Salesforce Scheduler Developer Guide

Version 64.0, Summer '25

Summer '25

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CHAPTER 1   Introduction to Salesforce Scheduler

Salesforce Scheduler (formerly known as Lightning Scheduler) gives you the tools and developer resources you need to simplify appointment scheduling in Salesforce. Create a personalized experience by scheduling customer appointments—in person, or by phone or video—with the right person at the right place and time.

With Salesforce Scheduler developer resources, it's easy to build seamless appointment scheduling applications. These resources include REST APIs, Connect REST APIs, Salesforce Platform Events, and Apex classes. Appointment scheduling involves numerous resources such as appointment attendees, appointment locations, appointment topics, appointment timings, appointment duration, and so on. With Salesforce Scheduler, you get the tools that you can use to manage these resources.

Before using the Scheduler resources, you must configure Scheduler with the following items:

- Create service resources that represent your appointment attendees, and add details about their areas of expertise (skills), location, and availability.
- Set up service territories that represent the branch or office locations where your appointment attendees operate from or meet customers.
- Create work type groups that represent appointment topics such as home loan or investment.
- Create work types that represent appointment templates that link appointment topics with particular locations and define key parameters such as appointment duration, preparation and wrap-up buffers, and availability timings.
- Schedule customer appointments with defined topics, attendees, duration, and location.

SEE ALSO:

Salesforce Scheduler: Set Up Salesforce Scheduler

CHAPTER 2 Set Up Salesforce Scheduler

Set up Salesforce Scheduler for your organization. Assign permissions and object access for users. Update related lists and tab visibility. Configure Salesforce Scheduler settings for multi-resource scheduling, concurrent scheduling, multiple time zone selection, and map and location services. Optionally, set up Asset Scheduling for Salesforce Scheduler.

Before you can use the scheduler developer resources, you need to set up Salesforce Scheduler. Here are some of the things you must do:

- Assign permissions and object access for users.
- Configure Salesforce Scheduler settings for multi-resource scheduling, concurrent scheduling, multiple time zone selection, and map and location services.
- Configure service resources, service territory members, work type groups, work types, time slots, work type group members, and service territory work types.
- Set up Asset Scheduling for Salesforce Scheduler.
- Create and manage records representing operating hours, employee attendees (service resources), location (service territories), skills, and appointment templates (work types).

SEE ALSO:
  Salesforce Help: Set Up Salesforce Scheduler

Salesforce Scheduler Data Model Overview

Learn about the objects and relationships within the Salesforce Scheduler data model that represent appointments and employees who can be scheduled to attend appointments.

📝 **Note:** Not all fields are specified in this data model.
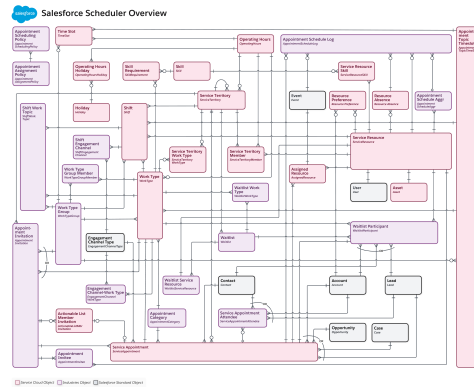
View the Salesforce Scheduler data model on the Salesforce Architect page.

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CHAPTER 4 Salesforce Scheduler Standard Objects

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Salesforce Scheduler gives you access to a suite of standard objects that you can find in Setup and as tabs in Salesforce. Salesforce Scheduler shares these objects with Field Service. These objects make up the core Salesforce Scheduler features, including appointments.

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

Available in: Enterprise, Unlimited, Performance, and Developer editions.

The following is a list of standard objects currently available within the Salesforce Scheduler platform.

AppointmentAssignmentPolicy

Stores information about resource assignment rules. This object is available in API version 52.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field	Details
FullName	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The API name of the AppointmentAssignmentPolicy object. 📝 Note: Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.
Language	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the appointment assignment policy. Possible values are: • `Possible values are:` • `da` (Danish) • `de` (German) • `en_US` (English) • `es` (Spanish) • `es_MX` (Spanish - Mexican) • `fi` (Finnish) • `fr` (French) • `it` (Italian) • `ja` (Japanese) • `ko` (Korean) • `nl_NL` (Dutch) • `no` (Norwegian)

Field	Details
	• `pt_BR` (Portuguese - Brazilian)
	• `ru` (Russian)
	• `sv` (Swedish)
	• `th` (Thai)
	• `zh_CN` (Chinese - Simplified)
	• `zh_TW` (Chinese - Traditional)

Field	Details
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label for the appointment assignment policy.
`PolicyApplicableDuration`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The frequency at which the utilization of service resources is calculated. This field is available in API version 53.0 and later. Possible values are: • `Parameter-Based` • `Monthly` • `Weekly` The default value is Parameter-Based.
`PolicyType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of appointment assignment policy. Possible values are: • `loadBalancing`
`UtilizationFactor`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description
	Specifies the count type for the resource utilization. This field is available in API version 53.0 and later.
	Possible values are:
	• `NumberOfAppointments`
	• `TotalAppointmentDuration`
	The default value is TotalAppointmentDuration.

AppointmentCategory

Represents the category of work types and shifts. This object is available in API version 58.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
`IsDropIn`	**Type**
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether the appointment mode is drop-in (`true`) or not (`false`).
	The default value is `false`.
`IsGroup`	**Type**
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether the appointment mode is group (`true`) or not (`false`). It also indicates whether work types and shifts support the group category.

Field	Details
	The default value is `false`. Available in API version 61.0 and later.
IsScheduled	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort **Description** Indicates whether the appointment mode is regular (`true`) or not (`false`). It also indicates whether work types and shifts support the group category. The default value is `false`.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the appointment category record was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the appointment category record was last viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the appointment category.

Usage

Use appointment categories to differentiate between various types of appointments, such as drop in, regular, and group. To define the work types and shifts available for these categories, assign appointment categories to work types and shifts.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AppointmentCategoryFeed
> Feed tracking is available for the object.

AppointmentCategoryHistory
> History is available for tracked fields of the object.

AppointmentInvitation

Represents information about an appointment invitation that's created for customers who can use it for booking appointments. This object is available in API version 55.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
AppointmentTopicId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** Appointment topic that's associated with this invitation. This field is a polymorphic relationship field. **Relationship Name** AppointmentTopic **Relationship Type** Lookup **Refers To** WorkType, WorkTypeGroup
AppointmentTopicType	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description
	Type of appointment topic that's related to this invitation. For example, work type or work type group.
AppointmentType	**Type**
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort
	Description
	Appointment type for the appointment invitation. This field is available in API version 57.0 and later.
	Recommended values are:
	• `groups`—Group
	• `resource_territory`—In Person
	• `phone_portrait`—Phone
	• `video`—Video call
	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 groups icon.
BookingEndDate	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date until which an appointment can be booked by using the appointment invitation URL.
BookingStartDate	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date from which an appointment can be booked by using the appointment invitation URL.
	Default value: current date.
EngagementChannelTypeId	**Type**
	reference
	Properties
	Create, Filter, Group, Nillable, Sort

Field	Details
	Description Engagement channel type for the appointment invitation. For example, users can choose video call as the engagement channel type when they create an appointment invitation. This field is available in API version 57.0 and later. This field is a relationship field. **Relationship Name** EngagementChannelType **Relationship Type** Lookup **Refers To** EngagementChannelType
InvitationIdentifier	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Invitation URL identifier that's used to book an appointment in a flow.
InvitationNumber	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Auto-assigned number that identifies the appointment invitation.
InvitationUrl	**Type** url **Properties** Create, Filter, Group, Nillable, Sort **Description** Appointment invitation URL that's shared with users to book appointments.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the invitation URL is available for a customer to book an appointment. The default value is `true`.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date on which the appointment invitation was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date on which the appointment invitation was last viewed.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Owner of the appointment invitation. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
ServiceTerritoryId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** Service territory that's associated with the appointment invitation. This field is a relationship field. **Relationship Name** ServiceTerritory **Relationship Type** Lookup

Field	Details
	Refers To
	ServiceTerritory
`UrlExpiryDate`	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Expiration date of the appointment invitation URL.

