke one or the other scheduling policy depending on the work type that users select when scheduling an appointment.

Select Scheduling Policy Rules to Enforce

If you don't create and use a custom scheduling policy in your flows or API calls, the Default Appointment Scheduling Policy is used. You can edit the Default Appointment Scheduling Policy and select the rules that you want to enforce during appointment scheduling.

 **Note:** You can't delete the Default Appointment Scheduling Policy.

1. From Setup, in the Quick Find box, enter *Scheduling Policies*, and then select **Scheduling Policies**.
2. Click **Edit** next to Default Appointment Scheduling Policy.
3. Select the rules that you want to enforce during the scheduling process.
4. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

Create and Use Custom Scheduling Policies in Salesforce Scheduler

You can use one or more custom scheduling policies in Salesforce Scheduler flows or API calls. For example, you can create two scheduling policies with different appointment start time intervals. Then, customize your flow to invoke one or the other scheduling policy depending on the work type that users select when scheduling an appointment.

 **Note:** If you don't create and use a custom scheduling policy in your flows or API calls, the Default Appointment Scheduling Policy is used.

1. Create a custom scheduling policy.
 - a. From Setup, in the Quick Find box, enter *Scheduling Policies*, and then select **Scheduling Policies**.
 - b. Click **New**.
 - c. Enter a name for your custom scheduling policy and then select the rules that you want to include.

 **Note:** You must select an appointment start time interval and select either the Include Primary Service Territory Members or Include Secondary Service Territory Members option.

- d. Save your changes.
2. Associate the custom scheduling policy with a flow.

The scheduling policy is used when identifying the available service resources and their time slots and when creating the appointment record.

- a. Edit your Salesforce Scheduler flow.
- b. In Flow Builder, on the Manager tab, edit the SchedulingPolicyName variable, and set its default value to the developer name of your custom scheduling policy.
- c. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Add Service Resource Preferences to Accounts for Salesforce Scheduler

To promote assignment of required service resources and prevent assignment of excluded service resources to service appointments, designate service resources as required or excluded on accounts.

To use the Required and Excluded preference types, in the scheduling policy, enable the Include Only Required Service Resources and Ignore Excluded Service Resources settings respectively.

Salesforce Scheduler uses resource preference types only when users select the By work type group, appointment type, or service territory option to schedule an appointment. When users select a work type group, appointment type, and service territory, Salesforce Scheduler uses the selected values to show available resources. If you've enabled the resource preference settings, Salesforce Scheduler uses the preference types to filter the list of resources that appear.

If you enable only the Ignore Excluded Service Resources setting, Salesforce Scheduler filters the list of available resources and shows service resources whose preference type isn't set to Excluded.

If you enable only the Include Only Required Service Resources setting, Salesforce Scheduler filters the list of available resources and shows only resources whose preference is set to Required. If there aren't any resources whose preference is set to Required, Salesforce Scheduler shows all the available resources.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To add service resource preferences:

- Read on service resources
- Edit on accounts

If you enable Include Only Required Service Resources and Ignore Excluded Service Resources, Salesforce Scheduler filters the list of resources and shows only resources whose preference is set to Required. If there aren't any resources whose preference is set to Required, Salesforce Scheduler shows all the available resources whose preference type isn't set to Excluded.

 **Note:** Users can schedule appointments with excluded resources by selecting the By name option or the By previously scheduled service appointments option in the Select Service Resources screen.

To add service resource preferences:

1. On account, click **New** in the **Resource Preferences** related list.
2. Select a service resource.
3. Select a preference type.
Salesforce Scheduler doesn't use the Preferred option.
4. Save your changes.

Check Calendars to Determine Availability of Service Resources

During an appointment scheduling process, Salesforce Scheduler can check Salesforce calendar events and even external systems to determine the availability of service resources.

[Check Salesforce Calendar to Determine Resource Availability](#)

Enable the Check Salesforce Calendar for Resource Availability scheduling policy rule if you want Salesforce Scheduler to avoid scheduling conflicts with manually created calendar events.

[Check External Systems to Determine Availability of Service Resources](#)

Use the provided LxScheduler.ServiceResourceScheduleHandler Apex interface to write an Apex class that checks external systems, such as external calendar events, to find time slots where service resources are already booked. Then associate this Apex class with Salesforce Scheduler flows or API calls through the Check External Systems for Resource Availability scheduling policy rule.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

Check Salesforce Calendar to Determine Resource Availability

Enable the Check Salesforce Calendar for Resource Availability scheduling policy rule if you want Salesforce Scheduler to avoid scheduling conflicts with manually created calendar events.

For manually created calendar events, the Show Time As field and the Assigned To field values determine whether Salesforce Scheduler considers the event to determine availability. When the Show Time As field value is set to Busy or Out of Office for an event and a service resource is selected in the Assigned To field, Salesforce Scheduler doesn't show the time slots that have scheduling conflicts with the event for the service resource. When the Show Time As field value is set to Free for an event, Salesforce Scheduler shows the time slots even if scheduling conflicts exist with the event.

For appointment-related events and buffer-related events created by Salesforce Scheduler, Salesforce Scheduler doesn't show time slots that have a scheduling conflict with these events irrespective of the Show Time As field value of the events. For more information, see [Considerations to Write Salesforce Scheduler Appointments to Salesforce Calendar](#).

 **Note:** Salesforce Scheduler doesn't show time slots that have a scheduling conflict with existing appointments or with the before and after appointment buffers even if the appointments or buffers aren't written to the Salesforce calendar.

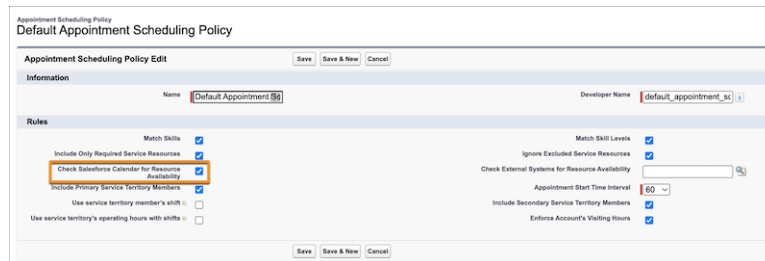
To enable the Check Salesforce Calendar for Resource Availability scheduling policy rule for a scheduling policy:

EDITIONS


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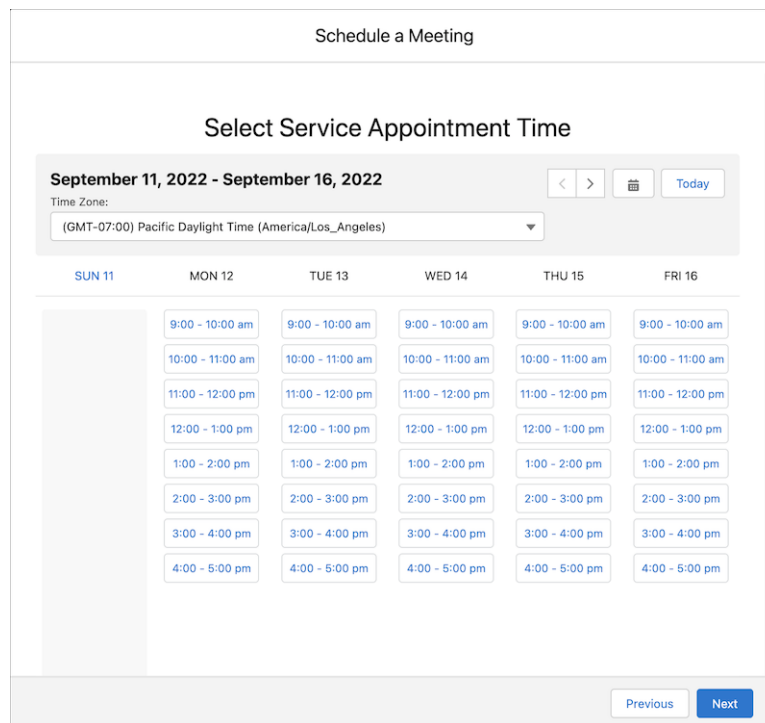
1. From Setup, in the Quick Find box, enter *Scheduling Policies*, and then select **Scheduling Policies**.
2. Click **Edit** next to the scheduling policy.
3. Select **Check Salesforce Calendar for Resource Availability**.




4. Save your changes.

 **Example:** Let's see how manually created calendar events, appointment-related calendar events, and the Show Time As field value affect available time slots when checking Salesforce Calendar for resource availability is enabled.

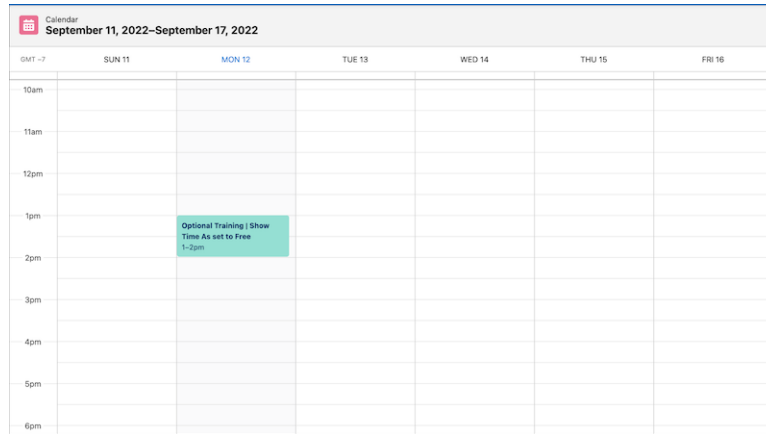
Here are Ryan's time slots for retail banking.



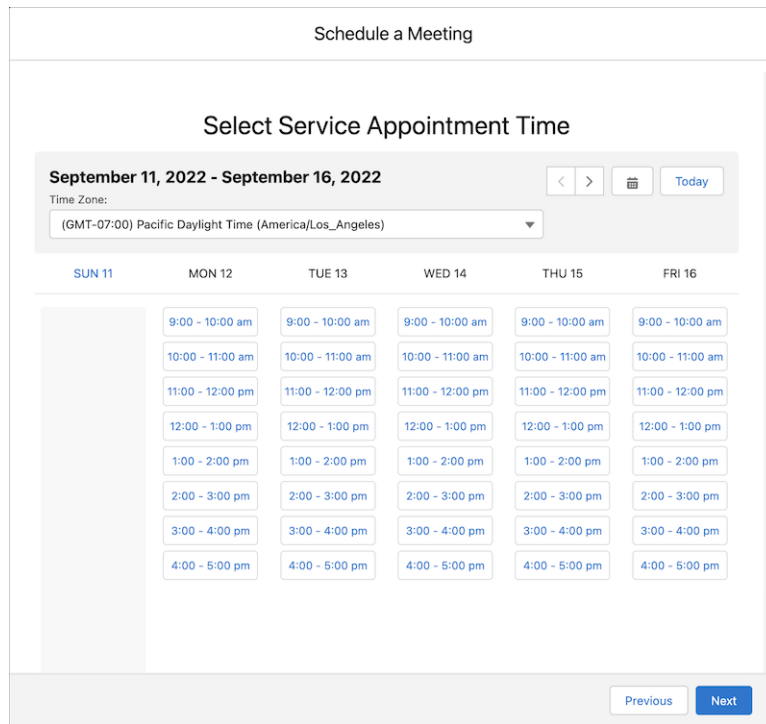
 **Note:** For retail banking, the appointment duration is 60 minutes, Block Time Before Appointment is 30 minutes, and Block Time After Appointment is 15 minutes.

Manually Created Appointments with Show Time As Free

Ryan has an optional training from 1:00 PM to 2:00 PM, which he wants to skip if any customer appointments are scheduled. So, he creates a calendar event from 1:00 PM to 2:00 PM and sets the Show Time As field to Free.

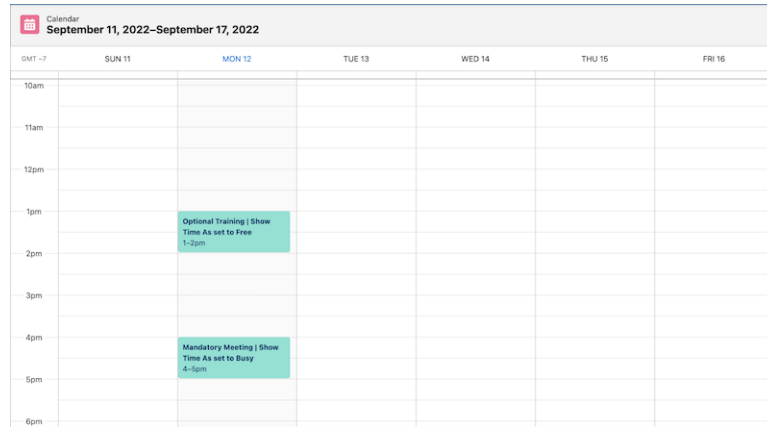


Now Salesforce Scheduler shows the time slots even if scheduling conflicts exist with the training.

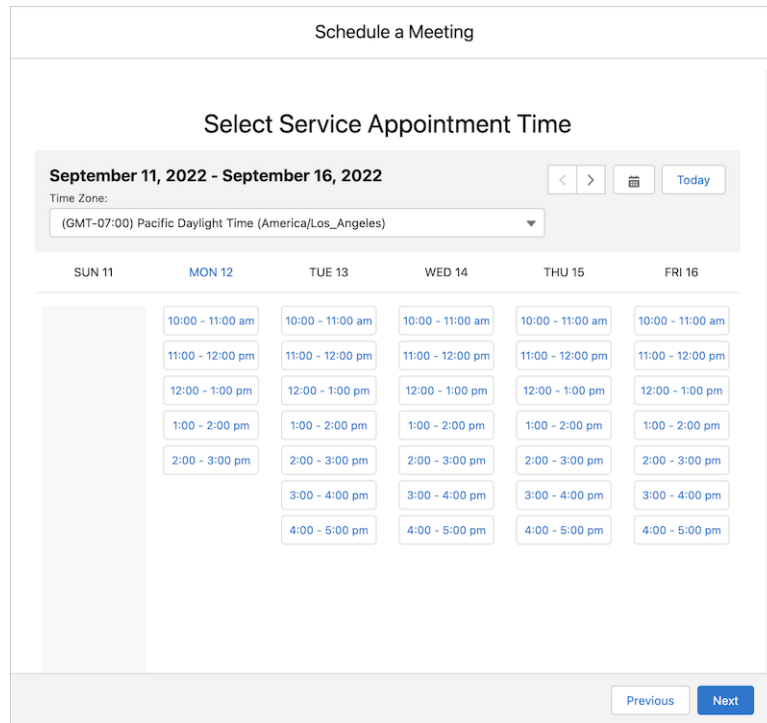


Manually Created Appointments with Show Time As Busy

Ryan has an important meeting with his manager from 3:00 PM to 4:00 PM that he can't miss. He creates a calendar event from 3:00 PM to 4:00 PM and sets the Show Time As field to Busy.



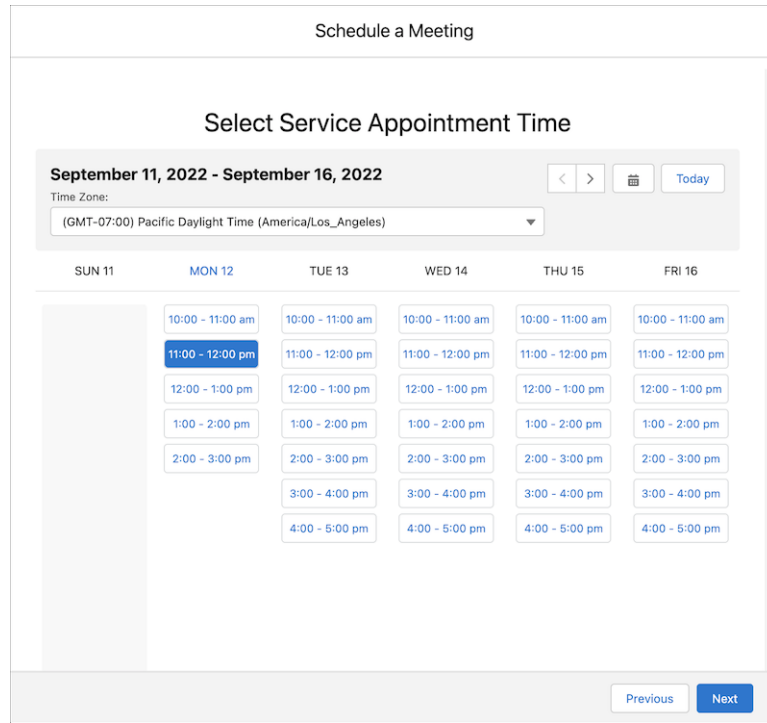
Now Salesforce Scheduler doesn't show the time slots that have scheduling conflicts with the meeting.



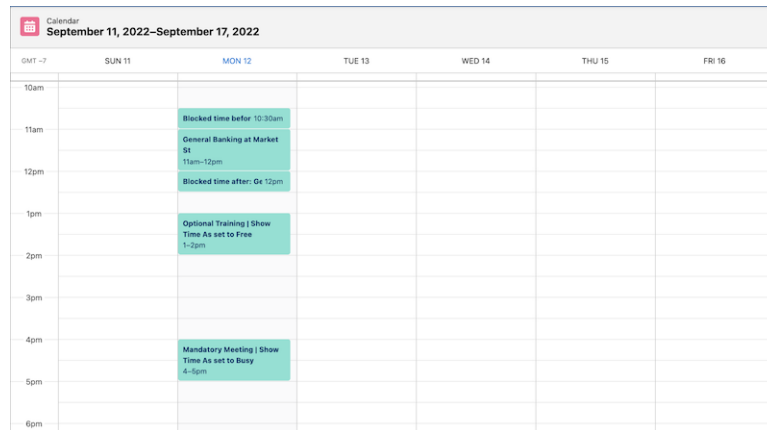
For more information, see the [What Happens to Available Time Slots When There Are Calendar Events and Absences](#) section of the [How Does Salesforce Scheduler Determine Available Time Slots?](#) on page 55 topic.

Appointment-Related Events with Show Time As Busy

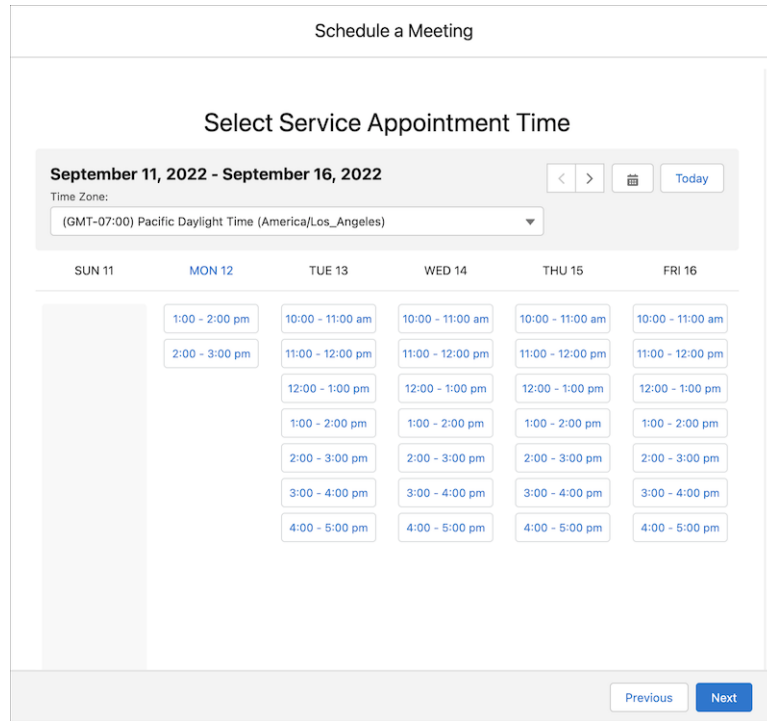
Kiara Shah books an appointment with Ryan from 11:00 AM to 12:00 PM.



Salesforce Scheduler creates events for the appointment, before appointment buffer, and after appointment buffer with the Show Time As value set to Busy. Here's how Ryan's calendar appears when Event Management and Block Resource Availability are enabled.

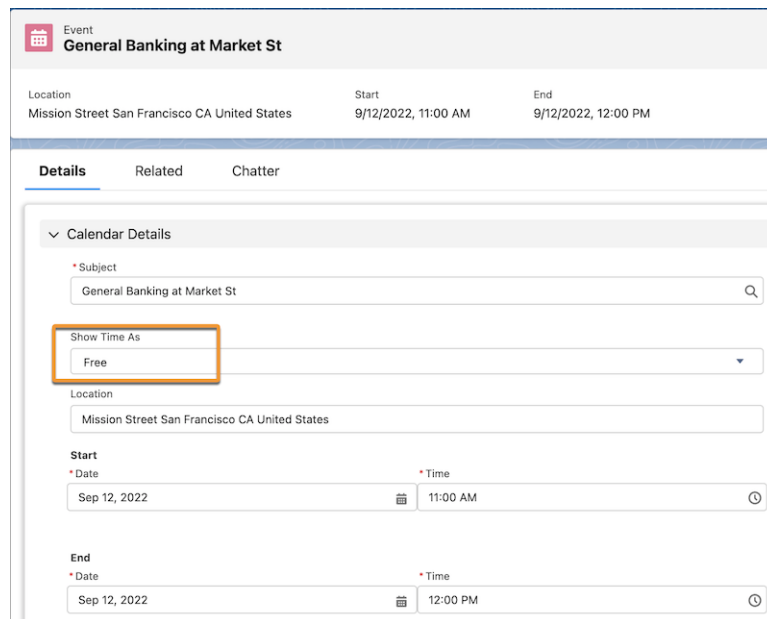


Salesforce Scheduler doesn't show the time slots that have conflicts with the appointment and buffer-related events. Here are the available time slots after creating the appointment.



Appointment-Related Events with Show Time As Free

Ryan accidentally edits the appointment event and appointment-buffer events and sets the value of the Show Time As field to Free.



As Salesforce Scheduler doesn't consider the Show Time As field to determine availability for appointment-related events created by Salesforce Scheduler, the available time slots aren't affected.

The screenshot shows a 'Schedule a Meeting' interface. At the top, it says 'Schedule a Meeting'. Below that, the main heading is 'Select Service Appointment Time'. The date range is 'September 11, 2022 - September 16, 2022'. There are navigation buttons for '<', '>', a calendar icon, and 'Today'. The 'Time Zone' is set to '(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)'. The calendar shows days from Sunday 11 to Friday 16. Time slots are displayed in a grid format for each day, with slots ranging from 1:00 - 2:00 pm to 4:00 - 5:00 pm. At the bottom right, there are 'Previous' and 'Next' buttons.

Check External Systems to Determine Availability of Service Resources

Use the provided `LxScheduler.ServiceResourceScheduleHandler` Apex interface to write an Apex class that checks external systems, such as external calendar events, to find time slots where service resources are already booked. Then associate this Apex class with Salesforce Scheduler flows or API calls through the Check External Systems for Resource Availability scheduling policy rule.

[Check External Calendars to Determine Resource Availability](#)

When you run a Salesforce Scheduler flow or make an API call, the Apex interface makes a synchronous call to the Apex class. The Apex interface passes the details of the requested service resources and timelines for which Salesforce Scheduler wants to find the resources' availability on the external calendar. The Apex class checks the external calendar events and returns the time slots where resources aren't available. Salesforce Scheduler excludes the unavailable time slots during appointment scheduling.

[Apex Interface Implementation Limitations and Error Codes](#)

When determining the availability of service resources, limitations apply when you use a custom Apex class to check external calendar events.

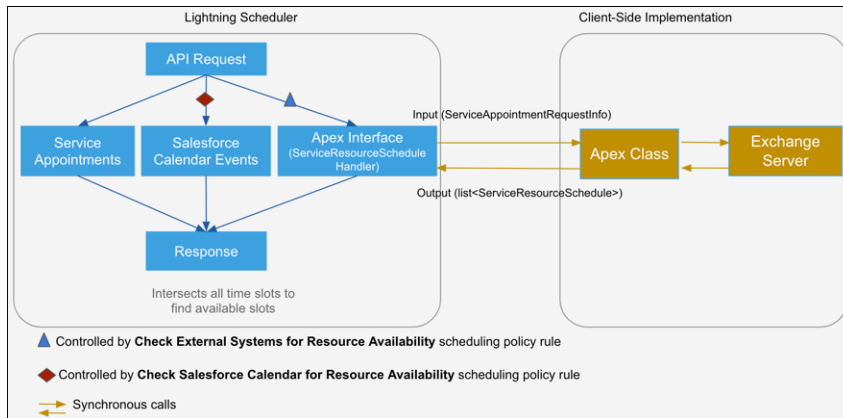
EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

Check External Calendars to Determine Resource Availability

When you run a Salesforce Scheduler flow or make an API call, the Apex interface makes a synchronous call to the Apex class. The Apex interface passes the details of the requested service resources and timelines for which Salesforce Scheduler wants to find the resources' availability on the external calendar. The Apex class checks the external calendar events and returns the time slots where resources aren't available. Salesforce Scheduler excludes the unavailable time slots during appointment scheduling.



1. From Setup, in the Quick Find box, enter *Scheduling Policies*, then select **Scheduling Policies**.
2. Click **Edit** next to Default Appointment Scheduling Policy or your custom scheduling policy.
3. Click in the Check External Systems for Resource Availability field, and select your Apex class.
4. Save your changes.

Apex Interface Implementation Limitations and Error Codes

When determining the availability of service resources, limitations apply when you use a custom Apex class to check external calendar events.

Limitations

- The implemented Apex class inherits the Apex platform limits such as CPU time and heap size.
- The `LxScheduler.ServiceResourceScheduleHandler` interface expects a response (unavailable time slots) from the implemented Apex class within 10 seconds. If no response is received within 10 seconds, the request times out and the appointment booking fails.
- The implemented Apex class must return the unavailable time slots in GMT time zone.
- If your custom implementation returns an exception, the entire operation fails.
- Any debug logs are created in user context.
- If the implemented class doesn't return information about a requested service resource, then Salesforce Scheduler assumes that the service resource is available throughout the requested time slot.
- As long as the Apex class is associated with the Check External Systems for Resource Availability scheduling policy rule, asset scheduling and concurrent scheduling don't work.
- As long as the Apex class is associated with the Check External Systems for Resource Availability scheduling policy rule, if an error occurs during appointment creation, the Review Service Appointment page shows a generic error message instead of a message specific to the problem.

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EDITIONS

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- If the external calendar system is down, you can't schedule appointments unless you disassociate the Apex class from the Check External Systems for Resource Availability scheduling policy rule.
- If you plan to use the provided flow screen components to build a custom appointment flow, you must use the standard service resource and appointment time components to get resources and the Save Appointment action to create appointments.
- By default, the Inbound New Guest Appointment standard flow template doesn't work with a scheduling policy that has a custom Apex class associated with it. The reason is callouts aren't allowed after DML operations in the same transaction because DML operations result in pending uncommitted work that prevents callouts from executing. For more information, see this [knowledge article](#).

To resolve this problem, edit the Save Appointment action in the Inbound New Guest Appointment flow. Expand **Advanced**, and under Transaction Control, select **Always start a new transaction**.

Edit "Save Appointment" core action

Service Resources Don't Include

Work Type Don't Include

Advanced

Manually assign variables

Store Output Values

Search variables...

{!ServiceAppointment.Id}

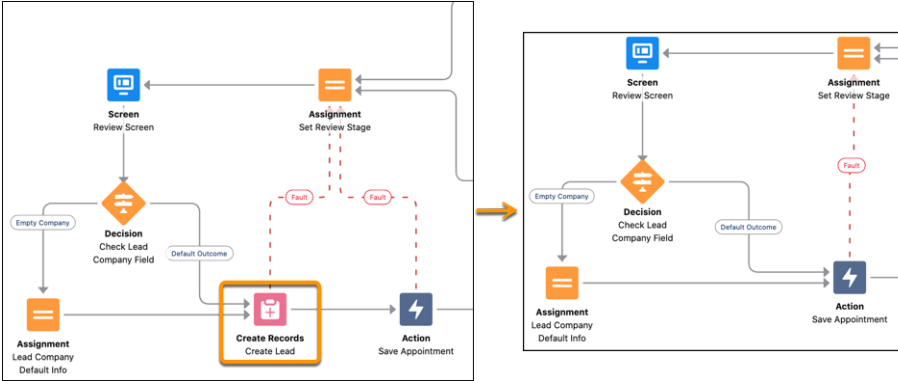
Transaction Control ⓘ

Let the flow decide (recommended)
The flow determines at run time whether a new transaction is required to successfully execute the action. If this action involves a callout, and the current transaction has pending operations, the current transaction is committed before executing the action in a new transaction.