Usage

An appointment invitation can show the availability of one or more resources represented in the Appointment Invitee object.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AppointmentInvitationChangeEvent
Change events are available for the object.

AppointmentInvitationFeed
Feed tracking is available for the object.

AppointmentInvitationHistory
History is available for tracked fields of the object.

AppointmentInvitationOwnerSharingRule
Sharing rules are available for the object.

AppointmentInvitationShare
Sharing is available for the object.

AppointmentInvitee

Represents information about the participant and resources required for creating an appointment invitation URL. This object is available in API version 55.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
AppointmentInvitationId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the appointment invitation. This field is a relationship field. **Relationship Name** AppointmentInvitation **Relationship Type** Lookup **Refers To** AppointmentInvitation
IsPrimaryResource	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a service resource that's used to book an appointment is a primary resource. The default value is `false`.
IsRequiredResource	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a service resource is required to book an appointment. The default value is `false`.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description
	Date on which the appointment invitee record was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	**Type**
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Date on which the appointment invitee record was last viewed.
Name	**Type**
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	Auto-assigned number that identifies the appointment invitee.
ParticipantServiceResourceId	**Type**
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Service resource who's assigned to the appointment invitation.
	This field is a relationship field.
	Relationship Name
	ParticipantServiceResource
	Relationship Type
	Lookup
	Refers To
	ServiceResource

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AppointmentInviteeChangeEvent

Change events are available for the object.

AppointmentInviteeFeed

Feed tracking is available for the object.

AppointmentInviteeHistory

History is available for tracked fields of the object.

AppointmentInviteeOwnerSharingRule

Sharing rules are available for the object.

AppointmentInviteeShare

Sharing is available for the object.

AppointmentScheduleAggr

Records the utilization of a service resource, by date, for the Load Balancing appointment assignment policy. This object is available in API version 52.0 and later.

Supported Calls

```
create(), delete(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(),
undelete(), update(), upsert()
```

Fields

Field	Details
AppointmentDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the appointment.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name or ID of the AppointmentScheduleAggr object.
ResourceUtilizationCount	**Type** integer **Properties** Filter, Group, Nillable, Sort **Description** The number of appointments scheduled for a service resource. Available in API version 53.0 and later. This is a calculated field.

Field	Details
ServiceResourceId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service resource associated with the appointment scheduling aggregate. This is a relationship field. **Relationship Name** ServiceResource **Relationship Type** Lookup **Refers To** ServiceResource
TotalResourceUtilization	**Type** double **Properties** Filter, Nillable, Sort **Description** The number of minutes for which the service resource has scheduled appointments. This is a calculated field.
UsageType	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specify the usage type of the AppointmentScheduleAggr object. Possible values are: • `FSL_Daily` • `FSL_Monthly` • `FSL_Weekly` • `LightningScheduler` The default value is 'LightningScheduler'.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

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AppointmentScheduleAggrOwnerSharingRule
> Sharing rules are available for the object.

AppointmentScheduleAggrShare
> Sharing is available for the object.

AppointmentScheduleLog

Stores service appointments of each service Resource. This object is used to calculate the utilization of a service resource for the AppointmentScheduleAggr object. This object is available in API version 52.0 and later.

Supported Calls

`create()`, `delete()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AppointmentDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the appointment.
AppointmentScheduleAggrId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The appointment scheduling aggregate associated with the appointment scheduling log. This is a relationship field. **Relationship Name** AppointmentScheduleAggr **Relationship Type** Lookup **Refers To** AppointmentScheduleAggr
IsUsedForResourceUtilization	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the appointment scheduling log is used for deriving the appointment scheduling aggregate. The default value is 'false'.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name or ID of the AppointmentScheduleLog object.
RelatedRecordId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service appointment, resource absence, event, or any other related record associated with the appointment scheduling log. This is a polymorphic relationship field. **Relationship Name** RelatedRecord **Relationship Type** Lookup **Refers To** Event, ServiceAppointment
ResourceUtilization	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The number of minutes the service resource already has scheduled appointments for.
ServiceResourceId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The service resource associated with the appointment scheduling log. This is a relationship field. **Relationship Name** ServiceResource **Relationship Type** Lookup **Refers To** ServiceResource
UsageType	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specify the product associated with the AppointmentScheduleLog object. Possible values are: • `FSL_Daily`—FSL - Daily • `FSL_Monthly`—FSL - Monthly • `FSL_Weekly`—FSL - Weekly • `LightningScheduler`—Lightning Scheduler The default value is 'LightningScheduler'.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AppointmentScheduleLogChangeEvent

Change events are available for the object.

AppointmentScheduleLogFeed

Feed tracking is available for the object.

AppointmentScheduleLogHistory

History is available for tracked fields of the object.

AppointmentScheduleLogOwnerSharingRule

Sharing rules are available for the object.

AppointmentScheduleLogShare

Sharing is available for the object.

AppointmentSchedulingPolicy

Represents a set of rules for scheduling appointments using Salesforce Scheduler. This object is available in API version 45.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field	Details
`AppointmentAssignmentPolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name or ID of the appointment assignment policy. This is a relationship field, available in version 52.0 and later. **Relationship Name** AppointmentAssignmentPolicy **Relationship Type** Lookup **Refers To** AppointmentAssignmentPolicy
`AppointmentStartTimeInterval`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The proposed time interval in minutes between appointment start times. For example, set the interval to 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, and so on). Possible values are: • 5 • 10 • 15 • 20 • 30 • 45 • 60 • 90

Field	Details
	120 150 180 240 300 360 420 480
DeveloperName	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The API name of the AppointmentSchedulingPolicy object.
ExtCalEventHandlerId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the custom Apex class that checks service resources' external calendar events and returns the time slots where service resources are already booked. Available in API version 50.0 and later. This is a relationship field. **Relationship Name** ExtCalEventHandler **Relationship Type** Lookup **Refers To** ApexClass
IsOrgDefault	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this scheduling policy is the default appointment scheduling policy for Lightning Scheduler appointments in this org.

Field	Details
IsSvcTerrOpHoursWithShiftsUsed	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this scheduling policy considers the intersection of shifts and service territory operating hours when determining the availability of service resources for appointments (true). The default value is false. Available in API version 56.0 and later.
IsSvcTerritoryMemberShiftUsed	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this scheduling policy considers shifts of service territory members when determining the availability of service resources for appointments (true). The default value is false. Available in API version 56.0 and later.
Language	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the appointment scheduling policy. Possible values are: • `Possible values are:` • `da` (Danish) • `de` (German) • `en_US` (English) • `es` (Spanish) • `es_MX` (Spanish - Mexican) • `fi` (Finnish) • `fr` (French) • `it` (Italian) • `ja` (Japanese) • `ko` (Korean) • `nl_NL` (Dutch) • `no` (Norwegian) • `pt_BR` (Portuguese - Brazilian) • `ru` (Russian)

Field	Details
	• `sv` (Swedish) • `th` (Thai) • `zh_CN` (Chinese - Simplified) • `zh_TW` (Chinese - Traditional)
MasterLabel	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label for the appointment scheduling policy.
ShouldConsiderCalendarEvents	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this policy checks the Salesforce calendar for resource availability. The default value is 'false'.
ShouldEnforceExcludedResource	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this appointment scheduling policy prevents excluded service resources from being assigned to appointments.
ShouldEnforceRequiredResource	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this appointment scheduling policy allows only required service resources to be assigned to appointments.
ShouldMatchSkill	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether this appointment scheduling policy allows only required service resources who have certain skills to be assigned to appointments.
ShouldMatchSkillLevel	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this appointment scheduling policy allows only required service resources who have certain skills and skill levels to be assigned to appointments.
ShouldRespectVisitingHours	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this appointment scheduling policy prevents users from scheduling appointments outside of an account's visiting hours.
ShouldUsePrimaryMembers	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this appointment scheduling policy allows only service resources who are primary members of a service territory to be assigned to appointments.
ShouldUseSecondaryMembers	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this appointment scheduling policy allows service resources who are secondary members of a service territory to be assigned to appointments.

AssignedResource

Represents a service resource who is assigned to a service appointment in Salesforce Scheduler. Assigned resources appear in the Assigned Resources related list on service appointments. This object is available in API version 38.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),`
`retrieve(), undelete(), update(), upsert()`

Fields

Field Name	Details
AssignedResourceNumber	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number identifying the resource assignment.
EventId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the event that is added to the assigned resources calendar when the service appointment is created. This is a relationship field. **Relationship Name** Event **Relationship Type** Lookup **Refers To** Event
IsPrimaryResource	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the service resource is a primary resource or not. The default value is false. Available in API version 47.0 and later.
IsRequiredResource	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field Name	Details
	Description
	Indicates whether the service resource is a required resource or not.
	The default value is 'false'.
	If this field is set to false, Salesforce Scheduler considers the resource as available for other appointments.
ServiceAppointmentId	**Type**
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The service appointment that the resource is assigned to.
	This is a relationship field.
	Relationship Name
	ServiceAppointment
	Relationship Type
	Lookup
	Refers To
	ServiceAppointment
ServiceResourceId	**Type**
	reference
	Properties
	Create, Update, Filter, Group, Sort
	Description
	The resource who is assigned to the service appointment.
	This is a relationship field.
	Relationship Name
	ServiceResource
	Relationship Type
	Lookup
	Refers To
	ServiceResource

Usage

You can assign multiple service resources to a service appointment. Service resources who are assigned to service appointments can't be deactivated until they're removed from the appointments.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AssignedResourceChangeEvent (API version 48.0)
Change events are available for the object.

AssignedResourceFeed
Feed tracking is available for the object.

Holiday

Represents the fields in the Holiday object that are used by Salesforce Scheduler. A holiday is a period during which your service resource is unavailable for appointment scheduling.

Supported Calls

`create()`, `delete()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field	Details
ActivityDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** If the Holiday `IsAllDay` flag is set to `true` (indicating that it is an all-day holiday), then the holiday due date information is contained in the `ActivityDate` field. This field is a date field with a timestamp that is always set to midnight in the Coordinated Universal Time (UTC) time zone. The timestamp is not relevant, and you must not attempt to alter it to account for any time zone differences.
Description	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text description of the holiday.
EndTimeInMinutes	**Type** int

Field	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The end time of the holiday in minutes.
IsAllDay	**Type**
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the duration of the holiday is all day (`true`) or not (`false`).
Name	**Type**
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the holiday.
StartTimeInMinutes	**Type**
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The start time of the holiday in minutes.

OperatingHours

Represents the hours in which a service territory, service resource, or account is available for work in Salesforce Scheduler. This object is available in API version 38.0 and later.

Supported Calls

```
create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()
```

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the operating hours. Add any details that aren't included in the name.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the operating hours record was last modified. Its label in the user interface is `Last Modified Date`.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the operating hours record was last viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the operating hours. For example, *Summer Hours*, *Winter Hours*, or *Peak Season Hours*.
TimeZone	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The time zone that the operating hours fall within.

Usage

By default, only System Administrators can view, create, and assign operating hours.

Service territory members—which are service resources who can work in the territory—automatically use their service territory's operating hours. If a resource needs different operating hours than their territory, create separate operating hours for them from the Operating Hours tab. Then, select the desired hours in the `Operating Hours` lookup field on the service territory member detail page.

To view a service resource's operating hours for a particular territory, navigate to their Service Territories related list and click the Member Number for the territory. This takes you to the service territory member detail page, which lists the member's operating hours and dates during which they belong to the territory.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

OperatingHoursFeed
> Feed tracking is available for the object.

OperatingHoursHoliday

Represents the day or hours for which a service territory and service resources exclusive to the service territory are unavailable in Salesforce Scheduler. This object is available in API version 54.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), update(), upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
DateAndTime	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** (Read-Only) The date or time for the holiday.
HolidayId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update
	Description The ID of the holiday that's related to the operating hours indicated in the OperatingHoursId field. This is a relationship field.
	Relationship Name Holiday
	Relationship Type Lookup
	Refers To Holiday
LastReferencedDate	**Type** dateTime
	Properties Filter, Nillable, Sort
	Description The date and time that the current user last viewed a record related to this object.
LastViewedDate	**Type** dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this object.
OperatingHoursHolidayNumber	**Type** string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description (Read-Only) An auto-generated number identifying the operating hours holiday.
OperatingHoursId	**Type** reference
	Properties Create, Filter, Group, Sort
	Description The ID of the operating hours that's related to the holiday indicated in the HolidayId field. This is a relationship field.

Field	Details
	Relationship Name OperatingHours
	Relationship Type Lookup
	Refers To OperatingHours

ResourcePreference

Represents an account's preference for a specified service resource.

Resource preferences indicate which service resources should be assigned to a service appointment. You can designate service resources as preferred, required, or excluded on accounts.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field Name	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the resource preference was last modified.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the resource preference was last viewed.
PreferenceType	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update

Field Name	Details
	Description Resource preference type. Values include: • `Preferred`— Indicates that the user would like their appointment assigned to the resource. • `Required`— Indicates that the resource must be assigned to the appointment. • `Excluded`— Indicates that the resource must not be assigned to the appointment. Resource preferences serve more as a suggestion than a requirement. You can still assign a service appointment to any resource regardless of the related account's resource preferences.
RelatedRecordId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The account with the resource preference. This is a polymorphic relationship field. **Relationship Name** RelatedRecord **Relationship Type** Lookup **Refers To** Account
ResourcePreferenceNumber	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number identifying the resource preference.
ServiceResourceId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The service resource that is preferred, required, or excluded. This is a relationship field.

Field Name	Details
	Relationship Name ServiceResource
	Relationship Type Lookup
	Refers To ServiceResource

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ResourcePreferenceFeed

Feed tracking is available for the object.

ResourcePreferenceHistory

History is available for tracked fields of the object.