Always start a new transaction
Before this action is executed, the current transaction is committed. The action is then executed in a new transaction. If the action fails for some reason, Salesforce can't roll back any operations from the previous transaction.

Always continue in current transaction
This action is always executed in the current transaction. If the action involves a callout while the current transaction has pending operations, the flow fails.

Then, delete the Create Lead node, and connect the Decision and Assignment nodes directly to the Save Appointment action node. Passing the Lead object, instead of lead records, to the Save Appointment action node ensures a complete rollback when something goes wrong during the guest appointment scheduling process. Previously, the appointment record was rolled back, but the lead record that was created during the process remained in the system, resulting in duplicate leads.



- When working with Appointment Distribution feature, Salesforce Scheduler doesn't consider external calendar events out of the box when calculating the utilization score. To calculate the utilization score, write a custom apex to support external calendars. The limit to show the 10 least occupied eligible resources is also applicable when you send an Apex read call to external calendars.

Error Codes

If something goes wrong with your custom Apex implementation, users get this error message when scheduling an appointment.

Something went wrong. Ask your admin for help: <error code>

The error code varies depending on the cause of the error.

Table 3: Apex Implementation Error Codes

| Error Code | Problem | Recommended Steps |
|------------|---|--|
| 40001 | The Apex class doesn't conform to the provided interface. | Ensure that the Apex class implements the LxScheduler.ServiceResourceScheduleHandler interface and has a parameter-less constructor. |
| 50001 | An error occurred when executing the Apex class. | Check your debug log for more information. |
| 40003 | The Apex class returned an invalid response. | Check your debug log for more information. |

Flow Screen Components and Actions Provided in Salesforce Scheduler

Salesforce Scheduler provides additional flow screen components and actions to create flows and modify flows.

Note: To run Salesforce Scheduler flow screen components, you need [Lightning runtime](#).

Flow screen components contain input and output attributes, which are stored in flow variables. You can edit the input attribute values to control the default values and options that appear on the screen. User actions on the screen determine the output attribute values. Salesforce Scheduler updates output attribute values in flow variables when users navigate to the next screen.

After you add flow screen components to capture user inputs, use actions to save the changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

[Flow Screen Component: Select Service Resources](#)

With the Select Service Resources Flow Screen component, users can select service resources (internal appointment attendees) for an account, case, lead, or opportunity record.

[Flow Screen Component: Select Work Type Groups](#)

Enables users to select a work type group (appointment topic) for a service appointment.

[Flow Screen Component: Select Appointment Type](#)

Enables users to select an appointment type, such as phone, branch, or video call.

[Flow Screen Component: Select Service Resource](#)

Enables users to select a service resource (appointment attendee).

[Flow Screen Component: Service Resource Availability](#)

Enables users to view the list of available service resources (appointment attendees) and select a service resource.

[Flow Screen Component: Select Service Territory](#)

Enables users to select a service territory (branch or office location).

[Flow Screen Component: Select Service Appointment Time](#)

Enables users to select a service appointment time.

[Flow Screen Component: Select Service Resource and Service Appointment Time](#)

Enables users to select a service resource (appointment attendee) and an appointment time.

[Flow Screen Component: Review Inbound or Outbound Service Appointment](#)

Enables licensed users and community users to view and modify a service appointment.

[Flow Screen Component: Review Service Appointment](#)

Enables guest users to view a service appointment.

[Flow Action: Save Appointment](#)

Use the Save Appointment action to create and modify appointments.

[Flow Action: Cancel Appointment](#)

Use the Cancel Appointment action to cancel appointments and to capture cancellation reasons.

[Flow Screen Component: Select Appointment Invitee](#)

With this component, users can select a service resource for an appointment invitation.

[Flow Screen Component: Appointment Booking Invitation Details](#)

With this component, users can specify the details of an appointment invitation.

[Flow Screen Component: Review URL for Appointment Booking](#)

With this component, users can review the invitation URL that's created for an appointment booking.

[Flow Action: Save Appointment Invitation Details](#)

Use the Save Appointment Invitation Details action to save details of an appointment invitation and appointment invitee.

Flow Screen Component: Select Service Resources

With the Select Service Resources Flow Screen component, users can select service resources (internal appointment attendees) for an account, case, lead, or opportunity record.

Schedule Appointment

Select Service Resources

Parent Record

Find a service resource

By work type group, appointment type, or service territory

By name

By previously scheduled service appointments

Felix Vasquez
 Technician
 1591950141000
 Last service appointment : 04-Oct-2021

Stanley McBride
 Technician
 1591950186000
 Last service appointment : 04-Oct-2021

John Doe
 Technician
 1590598500000
 Last service appointment : 27-Sep-2021

Hermoine Sherman
 Technician
 1591950129000
 Last service appointment : 11-Jun-2021

[Next](#)

EDITIONS

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| Attribute | Description | Additional Information |
|---------------|---|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound and inbound flows |
| Parent Record | <p>ID of the parent record for which the service resource is selected.</p> <p>If this attribute has a value, the related parent record ID is automatically selected. Supported values are account ID, case ID, opportunity ID, and lead ID.</p> <p>In outbound flows, this attribute is required to use the component. In default flows, this value is stored in recordId, which is a flow input variable. Users can select either a different account or opportunity by using the lookup field, which automatically changes the attribute value.</p> <p>In inbound flows, admins can set a value to select a parent record by default. If a value isn't set, the account ID of the logged-in user is automatically set as the parent record value.</p> <p>For example, 001xx000003GZQFAA4.</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound and inbound flows |

| Attribute | Description | Additional Information |
|--|--|--|
| Contact ID | <p>Contact ID of the community user.</p> <p>If Parent Record isn't available in inbound flows, Contact ID is auto-populated.</p> <p>For example, 003RM000007Vy2pYAC.</p> | <ul style="list-style-type: none"> • Type: Output • Data type: String • Used in: All inbound flows |
| Inbound Scheduling | <p>Indicates whether the component is used in an inbound scheduling flow.</p> <p>When the value is entered as <code>!\$GlobalConstant.True</code> and a parent record isn't passed, the Parent Record value is automatically selected as the record ID of the user who's logged in. If a value isn't entered, the <code>!\$GlobalConstant.False</code> value is used by default.</p> <p>For example, <code>!\$GlobalConstant.False</code>.</p> | <ul style="list-style-type: none"> • Type: Input • Data type: Boolean • Used in: All outbound and inbound flows |
| Outbound flow available to community users | <p>Indicates whether the inbound flow is available as an outbound flow to community users.</p> <p>When the value of the <code>isOutboundCommunity</code> variable for this attribute is entered as <code>!\$GlobalConstant.True</code> and the value of the <code>isInbound</code> variable is entered as <code>!\$GlobalConstant.False</code>, the Parent Record field becomes available to community users. If a value isn't entered for the <code>isOutboundCommunity</code> variable, the <code>!\$GlobalConstant.False</code> value is used by default.</p> <p>For example, <code>!\$GlobalConstant.False</code>.</p> | <ul style="list-style-type: none"> • Type: Input • Data type: Boolean • Used in: All inbound flows |
| Selected Option | <p>Method to select a resource.</p> <p>Supported values are:</p> <ul style="list-style-type: none"> • <code>specific</code>: Allows users to select a resource by name. • <code>previousServiceResource</code>: Allows users to select a resource from previous service appointments. • <code>findResource</code>: Allows users to select a resource based on either work type group, appointment type, or service territory. <p>If a value is entered, the corresponding option is selected on the screen by default.</p> <p>For example, <code>findResource</code>.</p> | <ul style="list-style-type: none"> • Type: Input and Output • Data type: String • Used in: All outbound and inbound flows |
| Service Resource | <p>ID of the selected service resource.</p> <p>This attribute is used if the Selected Option value is either <code>specific</code> or <code>previousServiceResource</code>.</p> <p>When the Selected Option value is entered as <code>previousServiceResource</code>, the service resource in this attribute</p> | <ul style="list-style-type: none"> • Type: Input and Output • Data type: String • Used in: All outbound and inbound flows |

| Attribute | Description | Additional Information |
|-----------------------|---|--|
| | is selected by default if the resource exists in previous appointments. Users can select a different resource if necessary. For example, 0HnRM0000004Rwo0AM. | |
| Service Resource Name | Name of the selected service resource. This attribute is used only when a flow is run from mobile devices and the Selected Option value is specific. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound and inbound flows |
| Validations | <p>Error message validations in the Select Service Resources component.</p> <p>This value is auto-populated. For example, the attribute stores the error message that’s generated when a user tries to go to the next screen without selecting an option.</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound and inbound flows |

Flow Screen Component: Select Work Type Groups

Enables users to select a work type group (appointment topic) for a service appointment.

EDITIONS

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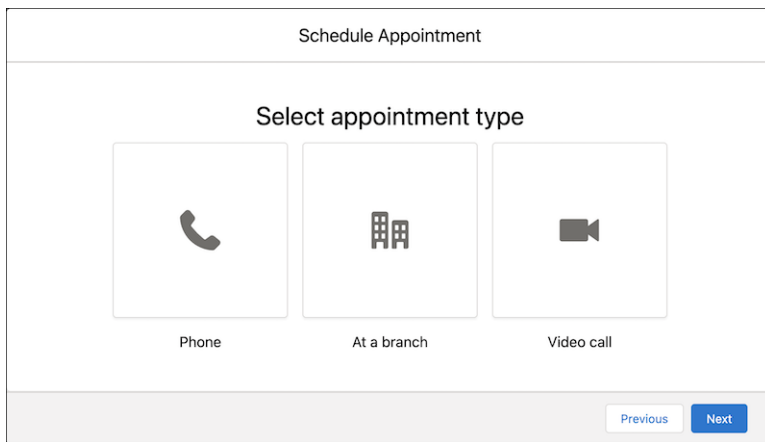
Available in: **Enterprise** and **Unlimited** Editions

| Attribute | Description | Additional Information |
|-------------------------------|--|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound and inbound flows |
| Additional Information | <p>The additional information of the work type group.</p> <p>If multiple values exist, they're stored as comma-separated values.</p> <p>This attribute is used only when a value is set for the Work Type Group attribute.</p> <p>Example: Investment Banking, Mobile Banking</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Comments | <p>The comments for the work type group.</p> <p>This value is used only when a value is set for the Work Type Group attribute and Other is selected in the additional information section.</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Filter by Resource IDs | <p>The IDs for resources—stored as comma-separated values—that are used to filter work type groups.</p> <p>When a value is set, the component shows only the work type groups that contain the skills of these service resources.</p> <p>Example: 0Hnxx0000004DdpCAE, 0Hnxx0000004DscCAE</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Filter by Work Type Group IDs | <p>The IDs for work type groups —stored as comma-separated values— that are used to filter work type groups.</p> <p>When a value is set, the component shows only the work type groups that are associated with the work type group IDs.</p> <p>You can enter up to 1,000 IDs.</p> <p>If both Filter by Resource IDs and Filter by WorkTypeGroup IDs are entered, then Scheduler first filters the work type groups by the service resources with the associated skills. Scheduler then filters the filtered list by the work type group IDs.</p> <p>Example: 0VSxx0000004D0GGAU</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Service Resource | <p>The ID of the selected service resource.</p> <p>When a value is set, the component shows only work type groups whose skills match the service resource skills.</p> <p>Example: 0Hnxx0000004DscCAE</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Validations | The error messages in the Select Work Type Groups component. | <ul style="list-style-type: none"> Type: Input and Output |

| Attribute | Description | Additional Information |
|-----------------|--|--|
| | This value is auto-populated. For example, the attribute stores the error message that’s generated when a user tries to navigate to the next screen without selecting a work type group. | <ul style="list-style-type: none"> Data type: String Used in: All outbound, inbound, and guest flows |
| Work Type Group | <p>The ID of the selected work type group.</p> <p>When a value is set, the corresponding work type group is selected on the page by default.</p> <p>Example: 0VSxx000004D0GGAU</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |

Flow Screen Component: Select Appointment Type

Enables users to select an appointment type, such as phone, branch, or video call.



EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Attribute | Description | Additional Information |
|-------------------------|---|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don’t end the name with an underscore, and don’t use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound and inbound flows |
| Appointment Type | <p>The name of the appointment type.</p> <p>Example: Phone</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Engagement Channel Type | <p>The name of the engagement channel type.</p> <p>Example: Video</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Label | This value isn’t used. | <ul style="list-style-type: none"> Type: Input Data type: String |

| Attribute | Description | Additional Information |
|-----------------|--------------------------------|--|
| | | <ul style="list-style-type: none"> Used in: All outbound, inbound, and guest flows |
| Work Type Group | The ID of the work type group. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |

Flow Screen Component: Select Service Resource

Enables users to select a service resource (appointment attendee).

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Schedule Appointment

Select Service Resource



Select the service resource for this service appointment



| Service Resource Name | Role | Next Availability |
|---------------------------------------|------|----------------------|
| <input type="radio"/> Felix Vasquez | | 19/10/2021, 12:00 AM |
| <input type="radio"/> Stanley McBride | | 19/10/2021, 12:00 AM |

Previous Next

Note: The screen shows only the resources who are available for the next 31 days.

| Attribute | Description | Additional Information |
|-----------|---|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String |

| Attribute | Description | Additional Information |
|----------------------------|--|--|
| | | <ul style="list-style-type: none"> Used in: All outbound and inbound flows |
| Anonymous Booking | <p>Indicates whether anonymous booking is enabled.</p> <p>If the value is set to true, the Automatically assign a service resource option is shown. When a user selects this option, the service resource selection is deferred to the screen that contains the Select Service Appointment Time component. A service resource is automatically assigned when the user selects a time slot.</p> <p> Note: You can disable either Anonymous Booking or Service Resource Booking, not both.</p> <p>If a value isn't set, false—the default value—is used.</p> <p>Example: <code>{!\$GlobalConstant.True}</code></p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All outbound flows |
| Anonymous Booking Selected | <p>Indicates whether the user wants a service resource to be assigned automatically.</p> <p> Note: You can disable either Anonymous Booking or Service Resource Booking, not both.</p> <p>If a value isn't set, false—the default value—is used.</p> <p>Example: <code>{!\$GlobalConstant.True}</code></p> | <ul style="list-style-type: none"> Type: Input and Output Data type: Boolean Used in: All outbound flows |
| Correlation Id | <p>The ID of the appointment scheduling data.</p> <p>Correlation Id is one of the parameters of the ServiceAppointmentRequestInfo class that's passed to the ServiceResourceScheduleHandler Apex interface.</p> <p>For example, you can use Correlation Id to identify the system that's calling the ServiceResourceScheduleHandler interface implementation. If a value isn't set, a random identifier is passed.</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound, outbound, and guest flows |
| Default Time Zone | <p>The timezone according to which the service resource's available time slots are shown. If a value isn't set, time slots are shown according to the user's locale timezone.</p> <p>Here's the list of accepted Timezone values.</p> <p>Example: <code>America/Los_Angeles</code></p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound flows |
| Engagement Channel Type | <p>The engagement channel type that the component shows available service resources for.</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Inbound, outbound, and guest flows |

| Attribute | Description | Additional Information |
|--|--|--|
| Filter By Resource IDs | <p>This attribute is used only when service resource booking is enabled.</p> <p>Filter By Resource IDs is a comma-separated list of resource IDs that's used to show the list of available resources when service resource booking is enabled.</p> <p>Example: 0Hnxx0000004DdpCAE, 0Hnxx0000004DscCAE</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound flows |
| Number of Resources to Show (Appointment Distribution) | <p>The maximum number of resources available—for users to select from—when appointment distribution is enabled.</p> | <ul style="list-style-type: none"> Type: Input Data type: Integer Used in: All outbound flows |
| Parent Record ID | <p>The ID of the parent record for which the service resource is selected. Supported values are account ID, case ID, lead ID, and opportunity ID.</p> <p>Example: 001xx000003GZQFAA4</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound flows |
| Scheduling Policy | <p>The developer name of the scheduling policy that's used by the schedule optimizer.</p> <p> Note: This field doesn't support developer ID.</p> <p>Example: default_appointment_scheduling_policy</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound flows |
| Service Resource | <p>The ID of the selected service resource.</p> <p>Example: 0Hnxx0000004D56CAE</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound flows |
| Service Resource Booking | <p>Indicates whether service resource booking is enabled.</p> <p>If this value is set to true, the screen shows available resources.</p> <p> Note: You can disable either Anonymous Booking or Service Resource Booking, not both.</p> <p>If a value isn't set, true—the default value—is used.</p> <p>Example: {!\$GlobalConstant.True}</p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All outbound flows |
| Show Service Resources by Availability | <p>Indicates whether service resources are sorted by availability. The earliest available resources are shown first.</p> <p>Set this value to false only if you're using Appointment Distribution so that service resources are sorted based on the assignment policy.</p> <p>If a value isn't set, true—the default value—is used.</p> <p>Example: {!\$GlobalConstant.True}</p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All outbound flows |

| Attribute | Description | Additional Information |
|---|---|---|
| Service Appointment ID | Optional. The ID of the service appointment to be modified. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Outbound Modify Appointment and Inbound Modify Appointment flows |
| Service Territory | The service territory for which the component shows available service resources. Example: 0Hhxx0000004DUuCAM | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound flows |
| Start date for the selected service resources' skills that are required by the work type. | The start date of skills—required by the work type—for the selected service resource. Example: 6/8/2021, 7:00 PM | <ul style="list-style-type: none"> Type: Input and Output Data type: DateTime Used in: All outbound flows |
| Validations | The error messages in the Select Service Resource component. This value is auto-populated. For example, the attribute stores the error message that's generated when users navigate to the next screen without selecting a service resource. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Work Type Group | Optional. The ID of the work type group for which the component shows available service resources. Example: 0VSxx0000004D0GGAU Specify either a work type group ID or a work type ID. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound flows |
| Work Type ID | Optional. The ID of the work type associated with the service appointment to be modified. Specify either a work type group ID or a work type ID. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Outbound Modify Appointment and Inbound Modify Appointment flows |

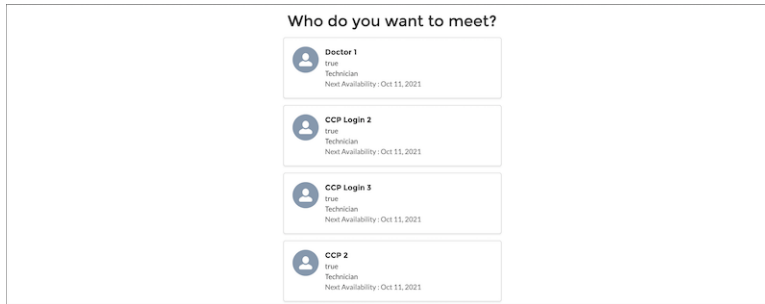
Flow Screen Component: Service Resource Availability


Enables users to view the list of available service resources (appointment attendees) and select a service resource.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions



 **Note:** The screen shows up to 10 service resources who are available for the next 31 days. If you're using appointment distribution, you can modify the limit to show service resources by using the Number of Resources to Show (Appointment Distribution) attribute.

| Attribute | Description | Additional Information |
|----------------------------|---|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound and inbound flows |
| Service Territory | The ID of the service territory for which the available service resources appear. Example: 0Hhxx0000004DUuCAM | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All inbound and guest flows |
| Work Type Group | The ID of the work type group for which the available service resources appear. Example: 0VSxx0000004D0GGAU | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All inbound and guest flows |
| Anonymous Booking | Indicates whether anonymous booking is enabled. If the value is set to true, an Anonymous Booking option appears. When a user selects this option, service resource selection doesn't happen on this component and takes place in the Select Resource Availability component. If a value isn't set, false—the default value—is used. Example: {!\$GlobalConstant.True} | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All inbound and guest flows |
| Anonymous Booking Selected | Indicates whether the user selected the Anonymous Booking option. If a value isn't set, false—the default value—is used. Example: {!\$GlobalConstant.True} | <ul style="list-style-type: none"> Type: Input and Output Data type: Boolean Used in: All inbound and guest flows |
| Correlation Id | The ID of the appointment scheduling data. Correlation Id is one of the parameters of the ServiceAppointmentRequestInfo class that's passed to the ServiceResourceScheduleHandler Apex interface. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound, outbound, and guest flows |

| Attribute | Description | Additional Information |
|--|---|---|
| | For example, you can use the correlation ID to identify the system that's calling the ServiceResourceScheduleHandler interface implementation. If a value isn't set, a random identifier is passed. | |
| Default Time Zone | The timezone according to which the availability of service resources is shown. If a value isn't set, time slots are shown according to the user's locale timezone. Here's the list of accepted Timezone values. Example: America/Los_Angeles. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound and guest flows |
| Filter By Resource IDs | A comma-separated list of service resource IDs that are used to filter resources. Only the eligible service resources that are both in this list and in the selected service territory appear on the screen. Example: 0Hnxx0000004DdpCAE, 0Hnxx0000004DscCAE | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound and guest flows |
| Number of Resources to Show (Appointment Distribution) | The number of service resources that appear when using Appointment Distribution. | <ul style="list-style-type: none"> Type: Input Data type: Integer Used in: Inbound, outbound, and guest flows |
| Parent Record ID | The ID of the parent record for which the service resource is selected. Supported values are account ID, case ID, opportunity ID, and lead ID. Example: 001xx000003GZQFAA4 | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound and guest flows |
| Scheduling Policy | The developer name of the scheduling policy that's used to fetch resources.  Note: This field doesn't support Salesforce ID. Example: default_appointment_scheduling_policy | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound and guest flows |
| Service Resource | The ID of the selected service resource. Example: 0Hnxx0000004D56CAE | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All inbound and guest flows |
| Service Resource Booking | Indicates whether service resource booking is enabled. If this value is set to true, the component shows available resources. If a value isn't set, true—the default value—is used. Example: {!\$GlobalConstant.True} | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All inbound and guest flows |

| Attribute | Description | Additional Information |
|--|---|--|
| Show service resources by Availability | Indicates whether service resources are sorted by availability such that the earliest available resources are shown first. If a value isn't set, true—the default value—is used. Example: <code>{!\$GlobalConstant.True}</code> | <ul style="list-style-type: none"> Type: Input Date type: Boolean Used in: Inbound, outbound, and guest flows |
| Validations | The error messages in the Service Resource Availability component. This value is auto-populated. For example, the attribute stores the error message that's generated when users navigate to the next screen without selecting a service resource. | <ul style="list-style-type: none"> Type: Input and output Data type: String Used in: Inbound, outbound, guest |

Flow Screen Component: Select Service Territory

Enables users to select a service territory (branch or office location).

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Attribute | Description | Additional Information |
|-----------|---|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound and inbound flows |
| City | The city of the service territory. Example: San Francisco | <ul style="list-style-type: none"> Type: Output Data type: String Used in: All outbound, inbound, and guest flows |
| Country | The country of the service territory. Example: United States | <ul style="list-style-type: none"> Type: Output Data type: String Used in: All outbound, inbound, and guest flows |

| Attribute | Description | Additional Information |
|---------------------------------|--|---|
| Distance | <p>The search radius from the specified location. All the service territories in this search radius appear.</p> <p>Values can be specified in miles (mi) or kilometers (km). Supported values are:</p> <ul style="list-style-type: none"> Miles: 5, 10, 25, 50, and 100 Kilometers: 10, 20, 50, 100, and 200 | <ul style="list-style-type: none"> Type: Input and Output Data type: Integer Used in: All outbound, inbound, and guest flows |
| Distance Unit | <p>The unit of the Distance attribute. Valid values are km and mi.</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Filter by Service Territory IDs | <p>A comma-separated list of service territory IDs that are used to filter service territories.</p> <p>If a value is set, the component shows only the associated service resources.</p> <p>Example: 0Hhxx0000004DUuCAM, 0Hhxx0000004DEhCAM</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Filter by Resource IDs | <p>A comma-separated list of resource IDs that are used to filter service territories.</p> <p>If a value is set, the component shows only supported service territories for these service resources.</p> <p>Example: 0Hnxx0000004DdpCAE, 0Hnxx0000004DscCAE</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Hide Operating Hours | <p>Indicates whether the operating hours of the service territories are hidden. If this value is set to true, the operating hours of the service territory don't appear.</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Latitude | <p>The latitude of the location entered by users. Latitude is auto-populated when a user selects a value suggested by Google search.</p> <p>Example: 37.7898</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Location | <p>The keywords entered to search for a service territory.</p> <p>Example: Salesforce Tower, San Francisco, CA, USA</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |

| Attribute | Description | Additional Information |
|-------------------|--|--|
| Longitude | The longitude of the location entered by users. Longitude is auto-populated when a user selects a value suggested by Google search. Example: -122.39695 | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Postal Code | The postal code of the service territory. Example: 94105 | <ul style="list-style-type: none"> Type: Output Data type: String Used in: All outbound, inbound, and guest flows |
| Service Resource | The ID of the service resource whose territories are shown. Example: 0Hnxx0000004DdpCAE | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Service Territory | The ID of the service territory. Example: 0Hhxx0000004DUuCAM | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| State | The state of the service territory. Example: CA | <ul style="list-style-type: none"> Type: Output Data type: String Used in: All outbound, inbound, and guest flows |
| Street | The street of the service territory. | <ul style="list-style-type: none"> Type: Output Data type: String Used in: All outbound, inbound, and guest flows |
| Validations | The error messages in the Select Service Territory component. This value is auto-populated. For example, the attribute stores the error message that's generated when a user tries to navigate to the next screen without selecting a location. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Work Type Group | The ID of the work type group that's used to filter service territories.  Note: Always set a value for this attribute. Example: 0VSxx0000004D0GGAU | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |

Flow Screen Component: Select Service Appointment Time

Enables users to select a service appointment time.