ResourceAbsence

Represents a time period in which a service resource is unavailable to work in Salesforce Scheduler. This object is available in API version 38.0 and later.

Supported Calls

```
create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),update(),upsert()
```

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
AbsenceNumber	**Type** string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description (Read only) An auto-generated number identifying the absence.

Field Name	Details
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the absence.
End	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the absence ends.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the resource absence was last modified. Its label in the user interface is `Last Modified Date`.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the resource absence was last viewed.
ResourceId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The absent service resource. This is a relationship field. **Relationship Name** Resource **Relationship Type** Lookup

Field Name	Details
	Refers To ServiceResource
Start	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the absence begins.

Usage

Resource absences you define periods of time when a service resource is unavailable to work.

💡 **Tip:** Create a trigger that sends an approval request to a supervisor when a service resource creates an absence.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ResourceAbsenceChangeEvent (API version 48.0)
> Change events are available for the object.

ResourceAbsenceFeed
> Feed tracking is available for the object.

ResourceAbsenceHistory
> History is available for tracked fields of the object.

ServiceAppointment

Represents an appointment booked through Salesforce Scheduler. This object is available in API version 38.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
AccountId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** (Read only) The account associated with the appointment. This is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
ActualDuration	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The number of minutes that it took the resource to complete the appointment. When values are first added to the `Actual Start` and `Actual End` fields, the `Actual Duration` is automatically populated to list the difference between the `Actual Start` and `Actual End`. If the `Actual Start` and `Actual End` fields are subsequently updated, the `Actual Duration` field doesn't re-update, but you can manually update it.
ActualEndTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual date and time the appointment ended.
ActualStartTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual date and time the appointment started.

Field Name	Details
AdditionalInformation	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Represents additional information about the service appointment,
Address	**Type** address **Properties** Filter **Description** The address where the appointment is taking place.
AppointmentCategoryId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the appointment category related to the service appointment. For example, for customers who visit the branch without an appointment, the drop in category is applicable. For pre-booked appointments, the scheduled category is applicable. This field is available in API version 58.0 and later. This is a relationship field. **Relationship Name** AppointmentCategory **Relationship Type** Lookup **Refers To** AppointmentCategory
AppointmentInvitationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the appointment invitation related to the appointment. This field is available in API version 55.0 and later. This field is a relationship field. **Relationship Name** AppointmentInvitation

Field Name	Details
	Relationship Type Lookup **Refers To** AppointmentInvitation
AppointmentMode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The mode of the service appointment.. This field is available in API version 60.0 and later. Possible values are: • `Group` • `Regular` The default value is `Regular`.
AppointmentNumber	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-assigned number that identifies the appointment.
AppointmentType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of appointment. Possible values are: • `call`—Phone • `company`—At a branch • `video`—Video call
ApptBookingInfoUrl	**Type** textarea **Properties** Create, Nillable, Update

Field Name	Details
	Description The appointment booking URL related to the appointment. This field is available in API version 57.0 and later. For Amazon Chime, this field has an encrypted appointment ID.
`ArrivalWindowEndTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You can choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only.
`ArrivalWindowStartTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The beginning of the window of time in which the technician is scheduled to arrive at the site. This window is typically larger than the Scheduled Start and End window to allow time for delays and scheduling changes. You can choose to share the Arrival Window Start and End with the customer, but keep the Scheduled Start and End internal-only.
`AttendeeCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of attendees associated with the service appointment. This field is available in API version 60.0 and later.
`AttendeeLimit`	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The maximum number of customers allowed to attend the service appointment. This field is considered when the appointment mode is `Group`. This field is available in API version 60.0 and later.

Field Name	Details
CancellationReason	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for the service appointment cancellation.
CheckedInTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the service appointment status changed to `CheckedIn`. This field is available in API version 60.0 and later.
City	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city where the appointment is completed. The maximum length is 40 characters.
Comments	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments for the service appointment.
ContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact associated with the parent record. If needed, you can manually update the service appointment contact. This is a relationship field. **Relationship Name** Contact

Field Name	Details
	Relationship Type Lookup **Refers To** Contact
Country	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country where the appointment is completed. The maximum length is 80 characters.
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the appointment.
DueDate	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date by which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.
Duration	**Type** double **Properties** Create, Nillable, Filter, Sort, Update **Description** The estimated length of the appointment. The duration is in minutes or hours based on the value selected in the `Duration Type` field.
DurationType	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The unit of duration.

Field Name	Details
	Possible values are: • `Hours` • `Minutes` The default value is `Hours`.
`EarliestStartTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date after which the appointment must be completed. Earliest Start Permitted and Due Date typically reflect terms in the customer's service-level agreement.
`Email`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address.
`EngagementChannelTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The engagement channel type that's associated with the service appointment. This field is available in API version 56.0 and later. This field is a relationship field. **Relationship Name** EngagementChannelType **Relationship Type** Lookup **Refers To** EngagementChannelType
`GroupAppointmentAccessType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The users who can access the group service appointment. Valid values are:

Field Name	Details
	• `AddedAndExperienceSiteAndInvitedUsers`—Added, Experience Site, and Invited Users • `AddedAndExperienceSiteUsers`—Added and Experience Site Users • `AddedUsers`—Added Users The default value is `AddedUsers`. Available in API version 61.0 and later.
IsAnonymousBooking	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a service resource was automatically assigned to the appointment (`true`) or not (`false`). The default value is `false`. This field is available in API version 49.0 and later.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the service appointment was last modified. Its label in the user interface is `LastModifiedDate`.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the service appointment was last viewed.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of the service appointment. This is a polymorphic relationship field. **Relationship Name** Owner

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Field Name	Details
	Relationship Type Lookup
	Refers To Group, User
ParentRecordId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort
	Description The parent record associated with the appointment. The parent record can't be updated after the service appointment is created. This is a polymorphic relationship field.
	Relationship Name ParentRecord
	Relationship Type Lookup
	Refers To Account, Case, Lead, Opportunity
ParentRecordType	**Type** string
	Properties Filter, Group, Nillable, Sort
	Description (Read only) The type of parent record: Account.
Phone	**Type** phone
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The phone number.
PostalCode	**Type** string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The postal code where the appointment is completed. The maximum length is 20 characters.

Field Name	Details
SchedEndTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The time at which the appointment is scheduled to end. `ScheduledEnd –` `ScheduledStart = EstimatedDuration.`
SchedStartTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The time at which the appointment is scheduled to start.
ServiceTerritoryId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service territory associated with the appointment. This is a relationship field. **Relationship Name** ServiceTerritory **Relationship Type** Lookup **Refers To** ServiceTerritory
State	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state where the service appointment is completed. The maximum length is 80 characters.
Status	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	The status of the appointment. The picklist includes the following values, which can be customized:
	• `None`—Default value.
	• `CheckedIn`—Checked In
	• `Scheduled`—Appointment has been assigned to a service resource.
	• `Dispatched`—Assigned service resource has been notified about their assignment.
	• `In Progress`—Work has begun.
	• `Completed`—Work is complete.
	• `Cannot Complete`—Work couldn't be completed.
	• `Canceled`—Work is canceled, typically before any work began
`StatusCategory`	**Type** picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The category that each `Status` value falls into. The `StatusCategory` field's values are identical to the default `Status` values except `CheckedIn`. Use the `CheckedIn` value for drop-in customers.
	If you create custom `Status` values, you must indicate which category it belongs to. For example, if you create a *Customer Absent* value, you can decide that it belongs in the *Cannot Complete* category. To learn which processes reference StatusCategory, see How are Status Categories Used?
`Street`	**Type** textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The street number and name where the service appointment is completed.
`Subject`	**Type** string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A short phrase describing the appointment.

Field Name	Details
WorkTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The work type associated with the service appointment. This is a relationship field. **Relationship Name** WorkType **Relationship Type** Lookup **Refers To** WorkType

Usage

Service appointments always have a parent record, which can be an account. Service appointments on *accounts* represent work being performed for the account.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceAppointmentChangeEvent (API version 48.0)
Change events are available for the object.

ServiceAppointmentFeed
Feed tracking is available for the object.

ServiceAppointmentHistory
History is available for tracked fields of the object.

ServiceAppointmentOwnerSharingRule
Sharing rules are available for the object.

ServiceAppointmentShare
Sharing is available for the object.

ServiceAppointmentAttendee

Represents a Lead, Contact, or Person Account who is associated with the Service Appointment of type Group. This object is available in API version 60.0 and later.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
AttendeeId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The customer who is attending the associated service appointment. This field is a polymorphic relationship field. **Relationship Name** Attendee **Relationship Type** Lookup **Refers To** Person Account, Contact, Lead
AttendeeIdentifier	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The alphanumeric unique identifier of the appointment attendee. For example, D101, E63, A5015.
Email	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email of the attendee.
HasAttended	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the attendee has attended the associated service appointment (`true`) or not (`false`). The default value is `false`. Available in API version 61.0 and later.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the service appointment attendee record was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the service appointment attendee record was last viewed.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of the service appointment attendee record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
ServiceAppointmentId	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description The service appointment associated with the appointment attendee. This field is a relationship field. **Relationship Name** ServiceAppointment **Relationship Type** Lookup **Refers To** ServiceAppointment
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the service appointment attendee. Valid value are: • Enrolled • Unenrolled The default value is Enrolled. These values are available in API version 61.0 and later.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceAppointmentAttendeeFeed
Feed tracking is available for the object.

ServiceAppointmentAttendeeHistory
History is available for tracked fields of the object.

ServiceAppointmentAttendeeOwnerSharingRule
Sharing rules are available for the object.

ServiceAppointmentAttendeeShare
Sharing is available for the object.

ServiceResource

Represents a technician or an asset. This object is available in API version 38.0 and later.

A technician represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients. An asset represents an item of commercial value, such as a product sold by your company or a competitor, that a customer has purchased and installed.

Supported Calls

`create()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
AssetId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the Asset. This is a relationship field. **Relationship Name** Asset **Relationship Type** Lookup **Refers To** Asset
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the resource.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field Name	Details
	Description
	When selected, this option means that the resource can be assigned to appointments. For service tracking purposes, resources can't be deleted, so deactivating a resource is the best way to send them into retirement.
	Deactivating a user doesn't deactivate the related service resource. You can't create a service resource that is linked to an inactive user.
IsPrimary	**Type**
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicate whether Salesforce Scheduler must consider the service resource record for scheduling appointments (true) or not (false).
	Note: This field is applicable only if the Main Service Resource setting is enabled in your Salesforce org.
	This field is available in API version 57.0 and later.
	The default value is `false`.
LastReferencedDate	**Type**
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the service resource was last modified. Its label in the user interface is `Last Modified Date`.
LastViewedDate	**Type**
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date when the service resource was last viewed.
RelatedRecordId	**Type**
	reference
	Properties
	Create, Filter, Group, Sort, Nillable, Update

Field Name	Details
	Description The associated user. Its label in the UI is `User`. If the service resource represents a service crew rather than a user, leave the `User` field blank and select the related crew in the `ServiceCrewId` field.
`ResourceType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Indicates whether the resource is a Technician (T) or Asset (S). The default value is Technician (T). You can't add additional resource types.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceResourceChangeEvent (API version 48.0)
Change events are available for the object.

ServiceResourceFeed
Feed tracking is available for the object.

ServiceResourceHistory
History is available for tracked fields of the object.

ServiceResourceOwnerSharingRule
Sharing rules are available for the object.

ServiceResourceShare
Sharing is available for the object.

ServiceResourceSkill

Represents a skill that a service resource possesses in Salesforce Scheduler. This object is available in API version 38.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
EffectiveEndDate	**Type** datetime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the skill expires. For example, if a service resource must be recertified after six months, the end date would be the date their certification expires.
EffectiveStartDate	**Type** datetime **Properties** Create, Filter, Sort, Update **Description** The date when the service resource gains the skill. For example, if the skill represents a certification, the start date would be the date of certification.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the resource skill was last modified. Its label in the user interface is `Last Modified Date`.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the resource skill was last viewed.
ServiceResourceId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The service resource who possesses the skill. This is a relationship field.

Field Name	Details
	Relationship Name ServiceResource **Relationship Type** Lookup **Refers To** ServiceResource
SkillId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The skill the service resource possesses. This is a relationship field. **Relationship Name** Skill **Relationship Type** Lookup **Refers To** Skill
SkillLevel	**Type** double **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** The service resource's skill level. Skill level can range from zero to 99.99.
SkillNumber	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number identifying the resource skill assignment.

Usage

You can assign skills to all service resources in your org to indicate their certifications and areas of expertise, and specify each resource's skill level from 0 to 99.99. For example, you can assign Maria the "Welding" skill, level 50.

If you intend to use the skills feature, determine which skills you want to track and how skill level must be determined. For example, you can want the skill level to reflect years of experience, certification levels, or license classes.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

ServiceResourceSkillFeed
    Feed tracking is available for the object.

ServiceResourceSkillHistory
    History is available for tracked fields of the object.

ServiceTerritory

Represents a geographic or functional region in which work can be performed in Salesforce Scheduler. This object is available in API version 38.0 and later.

Supported Calls

```
create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()
```

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
Address	**Type** address **Properties** Filter **Description** An address to associate with the territory. You can want to list the address of the territory's headquarters.
City	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city of the associated address. Maximum length is 40 characters.
Country	**Type** string

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The country to associate with the territory. Maximum length is 80 characters.
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the territory.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the service territory is meant to be used. If a territory is inactive, you can't add members to it or link it to service appointments.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the territory was last modified. Its label in the user interface is `Last Modified Date`.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the territory was last viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the territory.

Field Name	Details
OperatingHoursId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The territory's operating hours, which indicate when service appointments within the territory can occur. Service resources who are members of a territory automatically inherit the territory's operating hours unless different hours are specified on the resource record. This is a relationship field. **Relationship Name** OperatingHours **Relationship Type** Lookup **Refers To** OperatingHours
PostalCode	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The postal code of the address associated with the territory. Maximum length is 20 characters.
State	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state of the address associated with the territory. Maximum length is 80 characters.
Street	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The street number and name of the address associated with the territory.

Usage

If you want to use service territories, determine which territories you must create. Depending on how your business works, you can decide to create territories based on cities or counties, or on functional categories such as sales versus service. If you plan to build out a hierarchy of service territories, create the highest-level territories first.

For example, you can 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 service resources to each county territory to indicate who is available to work in that county.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceTerritoryChangeEvent (API version 48.0)
> Change events are available for the object.

ServiceTerritoryFeed
> Feed tracking is available for the object.