The screenshot shows a 'Schedule Appointment' interface. At the top, it says 'Select Service Appointment Time'. Below this, there's a section for 'Required Service Resources (1)' with a profile picture of Felix Vasquez, labeled 'Primary'. A 'Manage' button is next to it. Underneath is an 'Availability Calendar' for the period '16 October 2021 - 21 October 2021'. The time zone is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The calendar shows days from SAT 16 to THU 21. On TUE 19, several time slots are listed: 12:00 - 1:00 am, 12:30 - 1:30 am, 1:00 - 2:00 am, 1:30 - 2:30 am, 2:00 - 3:00 am, and 2:30 - 3:30 am. Navigation buttons for 'Previous' and 'Next' are at the bottom.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

| Attribute | Description | Additional Information |
|----------------------------|--|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound and inbound flows |
| Active | Indicates whether the appointment invitation is active. This attribute can also be modified after the invitation URL is created. | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Anonymous Booking Selected | Indicates whether a user selected the Anonymous Booking option. If the value is set to true, available time slots for service resources in the specified service territory are shown. When a user selects a time slot, one of the service resources available in the selected time slot is allocated randomly. | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All outbound, inbound, and guest flows |


| Attribute | Description | Additional Information |
|----------------------------------|--|--|
| | <p>If the value is set to false, only time slots for the specified service resources and the specified service territory are shown.</p> <p> Note: Anonymous booking isn't supported in flows that modify appointments.</p> | |
| Appointment Invitation Details | JSON string with field-value pairs that map to the flow user's input values for an invitation. This string is passed to an invocable action to create an appointment invitation. | <ul style="list-style-type: none"> Type: Output Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Appointment Invitation ID | Appointment invitation ID that's used to create an appointment booking. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Appointment Invitee Details | JSON string with field-value pairs that map to the flow user's input values for an invitee. This string is passed to an invocable action to create an appointment invitee. | <ul style="list-style-type: none"> Type: Output Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Change primary assigned resource | <p>This attribute is used only if Multi-Resource Scheduling is enabled.</p> <p>Indicates whether a user clicked the change button.</p> <p>In predefined flows, when a user clicks the Change button, the value is set to true and the Triage screen is shown.</p> <p>If a value isn't set, false—the default value—is used.</p> <p>Example: <code>!\$GlobalConstant.False</code></p> | <ul style="list-style-type: none"> Type: Input and Output Data type: Boolean Used in: All inbound and outbound flows |
| Correlation Id | <p>The unique ID of the appointment scheduling data. Correlation ID is one of the parameters of the <code>ServiceAppointmentRequestInfo</code> class that's passed to the <code>ServiceResourceScheduleHandler</code> Apex interface.</p> <p>For example, use Correlation Id to identify the system that is calling the <code>ServiceResourceScheduleHandler</code> interface implementation. If a value isn't set, a random identifier is passed.</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound, outbound, and guest flows |

| Attribute | Description | Additional Information |
|-----------------------------------|---|---|
| Default Time Zone | The time zone according to which the service resource's available time slots are shown. If a value isn't set, the time slots are shown according to the user's locale time zone. Here's the list of accepted time zone values. Example: America/Los_Angeles | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Disable Multi-Resource Scheduling | Indicates whether multi-resource scheduling is disabled. For guest, inbound, and mobile flows, always set this value to true, and then set Inbound Scheduling to true. Example: <code>{!\$GlobalConstant.True}</code> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All outbound, inbound, and guest flows |
| Engagement Channel Type | The engagement channel type related to the service resources that the component shows the time slots for. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Filter By Resource IDs | This attribute is used only for anonymous booking. A comma-separated list of resource IDs that are used to filter the time slots. If a value is set, the component shows time slots for only these resources. Example: <code>0Hnxx0000004DdpCAE,0Hnxx0000004DscCAE</code> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound, inbound, and guest flows |
| Inbound Scheduling | Indicates whether the component is used in inbound scheduling flow. If the component is used for an outbound scheduling flow, set the value to false. This attribute doesn't change any elements on the screen. Only when this value is set to true, the Disable Multi-Resource Scheduling attribute value is considered. Example: <code>{!\$GlobalConstant.True}</code> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All outbound, inbound, and guest flows |
| Invitation Flow Type | Type of flow in which the component is used. Valid values are: <ul style="list-style-type: none"> InvitationGeneration - the Generate Appointment Invitation flow InvitationBooking - the Book Appointment from Invitation flow. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Invitation URL Expiration Date | Date on which the invitation expires. This attribute can also be modified after the invitation URL is created. | <ul style="list-style-type: none"> Type: Input Data type: Date |

| Attribute | Description | Additional Information |
|--|--|---|
| | | <ul style="list-style-type: none"> Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Invitation URL Prefix | Prefix of the appointment invitation URL. The prefix can either be of a community or of a website. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Is Hide Skip | <p>Indicates whether the Skip Time Slot Selection link is hidden. If this value is set to true, the Skip Time Slot Selection link doesn't appear.</p> <p>For anonymous bookings, time slot selection can't be skipped. So, when Anonymous Booking Selected is set to true, the Skip Time Slot Selection link isn't shown even if this attribute is set to false.</p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All outbound, inbound, and guest flows |
| Number of Resources to Show (Appointment Distribution) | The maximum number of resources that users can choose from when appointment distribution is enabled. | <ul style="list-style-type: none"> Type: Input Data type: Integer Used in: All outbound, inbound, and guest flows |
| Parent Record ID | <p>The ID of the parent record that the appointment is being scheduled for. Supported values are account ID, case ID, opportunity ID, and lead ID.</p> <p>Example: 001xx000003GZQFAA4</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound and inbound flows |
| Resource Availability End Date | <p>Date after which a service resource can't be booked for appointments by using the invitation URL.</p> <p>This attribute can also be modified after the invitation URL is created.</p> | <ul style="list-style-type: none"> Type: Input Data type: Date Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Resource Availability Start Date | <p>Date on which a service resource becomes available to book appointments by using the invitation URL.</p> <p>This attribute can also be modified after the invitation URL is created.</p> | <ul style="list-style-type: none"> Type: Input Data type: Date Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Scheduling Policy | The developer name of the scheduling policy that is used by the schedule optimizer. | <ul style="list-style-type: none"> Type: Input Data type: String |

| Attribute | Description | Additional Information |
|---------------------|--|---|
| | <p> Note: This field doesn't support Salesforce ID.</p> <p>Example: default_appointment_scheduling_policy</p> | <ul style="list-style-type: none"> Used in: All outbound, inbound, and guest flows |
| Selected End Time | <p>The end time of the timeslot.</p> <p>If a value is set, a timeslot that ends at this time is selected by default.</p> <p>When a user selects a timeslot on the screen, the value is updated based on the selected timeslot.</p> <p>Format: MM/DD/YYYY, hh:mm AM/PM</p> <p>Example: 6/8/2021, 7:30 PM</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: DateTime Used in: All outbound, inbound, and guest flows |
| Selected Start Time | <p>The start time of the timeslot. If a value is set, a timeslot that starts at this time is selected by default.</p> <p>When a user selects a time slot on the screen, the value is updated based on the selected timeslot.</p> <p>Format: MM/DD/YYYY, hh:mm AM/PM</p> <p>Example: 6/8/2021, 7:00 PM</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: DateTime Used in: All outbound, inbound, and guest flows |
| Selected Time Zone | <p>The time zone selected by the user.</p> <p>Here's the list of accepted Timezone values.</p> <p>Example: America/Los_Angeles</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Service Appointment | <p>This value is used only if the Select Service Appointment Time is used to modify an existing service appointment.</p> <p>The ID of the service appointment.</p> <p>The Select Service Appointment Time component fetches the service resources present in the service appointment and shows them if the Service Territory, Service Appointment, and Work Type values exist.</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Outbound Modify Appointment and Inbound Modify Appointment flows |
| Service Resource | <p>This attribute is used only if multi-resource scheduling is disabled.</p> <p>The ID of the selected service resource for which time slots are shown.</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Outbound Modify Appointment and Inbound Modify Appointment flows |
| Service Resources | <p>This attribute is used only if multi-resource scheduling is enabled.</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String |

| Attribute | Description | Additional Information |
|---|--|--|
| | The details of the service resources selected in the Select Service Appointment Time component. This value is auto-populated when service resources are selected. | <ul style="list-style-type: none"> • Used in: All outbound flows |
| Service Territory | The service territory for which time slots appear. Example: 0Hhxx0000004DUuCAM | <ul style="list-style-type: none"> • Type: Input and Output • Data type: String • Used in: All outbound, inbound, and guest flows |
| Show Time Zone Pick List | Indicates whether the time zone pick list appears. If a value isn't set, false—the default value—is used. Example: {!\$GlobalConstant.False} | <ul style="list-style-type: none"> • Type: Input • Data type: Boolean • Used in: All outbound, inbound, and guest flows |
| Start Date | The date for which time slots appear. If the value is empty or set to a date in the past, time slots for the current date appear. If the value is set to a future date, time slots for the specified date appear. If the screen can show time slots for 7 days, then time slots appear for the start of the week to the end of the week for the specified date. For example, if the date passed is 2021-06-08T19:30:00Z, which is a Tuesday, time slots appear for 6 June 2021 (Sunday) to 12 June 2021 (Saturday). If the screen can only show time slots for one day, time slots appear only for the specified date. Format: YYYY-MM-DDThh:mm:ssZ Example: 2021-06-08T19:30:00Z | <ul style="list-style-type: none"> • Type: Input and Output • Data type: String • Used in: All outbound, inbound, and guest flows |
| Start date for the selected service resources' skills that are required by the work type. | The start date for skills of the service resource. Use this attribute to reduce the number of server calls. It's useful when a service resource isn't available for a long time. Time slots appear based on the maximum value of this attribute value, Start Date, and the current date. Format: MM/DD/YYYY, hh:mm AM/PM Example: 6/8/2021, 7:30 PM | <ul style="list-style-type: none"> • Type: Input • Data type: DateTime • Used in: All outbound flows |
| Time Slot is Changed | Indicates whether the user selected a time slot. If a value isn't set, false—the default value—is used. Example: {!\$GlobalConstant.False} | <ul style="list-style-type: none"> • Type: Output • Data type: Boolean • Used in: All outbound, inbound, and guest flows |

| Attribute | Description | Additional Information |
|------------------------------|--|--|
| Time Slot Preload Multiplier | <p>A multiplier that is used to determine the number of days for which time slots are fetched by each server call. Supported values are 1 and 2.</p> <p>Example, if the screen can show time slots for 7 days and if this value is 2, time slots for 14 days (7x2) are fetched by each server call.</p> <p> Tip: If your users generally look at time slots beyond the default dates that appear, set the value to 2 to reduce the number of server calls.</p> <p>Example: 1</p> | <ul style="list-style-type: none"> Type: Input Data type: Integer Used in: All outbound, inbound, and guest flows |
| Validations | <p>The error messages in the Select Service Appointment Time component.</p> <p>This value is auto-populated. For example, the attribute stores the error message that's generated when a user tries to navigate to the next screen without selecting a time slot.</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |
| Work Type | <p>The work type for which you want to show time slots. Always set a value for this attribute if you want to use this component in flows that modify appointments.</p> <p>When both Work Type and Work Type Group are specified, time slots for the specified work type appear.</p> <p>To populate this field:</p> <ol style="list-style-type: none"> Create a work type record with these values: <ul style="list-style-type: none"> Resource type: Variable Data type: Record Object: WorkType Add a getRecord action, and then use the response to populate this value. | <ul style="list-style-type: none"> Type: Input and Output Data type: WorkType Used in: Outbound Modify Appointment and Inbound Modify Appointment flows |
| Work Type Group | <p>The work type group for which you want to show time slots.</p> <p>Example: 0VSxx0000004D0GGAU</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All outbound, inbound, and guest flows |

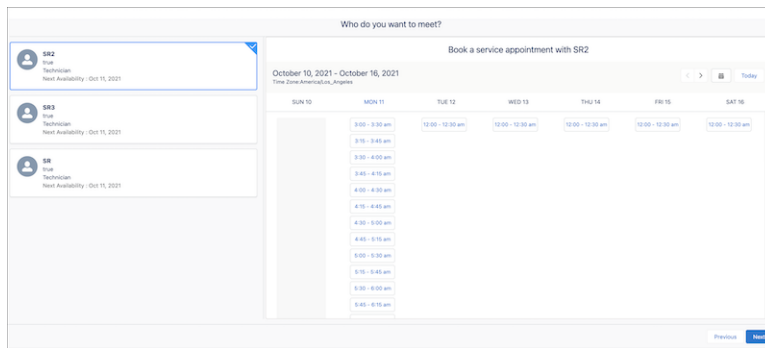
Flow Screen Component: Select Service Resource and Service Appointment Time

Enables users to select a service resource (appointment attendee) and an appointment time.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.




Available in: **Enterprise** and **Unlimited** Editions




Note: The screen shows up to 10 service resources who are available for the next 31 days. If you're using appointment distribution, you can modify the limit to show service resources by using the Number of Resources to Show (Appointment Distribution) attribute.

| Attribute | Description | Additional Information |
|----------------------------|--|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound and guest flows |
| Anonymous Booking | Indicates whether anonymous booking is enabled. If the value is set to true, the Anonymous Booking option appears. If users select this option, a service resource is assigned automatically when users select a time slot. If a value isn't set, false—the default value—is used. Example: <code>{!\$GlobalConstant.True}</code> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All inbound and guest flows |
| Anonymous Booking Selected | Indicates whether a user wants a service resource to be assigned automatically. Important: Always specify a value for this field. Example: <code>{!\$GlobalConstant.True}</code> | <ul style="list-style-type: none"> Type: Input and Output Data type: Boolean Used in: All inbound and guest flows |

| Attribute | Description | Additional Information |
|--|--|---|
| Correlation Id | <p>The unique ID of the appointment scheduling data. Correlation ID is one of the parameters of the ServiceAppointmentRequestInfo class that's passed to the ServiceResourceScheduleHandler Apex interface.</p> <p>For example, use Correlation Id to identify the system that is calling the ServiceResourceScheduleHandler interface implementation. If a value isn't set, a random identifier is passed.</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound and guest flows |
| Default Time Zone | <p>The time zone according to which the service resource's available slots appear. If a value isn't set, time slots appear according to the time zone of the user running the flow.</p> <p>See Supported Time Zones.</p> <p>Example: America/Los_Angeles</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound and guest flows |
| Filter By Resource IDs | <p>A comma-separated list of resource IDs.</p> <p>If a value is set, the component shows only available resources from this list.</p> <p>If a value is set for this attribute and Anonymous Booking is set to <code>{!\$GlobalConstant.True}</code>, when a user selects the Anonymous Booking option, the screen shows time slots for only these resources.</p> <p>Example: 0Hnxx0000004DdpCAE, 0Hnxx0000004DscCAE</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound and guest flows |
| Inbound Scheduling | <p>Indicates whether a screen is used in inbound scheduling flow.</p> <p> Important: Always set the value to true.</p> <p>This attribute doesn't change any elements on the screen but takes care of the other conditions on the screen.</p> <p>If a value isn't set, false—the default value—is used.</p> <p>Example: <code>{!\$GlobalConstant.True}</code></p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All inbound and guest flows |
| Number of Resources to Show (Appointment Distribution) | <p>The maximum number of resources that are available for users to choose from when appointment distribution is enabled.</p> <p>If a value isn't set, the component shows a maximum of 10 resources. To get good performance, set the value to 10 or less.</p> | <ul style="list-style-type: none"> Type: Input Data type: Integer Used in: All inbound and guest flows |
| Parent Record ID | <p>The ID of the parent record for which the appointment is being scheduled. Supported values are account ID, case ID, opportunity ID, and lead ID.</p> <p>Example: 001xx000003GZQFAA4</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound flows |
| Scheduling Policy | <p>The developer name of the scheduling policy that is used by the schedule optimizer.</p> | <ul style="list-style-type: none"> Type: Input Data type: String |

| Attribute | Description | Additional Information |
|--------------------------|---|---|
| | <p> Note: This field doesn't support Salesforce ID.</p> <p>Example: default_appointment_scheduling_policy</p> | <ul style="list-style-type: none"> Used in: All inbound and guest flows |
| Selected End Time | <p>The end time of the time slot. If a value is set, a time slot that ends at this time is selected by default.</p> <p>When a user selects a time slot on the screen, the value is updated based on the selected time slot.</p> <p> Important: When a user selects a service resource, Salesforce Scheduler clears the selected time slot information. Salesforce recommends that when you use this attribute, you also set a value for the Service Resource attribute to select a default service resource.</p> <p>Format: MM/DD/YYYY, hh:mm AM/PM</p> <p>Example: 6/8/2021, 7:30 PM</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: DateTime Used in: All inbound and guest flows |
| Selected Start Time | <p>The start time of the time slot. If a value is set, a time slot that starts at this time is selected by default.</p> <p>When a user selects a time slot on the screen, the value is updated based on the selected time slot.</p> <p> Important: When a user selects a service resource, Salesforce Scheduler clears the selected time slot information. Salesforce recommends that when you use this attribute, you also set a value for the Service Resource attribute to select a default service resource.</p> <p>Format: MM/DD/YYYY, hh:mm AM/PM</p> <p>Example: 6/8/2021, 7:00 PM</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: DateTime Used in: All inbound and guest flows |
| Selected Time Zone | <p>The time zone selected by a user.</p> <p>See Supported Time Zones.</p> <p>Example: America/Los_Angeles</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All inbound and guest flows |
| Service Resource | <p>The ID of the selected service resource for which time slots are shown.</p> <p>When a user selects a service resource, this value is auto-populated.</p> <p>Example: 0Hnxx0000004D56CAE</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All inbound and guest flows |
| Service Resource Booking | <p>Indicates whether service resource booking is enabled. If the value is set to true, the screen shows available resources.</p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean |

| Attribute | Description | Additional Information |
|--|---|---|
| | <p>If the value is set to false, the screen doesn't show available resources. You can set this value to false only when you enable anonymous booking.</p> <p>If anonymous booking is enabled and if this value is set to true, users can either select a service resource or select the Automatically assign a service resource option.</p> <p>If a value isn't set, true—the default value—is used.</p> <p>Example: <code>{!\$GlobalConstant.True}</code></p> | <ul style="list-style-type: none"> Used in: All inbound and guest flows |
| Service Territory | <p>The ID of the service territory for which available service resources and time slots appear.</p> <p>Example: 0Hhxx0000004DUuCAM</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All inbound and guest flows |
| Show service resources by Availability | <p>Indicates whether service resources are sorted by availability, with earliest available resources shown first.</p> <p>Set this value to false only if you're using Appointment Distribution so that service resources are sorted based on the assignment policy.</p> <p>If a value isn't set, true—the default value—is used.</p> <p>Example: <code>{!\$GlobalConstant.True}</code></p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All inbound and guest flows |
| Show Time Zone Pick List | <p>Indicates whether the time zone picklist appears.</p> <p>If a value isn't set, false—the default value—is used.</p> <p>Example: <code>{!\$GlobalConstant.False}</code></p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: All inbound and guest flows |
| Start Date | <p>The date for which time slots appear.</p> <p>If the value is empty or set to a date in the past, time slots for the current date appear. If the value is set to a future date, time slots for the specified date appear.</p> <p>If the screen can show time slots for 7 days, then time slots appear for the start of the week to the end of the week for the specified date. For example, if the date passed is 2021-06-08T19:30:00Z, which is a Tuesday, time slots appear for 6 June 2021 (Sunday) to 12 June 2021 (Saturday).</p> <p>If the screen can show time slots for only one day, time slots appear only for the specified date.</p> <p>Format: YYYY-MM-DDThh:mm:ssZ</p> <p>Example: 2021-06-08T19:30:00Z</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All inbound and guest flows |

| Attribute | Description | Additional Information |
|------------------------------|--|---|
| Time Slot Preload Multiplier | <p>A multiplier that is used to determine the number of days for which time slots are fetched by each server call. Supported values are 1 and 2.</p> <p>For example, if the screen can show time slots for 7 days and if this value is 2, time slots for 14 days (7x2) are fetched by each server call.</p> <p> Tip: If your users generally look at time slots beyond the default dates that appear, set the value to 2 to reduce the number of server calls.</p> | <ul style="list-style-type: none"> Type: Input Data type: Integer Used in: All inbound and guest flows |
| Validations | <p>The error messages in the Select Service Resource and Service Appointment Time component.</p> <p>This value is auto-populated. For example, the attribute stores the error message that's generated when a user tries to navigate to the next screen without selecting a time slot.</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All inbound and guest flows |
| Work Type Group | <p>The ID of the work type group for which the screen shows service resources and time slots.</p> <p>Example: 0VSxx0000004D0GGAU</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: All inbound and guest flows |

Flow Screen Component: Review Inbound or Outbound Service Appointment

Enables licensed users and community users to view and modify a service appointment.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.



Available in: **Enterprise** and **Unlimited** Editions


| Attribute | Description | Additional Information |
|-----------|---|---|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data Type: String Used in: All outbound and inbound flows |

| Attribute | Description | Additional Information |
|--|---|---|
| Appointment Type | The selected appointment type. Example: Phone | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound modify appointment and outbound modify appointment flows |
| Contact ID | The contact ID of the community user who is booking the service appointment. When the Contact ID isn't set, Contact ID is auto-populated when a value for Service Appointment is set. Example: 003xx000004Wht3AAC | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: All inbound flows |
| Engagement Channel Type | The selected engagement channel type. Example: Video | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound modify appointment and outbound modify appointment flows |
| Parent Record ID | The ID of the parent record for which the service resource is selected. Supported values are account ID, case ID, opportunity ID, and lead ID. Example: 001xx000003GZQFAA4 | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound modify appointment and outbound modify appointment flows |
| Service Appointment Additional Information | The additional information for the service appointment. Users can't edit these values. | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment City | The city of the service territory. Example: San Francisco | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment Comments | The comments for the service appointment. | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |

| Attribute | Description | Additional Information |
|---|---|---|
| Service Appointment Country | The country of the service territory. Example: United States | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment End Date and Time | The end time of the time slot. Format: YYYY-MM-DDThh:mm:ssZ Example: 2021-06-14T19:30:00Z | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment Postal Code | The postal code of the service territory. Example: 94105 | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment Start Date and Time | The start time of the time slot. Format: YYYY-MM-DDThh:mm:ssZ Example: 2021-06-14T19:00:00Z | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment State | The state of the service territory. Example: CA | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment Street | The street of the service territory. Example: 415 Mission St. | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Resource ID | The ID of the service resource. Example: 0Hnxx0000004DiiCAE | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |

| Attribute | Description | Additional Information |
|----------------------------|---|--|
| Service Territory ID | The ID of the service territory. Example: 0Hhxx0000004DUuCAM | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Work Type Group ID | The ID of the work type group. Example: 0VSxx0000004D0GGAU | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Additional Field Values | The values of attributes of this screen in JSON format. It’s passed to the save appointment action as input in predefined flows. This attribute’s value is auto-populated. Example: <code>{ "AppointmentType": "Read", "City": "San Francisco", "State": "CA", "Country": "United States", "Street": "2013 Street", "Time": "2019-09-20T14:00:00", "Appointment": "00001", "AppointmentID": "00001" }</code> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Anonymous Booking Selected | Indicates whether an appointment is scheduled via anonymous booking. If the value is set to true, the Anonymous Booking attribute in the Service Appointment is set to true. Example: <code>{!\$GlobalConstant.True}</code> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Optional service resource | A comma-separated list of service resource IDs that are used to identify resources to be marked as optional. Here’s how users can add optional resources: <ul style="list-style-type: none"> If multi-resource scheduling is enabled, users can add optional attendees from the Select Service Appointment Time component. If multi-resource scheduling is disabled, users can add optional attendees by using the Optional Service Resources lookup field in the review screen. <p>⚠ Important: If the Service Resources attribute has a value, this field doesn’t appear. And the Service Resources field has a value when multi-resource scheduling is enabled. So, if you want to specify service resources as optional when multi-resource scheduling is enabled:</p> <ul style="list-style-type: none"> Don’t set a value for Service Resources in this component. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |

| Attribute | Description | Additional Information |
|------------------------|--|---|
| | <ul style="list-style-type: none"> Set a value for Service Resources later but before the save appointment action. <p>Example: 0Hnxx0000004DdpCAE, 0Hnxx0000004DscCAE</p> | |
| Save Error Message | Any error message that is generated when saving the appointment. In predefined flows, these error messages are generated in the Save Appointment screen. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Scheduling Policy | <p>The developer name of the scheduling policy that is used by the schedule optimizer.</p> <p> Note: This field doesn't support Salesforce ID.</p> <p>Example: default_appointment_scheduling_policy</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment | <p>The values of all the service appointment attributes. In predefined flows that modify appointments, the Get Records action is used to fetch the service appointment attribute values and store them in this attribute.</p> <p>If you're using this attribute in flows that modify service appointments, set a value for this attribute, the Service Resource attribute, and the Work Type Group Id attribute. And skip all the other attributes or set empty values for them.</p> <p>The subject, description, phone, and email fields aren't exposed as flow variables. You can store those values in the Service Appointment attribute. You can use this attribute even in flows that create or show appointments.</p> <p>To populate this field:</p> <ol style="list-style-type: none"> Create a service appointment record with these values: <ul style="list-style-type: none"> Resource type: Variable Data type: Record Object: ServiceAppointment Add a getRecord action, and then use the response to populate this value. <p> Note: If a value is set for attributes directly and by using the Service Appointment attribute, values in the Service Appointment attribute are used.</p> | <ul style="list-style-type: none"> Type: Input Data type: ServiceAppointment Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Appointment ID | <p>This attribute is used only in flows that modify service appointments.</p> <p>The ID of the service appointment that's being modified.</p> | <ul style="list-style-type: none"> Type: Input Data type: String |

| Attribute | Description | Additional Information |
|-----------------------|---|--|
| | Example: 08pxx0000004GNwAAM | <ul style="list-style-type: none"> Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Service Resources | <p>A string representation of a JSON object that contains information such as:</p> <ul style="list-style-type: none"> URL of the service resource user profile image Service territory member ID Indication of whether a service resource is active Resource type Service resource user record ID Service resource ID Service resource name Attendance type <p>In predefined flows, this value is automatically created by the Timeslot screen and sent as output. It's then passed to the review screen as input.</p> <p>If you want to create a JSON object without using the timeslot screen, provide these details:</p> <ul style="list-style-type: none"> AttendanceType Name Id (Service Resource ID) Resource type <p>AttendanceType supports three values: Primary, Required, and Optional.</p> <p>Set the AttendanceType attribute if you want to use multi-resource scheduling and make some of the resources optional.</p> <p> Note: You can't use the same minimal service resources value provided as example value in timeslot screen. It's only meant for the review screen.</p> <p>Example: [{"Id": "0Hnxx0000004DqjCAE", "Name": "Resource 1", "AttendanceType": "Primary"}, {"Id": "0Hnxx0000004D56CAE", "Name": "Resource 2", "AttendanceType": "Required"}, {"Id": "0Hnxx0000004DY8CAM", "Name": "Resource 3", "AttendanceType": "Optional"}]</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Show Service Resource | <p>Indicates whether the Service Resources section appears on the review screen.</p> <p>If a value isn't set, true—the default value—is used.</p> <p>Example: {!\$GlobalConstant.True}</p> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Time Slot is Changed | This attribute isn't used. | <ul style="list-style-type: none"> Type: Input |

| Attribute | Description | Additional Information |
|--------------|---|--|
| | | <ul style="list-style-type: none"> Data type: Boolean Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Time Zone | <p>The time zone according to which the service resource's available time slots appear. If a value isn't set, time slots appear according to the time zone of the user running the flow.</p> <p>Here's the list of accepted time zone values.</p> <p>Example: America/Los_Angeles</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Validations | <p>The error messages in the Review Inbound or Outbound Service Appointment component.</p> <p>This value is auto-populated. For example, the attribute stores the error message that's generated when a user enters an incorrect email address.</p> | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |
| Work Type ID | <p>This attribute is used only in the flows that modify service appointments.</p> <p>The ID for the work type of the service appointment that's being modified.</p> <p>Example: 08qxx0000004DDAAA2</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound Modify Appointment and Outbound Modify Appointment flows |

Flow Screen Component: Review Service Appointment

Enables guest users to view a service appointment.