ServiceTerritoryHistory
> History is available for tracked fields of the object.

ServiceTerritoryOwnerSharingRule
> Sharing rules are available for the object.

ServiceTerritoryShare
> Sharing is available for the object.

ServiceTerritoryMember

Represents a service resource who can be assigned to service appointments in a service territory in Salesforce Scheduler. This object is available in API version 38.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
Address	**Type** address **Properties** Filter **Description** The member's address. You can want to list the related service resource's address in this field.
EffectiveEndDate	**Type** datetime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the service resource is no longer a member of the territory. If the resource will be working in the territory for the foreseeable future, leave this field blank. This field is useful for indicating when a temporary relocation ends.
EffectiveStartDate	**Type** datetime **Properties** Create, Filter, Sort, Update **Description** The date when the service resource becomes a member of the service territory.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the territory member was last modified. Its label in the user interface is `Last Modified Date`.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the territory member was last viewed.

Field Name	Details
OperatingHoursId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The operating hours assigned to the service territory member. If no operating hours are specified, the member is assumed to use their parent service territory's operating hours. If a member needs special operating hours, create them in Setup and select them in the `Operating Hours` lookup field on the member's detail page. This is a relationship field. **Relationship Name** OperatingHours **Relationship Type** Lookup **Refers To** OperatingHours
Role	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The role associated with the service resource.
ServiceResourceId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The service resource assigned to the service territory. This is a relationship field. **Relationship Name** ServiceResource **Relationship Type** Lookup **Refers To** ServiceResource
ServiceTerritoryId	**Type** reference

Field Name	Details
	Properties Create, Filter, Group, Sort **Description** The service territory that the service resource is assigned to. This is a relationship field. **Relationship Name** ServiceTerritory **Relationship Type** Lookup **Refers To** ServiceTerritory

TerritoryType	**Type**
	picklist
	
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	
	Description
	Primary, Secondary, or Relocation.
	
	• The primary territory is typically the territory where the resource works most often—for example, near their home base. Service resources can only have one primary territory.
	• Secondary territories are territories where the resource can be assigned to appointments, if needed. Service resources can have multiple secondary territories.
	• Relocation territories represent temporary moves for service resources.
	
	For example, a service resource can have the following territories:
	
	• Primary territory: *West Chicago*
	• Secondary territories:
	  – *East Chicago*
	  – *South Chicago*
	• Relocation territory: *Manhattan*, for a three-month period

Usage

If you delete a service territory with members, the service resources who were members no longer have any connection to the territory.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ServiceTerritoryMemberChangeEvent (API version 48.0)
>   Change events are available for the object.

ServiceTerritoryMemberFeed
>   Feed tracking is available for the object.

ServiceTerritoryMemberHistory
>   History is available for tracked fields of the object.

Shift

Represents a shift for service resource scheduling. This object is available in API version 46.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler is enabled. Users have Shift permission.

Fields

Field	Details
AppointmentCategoryId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This field is a relationship field. Available in API version 61.0 and later. **Relationship Name** ShiftAppointmentCategory **Relationship Type** Lookup **Refers To** AppointmentCategory
BackgroundColor	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Sets a background color for shifts shown in the UI. Use a 3- or 6-digit hexadecimal format. For example, #FF00FF. Available in API version 55.0 and later.
EndTime	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time that the shift ends.
Label	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The label that a shift is given.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time when the current user last viewed a related record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time when the current user last viewed this record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of the shift. This is a polymorphic relationship field. **Relationship Name** Owner

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Field	Details
	Relationship Type Lookup **Refers To** Group, User
RecurrenceEndDate	**Type** date **Properties** Create, Group, Nillable, Sort, Update **Description** The date when the recurrence period ends. The date must be after the Recurrence Start Date. The value for this field is retrieved from the pattern defined in the RecurrencePattern field. You can define the end date by using the COUNT or UNTIL parameter in the RecurrencePattern field. If you specify a value in this field and define a recurrence pattern, Salesforce Scheduler overrides the value with the end date in the recurrence pattern. The recurrence period is limited to 180 days. This field is available in API version 56.0 and later.
RecurrencePattern	**Type** string **Properties** Create, Group, Nillable, Sort, Update **Description** The RRULE that describes the recurrence pattern for recurring shifts. Supports a subset of the RFC 5545 standard for internet calendaring and scheduling. See the Salesforce Scheduler Recurring Shifts section in this topic for usage examples. The period for the recurrence pattern is limited to 180 days. This field is available in API version 56.0 and later.
RecurrenceStartDate	**Type** date **Properties** Create, Group, Nillable, Sort, Update **Description** The date when the recurrence period begins. The date must be before the Recurrence End Date. The value for this field is retrieved from the StartTime field. Don't modify the value for this field. This field is available in API version 56.0 and later.
ServiceResourceId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the service resource the shift belongs to. Available in API versions 47.0 and later. This is a relationship field.
	Relationship Name ServiceResource
	Relationship Type Lookup
	Refers To ServiceResource
ServiceTerritoryId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the service territory the shift belongs to. Available in API versions 47.0 and later. This is a relationship field.
	Relationship Name ServiceTerritory
	Relationship Type Lookup
	Refers To ServiceTerritory
ShiftNumber	**Type** string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The number automatically given to the shift upon creation.
StartTime	**Type** dateTime
	Properties Create, Filter, Sort, Update
	Description The date and time that the shift starts.

Field	Details
Status	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Describes the status of the shift. Users can create custom values. Possible values are: • `Confirmed` • `Fixed` • `Published` • `Tentative` The default value is 'Tentative'.
StatusCategory	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Describes the status of the shift using static values. This field is derived from `Status` using the mapping defined in setup. Possible values are: • `Confirmed` • `Published` • `Tentative`
TimeSlotType	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Type of time slot for the shift. The same setup values as the `TimeSlot` field in the `OperatingHours` object. Possible values are: • `Extended` • `Normal` (default value) The default value is 'Normal'.
Type	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Type of shift. Possible values are: • `Recurring` • `Regular` The default value is `Regular`. This field is available in API version 56.0 and later.
`WorkTypeGroupId`	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the work type group the shift belongs to. Available in API versions 54.0 and later. This is a relationship field.
	Relationship Name WorkTypeGroup
	Relationship Type Lookup
	Refers To WorkTypeGroup

Usage

Salesforce Scheduler Recurring Shifts

Use the `RecurrencePattern` field to specify the recurrence pattern for recurring shifts. These recurrence patterns, called reference rules or "RRULES", support a subset of the RFC 5545 standards. This table includes common RRULE examples.

Recurrence Pattern	RRULE Example
Every day for five days	`RRULE:FREQ=DAILY;INTERVAL=1;COUNT=5`
Every two weeks on Monday and Friday for 10 occurrences	`RRULE:FREQ=WEEKLY;INTERVAL=2;BYDAY=MO,FR;COUNT=10`
Monthly on the first day of the month until August 1, 2022	`RRULE:FREQ=MONTHLY;INTERVAL=1;BYMONTHDAY=1;UNTIL=20220801T100000Z`

The RRULE defined by `RecurrencePattern` supports a subset of the RFC 5545 standard for internet calendaring and scheduling. Supported RRULE parts include FREQ, BYMONTH, BYMONTHDAY, BYDAY, BYSETPOS, INTERVAL, UNTIL, and COUNT.

When the event record is saved, the RRULE might be modified to follow the required format:

- The RRULE parts are placed in the following order: FREQ, BYMONTH, BYMONTHDAY, BYDAY, BYSETPOS, INTERVAL, UNTIL, and COUNT.

- Any missing default values are inserted. For example, if the RRULE doesn't include INTERVAL, then `INTERVAL=1` is added.

- The RRULE is prefaced with `RRULE:` if that preface is missing.

RRULE Part	Supported RFC 5545 Implementation

FREQ	Required. Indicates the type of recurrence rule. Allowed values are:
	
	• `DAILY`— supported parts include FREQ, INTERVAL, UNTIL, and COUNT.
	
	• `WEEKLY`—supported parts include INTERVAL, UNTIL, COUNT, and BYDAY. BYDAY is required, but can't be preceded by a number.
	
	   For example, to indicate weekly on Tuesday and Thursday until September 1 2022, use
	   `RRULE:FREQ=WEEKLY;UNTIL=20220901T000000Z;BYDAY=TU,TH`
	
	• `MONTHLY`—supported patterns include:
	
	   – BYMONTHDAY
	
	     For example, to indicate monthly on the third day of the month use:
	     `RRULE:FREQ=MONTHLY;BYMONTHDAY=3`
	
	   – BYDAY and BYSETPOS
	
	     For example, to indicate the last weekday of the month, use
	     `RRULE:FREQ=MONTHLY;BYDAY=MO,TU,WE,TH,FR;BYSETPOS=-1`
	
	   – BYDAY, where the BYDAY values are specified with a numeric value
	
	     For example, to indicate monthly on the first Friday for 10 occurrences, use
	     `RRULE:FREQ=MONTHLY;COUNT=10;BYDAY=1FR`

BYMONTH	The month. Valid values are `1` to `12`.
BYMONTHDAY	The day of the month. Valid values are `1` to `31`. If BYMONTHDAY is `31` and the month has fewer than 31 days, the event is created on the last day of the month.
BYDAY	A comma-separated list of days of the week. Valid values are `SU, MO, TU, WE, TH, FR, SA`. For RRULES with monthly frequency, BYDAY must be one of: • a single day • weekend days • week days • every day of the week Each BYDAY value can be preceded by an integer that indicates the nth occurrence of a specific day within the monthly RRULE. Allowed values are `-1, 1, 2, 3,` and `4`. You can't use different numbers in the BYDAY values. For example, this RRULE isn't supported: `RRULE:FREQ=MONTHLY;INTERVAL=2;COUNT=10;BYDAY=1SU,-1SU` If BYDAY values are prefaced with a number, the RRULE can't include BYSETPOS.

RRULE Part	Supported RFC 5545 Implementation
BYSETPOS	A comma-separated list of values that correspond to the nth occurrence within the set of recurrence instances specified by the rule. Valid values are `-1`, `1`, `2`, `3`, or `4`. Default value is `1`. For example, to indicate the last weekday of the month, use: `RRULE:FREQ=MONTHLY;BYDAY=MO,TU,WE,TH,FR;BYSETPOS=-1`
INTERVAL	The repetition interval. Valid values are: • an integer between `1` and `31` if FREQ=DAILY • an integer between `1` and `26` if FREQ=WEEKLY • an integer between `1` and `12` if FREQ=MONTHLY Default value is `1`.
UNTIL	Specifies the datetime in UTC format when the recurrence rule stops. The supported format is yyyyMMddTHHmmssZ, for example: 20210419T083000Z. An RRULE can't contain both UNTIL and COUNT. A recurring event without either UNTIL or COUNT leads to an error.
COUNT	The number of occurrences. Allowed values are 1–120. An RRULE can't contain both UNTIL and COUNT. A recurring event without either UNTIL or COUNT leads to an error.

Skill

Represents a skill that service resources have. This object is available in API version 24.0 and later.

> 📝 **Note:** For information about WDC skills on a user's profile, see the ProfileSkill topic.

Supported Calls

`create()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Fields

Field Name	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the skill.

Field Name	Details
DeveloperName	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. 📝 Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance slows down while Salesforce generates one for each record.
LastViewedDate	**Type** datetime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed the skill.
MasterLabel	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the skill.

SkillRequirement

Represents a skill that is required to complete a particular task in Salesforce Scheduler. Skill requirements can be added to work types Salesforce Scheduler. This object is available in API version 38.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, this record can only have been referenced (`LastReferencedDate`) and not viewed.
RelatedRecordId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The record that the skill is required for. The related record can be a work type. This is a polymorphic relationship field. **Relationship Name** RelatedRecord **Relationship Type** Lookup **Refers To** PendingServiceRouting, WorkOrder, WorkOrderLineItem, WorkType
SkillId	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field Name	Details
	Description
	The skill that is required.
	This is a relationship field.
	Relationship Name
	Skill
	Relationship Type
	Lookup
	Refers To
	Skill
SkillLevel	**Type**
	double
	Properties
	Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description
	The level of the skill required. Skill levels can range from zero to 99.99. Depending on your business needs, you can want the skill level to reflect years of experience, certification levels, or license classes.
SkillNumber	**Type**
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated number identifying the skill requirement.

Usage

Skill requirements help dispatchers assign work to service resources with the proper expertise. You can still assign a service appointment to a service resource that *doesn't* possess the specified skills, so skill requirements serve more as a suggestion than a rule.

Add skill requirements to work types to save time and keep your processes consistent. When you add a skill requirement to a work type that use that type automatically inherits the skill requirement. For example, if all annual maintenance visits for your Classic Refrigerator product require a Refrigerator Maintenance skill level of at least 50, add that skill requirement to the Annual Maintenance Visit work type. When you create a service appointment for a customer's annual fridge maintenance, applying that work type adds the skill requirement as well.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

ServiceRequirementFeed
Feed tracking is available for the object.

ServiceRequirementHistory
   History is available for tracked fields of the object.

TimeSlot

Represents a period of time on a specified day of the week during which work can be performed in Salesforce Scheduler. Operating hours consist of one or more time slots. This object is available in API version 38.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
DayOfWeek	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The day of the week when the time slot takes place.
EndTime	**Type** time **Properties** Create, Filter, Sort, Update **Description** The time when the time slot ends.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field Name	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, this record can only have been referenced (`LastReferencedDate`) and not viewed.
MaxAppointments	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Maximum number of appointments for a single time slot. Available in API version 47.0 and later.
OperatingHoursId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The operating hours that the time slot belongs to. An operating hours' time slots appear in the Operating Hours related list. This is a relationship field. **Relationship Name** OperatingHours **Relationship Type** Lookup **Refers To** OperatingHours
StartTime	**Type** time **Properties** Create, Filter, Sort, Update **Description** The time when the time slot starts.
TimeSlotNumber	**Type** string

Field Name	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the time slot. The name is auto-populated to a day and time format—for example, `Monday 9:00 AM - 10:00 PM`—but you can manually update it.
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of time slot. Possible values are `Normal` and `Extended`. Default value must be `Normal`. You can choose to use `Extended` to represent overtime shifts.
`WorkTypeGroupId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Work type group assigned to the time slot. Available in API version 47.0 and later. This is a relationship field. **Relationship Name** WorkTypeGroup **Relationship Type** Lookup **Refers To** WorkTypeGroup

Usage

Operating hours are composed of time slots, which indicate the hours of operation for a particular day. After you create operating hours, create time slots for each day. For example, if the operating hours must be 8 AM to 5 PM Monday through Friday, create five time slots, one per day. To reflect breaks such as lunch hours, create multiple time slots in a day: for example, `Monday 8:00 AM - 12:00 PM` and `Monday 1:00 PM - 5:00 PM`.