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Attribute | Description | Additional Information |
|--|--|---|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: All outbound and inbound flows |
| Appointment Type | The selected appointment type. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Contact ID | This attribute isn't used. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Parent Record ID | <p>Don't set a value for this attribute for inbound guest flows.</p> <p>In inbound guest flows, a lead is created and its ID is used as the parent record ID. If this value is set, the lead passed to the Save Appointment action isn't used and the value set for this attribute is used.</p> <p>If you want to set a value for this attribute, supported values are account ID, case ID, opportunity ID, and lead ID.</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment Additional Information | The additional information for the service appointment. Users can't edit this information from the screen. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment City | <p>The city of the service territory.</p> <p>Example: San Francisco</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment Comments | The comments for the service appointment. Users can't edit this value from the screen. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment Country | <p>The country of the service territory.</p> <p>Example: United States</p> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |

| Attribute | Description | Additional Information |
|---|---|--|
| Service Appointment End Date and Time | The end time of the time slot. Format: MM/DD/YYYY, hh:mm AM/PM Example: 2021-06-14T19:30:00Z | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment Postal Code | The postal code of the service territory. Example: 94105 | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment Start Date and Time | The start time of the time slot. If a value is set, a time slot that starts at this time is selected by default. Format: MM/DD/YYYY, hh:mm AM/PM Example: 6/8/2021, 7:00 PM | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment State | The state of the service territory. Example: CA | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment Street | The street of the service territory. Example: 415 Mission St. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Resource ID | The ID of the service resource. Example: 0Hnxx0000004DiiCAE | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Territory ID | The ID of the service territory. Example: 0Hhxx0000004DUuCAM | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Work Type Group ID | The ID of the work type group. Example: 0VSxx0000004D0GGAU | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |

| Attribute | Description | Additional Information |
|----------------------------|--|---|
| Additional Field Values | The values of attributes of this screen in JSON format. It's passed to the save appointment action as input in predefined flows. This attribute's value is auto-populated. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Inbound New Guest Appointment |
| Anonymous Booking Selected | This attribute isn't used. | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: Inbound New Guest Appointment |
| Enable Guest User | Indicates whether the component is used in a guest flow. Always set this value to true when using this component for inbound guest flows so that a lead is properly generated. If the value is set to false, the section with lead-related fields doesn't appear and the optional attendees section appears. The phone, email, parent record id, and account id fields also appear. If a value isn't set, false—the default value—is used. Example: <code>{!\$GlobalConstant.True}</code> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: Inbound New Guest Appointment |
| Lead | The lead object that is used to populate fields such as first name, last name, email, phone, and company in the lead section. | <ul style="list-style-type: none"> Type: Input and output Data type: Lead Used in: Inbound New Guest Appointment |
| Optional service resource | This attribute isn't used in guest flows. A list of comma-separated IDs of resources to add to a service appointment. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Inbound New Guest Appointment |
| Save Error Message | Any error message generated when saving the appointment. In predefined flows, these error messages are generated in the Save Appointment action. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Scheduling Policy | The developer name of the scheduling policy that is used by the schedule optimizer.  Note: This field doesn't support Salesforce ID. Example: <code>default_appointment_scheduling_policy</code> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Service Appointment | The values of all the service appointment attributes. | <ul style="list-style-type: none"> Type: Input |

| Attribute | Description | Additional Information |
|------------------------|--|---|
| | <p>You can use this attribute to set service appointment field values instead of setting them separately. You can also set values of fields that are unavailable on the Review Screen.</p> <p>You can set values for these fields:</p> <ul style="list-style-type: none"> • Parent Record ID • Appointment Type • Additional Information • Service Appointment City • Service Appointment Comments • Service Appointment Country • Service Appointment Postal Code • Service Appointment Street • Service Territory ID • Work Type ID • Phone • Email • Province • Service Appointment Start Date and Time • Service Appointment End Date and Time <p>To populate this field:</p> <ol style="list-style-type: none"> 1. Create a service appointment record with these values: <ul style="list-style-type: none"> • Resource type: Variable • Data type: Record • Object: ServiceAppointment 2. Add a getRecord action, and then use the response to populate this value. <p> Note: Some of the fields—such as Phone, Email, and Province—don't appear on the screen.</p> | <ul style="list-style-type: none"> • Data type: ServiceAppointment • Used in: Inbound New Guest Appointment |
| Service Appointment ID | This attribute isn't used. | <ul style="list-style-type: none"> • Type: Input • Data type: String • Used in: Inbound New Guest Appointment |
| Service Resources | This attribute isn't used. | <ul style="list-style-type: none"> • Type: Input and Output • Data type: String • Used in: Inbound New Guest Appointment |

| Attribute | Description | Additional Information |
|-----------------------|---|---|
| Show Service Resource | Indicates whether to show the Service Resources screen. If a value isn't set, true—the default value—is used. Example: <code>{!\$GlobalConstant.True}</code> | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: Inbound New Guest Appointment |
| Time Slot is Changed | This attribute isn't used. | <ul style="list-style-type: none"> Type: Input Data type: Boolean Used in: Inbound New Guest Appointment |
| Time Zone | The time zone according to which the appointment start time and end time are shown. If a value isn't set, the appointment start time and end time are shown according to the user's locale time zone. Here's the list of accepted time zone values. Example: <code>America/Los_Angeles</code> | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |
| Validations | Any error messages in the component. This value is auto-populated. For example, the attribute stores the error message that's generated when a user enters an incorrect email address. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Inbound New Guest Appointment |
| Work Type ID | This attribute isn't used. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Inbound New Guest Appointment |

Flow Action: Save Appointment


Use the Save Appointment action to create and modify appointments.


| Input Value | Description | Data Type |
|-------------------------------|---|-----------|
| Lead | The ID of the lead record created for an unauthenticated (guest) customer appointment. Using this attribute for authenticated customers can result in unexpected behavior. | Lead |
| Optional Service Resource Ids | Used if multiresource scheduling is disabled. A comma-separated list of IDs of optional service resources. Salesforce Scheduler considers optional | String |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Input Value | Description | Data Type |
|----------------------------|---|-----------|
| | <p>service resources as available for other appointments.</p> <p>Example: 0HnRM0000004RWy0AM,0HnRM0000004S6A0AU</p> | |
| Selected Timezone | <p>The user-selected time zone. This value is stored in internal logs and is used to debug issues. For valid time zone formats, see Supported Time Zones.</p> <p>Example: America/Los_Angeles</p> | String |
| Service Appointment Fields | <p>The values of the service appointment attributes.</p> <p>To generate a value to pass to Service Appointment Fields:</p> <ol style="list-style-type: none"> 1. Use the Review Service Appointment component to generate the Additional Field Values attribute. 2. Pass the Additional Field Values attribute value to Service Appointment Fields. <p>For information about JSON fields, see the Create a Custom Review Service Appointment Screen section in Considerations for Creating a Custom Review Service Appointment Screen.</p> <p> Note: Predefined flows use the ServiceAppointmentFields flow variable in:</p> <ul style="list-style-type: none"> • Additional Field Values in the Review Service Appointment component • Service Appointment Fields in the Save Appointment action | String |
| Service Resources | <p>Used if multiresource scheduling is enabled.</p> <p>A string representation of a JSON object that contains information such as:</p> <ul style="list-style-type: none"> • URL of the service resource user profile image • Service territory member ID • Indication of whether a service resource is active • Resource type • Service resource user record ID • Service resource ID • Service resource name • Attendance type <p>In predefined flows, this value is automatically created by the Timeslot screen and sent as output. The value is then passed to the review screen as input.</p> <p>If you want to create a JSON object without using the timeslot screen, provide these details:</p> | String |

| Input Value | Description | Data Type |
|-------------|--|-----------|
| | <ul style="list-style-type: none"> AttendanceType Name Id (Service Resource ID) Resource type <p>AttendanceType supports three values: Primary, Required, and Optional. If you want to use multiresource scheduling and make some of the resources optional, set the AttendanceType attribute.</p> <p> Note: Salesforce Scheduler considers optional service resources as available for other appointments.</p> <p>Example:</p> <pre data-bbox="456 695 1127 863">[{"subject": "Taj Mahal", "subjectType": "ServiceResource", "AttendanceType": "Optional"}]</pre> | |
| Work Type | <p>Used only in modify appointment flows.</p> <p>The work type of the service appointment.</p> <p>To populate this field:</p> <ol style="list-style-type: none"> Create a work type record with these values: <ul style="list-style-type: none"> Resource type: variable Data type: record Object: WorkType Add a getRecord action, and then use the response to populate this value. | Work Type |

| Output Value | Description | Data Type |
|------------------------|--|-----------|
| Error Message | Any error message that's generated when saving an appointment. | String |
| Service Appointment Id | The ID of the service appointment. | String |

Flow Action: Cancel Appointment

Use the Cancel Appointment action to cancel appointments and to capture cancellation reasons.

| Input Value | Description | Data Type |
|------------------------|--|-----------|
| Cancellation Status | The status of the service appointment. Example: Canceled | String |
| Service Appointment Id | The ID of the service appointment. Example: 08pxx0000004GNwAAM | String |
| Cancellation Reason | The reason for canceling the appointment. | String |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Output Value | Description | Data Type |
|---------------|---|-----------|
| Error Message | Any error message that's generated when saving the appointment. | String |

Flow Screen Component: Select Appointment Invitee

With this component, users can select a service resource for an appointment invitation.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

Select Appointment Invitee

* Participant Service Resource

@ John Smith ×

Next

| Attribute | Description | Additional Information |
|--------------------------|---|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Primary Service Resource | ID of the selected primary service resource. For example, 0Hnxx0000004D56CAE. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |

Flow Screen Component: Appointment Booking Invitation Details

With this component, users can specify the details of an appointment invitation.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

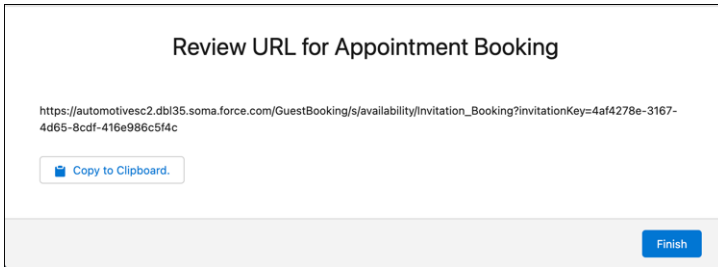
Available in: **Enterprise** and **Unlimited** Editions

| Attribute | Description | Additional Information |
|------------------------------|---|---|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Active | Indicates whether the appointment invitation is active. | <ul style="list-style-type: none"> Type: Input and Output Data type: Boolean Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Appointment Booking End Date | End date of the availability for an appointment booking. Format: MM/DD/YYYY Example: 04/21/2022 | <ul style="list-style-type: none"> Type: Input and Output Data type: Date Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |

| Attribute | Description | Additional Information |
|--------------------------------|---|--|
| Appointment Booking Start Date | Start date of the availability for an appointment booking. Format: MM/DD/YYYY Example: 04/04/2022 | <ul style="list-style-type: none"> Type: Input and Output Data type: Date Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Invitation URL Expiration Date | Date on which the invitation URL expires. Format: MM/DD/YYYY Example: 04/15/2022 | <ul style="list-style-type: none"> Type: Input and Output Data type: Date Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |

Flow Screen Component: Review URL for Appointment Booking

With this component, users can review the invitation URL that's created for an appointment booking.



EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Attribute | Description | Additional Information |
|----------------------------|---|--|
| API Name | Use underscores and alphanumeric characters without spaces. Begin the name with a letter, don't end the name with an underscore, and don't use two consecutive underscores. | <ul style="list-style-type: none"> Type: Input Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Appointment Invitation ID | Unique identifier that's generated when the appointment invitation is created. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |
| Appointment Invitation URL | Invitation URL that's generated when the appointment invitation is created. | <ul style="list-style-type: none"> Type: Input and Output Data type: String Used in: Generate Appointment Invitation and Book Appointment from Invitation flows |

Flow Action: Save Appointment Invitation Details

Use the Save Appointment Invitation Details action to save details of an appointment invitation and appointment invitee.

| Input Value | Description | Data Type |
|---------------------------------|---|-----------|
| Appointment Invitation Details | String representation of a JSON object that contains field-value pairs of an appointment invitation record. | String |
| Appointment Invitee Details | String representation of a JSON object that contains field-value pairs of an appointment invitee record. | String |
| Actionable List Member IDs List | A comma-delimited list of actionable list member IDs. | String |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Output Value | Description | Data Type |
|----------------------------|---|-----------|
| AppointmentInvitation ID | Record ID of the appointment invitation created with the specified details. | String |
| Appointment Invitation URL | The URL that's generated when the invitation is created. | String |

Customize Standard Flow Templates

The flows in Salesforce Scheduler are installed as standard flow templates. You can customize any of the flows to suit your business needs.

To customize a flow, create a flow based on a standard flow template.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Click **New Flow**.
3. In the list of templates, select the template that you want to customize, and click **Create**.
4. Customize the flow according to your business requirements. For example, you can use these global flow variables for some quick customizations.
 - If you customize the flow to use the flow components in a different order or remove any of the steps in the standard flows, then these flow variables might not work as designed.
 - The flow variables listed in the table are available in all Salesforce Scheduler flows.

| Flow Variable | Description |
|------------------------------|--|
| allowAnonymousBooking | Enable automatic service resource assignment to let your users schedule appointments without having to choose a service resource. To skip the resource selection page and automatically assign service resources, set <code>allowAnonymousBooking</code> to <i>True</i> and <code>allowResourceBooking</code> to <i>False</i> . To give users the option |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:

- Run Flows

| Flow Variable | Description |
|-----------------------------|--|
| allowResourceBooking | <p>to choose between automatic resource assignment and manual resource selection, set both <code>allowAnonymousBooking</code> and <code>allowResourceBooking</code> to <code>True</code>.</p> <p>For more information, see Enable Automatic Resource Assignment and Anonymous Scheduling on page 172.</p> <p>Give users the option to manually select a service resource. To skip the resource selection page and automatically assign service resources, set <code>allowAnonymousBooking</code> to <code>True</code> and <code>allowResourceBooking</code> to <code>False</code>. To give users the option to choose between automatic resource assignment and manual resource selection, set both <code>allowAnonymousBooking</code> and <code>allowResourceBooking</code> to <code>True</code>.</p> <p>For more information, see Enable Automatic Resource Assignment and Anonymous Scheduling on page 172.</p> |
| showServiceResource | <p>Set to <code>False</code> to hide assigned service resources' names on the appointment review page.</p> <p>For more information, see Enable Anonymous Resource Scheduling on page 174.</p> |
| distanceUnit | <p>Set to <code>km</code> or <code>mi</code> to show distances on the service territory selection page in kilometers or miles. If you don't enter a value or enter any other value, distances are shown in miles.</p> |
| SchedulingPolicyName | <p>Specify a scheduling policy's developer name to invoke it from the flow.</p> |
| WorkTypeGroupId | <p>Specify the ID of a work type group to preselect it on the Select Work Type Group page.</p> |
| showTimeZonePicklist | <p>Set to <code>True</code> to show a list of time zones supported in Salesforce on the appointment time slot page. Users can select a time zone from the list. Set to <code>False</code> to hide the list. When the list is hidden, the time slots are shown in the user's (appointment scheduler's) time zone.</p> |

5. Click **Show Advanced** and then make sure that **Salesforce Scheduler Flow** is selected as the Type.
6. Save the flow.
7. Activate the flow.
 - a. In the list of flows, click the name of the new flow.
 - b. Under Flow Versions, next to the latest version of the flow, click **Activate**.

Create a Schedule Appointment action and add it to the relevant object's page layout.

Add Components to Salesforce Scheduler Flow Screens

Add components to flow screens to display additional information or to capture additional inputs. For example, add labels and logos for branding.

Salesforce Scheduler doesn't automatically store information captured from input components. You must store user inputs in flow variables and then save these values in Salesforce records using one of these ways:

- Use the Update Records flow element or the Create Records flow element.
 - Include the values in the JSON content that's passed to the Save Appointment action.
1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
 2. Open a flow.
 3. Open the screen to which you want to add components.
 4. Drag the necessary components to the canvas, and then configure components.
 5. Save your changes.



Example: To add images and information to the Select Service Resources screen of the Inbound New Appointment flow:

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Open the Inbound New Appointment flow.
3. Open the Attendees screen.
4. Drag the Display Text component to the canvas.
5. Enter an API name for the component.
6. Add the necessary images and information.
7. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

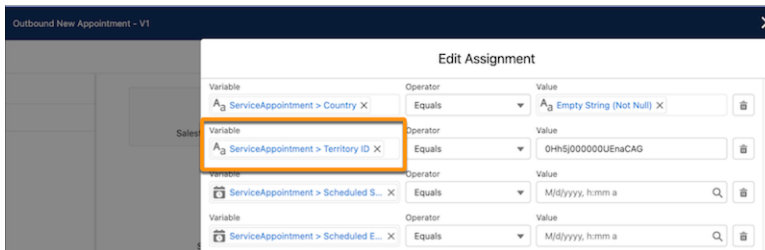
To modify flows:

- Manage Flow

Skip the Service Territory Selection Screen

If you want to use virtual territories or set a default service territory, modify the flow to set a default service territory and skip the Select Service Territory screen. You can skip the service territory selection screen for the Outbound New Appointment, Inbound New Appointment, and Inbound New Guest Appointment flows and their instances. You can also show the service territory address on the review screen if necessary.

1. Click the **Service Territories** tab.
2. Click the service territory record that you want to set as default.
3. Copy the Salesforce ID of the service territory.
4. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
5. Click the flow for which you want to skip the service territory selection screen.
6. Perform a step:
 - If you're modifying the Outbound New Appointment flow, double-click **Set Initial Values**.
 - If you're modifying the Inbound New Appointment or the Inbound New Guest Appointment flow, double-click **Initial Assignment**.
7. In the value column of the Service Territory > Territory ID variable, paste the copied Salesforce ID of the service territory.



8. If you want the review appointment screen to show address details, enter values for the address-related fields: Street, City, State/Province, Zip/Postal Code, and Country.
9. Click **Done**.
10. Delete these flow connectors:
 - The connector from the Appointment Type Screen component to the Set Location Stage component.
 - The connector from the Location Screen component to the Resource Decision component.
11. Add a connector from the Appointment Type Screen component to the Resource Decision component.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

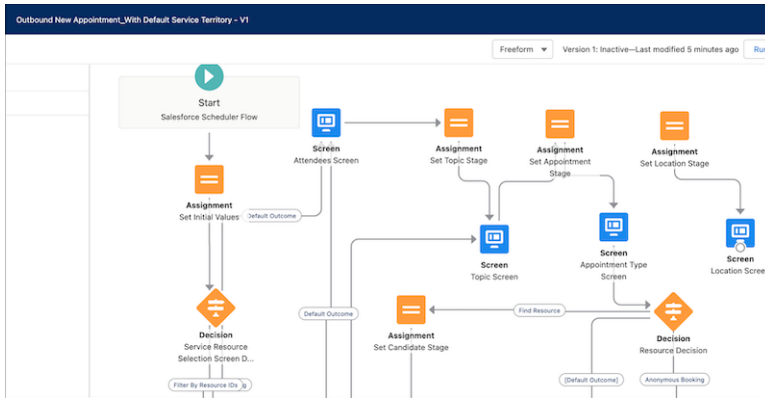
- Manage Flow

To run a flow:

- Run Flows

To modify page layouts for Service Appointment:

- View Setup and Configuration
- Customize Application



12. Delete the Set Location Stage and Location Screen components and the connector between them.

13. Click **Save As**.

14. Enter values for Flow Label and Flow API Name, and then save your changes.
An instance of the flow is created.

15. Activate the flow.

16. Add the flow instance to the page layout from which the flow is to be used.

For more information, see [Set Up a Custom Outbound Flow \(Optional\)](#).

As Salesforce Scheduler checks internal and external calendars in real time to determine time slots, test your setup's performance after you make these changes.

Customize Flow Screens

You can customize flow screens to meet your business needs. For example, you can change labels to use your company's terminology and change the preselected values.

You can add components to flow screens and add flow screen components to flows. If you want to customize screens beyond the inbuilt customization options, you can also create your own flow screens. For more information, see [Provided Flow Screen Components](#) and [Considerations for Creating a Custom Review Service Appointment Screen](#).

You can also translate data for Work Type Group, Service Territory, and Service Resource objects. For more information, see [Manage Objects' Data Translations](#) on page 178.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

[Customize the Select Service Resources Screen](#)

Customize the Select Service Resources screen and the options that appear on the screen.

[Customize the Select Work Type Group Screen](#)

Customize the Select Work Type Group screen and the options that appear on the screen.

[Customize the Select Appointment Type Screen and the Select Engagement Channel Screen](#)

By default, Salesforce Scheduler shows the Select Appointment Type screen for users to select appointment mediums from. But if the engagement channels are enabled, then Salesforce Scheduler shows the Select Engagement Channel screen. Learn how to customize the screens and the options that appear on the screens.

[Customize the Select Service Resource Screen](#)

Customize the Select Service Resource screen and the options that appear on the screen.

[Customize the Service Resource Availability Screen](#)

Customize the Service Resource Availability screen and the options that appear on the screen.

[Customize the Select Service Territory Screen](#)

Customize the Select Service Territory screen and the options that appear on the screen.

[Customize the Select Service Appointment Time Screen](#)

Customize the Select Service Appointment Time screen and the options that appear on the screen.

[Customize the Select Service Resource and Service Appointment Time Screen](#)

Customize the Select Service Resource and Service Appointment Time screen and the options that appear on the screen.

[Customize the Review Inbound or Outbound Service Appointment Screen](#)

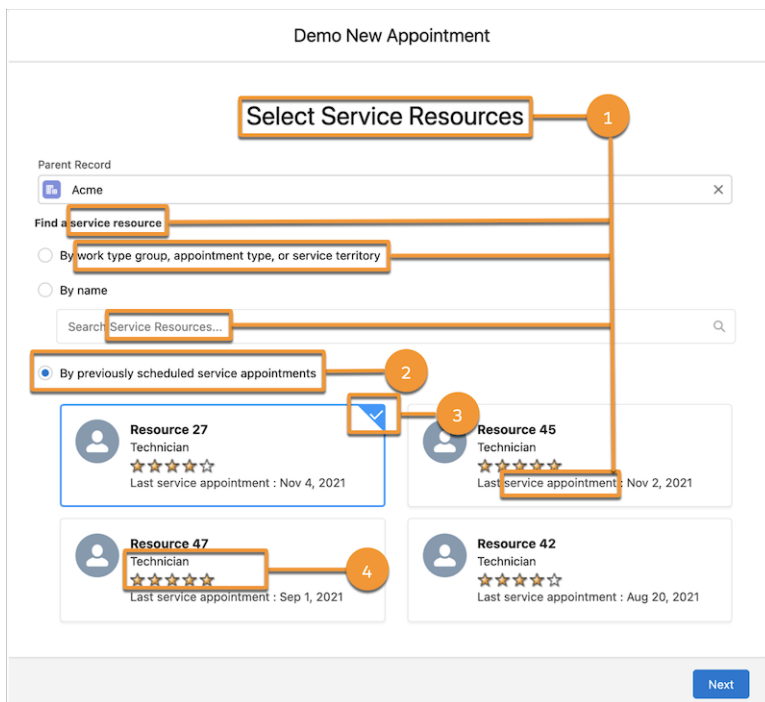
Customize the Review Inbound or Outbound Service Appointment screen and the options that appear on the screen.

[Customize the Review Service Appointment Screen](#)

Customize the Review Service Appointment screen and the options that appear on the screen.

Customize the Select Service Resources Screen

Customize the Select Service Resources screen and the options that appear on the screen.



EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

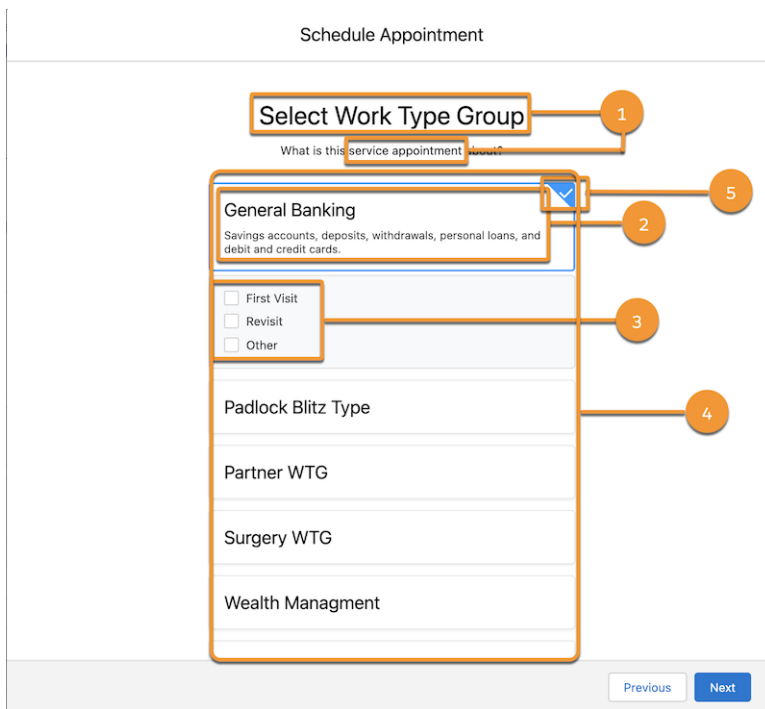
Available in: **Enterprise** and **Unlimited** Editions

| UI Element | How to Customize the Element |
|---|---|
| The title and field labels (1) | Change Labels in Flow Screens |
| The preselected option to select a service resource (2) | <ul style="list-style-type: none"> Preselect an Option on the Select Service Resources Page on page 225 Flow Screen Component: Select Service Resources |

| UI Element | How to Customize the Element |
|---|--|
| The preselected service resource (3) | Flow Screen Component: Select Service Resources on page 114 |
| The fields and images that appear on service resource cards (4) | <ul style="list-style-type: none"> • Change the Fields That Appear on Service Resource Cards on page 222 • Show Images on Service Resource Cards on page 223 |
| The Select Service Resources screen | <ul style="list-style-type: none"> • Enable Automatic Resource Assignment and Anonymous Scheduling on page 172 • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

Customize the Select Work Type Group Screen

Customize the Select Work Type Group screen and the options that appear on the screen.



EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| UI Element | How to Customize the Element |
|---|--|
| The title and field labels (1) | Change Labels in Flow Screens on page 62 |
| The name and description of the work type group (2) | Create Work Type Groups in Salesforce Scheduler on page 18 |

| UI Element | How to Customize the Element |
|--|---|
| The list of appointment subtopics (3) | Customize Appointment Subtopics in Salesforce Scheduler on page 17 |
| The list of work type groups that appear (4) | <ul style="list-style-type: none"> • Customize Standard Flow Templates on page 156 • Flow Screen Component: Select Work Type Groups on page 116 |
| The preselected work type group (5) | <ul style="list-style-type: none"> • Customize Standard Flow Templates on page 156 • Flow Screen Component: Select Work Type Groups on page 116 |
| The Select Work Type Group screen | <ul style="list-style-type: none"> • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

Customize the Select Appointment Type Screen and the Select Engagement Channel Screen

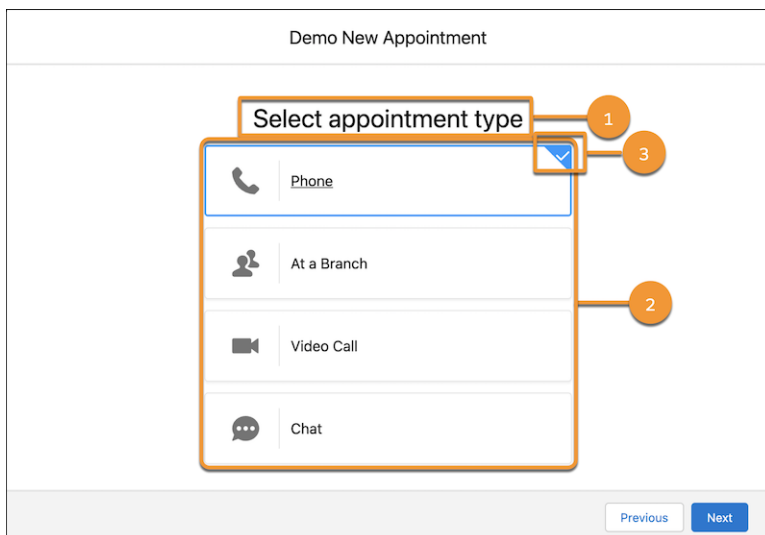
By default, Salesforce Scheduler shows the Select Appointment Type screen for users to select appointment mediums from. But if the engagement channels are enabled, then Salesforce Scheduler shows the Select Engagement Channel screen. Learn how to customize the screens and the options that appear on the screens.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

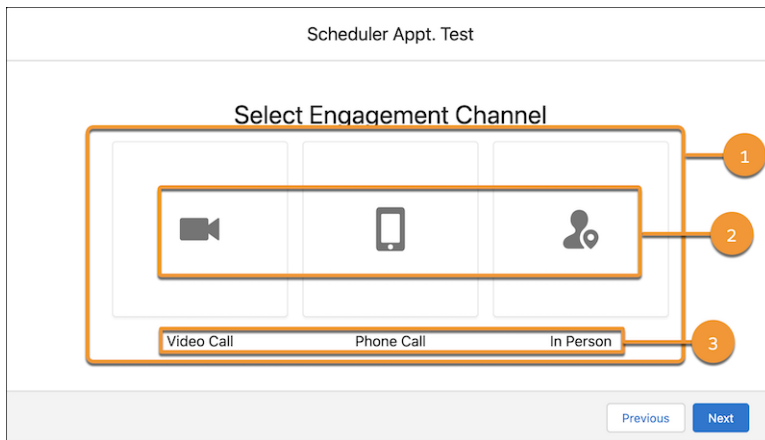
Available in: **Enterprise** and **Unlimited** Editions

Select Appointment Type



| UI Element | How to Customize the Element |
|---|---|
| The title (1) | Change Labels in Flow Screens on page 62 |
| The list of appointment types that appear (2) | Customize Default Appointment Types in Salesforce Scheduler on page 21 |
| The preselected appointment type (3) | Flow Screen Component: Select Appointment Type on page 118 |
| The Select Appointment Type screen | <ul style="list-style-type: none"> • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

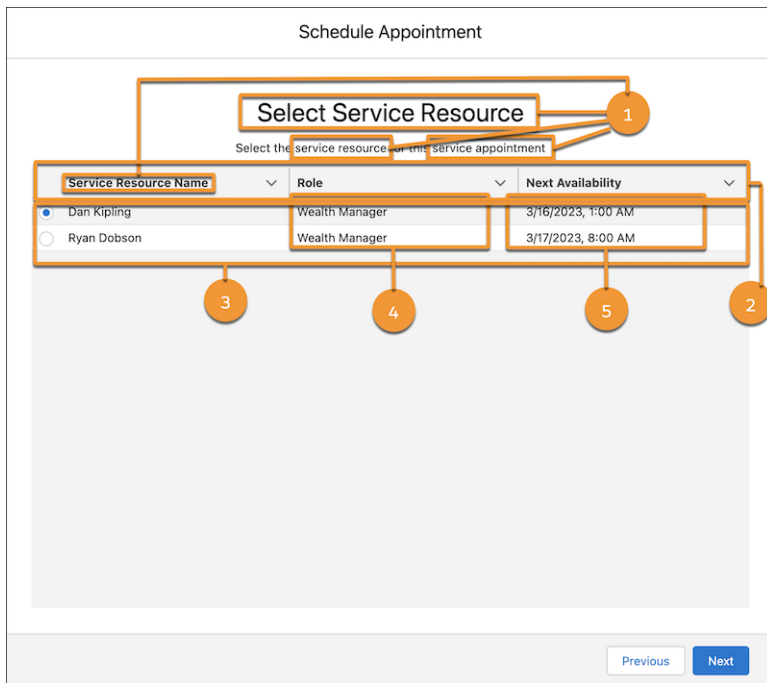
Select Engagement Channel



| Number | UI Element | How to Customize the Element |
|--------|---|---|
| 1 | The list of engagement channels that appear | Create and Assign Engagement Channels |
| 2 | The icons for engagement channels | Create Engagement Channel Types |
| 3 | The names of the engagement channels | Create Engagement Channel Types |
| — | The Select Engagement Channel screen | <ul style="list-style-type: none"> • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

Customize the Select Service Resource Screen


Customize the Select Service Resource screen and the options that appear on the screen.



EDITIONS

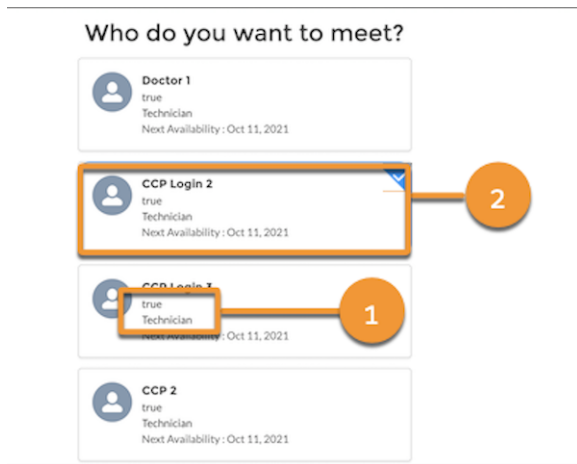
Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| UI Element | How to Customize the Element |
|--|--|
| The title and field labels (1) | Change Labels in Flow Screens |
| The order in which service resources are sorted (2) | Flow Screen Component: Select Service Resource on page 119 |
| The maximum number of service resources that appear on the screen (3) | Flow Screen Component: Select Service Resource |
| The roles associated with service resources (4)  Note: You can show roles if necessary. Salesforce Scheduler doesn't use these roles to determine availability. | Add values to the Roles picklist of the Service Territory Member entity. See Add or Edit Picklist Values . Then assign roles using the Role picklist on service territory member records. |
| The time zone based on which next available time slots are shown (5) | Flow Screen Component: Select Service Resource |
| The Select Service Resource screen | <ul style="list-style-type: none"> • Manage Time Zones for Appointments on page 174 • Enable Automatic Resource Assignment and Anonymous Scheduling on page 172 • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

Customize the Service Resource Availability Screen

Customize the Service Resource Availability screen and the options that appear on the screen.



EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| UI Element | How to Customize the Element |
|---|--|
| The fields and images that appear on service resource cards (1) | <ul style="list-style-type: none"> Change the Fields That Appear on Service Resource Cards on page 222 Show Images on Service Resource Cards on page 223 |
| The preselected service resource (2) | Flow Screen Component: Service Resource Availability |
| The Service Resource Availability screen | <ul style="list-style-type: none"> Manage Time Zones for Appointments Enable Automatic Resource Assignment and Anonymous Scheduling on page 172 Add Components to Salesforce Scheduler Flow Screens Add Validation Rules to Service Appointment Fields on page 177 Update Flows to Refresh Inputs on page 177 |

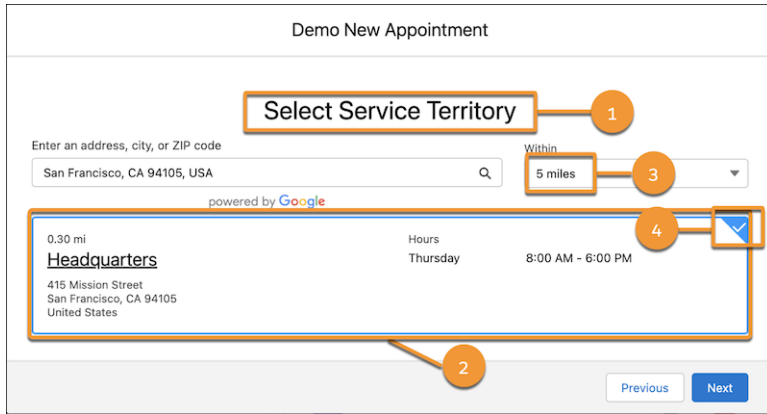
Customize the Select Service Territory Screen

Customize the Select Service Territory screen and the options that appear on the screen.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions



| UI Element | How to Customize the Element |
|---|--|
| The title (1) | Change Labels in Flow Screens |
| The list of service territories that appear (2) | <ul style="list-style-type: none"> • Set Up Service Territories in Salesforce Scheduler on page 6 • How Work Types, Work Type Groups, and Service Territories Work Together • Flow Screen Component: Select Service Territory |
| The preselected distance and distance unit (3) | Flow Screen Component: Select Service Territory on page 125 |
| The preselected location (4) | Flow Screen Component: Select Service Territory on page 125 |
| The Select Service Territory screen | <ul style="list-style-type: none"> • Skip the Service Territory Selection Screen on page 159 • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

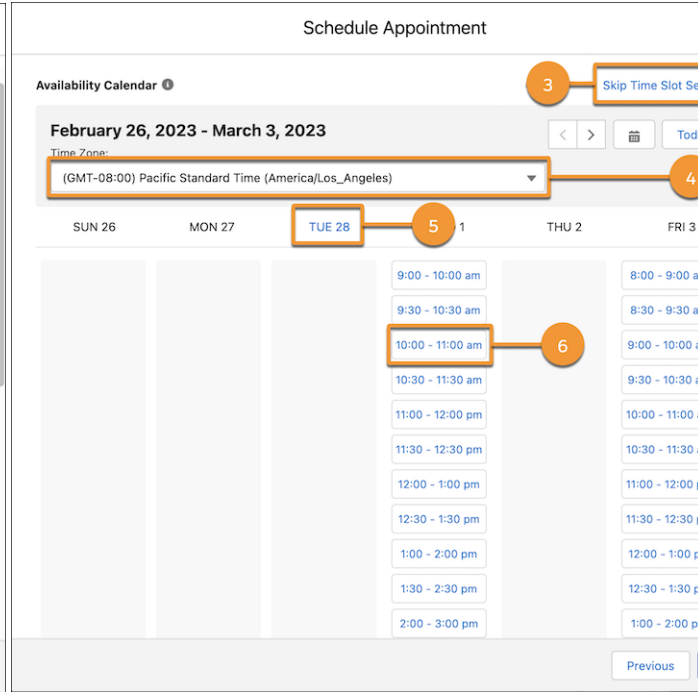
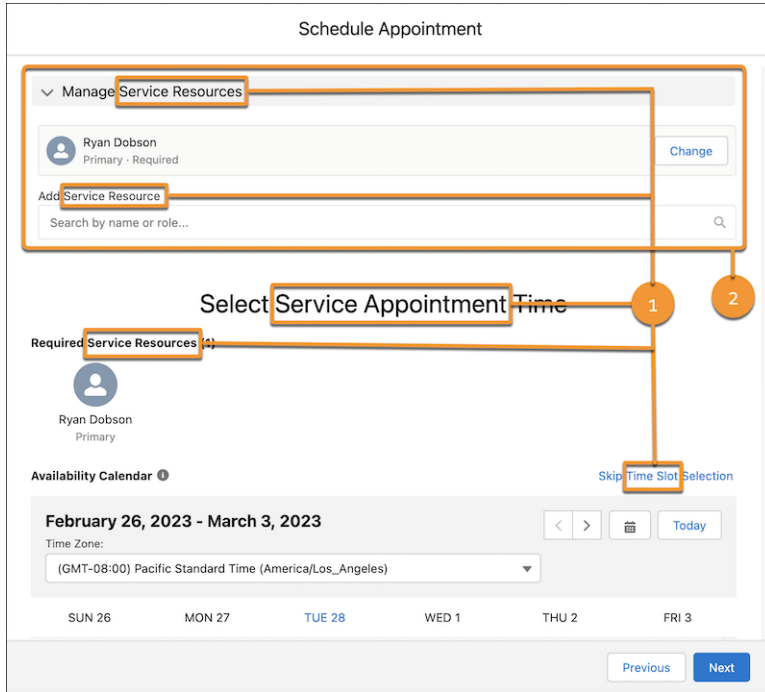
Customize the Select Service Appointment Time Screen

Customize the Select Service Appointment Time screen and the options that appear on the screen.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

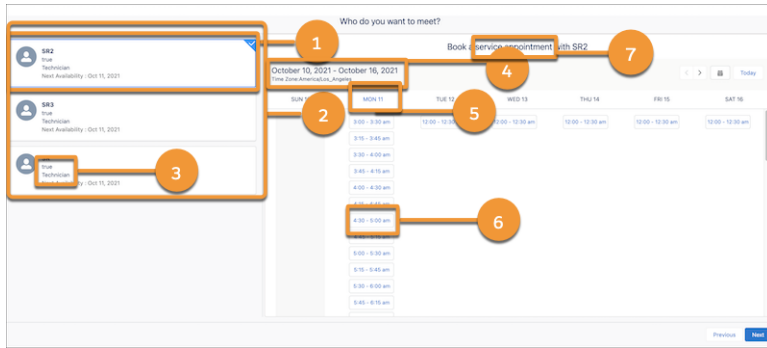
Available in: **Enterprise** and **Unlimited** Editions



| UI Element | How to Customize the Element |
|---|--|
| The title and field labels (1) | Change Labels in Flow Screens |
| The Manage resources option (for multi-resource scheduling) (2) | Flow Screen Component: Select Service Appointment Time on page 128 |
| The Skip Time Slot Selection option (3) | Flow Screen Component: Select Service Appointment Time |
| The Time Zone picklist (4) | Flow Screen Component: Select Service Appointment Time |
| The preselected start date (5) | Flow Screen Component: Select Service Appointment Time |
| The preselected start time and end time (6) | Flow Screen Component: Select Service Appointment Time |
| The Select Service Appointment Time screen | <ul style="list-style-type: none"> • Manage Time Zones for Appointments on page 174 • Enable Automatic Resource Assignment and Anonymous Scheduling on page 172 • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

Customize the Select Service Resource and Service Appointment Time Screen

Customize the Select Service Resource and Service Appointment Time screen and the options that appear on the screen.



EDITIONS

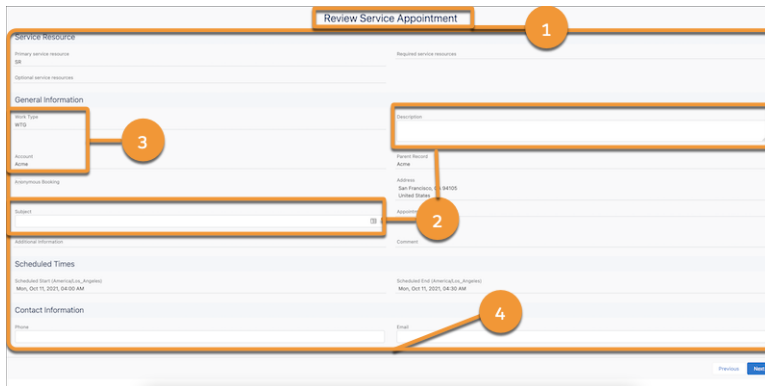
Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| UI Element | How to Customize the Element |
|--|--|
| The preselected service resource (1) | Flow Screen Component: Select Service Resource and Service Appointment Time |
| The maximum number of service resources that appear on the screen, the order in which service resources are sorted, and the time zone based on which the service resource's available slots appear (2) | Flow Screen Component: Select Service Resource and Service Appointment Time on page 135 |
| The fields and images that appear on service resource cards (3) | <ul style="list-style-type: none"> • Change the Fields That Appear on Service Resource Cards on page 222 • Show Images on Service Resource Cards on page 223 |
| The availability of the Time Zone picklist (4) | Flow Screen Component: Select Service Resource and Service Appointment Time |
| The preselected start date (5) | Flow Screen Component: Select Service Resource and Service Appointment Time |
| The preselected start time and end time (6) | Flow Screen Component: Select Service Resource and Service Appointment Time |
| The field label (7) | Change Labels in Flow Screens |
| The Select Service Resource and Service Appointment Time screen | <ul style="list-style-type: none"> • Manage Time Zones for Appointments on page 174 • Enable Automatic Resource Assignment and Anonymous Scheduling on page 172 • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

Customize the Review Inbound or Outbound Service Appointment Screen

Customize the Review Inbound or Outbound Service Appointment screen and the options that appear on the screen.



EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| UI Element | How to Customize the Element |
|---|---|
| The title (1) | Change Labels in Flow Screens |
| The default values in fields, such as Subject and Description (2) | Autofill Fields in the Appointment Review Screen on page 224 |
| The values in fields, such as Work Type and Account (3) | Flow Screen Component: Review Inbound or Outbound Service Appointment on page 139 |
| The layout, the fields that appear, and the field labels (4) | <ul style="list-style-type: none"> • Modify the Review Service Appointment Screen • Change Labels in Flow Screens |
| The Review Inbound or Outbound Service Appointment screen | <ul style="list-style-type: none"> • Manage Time Zones for Appointments • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

If you want to customize the Review Service Appointment screen beyond the inbuilt customization options, you can create your own screen. For more information, see [Considerations for Creating a Custom Review Service Appointment Screen](#).

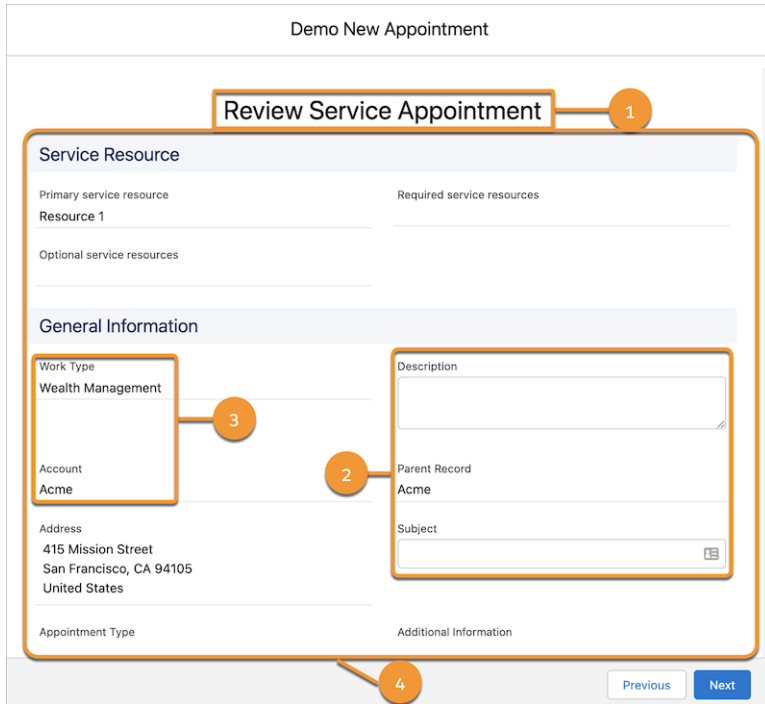
Customize the Review Service Appointment Screen

Customize the Review Service Appointment screen and the options that appear on the screen.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions



| UI Element | How to Customize the Element |
|---|---|
| The title (1) | Change Labels in Flow Screens |
| The default values in fields, such as Subject and Description (2) | Autofill Fields in the Appointment Review Screen on page 224 |
| The values in fields, such as Work Type and Account (3) | Flow Screen Component: Review Service Appointment on page 145 |
| The layout, the fields that appear, and the field labels (4) | <ul style="list-style-type: none"> • Modify the Review Service Appointment Screen • Change Labels in Flow Screens |
| The Review Service Appointment screen | <ul style="list-style-type: none"> • Manage Time Zones for Appointments • Add Components to Salesforce Scheduler Flow Screens • Add Validation Rules to Service Appointment Fields on page 177 • Update Flows to Refresh Inputs on page 177 |

If you want to customize the Review Service Appointment screen beyond the inbuilt customization options, you can create your own screen. For more information, see [Considerations for Creating a Custom Review Service Appointment Screen](#).

Enable Automatic Resource Assignment and Anonymous Scheduling


You can enable automatic service resource assignment to let users schedule appointments without selecting service resources. Customers or guest users don't always know the names of service resources. And sometimes they don't care about which resource they're assigned. After you enable automatic resource assignment, service resources are automatically assigned based on the time slots users select. Also, you can hide the assigned resources' names on the appointment summary page to protect their privacy.


In anonymous scheduling, Salesforce Scheduler shows the list of aggregated time slots for the service resources who are available for the selected work type group, engagement channel (optional), and service territory. After you select a time slot, Salesforce Scheduler randomly assigns a service resource from the resources available for the time slot. If you want to optimize resource utilization, enable the Appointment Distribution setting.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

 **Note:** The random selection of a service resource applies only to the Lightning console. For APIs, Salesforce Scheduler returns a set of service resources available for each time slot.

 **Example:** Bruce, a customer, wants to meet a retail banker for wealth management queries at the 1 Market St. branch between 2 PM and 5 PM. Three retail bankers—John, Sara, and Jane—are available during this time. John is available for the 1 PM to 2 PM and 2 PM to 3 PM slots. Sara is available for the 2 PM to 3 PM, 3 PM to 4 PM, and 4 PM to 5 PM slots. And Jane is available for the 3 PM to 4 PM and 4 PM to 5 PM slots. In the time slot screen, Bruce sees a consolidated view of the available time slots: 1 PM to 2 PM, 2 PM to 3 PM, 3 PM to 4 PM, and 4 PM to 5 PM. If Bruce selects the 3 PM to 4 PM time slot, Salesforce Scheduler randomly assigns one of the three available retail bankers to the appointment.

[Grant Users Edit Access to the Anonymous Booking Field](#)

Before you enable automatic service resource assignment, give users edit access to the Anonymous Booking field on the Service Appointment object.

[Enable Automatic Service Resource Assignment](#)

When automatic service resource assignment is enabled, your customers or guest users can schedule appointments without selecting a service resource. Based on the selected time slot, an appropriate service resource is automatically assigned to the appointment. You can also configure your flows to give users the option to manually select a service resource or have one assigned automatically.

[Enable Anonymous Resource Scheduling](#)

When anonymous scheduling is enabled, users don't get to choose service resources during the scheduling process. Also, assigned resources' names aren't shown on the appointment summary page. Hiding service resource names from users protects their privacy. It also gives you the flexibility to assign different resources to appointments if the resources initially assigned become unavailable.

Grant Users Edit Access to the Anonymous Booking Field

Before you enable automatic service resource assignment, give users edit access to the Anonymous Booking field on the Service Appointment object.

1. From Setup, open **Object Manager**.
2. In the Quick Find box, enter *Service Appointment*, and then select **Service Appointment**.
3. Click **Fields & Relationships**, and select **Anonymous Booking**.
4. Click **Set Field-Level Security**.
5. Select **Visible** for all user profiles that schedule appointments.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions


6. Save your changes.

Enable Automatic Service Resource Assignment


When automatic service resource assignment is enabled, your customers or guest users can schedule appointments without selecting a service resource. Based on the selected time slot, an appropriate service resource is automatically assigned to the appointment. You can also configure your flows to give users the option to manually select a service resource or have one assigned automatically.

Before you enable automatic service resource assignment, update field-level security for the Anonymous Booking field on the Service Appointment object to give users edit access.

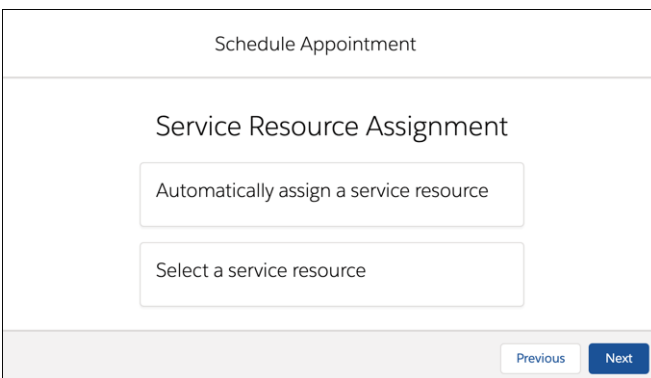
Use the new Anonymous Booking and Service Resource Booking attributes on your flow screen component. These attributes are available on the Select Service Resource, Service Resource Availability, and Select Service Resource and Service Appointment Time flow screen components. By default, Anonymous Booking is set to *False* and Service Resource Booking to *True*, and there's no change in your flow's behavior.

 **Note:** In Salesforce Scheduler with the Asset Management add-on, a service resource can be a technician (person) or an asset (meeting room or equipment). Create and assign different sets of skills for technicians and assets to prevent assets from being automatically assigned as service resources. For example, mammograms can be a skill for an X-ray technician. And 3D mammogram can be a skill for an X-ray machine.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Create a flow or edit an existing flow that you want to enable automatic resource assignment for.

 **Note:** Before you can edit a flow, you must deactivate it.

3. On the Manager tab, under Variables, edit the `allowAnonymousBooking` and `allowResourceBooking` variables and set their values according to your requirement.
 - To skip the resource selection page and automatically assign service resources, set `allowAnonymousBooking` to `{!$GlobalConstant.True}` and `allowResourceBooking` to `{!$GlobalConstant.False}`.
 - To give users the option to choose between automatic resource assignment and manual resource selection, set both `allowAnonymousBooking` and `allowResourceBooking` to `{!$GlobalConstant.True}`.



The screenshot shows a 'Schedule Appointment' screen. The main heading is 'Service Resource Assignment'. Below this heading are two radio button options: 'Automatically assign a service resource' and 'Select a service resource'. At the bottom of the screen, there are two buttons: 'Previous' and 'Next'.

4. Save your changes, and then activate the flow.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:


- Run Flows

Enable Anonymous Resource Scheduling

When anonymous scheduling is enabled, users don't get to choose service resources during the scheduling process. Also, assigned resources' names aren't shown on the appointment summary page. Hiding service resource names from users protects their privacy. It also gives you the flexibility to assign different resources to appointments if the resources initially assigned become unavailable.

To enable anonymous scheduling, first enable automatic service resource assignment by setting the new Anonymous Booking attribute to *True* and Service Resource Booking attribute to *False* on your flow screen component. And then hide assigned resources' names by setting the new Show Service Resource attribute on the Review Service Appointment flow screen component to *False*.

To hide service resources' names on the review appointment page:

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Edit the flow that you want to hide service resource names for.
 -  **Note:** Before you can edit a flow, you must deactivate it.
3. Use the `showServiceResource` variable to set the value of the Show Service Resource attribute to *False*.
 - a. On the Manager tab, under Variables, click **showServiceResource**.
 - b. Click **Edit**.
 - c. In the Default Value field, enter `{!$GlobalConstant.False}`.
 - d. Click **Done**.
4. Save your changes, and then activate the flow.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:

- Run Flows

Manage Time Zones for Appointments

Preset a default time zone for appointment time slot pages or dynamically set a time zone for them. Enable the time zone dropdown list on time slot pages to let users schedule appointments in the time zones they prefer.

[Preset a Time Zone for Appointment Time Slot Pages](#)

Use the Default Time Zone attribute in Salesforce Scheduler flows to set a default time zone for all the pages that show appointment time slots. Or dynamically set a time zone for each page according to the selected service resource, service territory, customer, or browser time zone.

[Set a Time Zone for the Review Appointment Page](#)

By default, the appointment review page shows the scheduled appointment time in the same time zone that was selected on the appointment time slot page. However, you can override the default behavior and set a different time zone for the review page using the Time Zone attribute.

[Enable Multiple Time Zone Selection](#)

In your appointment flows, when you set the Show Time Zone Pick List attribute to *True*, the appointment time slot pages show a dropdown list with all the time zones supported in Salesforce. When scheduling appointments, users can select the time zone in which they want to see the appointment time slots.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Use Service Territory Time Zone on Flow Screens


By default, Salesforce Scheduler shows time based on the time zone of the user who's scheduling the flow. But sometimes it makes more sense to show time based on the time zone of the selected service territory. For example, when customer service representatives schedule appointments for multiple locations. In such scenarios, set the value of the `DefaultTimeZone` variable to use the service territory time zone.

Preset a Time Zone for Appointment Time Slot Pages

Use the Default Time Zone attribute in Salesforce Scheduler flows to set a default time zone for all the pages that show appointment time slots. Or dynamically set a time zone for each page according to the selected service resource, service territory, customer, or browser time zone.

The Default Time Zone attribute is available on the Select Service Appointment Time, Select Service Resource and Service Appointment Time, and Select Service Resource pages in appointment flows.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Create a flow or edit an existing flow.

 **Note:** Before you can edit a flow, you must deactivate it.

3. Set the value of the Default Time Zone attribute in one of these ways.
 - To set a default time zone for a time slot page, enter a time zone in the Default Time Zone attribute on the corresponding flow screen component.
 - To quickly set one default time zone for all time slot pages, use the provided `DefaultTimeZone` flow variable to set the value of the attribute.
 - To dynamically set a time zone, apply custom logic to set the value of the attribute.

 **Note:** If you don't specify a value for the Default Time Zone attribute, the time slots are shown in the user's (appointment scheduler's) time zone.

4. Save your changes, and then activate the flow.

Set a Time Zone for the Review Appointment Page

By default, the appointment review page shows the scheduled appointment time in the same time zone that was selected on the appointment time slot page. However, you can override the default behavior and set a different time zone for the review page using the Time Zone attribute.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Create a flow or edit an existing flow.

 **Note:** Before you can edit a flow, you must deactivate it.

3. In Flow Builder, edit the flow screen with the Review Inbound or Outbound Service Appointment flow screen component.
4. Select the flow screen component.
5. Replace the default value of the Time Zone attribute with the time zone you want to set.

 **Note:** If you don't set a value for the Time Zone attribute, the appointment time is shown in the scheduler's time zone.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:

- Run Flows

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:


- Run Flows

6. Save your changes, and then activate the flow.

Enable Multiple Time Zone Selection

In your appointment flows, when you set the Show Time Zone Pick List attribute to True, the appointment time slot pages show a dropdown list with all the time zones supported in Salesforce. When scheduling appointments, users can select the time zone in which they want to see the appointment time slots.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Create a flow or edit an existing flow.

 **Note:** Before you can edit a flow, you must deactivate it.

3. In Flow Builder, on the **Manager** tab, edit the showTimeZonePicklist flow variable, and set its value to `{!$GlobalConstant.True}`.
4. Save your changes, and then activate the flow.

Use Service Territory Time Zone on Flow Screens

By default, Salesforce Scheduler shows time based on the time zone of the user who's scheduling the flow. But sometimes it makes more sense to show time based on the time zone of the selected service territory. For example, when customer service representatives schedule appointments for multiple locations. In such scenarios, set the value of the DefaultTimeZone variable to use the service territory time zone.

When you modify flows to use service territory time zone, the default value in the time zone dropdown list is also set to the service territory time zone. For example, the Time Zone dropdown list on the Select Service Appointment Time screen.

The steps to use the service territory time zone on flow screens are the same for inbound, outbound, and guest flows.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Click the flow for which you want to use the service territory time zone.
3. In Flow Builder, on the Manager tab, under Variables, click **DefaultTimeZone**.
4. In the Default Value field, enter

```
{!ServiceAppointment.ServiceTerritory.OperatingHours.TimeZone}.
```

5. Click **Done**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:

- Run Flows

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:

- Run Flows

To modify page layouts for Service Appointment:

- View Setup and Configuration
- Customize Application


6. Click **Save As**.
7. Enter values for Flow Label and Flow API Name, and then save your changes. An instance of the flow is created.
8. Activate the flow.
9. Add the flow instance to the page layout from which the flow is to be used. For more information, see [Set Up a Custom Outbound Flow \(Optional\)](#).

Add Validation Rules to Service Appointment Fields

Add validation rules to ensure that user inputs meet your requirements. You can also use validation rules to override the default error messages. For example, you can add a validation rule that enables users to save an appointment only after they enter a subject.

When users save an appointment, Salesforce Scheduler checks if all the validation rules are met. If a rule isn't met, Salesforce Scheduler shows the configured error message.

1. From the object management settings for service appointment, go to Validation Rules.
2. Click **New**.
3. Enter a rule name, error condition formula, and error message.


 **Note:** To check your formula for errors, click **Check Syntax**.

4. Save your changes.

Update Flows to Refresh Inputs

Configure your Salesforce Scheduler flows to ensure that when users go back to a page and make changes during appointment scheduling, the changes are reflected on the subsequent pages. Otherwise, if a user doesn't select the right value on a previous page, they must cancel the scheduling process and start over.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Edit the flow that you want to configure.

 **Note:** Before you can edit a flow, you must deactivate it.

3. In Flow Builder, edit the flow screen with the relevant flow screen component.
4. Select the flow screen component.
5. In the properties pane, expand **Advanced**. Under Revisited Screen Values, select **Refresh inputs to incorporate changes elsewhere in the flow**.
6. Repeat steps 3 through 5 for each flow screen.
7. Save your changes, and then activate the flow.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To view field validation rules:

- View Setup and Configuration

To define or change field validation rules:

- Customize Application

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:

- Run Flows

Debug a Salesforce Scheduler Flow as Another User

Test and debug a flow as another user without logging in as that user. You can troubleshoot a flow by seeing the flow's debug log as a user sees it.

1. In Setup, in the Quick Find box, enter *Process Automation Settings*, and then select **Process Automation Settings**.
2. Select the **Let admins debug flows as other users** checkbox.
3. Save your changes.
4. In Flow Builder, click **Debug**, and then select the **Run flow as another user** checkbox.
5. Choose the user to simulate while running the flow.
6. The flow debug run starts with the simulated user. Review the debug details.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Manage Objects' Data Translations

You can manage data translation for Work Type Group, Service Territory, and Service Resource objects. Use data translation to build Scheduler's appointment booking experience in multiple languages. For example, you can translate the work type group names and their description to Spanish for a customer who uses the website in Spanish to schedule appointments.

[Considerations for Data Translation of Objects](#)

Here are some things to keep in mind when you translate object data.

[Enable Data Translation](#)

Enable users to translate the data for Work Type Group, Service Territory, and Service Resource objects.

[Enable Translation Workbench](#)

Use Translation Workbench to specify languages for translation, to assign translators, and to manage your translations.

[Add Translation Languages and Translators](#)

Add languages for translation, assign translators for each language, and activate or deactivate a language's translations.

[Enable Translation of Custom Field Data](#)

Enable translation of custom field data for Work Type Group, Service Territory, and Service Resource objects. You can enable data translation for custom fields with Text, Text Area, Text Area (Long), Text Area (Rich), and URL types.

[Add the Translations Tab to an Object](#)

To associate translations with their objects, add the Translations tab.

[Add Translations to Standard and Custom Fields](#)

Add translations to standard and custom fields of Work Type Group, Service Territory, and Service Resource objects.

[Import and Export Translations](#)

You can import and export translated data files.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Considerations for Data Translation of Objects

Here are some things to keep in mind when you translate object data.

- Administrators who implement their own screens by using Scheduler APIs and custom SOQLs can translate data of objects. Out-of-the-box screens aren't supported.
- Data translation is supported for these objects and fields:
 - Name and Description fields for service resource, service territory, and work type group.
 - Custom fields defined on the object service resource, service territory, and work type group that are of type Text, Text Area, Text Area (Long), Text Area (Rich), and URL.

The Address field appears in the org's default language and can't be translated.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Enable Data Translation

Enable users to translate the data for Work Type Group, Service Territory, and Service Resource objects.

1. From Setup, in the Quick Find box, enter *Company Information*, and then select **Company Information**.
2. In the Organization Detail section, click **Edit**.
3. Under Translation Settings, select **Enable Data Translation**.
4. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Enable Translation Workbench

Use Translation Workbench to specify languages for translation, to assign translators, and to manage your translations.

1. From Setup, in the Quick Find box, enter *Translation Language Settings*, and then select **Translation Language Settings**.
2. Enable translation workbench.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Add Translation Languages and Translators

Add languages for translation, assign translators for each language, and activate or deactivate a language's translations.

Before adding a language for translation, ensure that you select languages for your org and enable Translation Workbench.


1. From Setup, in the Quick Find box, enter *Translation Language Settings*, and then select **Translation Language Settings**.
2. To add a language, click **Add**.
3. From the Language dropdown, select a language.
4. To make the translations available to your users, select **Active**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Users can change their personal language anytime even if the language is active in the Translation Workbench.

 **Note:** We recommend that you make a language active after the translators translate all values.

5. Under Identify Translators for this Language, select a user from the Available List box, and then click **Add** to move the user to the Selected List box.

The selected user controls the language translation.

 **Important:** Assign translators the View Setup and Configuration permission to enable them to translate. Users can translate only assigned languages.

6. Save your changes.

Enable Translation of Custom Field Data

Enable translation of custom field data for Work Type Group, Service Territory, and Service Resource objects. You can enable data translation for custom fields with Text, Text Area, Text Area (Long), Text Area (Rich), and URL types.

Before enabling data translation for custom fields, ensure that you enable data translation.

1. From Setup, in the Quick Find box, enter *Data Translation Settings*, and then select **Data Translation Settings**.
2. To enable data translation for custom fields, select an object.
Only objects that support data translation are listed.
3. Select the custom fields for which you want to enable translation.
4. Save your changes.

Add the Translations Tab to an Object

To associate translations with their objects, add the Translations tab.

1. Click an object tab, and then select an instance of the object.
For example, click the **Service Territories** tab, and then select a service territory.
2. Click the gear icon in the header, and then select **Edit Page**.
3. Select the section with the Related and Details tabs.
4. In the right pane, click **Add Tab**.
5. Click the new tab value, and then in the Tab Label dropdown, select **Translations**.
6. Click the **Translations** tab, and then add the Translations component.
7. Save your changes.
8. Click **Activation**, and then assign the profile for whom the Translations tab is visible.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Add Translations to Standard and Custom Fields

Add translations to standard and custom fields of Work Type Group, Service Territory, and Service Resource objects.

Before adding data translations, ensure that you add the Translations tab to the object.

1. Click an object tab, and then select an instance of the object.
For example, click the **Service Territories** tab, and then select a service territory.
2. Click the **Translations** tab, and then click **Add Translation**.
3. Select a language.
4. Enter the translated text for the name, description, and custom fields.
5. Save your changes.

Import and Export Translations

You can import and export translated data files.

- To import and update the translation files for your objects' custom field data, see [Import Translated Files](#).
- To generate your objects' custom field data files for your translators, see [Export Data Translation Files](#).

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

APPOINTMENT BOOKING EXPERIENCE CHANNELS

Add flows to Salesforce Lightning Service Console, Experience Cloud sites, and your company websites.

[Manage Flow Access](#)

Use flow access to limit users who can edit and run flows based on their user records, profiles, or permission sets. To apply more granular security to an individual flow, override the default behavior of the flow. And then grant access to the flow based on user profiles or permission sets.

[Set Up Outbound Scheduling](#)

Salesforce Scheduler provides standard flow templates to let your internal users (employees) quickly schedule appointments with customers. Users can easily search for and select the right person, topic, location, and date and time of the appointment. You can either use the provided standard flow templates or create flows based on those templates and customize them to suit your business needs.

[Set Up Inbound Scheduling](#)

Set up and configure the provided standard inbound flow templates to let your authenticated external users (customers and partners) and unauthenticated users (prospects) quickly schedule appointments with your employees.


EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Manage Flow Access

Use flow access to limit users who can edit and run flows based on their user records, profiles, or permission sets. To apply more granular security to an individual flow, override the default behavior of the flow. And then grant access to the flow based on user profiles or permission sets.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Click  for the flow that you want to edit, and then click **Edit Access**.

 **Note:** The Edit Access option is available only for a cloned or customized flow

3. Select **Override default behavior and restrict access to enabled profiles or permission sets**.
4. From the Available Profiles list, select the profiles to which you want to provide edit and run flow permissions.
5. To move the selected profiles to the Enabled Profiles list, click **Add**.
6. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Set Up Outbound Scheduling

Salesforce Scheduler provides standard flow templates to let your internal users (employees) quickly schedule appointments with customers. Users can easily search for and select the right person, topic, location, and date and time of the appointment. You can either use the provided standard flow templates or create flows based on those templates and customize them to suit your business needs.

Salesforce Scheduler provides these standard flow templates for internal users.

| Flow | Purpose |
|-----------------------------|--|
| Outbound New Appointment | Walks an employee through scheduling an appointment with a customer. |
| Outbound Modify Appointment | Walks an employee through modifying a scheduled appointment. |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

To give users access to the standard Outbound New Appointment flow, add the provided Schedule Appointment action to lead, account, person account, case, and opportunity page layouts. To give users access to the standard Outbound Modify Appointment flow, add the provided Modify Service Appointment action to the service appointment page layout. To give users access to your customized versions of the two outbound flows, create custom actions and add them to the page layouts for relevant objects.

Alternatively, you can embed a flow into a record page. Users can schedule or modify appointments without launching the flow in a separate window over the record page, which blocks their access to details on the page.

[Set Up the Outbound New Appointment Flow](#)

To give your users access to the provided Outbound New Appointment flow, add the Schedule Appointment action to lead, account, person account, case, and opportunity page layouts.

[Set Up the Outbound Modify Appointment Flow](#)

To give your users access to the Outbound Modify Appointment flow, add the Modify Service Appointment action to the service appointment page layout.

[Set Up a Custom Outbound Flow \(Optional\)](#)

To give your users access to a customized version of the Outbound New Appointment flow or Outbound Modify Appointment standard flow template, create an action and add it to the relevant page layout.

[Embed Outbound Flows Into Record Pages \(Optional\)](#)

When you embed a flow into a record page, users can schedule or modify appointments directly from the page. They don't have to use the quick action, which launches the flow in a separate window and blocks users' access to details on the page.

[Assign Permissions to Schedule Appointments](#)

Assign users the appropriate user permissions and object access to schedule appointments using the Salesforce Scheduler flows.

Set Up the Outbound New Appointment Flow

To give your users access to the provided Outbound New Appointment flow, add the Schedule Appointment action to lead, account, person account, case, and opportunity page layouts.

To use the Schedule Appointment action, a user needs the Run Flows permission.

1. In Setup, click **Object Manager**, and select **Account, Person Account, Case, Lead, or Opportunity**.
2. Select **Page Layouts** and select the page layout that you want to add the Schedule Appointment action to.
3. Select **Mobile & Lightning Actions** in the palette.

If you see a link to **override the predefined actions** in the Salesforce Mobile and Lightning Experience Actions section of the layout editor, click the link.

4. Drag the **Schedule Appointment** action to the top of the Salesforce Mobile and Lightning Experience Actions section.



Note: By default, the Schedule Appointment action exposes the provided Outbound New Appointment flow to users. If you want to distribute a customized version of Outbound New Appointment flow, create an action that uses the customized flow.

5. Save your changes.
6. Repeat these steps for each page layout.

Users can now click the **Schedule Appointment** button or the link in the dropdown list on account, case, person account, lead, or opportunity record pages to schedule appointments.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Set Up the Outbound Modify Appointment Flow

To give your users access to the Outbound Modify Appointment flow, add the Modify Service Appointment action to the service appointment page layout.

To use the Schedule Appointment action, a user needs the Run Flows permission.

1. In Setup, click **Object Manager**, and select **Service Appointment**.
2. Select **Page Layouts** and select the page layout that you want to add the Modify Service Appointment action to.
3. Select **Mobile & Lightning Actions** in the palette.

If you see a link to override the predefined actions in the Salesforce Mobile and Lightning Experience Actions section of the layout editor, click the link.

4. Drag **Modify Service Appointment** to the top of the Salesforce Mobile and Lightning Experience Actions section.



Note: By default, the Modify Service Appointment action exposes the provided Outbound Modify Appointment flow to users. To distribute a customized version of the Outbound Modify Appointment flow, create an action that uses the customized flow.

5. If you're setting up the Outbound Modify Appointment flow to reassign service appointments, drag **Reassign Service Appointment** to the top of the Salesforce Mobile and Lightning Experience Actions section.
6. Save your changes.

Users can now click **Modify Service Appointment** or the link in the dropdown list on the service appointment record page to reschedule appointments.

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

Set Up a Custom Outbound Flow (Optional)


To give your users access to a customized version of the Outbound New Appointment flow or Outbound Modify Appointment standard flow template, create an action and add it to the relevant page layout.

1. Create an action for your custom flow.

 **Note:** For your custom outbound new appointment flow, create actions for the Account, Case, Lead, and Opportunity objects. For your custom outbound modify appointment flow, create an action for the Service Appointment object.

 **Note:** The action that you create for accounts is also available for person accounts.

- a. In Setup, click **Object Manager**, and select the object that you want to create an action for.
 - b. Click **Buttons, Links, and Actions**, and then click **New Action**.
 - c. In the Action Type list, select **Flow**.
 - d. In the Flow list, select the name of your customized outbound flow.
 - e. Enter a label that users see as the name for the action.
 - f. Save your changes.
 - g. Repeat these steps for each object you want to create an action for.
2. Add the actions to the relevant object page layouts.


 **Note:** For your custom outbound new appointment flow, add the actions to the account, case, person account, lead, and opportunity page layouts. For your custom outbound modify appointment flow, add the action to the service appointment page layout.

- a. In Setup, click **Object Manager**, and select the object that you want to add the quick action for.
- b. Select **Page Layouts** and select the page layout that you want to add the quick action to.
- c. Select **Mobile & Lightning Actions** in the palette.
If you see a link to **override the predefined actions** in the Salesforce Mobile and Lightning Experience Actions section of the layout editor, click the link.
- d. Drag the action to the top of the Salesforce Mobile and Lightning Experience Actions section.
- e. Save your changes.

Embed Outbound Flows Into Record Pages (Optional)

When you embed a flow into a record page, users can schedule or modify appointments directly from the page. They don't have to use the quick action, which launches the flow in a separate window and blocks users' access to details on the page.

1. On the record page that you want to embed your Salesforce Scheduler flow into, from Setup, select **Edit Page**.
2. Drag the Flow component to the page.

 **Warning:** If you have enabled multi-resource scheduling, add the Flow component to the main region on the page. With multi-resource scheduling enabled, Salesforce Scheduler flows don't work when added to tabs or to the sidebar on a record page.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

- In the Properties pane, from the Flow list, select the Salesforce Scheduler flow that you want to add.
- Save your changes.

Assign Permissions to Schedule Appointments

Assign users the appropriate user permissions and object access to schedule appointments using the Salesforce Scheduler flows.

- In Setup, in the Quick Find box, enter *Profiles*, then select Profiles.
- Click **Edit** next to the profile that you want to assign permissions to.
- Under General User Permissions, select these permissions.

User Permission

Run Flows

- **Access Activities**
- **Edit Events**

Purpose

To run appointment flows.

To write and update events on Salesforce calendar.



Note: Applicable only when the Event Management setting is enabled.

- Under Standard Object Permissions, define appropriate access levels for these objects.

| Object | Permissions |
|------------------------------|--------------------|
| Appointment Topic Time Slots | Read |
| Accounts | Read |
| Contacts | Read |
| Operating Hours | Read |
| Service Appointments | Read, Create, Edit |
| Service Resources | Read |
| Service Territories | Read |
| Work Types | Read |
| Work Type Groups | Read |

- Save your changes.
If you see a permission change confirmation, click **Save**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Set Up Inbound Scheduling

Set up and configure the provided standard inbound flow templates to let your authenticated external users (customers and partners) and unauthenticated users (prospects) quickly schedule appointments with your employees.

Set Up Scheduling for Authenticated External Users

With Salesforce Scheduler, your authenticated external users (customers and partners) can use standard flow templates to quickly schedule appointments with your employees. Users can easily search for and select the right person, topic, location, and date and time of the appointment. You can either use the provided standard flow templates or create flows based on those templates and customize them to suit your business requirement.

Set Up Scheduling for Guest Users

Salesforce Scheduler provides a standard flow template, Inbound New Guest Appointment, to let your unauthenticated external users (leads or prospects) quickly schedule appointments with your employees. Users can easily search for and select the right person, topic, location, and date and time for the appointment. You can either use the provided standard flow template or create a flow based on the template and then customize the new template per your business needs.

Set Up Scheduling for Authenticated External Users

With Salesforce Scheduler, your authenticated external users (customers and partners) can use standard flow templates to quickly schedule appointments with your employees. Users can easily search for and select the right person, topic, location, and date and time of the appointment. You can either use the provided standard flow templates or create flows based on those templates and customize them to suit your business requirement.

Salesforce Scheduler provides these standard flow templates for authenticated external users.

| Flow | Purpose |
|----------------------------|--|
| Inbound New Appointment | <p>Walks an authenticated external user through scheduling an appointment with one or more employees or contractors.</p> <p>You can modify this flow and make it available as an outbound flow to community users. For more information, see Make the Inbound Flow Available as an Outbound Flow. By using the modified flow, partner users, such as independent wealth advisers or automotive dealership personnel, can easily book appointments.</p> |
| Inbound Modify Appointment | <p>Walks an authenticated external user through modifying a scheduled appointment.</p> <p>Partner users (contractors) can also use this flow to modify their appointments using Experience Cloud.</p> |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Flow | Purpose |
|----------------------------|---|
| Inbound Cancel Appointment | Walks an authenticated external user through canceling a scheduled appointment. |

To give your authenticated external users access to inbound appointment flows, add inbound appointment flows in your Experience Cloud site.

[Supported Licenses for Authenticated External Users](#)

To configure inbound scheduling in your Experience Cloud site or on your website, your authenticated external users must have one of these communities licenses. Communities licenses are used with Experience Cloud sites and legacy portals. Browser support for Experience Cloud sites varies by the device on which you access the site or the template.

[Grant Authenticated Users Required User and Object Permissions](#)

To schedule appointments, authenticated users need certain user and object permissions. You can grant these permissions to users through their user profiles or permission sets.

[Update Sharing Settings for Authenticated External Users Who Schedule Appointments](#)

Use organization-wide default sharing settings to set the baseline external access for Salesforce Scheduler records.

[Additional Configuration for Inbound Modify Appointment Flow](#)

If the Event Management setting is enabled in your org, you must perform extra steps to make the Inbound Modify Appointment flow work.

[Add Inbound Flows to an Experience Cloud Site](#)

Add one or more inbound flows to your site to let your authenticated site users schedule, modify, or cancel appointments.

[Make the Inbound Flow Available as an Outbound Flow](#)

To provide the inbound flow as an outbound flow, use the Outbound flow available to community users attribute. With the outbound flow enabled, service resources who are contractors can create and manage service appointments for either an account, opportunity, or lead. Contractors can also request their assistants to book appointments on their behalf.

Supported Licenses for Authenticated External Users

To configure inbound scheduling in your Experience Cloud site or on your website, your authenticated external users must have one of these communities licenses. Communities licenses are used with Experience Cloud sites and legacy portals. Browser support for Experience Cloud sites varies by the device on which you access the site or the template.

- Customer Community



Note: This license doesn't support the Event Management setting. That is, you can't integrate Salesforce Scheduler with the Salesforce Calendar to show scheduled appointments as events on the Salesforce Calendar.

- Customer Community Plus
- Partner Community
- Channel Account

Communities license limitations apply to Salesforce Scheduler.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Grant Authenticated Users Required User and Object Permissions

To schedule appointments, authenticated users need certain user and object permissions. You can grant these permissions to users through their user profiles or permission sets.

1. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
2. Click **Edit** next to the profile that you want to assign permissions to.
3. Under General User Permissions, select these permissions.

User Permission

Purpose

Access Activities

To create and update events on Salesforce calendar.



Note: Required only if the Event Management setting is enabled.

Run Flows

To run inbound flows.

4. Under Standard Object Permissions, define appropriate access levels for these objects.

Object

Permissions

Accounts

Read

Appointment Category

Read

Contacts

Read

Operating Hours

Read

Service Appointments

Read, Create, Edit

Service Resources

Read

Service Territories

Read

Shift

Read

Appointment Topic Time Slots

Read

Work Types

Read

Work Type Groups

Read

5. Save your changes.



Important: Under Field-Level Security, Salesforce Scheduler provides required access for these objects by default.

| Object | Field | Permission |
|------------------------|-----------------------|------------|
| Service Resource Skill | Skill Level, End Date | Read |
| Skill Requirement | Skill Level | Read |

If you remove these permissions, it can lead to an error.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create and edit events on Salesforce calendar


- Edit Events on service resources

Update Sharing Settings for Authenticated External Users Who Schedule Appointments

Use organization-wide default sharing settings to set the baseline external access for Salesforce Scheduler records.

1. From Setup, in the Quick Find box, enter *Sharing Settings*, and then select **Sharing Settings**.
2. Under Organization-Wide Defaults, set the sharing settings as described in this table.
3. Under General User Permissions, select these permissions.

| Object | Default External Access |
|----------------------------|-----------------------------|
| Operating Hours | Public Read Only |
| Calendar | Show Details and Add Events |
| Service Appointment | Public Read/Write |
| Service Resource | Public Read Only |
| Service Territory | Public Read Only |
| Work Type | Public Read Only |
| Work Type Group | Public Read Only |
| User | Public Read Only |

 **Note:** Required only if the Event Management setting is enabled.

Ideally, it's recommended to set the access level for user records via a sharing rule.

4. Save your changes.

Additional Configuration for Inbound Modify Appointment Flow

If the Event Management setting is enabled in your org, you must perform extra steps to make the Inbound Modify Appointment flow work.

1. Give your users edit permission on Account and Contact.
 - a. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.
 - b. Click **Edit** next to the profile that you want to assign permissions to.
 - c. Under Standard Object Permissions, select Edit for Account and Contact objects.
2. Give your partner users read and write access to partner account records. You can do that in one of the following ways.
 - Manually share account records with partner users.
 - Create a sharing set to give read and write access to partner users
 - Use a sharing rule on Account to share account records with partner users.

EDITIONS

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EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions

3. In Sharing Settings, under Organization-Wide Defaults, for Activity, set default internal access to Controlled By Parent.
4. For the Public field on the Event object, set the field-level security to Visible for partner user and admin profiles.
5. Create a workflow rule on the Event object to set 'Public' flag to true when partner users create an event.

| Workflow Rule Detail | | Edit | Delete | Clone | Activate |
|----------------------|--|-------------|---------------------------------|---------------------|--|
| Rule Name | Set Public | | | | |
| Active | <input type="checkbox"/> | | | | |
| Description | | Object | Event | Evaluation Criteria | Evaluate the rule when a record is created |
| Rule Criteria | Current User: Profile CONTAINS Partner | | | | |
| Created By | Admin User, 4/16/2020, 10:13 PM | Modified By | Admin User, 4/16/2020, 10:13 PM | | |

| Workflow Actions | | Edit |
|--|-----------------|------|
| Immediate Workflow Actions | | |
| Type | Description | |
| Field Update | Set Public Flag | |
| Time-Dependent Workflow Actions See an example | | |
| <div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4;"> <p>i No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.</p> </div> | | |
| Edit | | |

Add Inbound Flows to an Experience Cloud Site

Add one or more inbound flows to your site to let your authenticated site users schedule, modify, or cancel appointments.

1. From your inbound scheduling site, click Experience Builder in the profile menu.
2. In Experience Builder, select the **Components** icon.
3. Enter *Flow* into the search box.
4. Drag the Flow component onto the canvas.
5. From the Flow list, select a standard flow template, such as Inbound New Appointment, Inbound Modify Appointment, Inbound Cancel Appointment, or a custom inbound scheduling flow.



Note:

- If the Event Management setting is enabled, you must perform certain extra steps for the Inbound Modify Appointment flow. For information, see [Additional Configuration for Inbound Modify Appointment Flow](#) on page 190.
- To modify and cancel appointments, you must also add the Service Appointment object to the Navigation Menu. For more information, see [Navigation Menu](#).

6. Repeat steps 4 and 5 to add more flows.
7. Click **Publish** to save and publish your changes.


EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

Make the Inbound Flow Available as an Outbound Flow

To provide the inbound flow as an outbound flow, use the Outbound flow available to community users attribute. With the outbound flow enabled, service resources who are contractors can create and manage service appointments for either an account, opportunity, or lead. Contractors can also request their assistants to book appointments on their behalf.

 **Note:** Outbound flow for community users has the same behavior for anonymous bookings and filter by resource bookings as any other outbound flow. To enter a value in the Parent Record field, invoke the flow from the Account's Detail page.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Edit the required Inbound New Appointment flow.

 **Note:** Before you can edit a flow, ensure that you deactivate it.

3. In the Flow Builder, under Toolbar, click **Manager**.
4. Under Variables, click **IsInbound**.
5. Enter the default value as *false*, and then click **Done**.
6. Under Variables, click **isOutboundCommunity**.
7. Enter the default value as *true*, and then click **Done**.
8. Save your changes, and then activate the flow.

The Inbound flow is available as an Outbound flow to community users. This Outbound flow is also compatible on mobile devices.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

Set Up Scheduling for Guest Users

Salesforce Scheduler provides a standard flow template, Inbound New Guest Appointment, to let your unauthenticated external users (leads or prospects) quickly schedule appointments with your employees. Users can easily search for and select the right person, topic, location, and date and time for the appointment. You can either use the provided standard flow template or create a flow based on the template and then customize the new template per your business needs.

Watch the video to see how to enable guest users to book appointments from Experience Cloud sites and your company websites.

 [Watch a video](#)

If you aren't able to watch the view in full screen, open the video on a new tab:  [Enable Guest Users to Book Appointments by Using Flows in Salesforce Scheduler](#).

Here are the ways to give your guest users access to the Inbound New Guest Appointment flow:

- Experience Cloud sites: Add the inbound new guest appointment flow to your Experience Cloud site.
- External websites (your company websites):
 - Add a redirect to an Experience Cloud site: Add the inbound new guest appointment flow to an Experience Cloud site page. Then, add a link to your company website to launch the Experience Cloud site page.

 **Note:** You can register a customized domain in Salesforce to use with your site for branding.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

- Use Lightning Out: Add the inbound new guest appointment flow directly to your website by adding a Lightning Out-dependency app. Then, your users can access the inbound new guest appointment flow from your company website and also remain on your company website's URL.

 **Note:** Guest users can't modify or delete existing appointments.

You can also set up scheduling experiences for guest users by using APIs. For more information, see [Salesforce Scheduler Business APIs](#).

[Grant Guest Users Required User and Object Permissions](#)

To schedule appointments, guest users need certain user and object permissions. You can grant these permissions to guest users through the guest user profile for your Experience Cloud site.

[Create Sharing Rules for Guest Users Who Schedule Appointments](#)

Create criteria-based record-sharing rules to control which records are exposed to your guest users.

[Add the Inbound New Guest Appointment Flow to an Experience Cloud Site](#)


Add the Inbound New Guest Appointment flow to your Experience Cloud site so that your guest users can schedule appointments.


[Add Inbound New Guest Appointment Flow to Websites Using Lightning Out](#)

Add a Lightning Out-dependency app to your company website (external website) to give your unauthenticated users access to the Inbound New Guest Appointment flow.

Grant Guest Users Required User and Object Permissions

To schedule appointments, guest users need certain user and object permissions. You can grant these permissions to guest users through the guest user profile for your Experience Cloud site.

 **Note:** When you create an Experience Cloud site, Salesforce automatically creates a guest user profile for it.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
2. On the All Sites page, click **Builder** next to the site for which you want to configure guest access.
3. In Experience Builder, click .
4. Under Settings, select the **General** tab, and then under Public Access, select **Guest users can see and interact with the site without logging in**.
5. Under Guest User Profile, click the guest user profile link.

EDITIONS

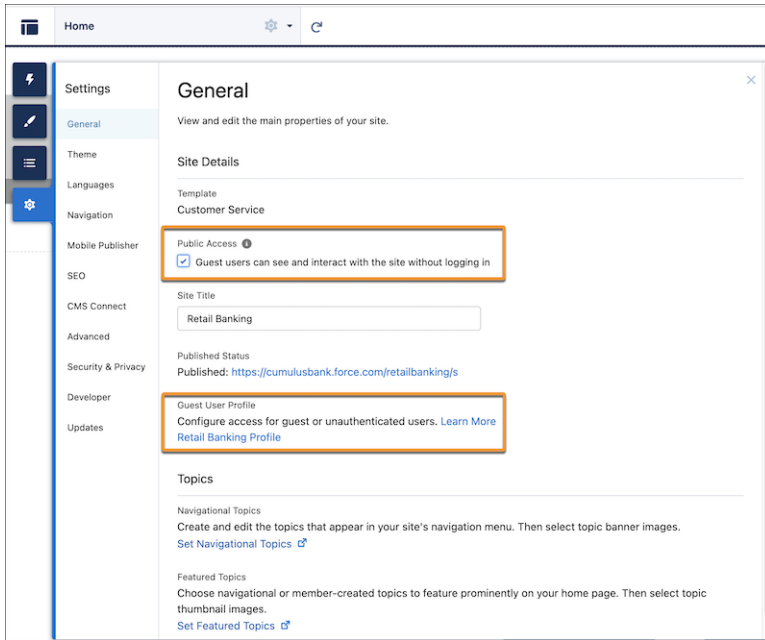
Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To create and edit events on Salesforce calendar:

- Edit Events on service resources




The profile page opens.

6. Click **Edit**.
7. Give flow access:
 - a. Click **Edit** for Enabled Flow Access.
 - b. From the Available Flows list, select the flows for which you want to give the guest user profile access.
To show a flow in the Available Flows list, ensure that the System Administrator profile is enabled for the flow. For more information, see [Manage Flow Access](#).
 - c. To move the selected flows to the Enabled Flows list, click **Add**.
 - d. Save your changes.
8. Under Standard Object Permissions, assign these access levels for the objects:

| Object | Permissions |
|------------------------------|--------------|
| Appointment Category | Read |
| Appointment Topic Time Slots | Read |
| Leads | Read, Create |
| Operating Hours | Read |
| Service Appointments | Read, Create |
| Service Resources | Read |
| Service Territories | Read |
| Shift | Read |
| Work Types | Read |


| Object | Permissions |
|------------------|-------------|
| Work Type Groups | Read |

9. Save your changes.
10. On the profile page, under Field-Level Security, click **View** next to Time Slot, and then click **Edit**.
11. Give read access to Maximum Appointments and Work Type Group, and then save your changes.
12. Set the guest user's default timezone:
 - a. On the profile page, click **View Users**.
 - b. Click **Edit** next to the guest user.
 - c. Under Locale Settings, set the time zone, and then save your changes.

 **Note:** For guest users, the date and time formats configured under Salesforce's locale settings are overridden by the browser's locale settings.

Create Sharing Rules for Guest Users Who Schedule Appointments

Create criteria-based record-sharing rules to control which records are exposed to your guest users.

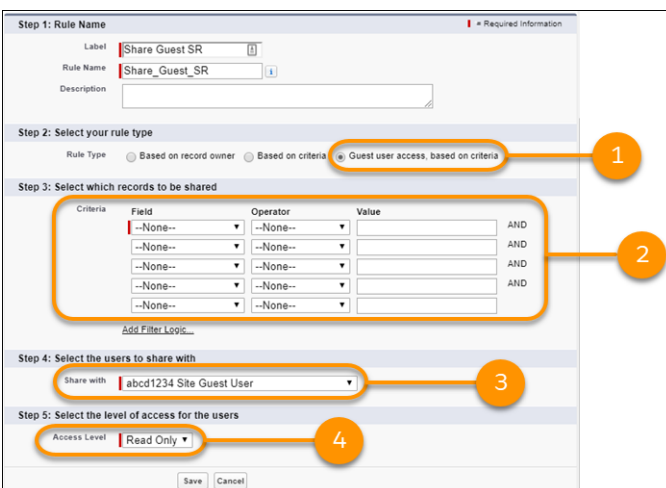
 **Note:** Operating Hours, Service Resource, Service Territory, Work Type, and Work Type Group require at least one sharing rule each. Without at least one sharing rule per object, unauthenticated users can't access the records required for the Inbound New Guest Appointment flow.

1. From Setup, in the Quick Find box, enter *sharing*, then select **Sharing Settings**.
2. Under Service Resource Sharing Rules, click **New**.
3. Enter a label for the rule.

EDITIONS

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Available in: **Enterprise** and **Unlimited** Editions



The screenshot shows the 'New Sharing Rule' configuration page in Salesforce. It is divided into five steps:

- Step 1: Rule Name**: Label is 'Share Guest SR', Rule Name is 'Share_Guest_SR', and Description is empty.
- Step 2: Select your rule type**: 'Guest user access, based on criteria' is selected (indicated by callout 1).
- Step 3: Select which records to be shared**: A table with columns 'Field', 'Operator', 'Value', and 'AND'. All fields are currently set to '--None--' (indicated by callout 2).
- Step 4: Select the users to share with**: 'Share with' dropdown is set to 'abcd1234 Site Guest User' (indicated by callout 3).
- Step 5: Select the level of access for the users**: 'Access Level' dropdown is set to 'Read Only' (indicated by callout 4).

Buttons for 'Save' and 'Cancel' are at the bottom.

4. Select **Guest user access, based on criteria** (1).
5. Define the criteria for your guest record-sharing rule (2).

6. From the **Share with** dropdown list, select your guest user (3).
7. Set Access Level to **Read Only** (4), and then click **Save**.
8. Repeat these steps for Operating Hours, Service Territory, Work Type, and Work Type Group sharing rules.

Add the Inbound New Guest Appointment Flow to an Experience Cloud Site

Add the Inbound New Guest Appointment flow to your Experience Cloud site so that your guest users can schedule appointments.

Ensure that you provide the required user and object permissions to your guest users. For more information, see [Grant Guest Users Required User and Object Permissions](#) and [Create Sharing Rules for Guest Users Who Schedule Appointments](#).

1. In your site, in the profile menu, click Experience Builder.
2. In Experience Builder, select **Components**.
3. Enter *Flow*.
4. Drag the Flow component onto a public page on your site.
5. From the Flow list, select **Inbound New Guest Appointment**.
6. To save and then publish your changes, click **Publish**.

EDITIONS


Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Add Inbound New Guest Appointment Flow to Websites Using Lightning Out

Add a Lightning Out-dependency app to your company website (external website) to give your unauthenticated users access to the Inbound New Guest Appointment flow.

Ensure that you provide the required user and object permissions to your guest users. For more information, see [Grant Guest Users Required User and Object Permissions](#) and [Create Sharing Rules for Guest Users Who Schedule Appointments](#).

 **Note:** When Scheduler flows are hosted on external websites, the flow uses the language set for the browser instead of the language set for the guest user profile.

1. Create a copy of the Inbound New Guest Appointment standard flow template.
2. To ensure the accurate alignment of UI elements, add this `<style>` tag to your webpage:

```
<style>
  .slds-visual-picker_vertical .slds-visual-picker__figure {
    height: inherit !important;
  }


  .runtime_appointmentbookingFlowLocation .slds-visual-picker_vertical {
    display: inline-flex !important;
  }
</style>
```

3. To add a reference to the JavaScript Lightning Out library, use the `script` tag:
 - a. Add `<script src="https://YourSiteDomain/lightning/lightning.out.js"></script>` to your webpage.
 - b. Replace `https://YourSiteDomain/` with your Experience Cloud site URL.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

 **Warning:** If you add SiteURL in the `script` tag, the flow doesn't work.

4. To load and activate the lightningOutGuest app on your webpage:

a. Add this standard Lightning Out JavaScript code:

```
<script>
  $Lightning.use("runtime_appointmentbooking:lightningOutGuest",
    function() { // Callback once framework and app load
      $Lightning.createComponent(
        "lightning:flow", // top-level component of your app
        { }, // attributes to set on the component when created
        "lexcontainer", // the DOM location to insert the component
        function(component) { // API name of the Flow
          component.startFlow("Salesforce_Scheduler_Unauthenticated");
        }
      );
    }, 'https://YourSiteDomain/SiteURL/' // Site endpoint
  );
</script>
```

b. Replace `lexcontainer` with the page location where you want to insert the lightning component, and then invoke the lightning component from another tag. Here's a sample code to invoke the lightning component:

```
<div id="lexcontainer">
  <p>Invoke the Lightning Component specified in the Script.</p>
</div>
```

c. Replace `https://YourSiteDomain/SiteURL` with the Experience Cloud site URL that contains the Inbound New Guest Appointment flow with the required object permissions.


5. To add the external site origin URL to CORS:

a. From Setup, in the Quick Find box, enter `CORS`, and then select **CORS**.

b. Click **New**.

c. In the Origin URL Pattern field, enter the external site origin URL.

d. Save your changes.

 **Note:** When Scheduler flows are hosted on external websites, the resource cards show standard images instead of photographs of service resources.

USAGE AND TROUBLESHOOTING

Run flows to manage appointments, generate appointment URLs, book appointments using URLs, and troubleshoot flows.

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

Use Salesforce Scheduler to schedule an appointment with a customer and an assigned resource or resources. Modify an appointment to reschedule it to a different date or time or to add more service resources. Cancel the appointment if the customer can no longer make it. After you schedule an appointment, deleting service resources, modifying work type durations, or modifying the appointment to remove assigned service resources can result in unexpected behavior.

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

Customers, partners, and prospects can use Salesforce Scheduler to schedule appointments with your service resources. They can also modify appointments to reschedule them or add service resources, and cancel appointments. After an appointment is scheduled, deleting service resources, modifying work type durations, or modifying the appointment to remove assigned service resources can result in unexpected behavior.

[Share Service Resource Availability by Using an Invitation URL](#)

Service resources or their assistants can share the time period during which the resources are available for appointment booking. They can define and share the appointment criteria with users by creating an invitation URL. Users can navigate to the invitation URL and book an appointment. The URL directs users to the starting week of when the service resource is available.

[Checklist to Troubleshoot Flow Screens in Salesforce Scheduler](#)

Salesforce Scheduler uses various settings, policies, and filters to show records on flow screens. When users don't see records on flow screens, troubleshoot using these steps. Before you troubleshoot, check data permissions and field-level permissions to confirm that users have the necessary access.

[Field-Level Security \(FLS\) Permissions Checklist](#)

With field-level security (FLS) settings, you can restrict your users' access to view and edit specific fields. You can also use FLS settings to provide access to fields that are required to create and modify appointments. If you face FLS permission errors, ensure that users have the necessary field-level permissions.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Create and Manage Outbound Appointments in Salesforce Scheduler

Use Salesforce Scheduler to schedule an appointment with a customer and an assigned resource or resources. Modify an appointment to reschedule it to a different date or time or to add more service resources. Cancel the appointment if the customer can no longer make it. After you schedule an appointment, deleting service resources, modifying work type durations, or modifying the appointment to remove assigned service resources can result in unexpected behavior.

[Schedule an Outbound Appointment in Salesforce Scheduler](#)

An appointment represents a meeting—in person, or by phone or video—with a customer and an assigned resource or resources.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

[Reschedule an Outbound Appointment in Salesforce Scheduler](#)

You can reschedule a service appointment to change the appointment date and time or to add more service resources to the appointment.


[Cancel an Outbound Appointment in Salesforce Scheduler](#)

Use the provided Cancel Service Appointment quick action to cancel an appointment.

Schedule an Outbound Appointment in Salesforce Scheduler

An appointment represents a meeting—in person, or by phone or video—with a customer and an assigned resource or resources.

1. Open the account, person account, case, lead, or opportunity record that you want to schedule an appointment with.


 **Note:** Salesforce Scheduler doesn't support scheduling appointments with any other type of record. Selecting a record other than account, person account, case, lead, or opportunity can lead to an error.

2. On the record page, click **Schedule Appointment**.


For a case record, you can invoke the flow by embedding the flow component in the Case record page. For information on how to embed the flow component, see [Embed Outbound Flows Into Record Pages \(Optional\)](#).

3. Select an attendee (service resource) for the appointment, and then click **Next**.

You can select an attendee by name; search for an attendee by appointment topic (work type group), by appointment type, or by location (service territory); or select a resource from previously scheduled appointments.

 **Note:** When you select the By name or By previously scheduled service appointments option, Salesforce Scheduler shows only service resources of the type Technician and doesn't show assets.

4. Select a work type group, and then click **Next**.

 **Important:** By default, Salesforce Scheduler shows work type groups that support both drop-in and scheduled appointments. To filter out work type groups that support only drop-in appointments, use the Filter by Work Type Group IDs attribute on the Select Work Type Group flow page.

5. Select an appointment type, such as phone, video, or at a branch, and then click **Next**.

6. Select an appointment location:

a. Enter an address, city, or ZIP code.

b. Select the radius.

A list of all active service territories that are associated with the selected appointment topic, including the branch name, address, and operating hours appears.

c. Select a service territory.

d. Click **Next**.

 **Note:** The Maps and Location Services permission is enabled in Enterprise editions by default.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To run appointment flows:

- Run Flows

To create and modify appointments in Salesforce Scheduler:

- Read, Create, and Edit on service appointments
- Read on accounts, contacts, operating hours, service resources, service territories, work types, and work type groups

7. Select a time slot, and then click **Next**.
8. Review your service appointment details, enter a subject and description for the appointment if necessary, and then click **Next**.
9. Click **Finish**.

Reschedule an Outbound Appointment in Salesforce Scheduler

You can reschedule a service appointment to change the appointment date and time or to add more service resources to the appointment.

1. On the Service Appointments tab, click the service appointment that you want to reschedule.
2. On the record page, click the **Modify Service Appointment** quick action.
3. Select a new time slot. Under Manage Service Resources, add one or more service resources, if needed. Click **Next**.
4. Review your service appointment details, click **Next**, and then click **Finish**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To run appointment flows:

- Run Flows

To create and modify appointments in Salesforce Scheduler:

- Read, Create, and Edit on service appointments
- Read on accounts, contacts, operating hours, service resources, service territories, work types, and work type groups

Cancel an Outbound Appointment in Salesforce Scheduler

Use the provided Cancel Service Appointment quick action to cancel an appointment.

1. On the Service Appointments tab, click the service appointment that you want to cancel.
2. On the record page, click the **Cancel Service Appointment** quick action.
3. From Cancellation Status, select **Canceled**.
4. Optionally, enter a reason for canceling the appointment.
5. Click **Confirm Cancellation**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To cancel appointments in Salesforce Scheduler:

- Edit on service appointments
- Edit on the Status, Status Category, and Cancellation Reason fields of service appointments

Create and Manage Inbound Appointments in Salesforce Scheduler

Customers, partners, and prospects can use Salesforce Scheduler to schedule appointments with your service resources. They can also modify appointments to reschedule them or add service resources, and cancel appointments. After an appointment is scheduled, deleting service resources, modifying work type durations, or modifying the appointment to remove assigned service resources can result in unexpected behavior.

[Schedule an Inbound Appointment in Salesforce Scheduler](#)

Customers, partners, and prospects can schedule a meeting—in person, by phone, or by video—with service resources.

[Reschedule an Inbound Appointment in Salesforce Scheduler](#)

Customers, partners, and prospects can reschedule a service appointment to change the appointment date and time or to add service resources.

[Cancel an Inbound Appointment in Salesforce Scheduler](#)

Customers, partners, and prospects can cancel an appointment.


EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Schedule an Inbound Appointment in Salesforce Scheduler

Customers, partners, and prospects can schedule a meeting—in person, by phone, or by video—with service resources.

1. On the **Home** tab, click **Schedule Appointment**.
2. Select an attendee (service resource) for the appointment.
You can select an attendee by name or search for an attendee by appointment topic (work type group), appointment type, or location (service territory).
3. Click **Next**.
4. Select a work type group, and then click **Next**.
 **Important:** By default, Salesforce Scheduler shows work type groups that support both drop-in and scheduled appointments. To filter out work type groups that support only drop-in appointments, use the Filter by Work Type Group IDs attribute on the Select Work Type Group flow page.
5. Select an appointment type if necessary, and then click **Next**.
6. Select a service territory (appointment location):
 - a. Enter an address, city, or ZIP code.
 - b. Select the radius.
A list of all active service territories that are associated with the selected appointment topic appear.
 - c. Select a service territory.
 - d. Click **Next**.
7. Select a time slot, and then click **Next**.
8. Review your service appointment details.
9. If necessary, enter a subject and description for the appointment.
10. Click **Next**, and then click **Finish**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To run appointment flows:

- Run Flows

To create and modify appointments in Salesforce Scheduler:

- Read, Create, and Edit on service appointments
- Read on accounts, contacts, operating hours, service resources, service territories, work types, and work type groups

Reschedule an Inbound Appointment in Salesforce Scheduler

Customers, partners, and prospects can reschedule a service appointment to change the appointment date and time or to add service resources.

1. On the **Service Appointments** tab, click the service appointment that you want to reschedule.
2. Click **Modify Inbound Appointment**.
3. Select a new time slot. Click **Manage**, and then add resources, if needed. Click **Next**.
4. Review your service appointment details.
5. If needed, modify the subject and description for the appointment.
6. Click **Next**, and then click **Finish**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To run appointment flows:

- Run Flows

To create and modify appointments in Salesforce Scheduler:

- Read, Create, and Edit on service appointments
- Read on accounts, contacts, operating hours, service resources, service territories, work types, and work type groups

Cancel an Inbound Appointment in Salesforce Scheduler

Customers, partners, and prospects can cancel an appointment.

1. On the **Service Appointments** tab, open the dropdown for the service appointment that you want to cancel, and then select **Cancel Service Appointment**.
The Cancel Service Appointment dialog appears.
2. Confirm that the Cancellation Status is Canceled, enter a reason for the cancellation if necessary, and then click **Confirm Cancellation**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To cancel appointments in Salesforce Scheduler:

- Edit on service appointments
- Edit on the Status, Status Category, and Cancellation Reason fields of service appointments

Share Service Resource Availability by Using an Invitation URL

Service resources or their assistants can share the time period during which the resources are available for appointment booking. They can define and share the appointment criteria with users by creating an invitation URL. Users can navigate to the invitation URL and book an appointment. The URL directs users to the starting week of when the service resource is available.

For example:

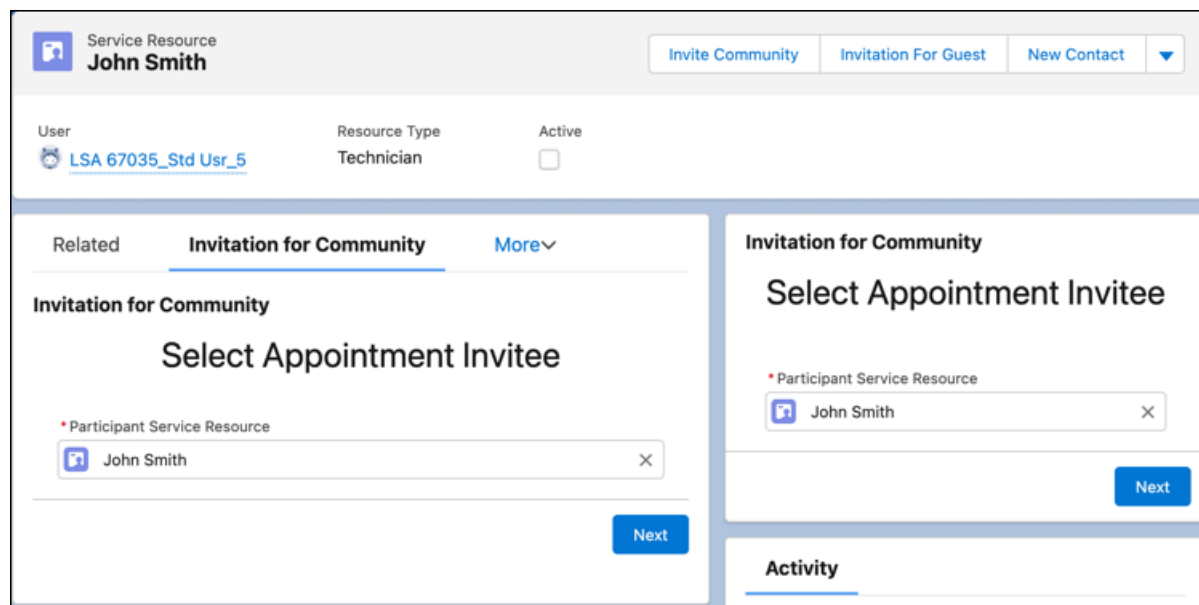
- A wealth manager (contractor) can generate an appointment invitation URL and add the URL to their signature. Prospective clients can use this URL to book appointments.
- An equity portfolio manager (contractor) wants to share their availability three months in the future with an existing client (authenticated consumer) for portfolio review. The equity portfolio manager can generate a URL with a start date that's three months from the current date, and then share the URL with the client.

 **Note:** An assistant can also create an appointment invitation URL on behalf of contractors and then share the URL with clients.

Enable the resource availability sharing capability by using these flows:


Generate Appointment Invitation

By using this flow, either service resources or their assistants can generate the appointment invitation URL. Customers can customize the flow to enhance the appointment booking experience. For example, customers can either select a default work type group or service territory or skip the time slot preview page. They can also embed this flow by using the Lightning App builder and launch the flow from an authenticated consumer's accounts page.



Book Appointment from Invitation

With this feature, users can book appointments by using the appointment invitation URL. Customers can customize this flow according to their requirement.

 **Note:** Both Generate Appointment Booking and Book Appointment from Invitation flows don't consider account's visiting hours and resource preferences.


Watch the video to see how to share service resource availability by Using an Invitation URL.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

 [Watch a video](#)

If you aren't able to watch the view in full screen, open the video on a new tab:  [Share Service Resource Availability by Using an Invitation URL](#).

[Create an Invitation URL Prefix for Community Sites](#)

To generate an appointment invitation URL, create a URL prefix first. Then enter the URL prefix in the InvitationURLPrefix flow variable of the Select Service Appointment Time flow screen component.

[Create a Quick Action to Launch the Flow](#)

With quick actions, you can launch and navigate through workflows and perform a series of actions with just a few clicks. For example, to generate invitations quickly, create a quick action for generating the appointment invitation flow.

[Add Flow Quick Action to Service Resource Record Pages](#)

To launch the generate appointment invitation flow from the Service Resource record page, add the flow quick action to the Service Resource record page.

[Generate an Appointment Invitation URL](#)

Generate appointment invitation URLs to share with your customers. Customers can use appointment invitation URLs to quickly book an appointment.

[Generate an Appointment Invitation URL for a Customer Website](#)

You can generate an appointment invitation URL that directly opens within a customer portal via Lightning Out.


[Book a Service Appointment by Using an Appointment Invitation URL](#)

Use the appointment invitation URL to book service appointments.

Create an Invitation URL Prefix for Community Sites

To generate an appointment invitation URL, create a URL prefix first. Then enter the URL prefix in the InvitationURLPrefix flow variable of the Select Service Appointment Time flow screen component.

Ensure that you've created a flow page and configured the Book Appointment from Invitation flow for your site. To pass the invitation key to the flow, when you configure the flow, enter `{!invitationKey}` in the invitationKey field.

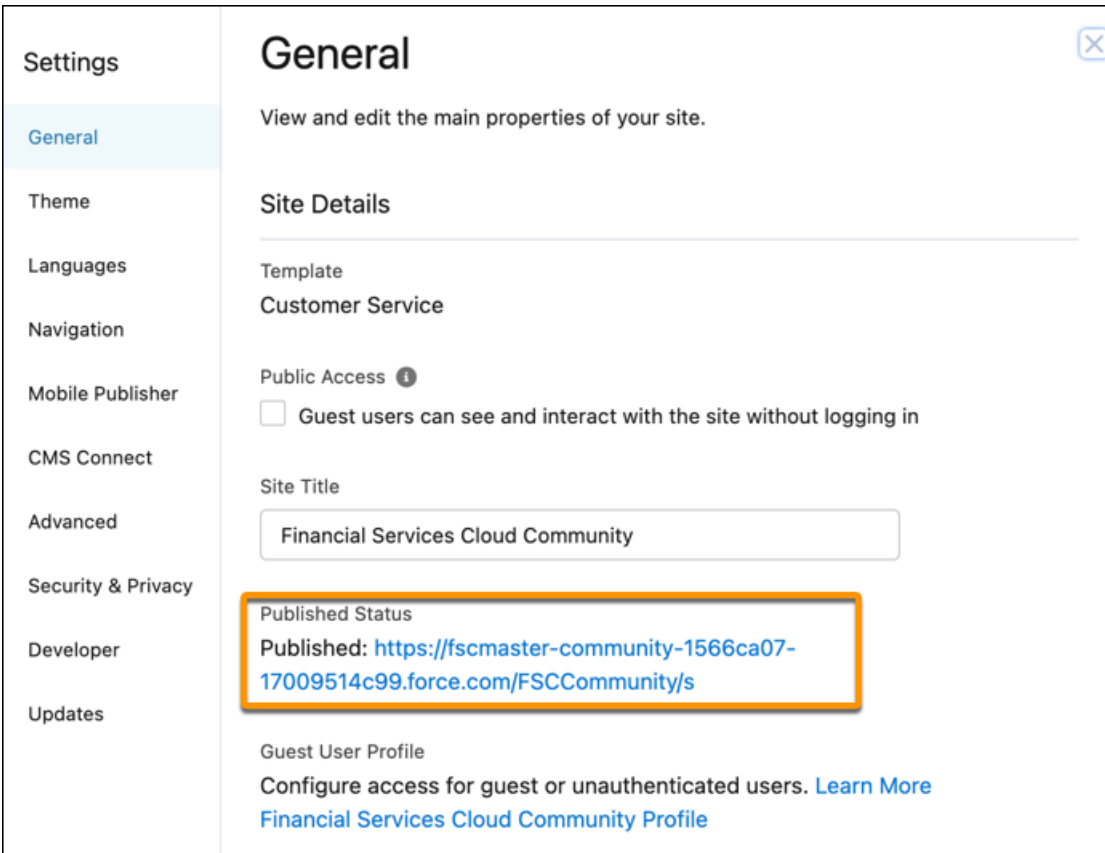
 **Note:** Ensure that the flow is added to the Content section of the flow page. Otherwise, the value of the invitationKey field doesn't pass to the site URL.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.
2. On the All Sites page, click **Builder** next to the community site for which you want to generate the invitation URL.
3. In Experience Builder, click the settings icon ().
4. From the General settings page, copy and then paste the published URL in a text editor.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions



The screenshot shows the 'General' settings page for a community site. The left sidebar contains a 'Settings' menu with options: General, Theme, Languages, Navigation, Mobile Publisher, CMS Connect, Advanced, Security & Privacy, Developer, and Updates. The main content area is titled 'General' and includes a close button (X). Below the title is the instruction: 'View and edit the main properties of your site.' The 'Site Details' section includes a 'Template' dropdown set to 'Customer Service'. The 'Public Access' section has an information icon and a checkbox labeled 'Guest users can see and interact with the site without logging in', which is currently unchecked. The 'Site Title' field contains the text 'Financial Services Cloud Community'. The 'Published Status' section is highlighted with an orange border and displays the text: 'Published: <https://fscmaster-community-1566ca07-17009514c99.force.com/FSCCommunity/s>'. Below this is the 'Guest User Profile' section with the text: 'Configure access for guest or unauthenticated users. [Learn More](#) [Financial Services Cloud Community Profile](#)'.

5. From the Properties settings of your page, copy the base URL from the URL field and paste it after the published URL in the text editor.

The screenshot shows the Salesforce Pages editor interface. On the left is a 'Pages' sidebar with a search bar and a list of page types including 'Flow', 'Generic', 'Group', 'Login', 'Messages', 'My Account', 'myshifts', 'Question Detail', 'Report', 'Report Builder', 'Search', 'Service Appointment', 'Service Not Available', 'Stream', and 'Too Many Requests'. The 'Flow' page type is selected. On the right is the 'Properties' panel for the 'Flow' page. The 'URL' property is highlighted with an orange box and contains the text '/book-appointment-from-invitation/:flowName'. Below the URL field is a 'Change Base URL' button. Other properties shown include 'API Name' (Flow), 'Page Access' (Site Default Setting: Requires Login), 'SEO' (The search engine optimization (SEO) properties are automatically configured for this page. [Learn More](#)), and 'Layout' (Content Layout: 1 full-width column, with a 'Change' button and an option to 'Override the default theme layout for this page.').

- Replace :flowName with the API name of the configured Book Appointment from Invitation flow.
Book_appointment_from_invitation_for_partners
The Invitation URL prefix is created. For example:
https://fscmaster-community-1566ca07-17009514c99force.com/FSCCommunity/s/book-appointment-from-invitation/Book_appointment_from_invitation_for_partners

Create a Quick Action to Launch the Flow

With quick actions, you can launch and navigate through workflows and perform a series of actions with just a few clicks. For example, to generate invitations quickly, create a quick action for generating the appointment invitation flow.

1. From the object management settings for Service Resource, go to Buttons, Links, and Actions, and then click **New Action**.
2. For Action Type, select **Flow**.
3. Select an existing flow, such as Generate Appointment Invitation for Partners, for the quick action.
4. In the Standard Label Type picklist, select **None**.
5. Enter your label, such as Invitation for Guests, in the Label field.
6. If necessary, enter a description and select an icon for your action.
7. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Add Flow Quick Action to Service Resource Record Pages

To launch the generate appointment invitation flow from the Service Resource record page, add the flow quick action to the Service Resource record page.

Before you add the quick action, create a quick action to launch the Generate Appointment Invitation flow.

1. From the object management settings for Service Resource, go to Page Layouts.
2. Select the page layout to which you want to add the quick action.
3. In the palette, select **Mobile & Lightning Actions**.
4. If you see a link to override the predefined actions in the Salesforce Mobile and Lightning Experience Actions section of the layout editor, click the link.
5. Drag the quick action to the top of the Salesforce Mobile and Lightning Experience Actions section.
6. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.


Available in: **Enterprise** and **Unlimited** Editions

Generate an Appointment Invitation URL

Generate appointment invitation URLs to share with your customers. Customers can use appointment invitation URLs to quickly book an appointment.


Watch the video to see how to generate an appointment invitation URL and book appointments using that invitation URL.

 [Watch a video](#)

If you aren't able to watch the view in full screen, open the video on a new tab:  [Generate an Appointment Invitation URL and Book Appointments Using Invitation URL](#).


Before you generate an appointment invitation URL, add the URL prefix in the InvitationURLPrefix flow variable. For more information, see [Create an Invitation URL Prefix for Community Sites](#). After you specify the prefix in the flow, activate the flow.

1. From the App Launcher, find and select the Salesforce Scheduler Setup app.
2. On the Service Resources tab, select a service resource.

 **Note:** The Service Resource tab shows only the records that the logged-in user has access to.

3. On the record page, click the quick action to generate an appointment invitation.
In the Select Appointment Invitee page, the Participant Service Resource field is auto-populated with the selected service resource.

4. Click **Next**.

 **Note:** If you want to create the invitation URL for another service resource, change the auto-populated resource to the required resource.

5. Select a work type group, and then click **Next**.
6. Select an appointment type or an engagement channel, such as **Phone, Video, or At a Branch**, and then click **Next**.

If you've enabled the Schedule Appointments with Engagement Channel setting, then Salesforce Scheduler replaces the Select Appointment Type page with the Select Engagement Channel Type page.

7. Select an appointment location:

- a. Enter an address, city, or ZIP code.
- b. Select the radius; the range is 5–100 miles or 10–200 kilometers.

The Maps and Location Services permission is enabled in Enterprise editions by default.

A list of all active service territories that are associated with the selected appointment topic, including the branch name, address, and operating hours appears.

8. Click **Next**.

When you select an appointment location, the service resource is available for appointments only in the selected service territory.

9. If necessary, select a start date and an end date for the appointment booking and an expiration date for the appointment invitation URL.

The Start date field defaults to the current date.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To generate an appointment invitation URL:

- Create, Edit, and Delete on Appointment Invitation object

AND

Visible field-level security access on the Appointment Invitation field of the Service Appointment object.

If the Schedule Appointment Using Engagement Channel setting is enabled, then Read on the Engagement Channel Type object.

To access an appointment type:

- Read and Edit on the Appointment Invitation Field-Level Security.

10. If necessary, to deactivate the URL, deselect **Active**, and then click **Next**.

The Active checkbox is selected by default.





11. For multi-resource scheduling, expand Manage Service Resources.

 **Note:** You can add multiple resources only when Multi-Resource Scheduling is enabled and Disable Multi-Resource Scheduling design attribute is set to *False*.

12. In the Add Service Resource field, search for and add other required or optional service resources for the appointment.

For example, a wealth manager and another resource (a real estate specialist) can share joint availability.

13. Review the available time slots based on the inputs that you provided.

The Availability Calendar shows only the time slots that are available between the shared start and end dates. You can use  and  to move to the previous week and next week, respectively. Use  and  to go to the first week and last week of availability, respectively.

14. Click **Next**.

The Review URL for Appointment Booking page shows the generated appointment invitation URL.

15. To copy the appointment invitation URL, click **Copy to Clipboard**.

Share the copied URL with users to book appointments or add the URL to your email signature.

Generate an Appointment Invitation URL for a Customer Website

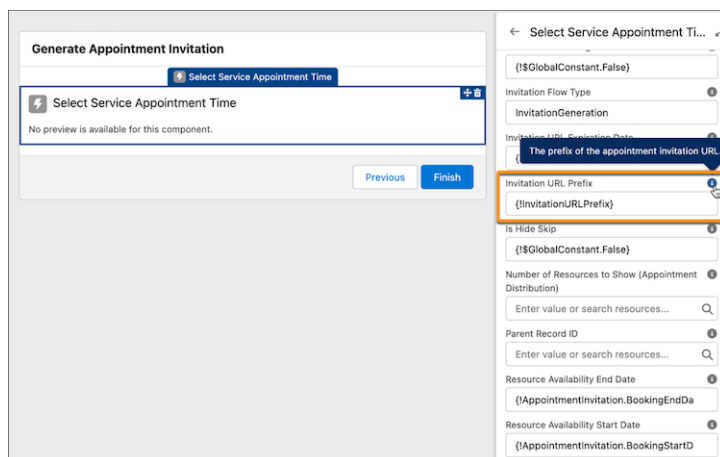
You can generate an appointment invitation URL that directly opens within a customer portal via Lightning Out.

The invitation URL includes two components: invitation URL prefix and invitation key. The invitation key is auto-generated. You can specify the invitation URL prefix in the [Select Service Appointment Time](#) on page 128 flow screen component.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions



For an invitation URL to open in a customer's portal via Lightning Out, specify the customer website URL in the InvitationURLPrefix flow variable. After you specify the prefix in the flow and activate the flow, follow the steps in [Generate an Appointment Invitation URL](#) on page 209.

To add the Generate Appointment Invitation flow to a website, follow the steps in [Add the Inbound New Guest Appointment Flow to a Website](#) on page 196. Ensure that you change the flow to the Generate Appointment Invitation flow and then pass the invitationKey parameter.





Here's a sample JavaScript code to load and activate the lightningOutGuest app on your webpage.

```
<script>
    $Lightning.use("runtime_appointmentbooking:lightningOutGuest", // name of the
Lightning app
    function() {
        $Lightning.createComponent(
            "lightning:flow", // top-level component of your app
            { },
            "lightningLocator", // the DOM location to insert the component
            function(component) { // callback when component is created and active on
the page
                var inputVariables = [
                    {
                        name : 'invitationKey',
                        type : 'String',
                        value : new
URLSearchParams(window.location.search).get('invitationKey')
                    }
                ];
                component.startFlow('Invitation_Booking',inputVariables);
            }
        );
    }, 'https://YourSiteDomain/SiteURL/' // Community endpoint
    );
</script>
```

Book a Service Appointment by Using an Appointment Invitation URL

Use the appointment invitation URL to book service appointments.

ⓘ Important:

- To book appointments by using invitation URLs, users must have access to appointment invitations, service territories, work types or work type groups, and service resources that are selected in the invitation URLs. Users must also have access to the Book Appointment from Invitation flow. Administrators can provide the required read-only access to the objects by using sharing settings or Apex sharing.
 - To either book appointments by using invitation URLs or modify appointments that are booked by using invitation URLs, ensure that profiles have visible field-level security access to the Appointment Invitation field of the Service Appointment object.
1. Use a web browser to go to the appointment invitation URL.
The URL opens with the starting week of when the service resource is available. The calendar shows only the time slots that are available between the shared start and end dates. You can use  and  to go to previous week and next week, respectively. Use  and  to jump to the first week and last week of availability, respectively.
 2. Select a time slot, and then click **Next**.
 3. Review your service appointment details. Optionally, you can enter a subject and description for the appointment.
 4. If you're a guest user, enter your first name, last name, email address, and phone number.
 5. Click **Next**, and then click **Finish**.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To book an appointment by using an invitation URL or to modify an appointment booked by using an invitation URL:

- Read Access on Appointment Invitation object.

To book an appointment by using an invitation URL for a Guest profile

- Read Access on Appointment Invitation object.

Checklist to Troubleshoot Flow Screens in Salesforce Scheduler

Salesforce Scheduler uses various settings, policies, and filters to show records on flow screens. When users don't see records on flow screens, troubleshoot using these steps. Before you troubleshoot, check data permissions and field-level permissions to confirm that users have the necessary access.

[Troubleshoot Work Type Groups](#)

Use these steps when Salesforce Scheduler doesn't show a work type group when users run a flow.

[Troubleshoot Service Territories](#)

Use these steps when Salesforce Scheduler doesn't show a service territory when users run a flow.

[Troubleshoot Service Resources](#)

Use these steps when Salesforce Scheduler doesn't show a service resource when users run a flow.

[Troubleshoot Time Slots](#)

Use these steps when Salesforce Scheduler doesn't show time slots when users run a flow.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Troubleshoot Work Type Groups

Use these steps when Salesforce Scheduler doesn't show a work type group when users run a flow.

1. Ensure that the work type group is active and the Group Type field value is set to Default.
For information, see [Create Work Type Groups in Salesforce Scheduler](#) on page 18.
2. Ensure that flow customizations aren't filtering out the service territory.
Check these attributes of the Select Work Type Groups component:
 - Filter by Resource IDs
 - Filter by Work Type Group IDs
 - Service Resource
 - Work Type Group

For information, see [Flow Screen Component: Select Work Type Groups](#) on page 116.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Troubleshoot Service Territories

Use these steps when Salesforce Scheduler doesn't show a service territory when users run a flow.

1. Ensure that the service territory is active.
For information, see [Create Service Territories in Salesforce Scheduler](#) on page 8.
2. Ensure that a work type that links the user-selected work type group to the service territory exists.
For information, see [How Work Types, Work Type Groups, and Service Territories Work Together](#).
3. Ensure that the address is complete and the data integration rules updated the geolocation information for the service territory.
For information, see:
 - [Data Integration Rules for Salesforce Scheduler](#)
 - [Enable Maps and Location Services in Salesforce Scheduler](#)
 - [Create Service Territories in Salesforce Scheduler](#)

4. Ensure that flow customizations aren't filtering out the service territory.
Check these attributes of the Select Service Territory component:
 - Distance
 - Distance Unit
 - Filter by Resource IDs
 - Service Resource
 - Work Type Group

For information, see [Flow Screen Component: Select Service Territory](#) on page 125.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Troubleshoot Service Resources


Use these steps when Salesforce Scheduler doesn't show a service resource when users run a flow.

1. Ensure that the Salesforce Scheduler permission set license is assigned to the resource and the Let a user be included in appointments in Salesforce Scheduler permission is enabled.
For information, see [Configure Who Can Be a Service Resource](#) on page 11.
2. Ensure that the service resource is active.
For information, see [Create Service Resources in Salesforce Scheduler](#) on page 11.
3. Ensure that the service resource is assigned to the selected service territory.
For information, see [Assign Service Resources to Service Territories in Salesforce Scheduler](#).

4. When you're not using shifts, ensure that the intersection of operating hours of the service territory, the service territory member, the work type, and the account's visiting hours has at least one time slot.

At least one time slot appears if this condition is met:

`Intersection of operating hours > Estimated Duration + Block Time After Appointment + (Block Time Before Appointment or Start Time Interval, whichever is higher)`

 **Important:** Account's visiting hours are used only if you enable the Enforce Account's Visiting Hours scheduling policy.

For information, see [Set Up Operating Hours in Salesforce Scheduler](#) and [How Does Salesforce Scheduler Determine Available Time Slots?](#)

5. When you use shifts, ensure that at least one shift is created and assigned to the service resource and the shifts have at least one time slot.

At least one time slot appears if this condition is met:

`Availability > Estimated Duration + Block Time After Appointment + (Block Time Before Appointment or Start Time Interval, whichever is higher)`

For information, see:

- [Determine Appointment Time Slots with Shifts](#)
- [Considerations for Shifts](#)
- [Scheduling Policy Rules in Salesforce Scheduler](#)
- [Define Shift Rules in Scheduling Policy](#)
- [How Does Salesforce Scheduler Determine Available Time Slots?](#)

6. Ensure that at least one time slot is between Timeframe Start and Timeframe End for the work type selected.
For information, see [Create Work Types in Salesforce Scheduler](#) on page 19.

7. Ensure that the operating hours for service territory members for the selected work type group are sufficient for at least one appointment.

For information, see [Operating Hours for Resources Working on Appointment Topics](#). on page 81

8. Ensure that the service resource is available.

Salesforce Scheduler considers a service resource unavailable if the resource is absent or the resource's calendar is blocked by calendar or external events:

- During all the days between the Timeframe Start and the Timeframe End for the work type.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

- For 31 days from the date of scheduling the appointment.

For information, see [Check Calendars to Determine Availability of Service Resources](#) on page 103.

9. Ensure that the duration between Start Date and End Date of the service territory member has at least one time slot.

For information, see [Assign Operating Hours to Service Territories, Service Territory Members, and Work Types](#) on page 27.

10. Ensure that the resource preferences of the user booking the appointment aren't filtering out the service resource.

For information, see [Add Service Resource Preferences to Accounts for Salesforce Scheduler](#) on page 102.

11. Ensure that these scheduling policies aren't filtering out the resource:

- Include Primary Service Territory Members
- Include Secondary Service Territory Members
- Match Skills
- Match Skill Levels
- Include Only Required Service Resources
- Ignore Excluded Service Resources

For information, see [Scheduling Policy Rules in Salesforce Scheduler](#) and [Add Service Resource Preferences to Accounts for Salesforce Scheduler](#) on page 102.

12. Ensure that flow customizations aren't filtering out the service resource.

Salesforce Scheduler uses these attribute values in the Select Service Resource component and the Select Service Resource and Service Appointment Time components to filter service resources:

- Service Territory
- Work Type Group
- Anonymous Booking
- Filter By Resource IDs
- Number of Resources to Show (Appointment Distribution)
- Start date for the selected service resources' skills that are required by the work type.

For information, see [Flow Screen Component: Select Service Resource](#) on page 119 and [Flow Screen Component: Select Service Resource and Service Appointment Time](#) on page 135.

Troubleshoot Time Slots

Use these steps when Salesforce Scheduler doesn't show time slots when users run a flow.

1. View the calendar pages for the next 31 days by using the Next calendar page button on the flow screen.
2. When you don't use shifts, ensure that the intersection of operating hours of the service territory, the service territory member, the work type, and the account's visiting hours has at least one time slot.


At least one time slot appears if this condition is met:

```
Intersection of operating hours > Estimated Duration + Block Time After Appointment + (Block Time Before Appointment or Start Time Interval, whichever is higher)
```

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

 **Important:** Account's visiting hours are used only if you enable the Enforce Account's Visiting Hours scheduling policy.

For information, see [Set Up Operating Hours in Salesforce Scheduler](#) on page 24 and [How Does Salesforce Scheduler Determine Available Time Slots?](#) on page 55.

3. When you use shifts, ensure that at least one shift is created and assigned to the service resource and the shifts have at least one time slot.

At least one time slot appears if this criteria is met:

`Availability > Estimated Duration + Block Time After Appointment + (Block Time Before Appointment or Start Time Interval, whichever is higher)`

For information, see:

- [Determine Appointment Time Slots with Shifts](#)
- [Considerations for Shifts](#)
- [Scheduling Policy Rules in Salesforce Scheduler](#)
- [Define Shift Rules in Scheduling Policy](#)
- [How Does Salesforce Scheduler Determine Available Time Slots?](#)

4. Ensure that the operating hours for service territory members for the selected work type group have at least one time slot.

For information, see [Operating Hours for Resources Working on Appointment Topics](#) on page 81

5. Ensure that service appointments aren't booked for all the available time slots. Concurrent time slots are applicable only for service territory members; they aren't applicable for service territories or work types. For information, see [Considerations for Concurrent Scheduling](#) on page 86.

If concurrent scheduling is enabled, ensure that the maximum number of appointments aren't booked for all the time slots.

6. Ensure that Salesforce calendar events and external systems aren't blocking all the time slots.

For information, see [Check Calendars to Determine Availability of Service Resources](#) on page 103.

7. Ensure that at least one time slot is between Timeframe Start and Timeframe End for the work type selected.

For information, see [Create Work Types in Salesforce Scheduler](#) on page 19.

8. Ensure that flow customizations aren't filtering out all the time slots.

Salesforce Scheduler uses these attribute values in the Select Service Appointment Time component and the Select Service Resource and Service Appointment Time component to filter time slots:

- Work Type
- Work Type Group
- Service Territory
- Anonymous Booking Selected
- Filter By Resource IDs
- Scheduling Policy
- Service Resource
- Service Resources
- Start Date
- Start date for the selected service resources' skills that are required by the work type.

For information, see [Flow Screen Component: Select Service Appointment Time](#) on page 128 and [Flow Screen Component: Select Service Resource and Service Appointment Time](#) on page 135.

9. If you're using anonymous booking, at least one service resource is available.

For information, see [Troubleshoot Service Resources](#) on page 214.

Field-Level Security (FLS) Permissions Checklist

With field-level security (FLS) settings, you can restrict your users' access to view and edit specific fields. You can also use FLS settings to provide access to fields that are required to create and modify appointments. If you face FLS permission errors, ensure that users have the necessary field-level permissions.

| Object | Field | Outbound | Authenticated User | Guest |
|-------------------|-------------------------------|----------------------|----------------------|----------------------|
| | | Required Permissions | Required Permissions | Required Permissions |
| Service Territory | Active | Read | Read | Read |
| | Address | Read | Read | Read |
| Service Resource | Active | Read | Read | Read |
| Work Type Group | Active | Read | Read | Read |
| | Additional Information | Read | Read | Read |
| Work Type | Block Time After Appointment | Read | Read | Read |
| | Block Time After Unit | Read | Read | Read |
| | Block Time Before Appointment | Read | Read | Read |
| | Block Time Before Unit | Read | Read | Read |
| | Operating Hours | Read | Read | Read |
| | Timeframe End | Read | Read | Read |
| | Time Frame End Unit | Read | Read | Read |
| | Timeframe Start | Read | Read | Read |
| | Time Frame Start Unit | Read | Read | Read |

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

| Object | Field | Outbound | Authenticated User | Guest |
|--------------------------|--|----------------------|--------------------------------------|--------------------------------------|
| | | Required Permissions | Required Permissions | Required Permissions |
| Time Slot | Maximum Appointments | Read | Read | Read |
| Skill Requirement | Skill Level | Read | Read | - |
| Service Resource Skill | End Date | Read | Read | - |
| | Skill Level | Read | Read | - |
| Service Territory Member | End Date | Read | Read | Read |
| | Operating Hours | Read | Read | Read |
| | Role | Read | Read (For Multi-resource Scheduling) | Read (For Multi-resource Scheduling) |
| Assigned Resource | Required Resource | Read | Read | - |
| | Primary Resource (For Multi-resource Scheduling) | Read | Read | - |
| Service Appointment | Additional Information | Read | Read | Read |
| | Address | Read | Read | Read |
| | Anonymous Booking | Read | Read | Read |
| | Appointment Type | Read | Read | Read |
| | Comment | Read | Read | Read |
| | Contact | Read | Read | Read |
| | Description | Read | Read | Read* |
| | Email | Read | Read | Read* |
| | Phone | Read | Read | Read* |
| | Scheduled End | Read | Read | Read |
| | Scheduled Start | Read | Read | Read |
| | Service Territory | Read | Read | Read |
| | Status Category | Read | Read | Read* |
| | Subject | Read | Read | Read* |
| | Work Type | Read | Read | Read* |
| | Status Category | Read | Read | - |
| | Arrival Window Start | Read | Read | - |
| Arrival Window End | Read | Read | - | |

| Object | Field | Outbound | Authenticated User | Guest |
|--|-------------------|----------------------|----------------------|----------------------|
| | | Required Permissions | Required Permissions | Required Permissions |
| Shift (Only required when Shifts are used to determine available service resource) | Service Resource | Read | Read | Read |
| | Service Territory | Read | Read | Read |
| | Work Type | Read | Read | Read |
| | Work Type Group | Read | Read | Read |

*You don't require these field permissions to schedule appointments. But if you revoke these permissions, it can lead to loss of information. You can edit service appointments only if these permissions are available.

EXTEND SALESFORCE SCHEDULER FUNCTIONALITY WITH SALESFORCE PRODUCTS AND FEATURES

Use other Salesforce products and features, such as email, surveys, notes, calendar integration, and analytics, to extend Salesforce Scheduler functionality.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

REFERENCE: FLOW SCREEN COMPONENT CUSTOMIZATIONS

Customize Salesforce Scheduler flows to meet your business needs. For example, autofill values, preselect options, and filter records in flow screens.

[Change the Fields That Appear on Service Resource Cards](#)

Modify the compact layout to change the fields that appear on the service resource cards when users create a service appointment.

[Show Images on Service Resource Cards](#)

Use formula fields to show various types of information, such as ratings and status, as images on service resource cards.

[Autofill Fields in the Appointment Review Screen](#)

Autofill fields, such as phone and email, in the appointment review screen for inbound and outbound flows.

[Preselect an Option on the Select Service Resources Page](#)

Save a click when scheduling an appointment by preselecting an option on the Select Service Resources page. Enter an appropriate value in the Selected Option attribute, depending on the option you want preselected on the page. Or use the selectedTriageOption variable to set the value of the attribute.

[Filter Work Type Groups](#)

Let users schedule appointments faster and with relevant work type groups by applying work type group filters in your appointment flows. Specify a list of comma-separated work type group IDs in the Filter by Work Type Group IDs attribute on the Select Work Type Group flow page. Salesforce Scheduler shows only the work type groups that you specify in the list of work type groups. For example, a customer wants to book an appointment with a banker who has expertise in wealth management and is also fluent in the Spanish language. For this customer, you can only specify work type groups IDs that match the criteria. On the work type group selection page, work type groups appear in alphabetical order.

[Enable Service Resource Filtering](#)

Let users schedule appointments faster and with the most suitable service resources by applying service resource filters in your appointment flows. Use the Filter by Resource IDs attribute on relevant flow pages to specify a comma-separated list of service resource IDs. Salesforce Scheduler limits its search to the specified list of resources when getting service resources or service territory slots for appointments. On the service resource selection page, service resources appear in the order in which you specify them in the comma-separated list.

EDITIONS

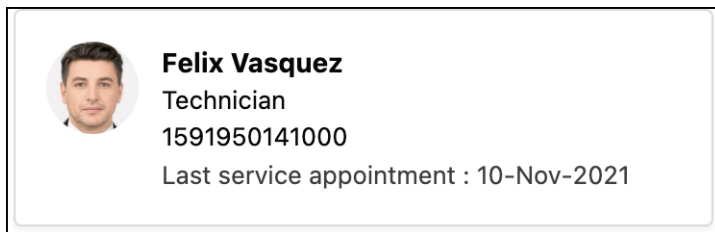
Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

Change the Fields That Appear on Service Resource Cards

Modify the compact layout to change the fields that appear on the service resource cards when users create a service appointment.


Salesforce Scheduler uses the compact layout of the service resource for screens that use the Select Service Resources, Select Service Resource and Service Appointment Time, and Service Resource Availability components.



 **Note:** The Select Service Resource component doesn't use the compact layout.

You can't change the first (Name) and last (Last Service Appointment) fields that appear on service appointment cards.

You can modify the compact layout to show one or two fields between the first and last fields.

 **Important:** The compact layout uses two fields to show the Created By information. The first field shows who created the service resource and the second field shows the date of creation of the record. The compact layout uses two fields show the Last Modified By information as well.

 **Note:**

- The Name field appears by default. Even if you select the Name field in the compact layout, Salesforce Scheduler ignores the selection and shows the field only one time.
- The date fields use Epoch time. That is, they show the difference, in milliseconds, between when the action is performed and the midnight of January 1, 1970 UTC. For example, Created Date shows the difference, in milliseconds, between when a record is created and the midnight of January 1, 1970 UTC.

To learn about factors that affect the service resource image, see the [Guest users cannot access the SmallPhotoURL field once Communities are enabled in an org](#) knowledge article.

1. From the object management settings for the service resource, go to Compact Layouts.
2. Select the primary compact layout, and then click **Edit**.
3. In the Select Compact Layout Fields section, add or remove fields.

 **Note:** When you select more than two fields, Salesforce Scheduler shows only the last two fields that a user has access to.

4. Save your changes.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To view compact layouts:


- View Setup and Configuration

To customize compact layouts:


- Customize Application

Show Images on Service Resource Cards

Use formula fields to show various types of information, such as ratings and status, as images on service resource cards.

 **Note:** For more information about the factors that affect a service resource image, see the [Guest users cannot access the SmallPhotoURL field once Communities are enabled in an org](#) knowledge article.

1. On the Service Resource object, create a formula field that shows an image. For more information, see [Sample Image Link Formulas](#) and [Formula Operators and Functions Overview](#).
2. To show the formula field on service resource cards, edit the compact layout. For more information, see [Change the Fields That Appear on Service Resource Cards](#) on page 222.

 **Example:** To show ratings for service resources:

1. Create a custom field.
 - Field Label and Field Name: *RatingNumber*
 - Type: *Number*
 - Length: *1*
2. Create a formula field.
 - Field Label and Field Name: *Rating*
 - Formula Return Type: *Text*
 - Rating (Text):

```
IMAGE (
CASE( RatingNumber__c ,
1, "/img/samples/stars_100.gif",
2, "/img/samples/stars_200.gif",
3, "/img/samples/stars_300.gif",
4, "/img/samples/stars_400.gif",
5, "/img/samples/stars_500.gif",
"/img/samples/stars_000.gif"),
"rating")
```

3. To show the Rating field on service resource cards, edit the compact layout to ensure that Salesforce Scheduler shows the Rating field, and then save your changes.
4. In the respective Rating fields for resources, enter appropriate values.

To view service resource cards with images, run flows. You can also use external systems to capture ratings and populate the Rating field.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

- To add fields:
 - To customize compact layouts:
 - Customize Application
- To view compact layouts:
- View Setup and Configuration

Autofill Fields in the Appointment Review Screen

Autofill fields, such as phone and email, in the appointment review screen for inbound and outbound flows.

You can modify flows to autofill these fields:

- AdditionalInformation
 - AppointmentType
 - Comments
 - ParentRecordId
 - ServiceTerritoryId
 - Street
 - City
 - State
 - Country
 - PostalCode
 - SchedStartTime
 - SchedEndTime
 - WorkTypeld
 - Id
 - Description
 - Subject
 - Phone
 - Email
 - ContactId
 - IsAnonymousBooking
1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
 2. Click the flow for which you want to autofill fields.
 3. Open the Set Initial Values assignment element.
 4. For fields that you want to autofill, perform these steps:
 - a. Click the **Add Assignment** button.
 - b. Select the variable that you want to autofill.
 - c. Select **Equals** as the operator, and then enter a value for the field.
 5. Click **Done**.
 6. If the flow is an outbound flow, open the Review Screen screen element.
 - a. Select the **Review Inbound or Outbound Service Appointment** component.
 - b. In the Service Appointment field, enter `{!ServiceAppointment}`.

 **Note:** In inbound flows, the Service Appointment field value is set by default.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS


To modify flows:

- Manage Flow

7. Click **Done**.
8. Save your changes.

Preselect an Option on the Select Service Resources Page

Save a click when scheduling an appointment by preselecting an option on the Select Service Resources page. Enter an appropriate value in the Selected Option attribute, depending on the option you want preselected on the page. Or use the `selectedTriageOption` variable to set the value of the attribute.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Create a flow or edit an existing flow.
 -  **Note:** Before you can edit a flow, you must deactivate it.
3. In Flow Builder, edit the flow screen with the Select Service Resources flow screen component.
4. Select the Select Service Resources flow screen component.
5. In the Selected Option attribute, enter one of these values.
 - To preselect the By work type group, appointment type, or service territory option, enter *findResource*.
 - To preselect the By name option, enter *specific*.
 - To preselect the By previously scheduled service appointments option, enter *previousServiceResource*.
6. Save your changes, and then activate the flow.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow


To run a flow:

- Run Flows

Filter Work Type Groups

Let users schedule appointments faster and with relevant work type groups by applying work type group filters in your appointment flows. Specify a list of comma-separated work type group IDs in the Filter by Work Type Group IDs attribute on the Select Work Type Group flow page. Salesforce Scheduler shows only the work type groups that you specify in the list of work type groups. For example, a customer wants to book an appointment with a banker who has expertise in wealth management and is also fluent in the Spanish language. For this customer, you can only specify work type groups IDs that match the criteria. On the work type group selection page, work type groups appear in alphabetical order.

The Filter by Work type Group IDs attribute is available on the Select Work Type Group page.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Create a flow or edit an existing flow for which you want to enable work type group filtering.
 -  **Note:** Before you can edit a flow, ensure that you deactivate it.
3. In Flow Builder, edit the flow screen by using the Select Work Type Group flow screen component.
4. Select the flow screen component.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:


- Run Flows

5. In the Filter by Work Type Group IDs attribute, enter a comma-separated list of work type group IDs.
The affected page shows only those work type groups that are in the specified list of work type groups.
6. Save your changes, and then activate the flow.

Enable Service Resource Filtering

Let users schedule appointments faster and with the most suitable service resources by applying service resource filters in your appointment flows. Use the Filter by Resource IDs attribute on relevant flow pages to specify a comma-separated list of service resource IDs. Salesforce Scheduler limits its search to the specified list of resources when getting service resources or service territory slots for appointments. On the service resource selection page, service resources appear in the order in which you specify them in the comma-separated list.

The Filter by Resource IDs attribute is available on the Select Service Resource page in outbound flows. It's also available on the Select Service Resource and Service Appointment Time page in inbound and guest flows.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.
2. Create a flow or edit an existing flow that you want to enable service resource filtering for.
 -  **Note:** Before you can edit a flow, you must deactivate it.
3. In Flow Builder, edit the flow screen with the Select Service Resource or Select Service Resource and Service Appointment Time flow screen component.
4. Select the flow screen component.
5. In the Filter by Resource IDs attribute, enter a comma-separated list of service resource IDs.
The affected page shows only those service resources that are in the specified list of service resources and in the selected service territory and work type group.
6. Save your changes, and then activate the flow.

EDITIONS

Salesforce Scheduler is available for an extra cost in Lightning Experience.

Available in: **Enterprise** and **Unlimited** Editions

USER PERMISSIONS

To open, edit, or create a flow in Flow Builder:

- Manage Flow

To run a flow:

- Run Flows