💡 Tip: Time slots don't come with any built-in rules, but you can create Apex triggers that limit time slot settings in your org. For example, you can want to restrict the start and end times on time slots to half-hour increments, or to prohibit end times later than 8 PM.

Waitlist

Represents a queue to which drop in customers who visit the branch without an already scheduled appointment are added. This object is available in API version 58.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the waitlist.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the waitlist is available to add drop in customers (`true`) or not (`false`). The default value is `false`.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the waitlist was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	**Type** dateTime

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Field	Details
	Properties
	Filter, Nillable, Sort
	Description
	The date when the waitlist was last viewed.
Name	**Type**
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the waitlist.
OwnerId	**Type**
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The owner of the waitlist.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type
	Lookup
	Refers To
	Group, User
ServiceTerritoryId	**Type**
	reference
	Properties
	Create, Filter, Group, Nillable, Sort
	Description
	The ID of the service territory to which the waitlist belongs.
	This field is a relationship field.
	Relationship Name
	ServiceTerritory
	Relationship Type
	Lookup
	Refers To
	ServiceTerritory

Field	Details
Type	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the appointment type. Possible values are: • `DropIn` • `Queued` The default value is `DropIn`.

Usage

Use waitlists to manage drop in customers. You can create multiple waitlists for a service territory. Depending on your business set up, assign work type groups and service resources to a waitlist. When customers visit the branch, the greeter can check them in to a specific waitlist based on the reason they're visiting the branch. Depending on the availability of service resources on a particular day, you can choose to enable or disable a waitlist.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WaitlistFeed
Feed tracking is available for the object.

WaitlistHistory
History is available for tracked fields of the object.

WaitlistOwnerSharingRule
Sharing rules are available for the object.

WaitlistShare
Sharing is available for the object.

WaitlistParticipant

Represents a customer who is added to a waitlist. This object is available in API version 58.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
AcceptanceTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time the service resource accepts the appointment request of the waitlist participant. This field is available in API version 59.0 and later.
Description	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the waitlist participant.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the waitlist participant record was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the waitlist participant record was last viewed.
ParticipantId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the participant that's associated as a parent for the service appointment.

Field	Details
	This field is a polymorphic relationship field.
	Relationship Name Participant
	Relationship Type Lookup
	Refers To Account, Contact, Lead
RelatedRequestId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description This field is a relationship field.
	Relationship Name RelatedRequest
	Refers To ClinicalServiceRequest
ParticipantIdentifier	**Type** string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The alphanumeric unique identifier of the participant in a waitlist. For example, D101, E63, A5015
ServiceAppointmentId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the service appointment that's related to the waitlist participant. This field is a relationship field.
	Relationship Name ServiceAppointment
	Relationship Type Lookup
	Refers To ServiceAppointment

Field	Details
ServiceResourceId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the service resource that's related to the service appointment for the waitlist participant. This field is a relationship field. **Relationship Name** ServiceResource **Relationship Type** Lookup **Refers To** ServiceResource
ServiceTerritoryId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This field is a relationship field. **Relationship Name** ServiceTerritory **Refers To** ServiceTerritory
Status	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The status of waitlist participant. Possible values are: • `Assigned` - Assigned to a service resource. • `Unassigned` - Waiting to be assigned. The default value is `Unassigned`.
WaitlistId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** The ID of the Waitlist that's related to the participant. This field is a relationship field. **Relationship Name** Waitlist **Relationship Type** Lookup **Refers To** Waitlist
WorkTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the work type that's associated with the service appointment. This field is a relationship field. **Relationship Name** WorkType **Relationship Type** Lookup **Refers To** WorkType

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WaitlistParticipantFeed

Feed tracking is available for the object.

WaitlistParticipantHistory

History is available for tracked fields of the object.

WorkType

Represents a type of work to be performed in Salesforce Scheduler. This object is available in API version 38.0 and later.

Supported Calls

`create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),`
`retrieve(),search(),undelete(),update(),upsert()`

Work types are templates representing an appointment topic (work type group) with an appointment location (service territory). Defines key appointment parameters such as appointment duration, prep and wrap-up buffers, and availability timings.

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field Name	Details
`AppointmentCategoryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the appointment category that's assigned to the work type. This field is available in API version 58.0 and later. This field is a relationship field. **Relationship Name** AppointmentCategory **Relationship Type** Lookup **Refers To** AppointmentCategory
`ApptStartTimeIntvlInMin`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specify 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 can be between 5 through 720. Note: If you don't specify a value for this field, Salesforce Scheduler considers the value specified in the default scheduling policy. This field is available in API version 57.0 and later.

Field Name	Details
AttendeeLimit	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The maximum number of attendees for a group service appointment in a shift. This field is considered when the appointment mode is Group. Available in API version 61.0 and later.
BlockTimeAfterAppointment	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specify the after buffer time for the service appointment. 📝 Note: In Salesforce Scheduler, during appointment scheduling, the number of available time slots is automatically adjusted to accommodate the after buffer time.
BlockTimeAfterUnit	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specify the unit of time for BlockTimeAfterAppointment. Possible values are: • Hours • Minutes The default value is 'Minutes'.
BlockTimeBeforeAppointment	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specify the before buffer time for the service appointment. 📝 Note: In Salesforce Scheduler, during appointment scheduling, the number of available time slots is automatically adjusted to accommodate the before buffer time.

Field Name	Details
BlockTimeBeforeUnit	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specify the unit of time for BlockTimeBeforeAppointment. Possible values are: • Hours • Minutes The default value is 'Minutes'.
DefaultAppointmentType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The default appointment type of the work type. Possible values are: • Phone • At Branch • Video In Lobby Management, the Scheduled Service Appointments list only shows appointments that are set to At Branch.
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the work type. Try to add details about the task or tasks that this work type represents.
DurationType	**Type** picklist **Properties** Create, Filter, Group, Defaulted on create, Restricted picklist, Sort, Update **Description** The unit of the Estimated Duration: Minutes or Hours.

Field Name	Details
EstimatedDuration	**Type** double **Properties** Create, Filter, Sort, Update **Description** The estimated length of the work. The estimated duration is in minutes or hours based on the value selected in the `Duration Type` field.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the work type was last modified. Its label in the user interface is `Last Modified Date`.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the work type was last viewed by the current user.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the work type.
OperatingHoursId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the operating hours that's assigned to the work type. If a service resource needs special operating hours, create them in Setup and select them in the `Operating Hours` lookup field on the member's detail page. This is a relationship field. **Relationship Name** OperatingHours

Field Name	Details
	Relationship Type Lookup
	Refers To OperatingHours
OwnerId	**Type** reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The work type's owner. This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ProductId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description References the product associated with the work type. This field is available in API version 63.0 and later. This field is a relationship field.
	Relationship Name Product
	Refers To Product2
TimeFrameEndUnit	**Type** picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specify the unit of time for TimeFrame End. Possible values are: • Days

Field Name	Details
	• Hours
	The default value is 'Days'.
TimeFrameStartUnit	**Type**
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specify the unit of time for TimeFrame Start.
	Possible values are:
	• Days
	• Hours
	The default value is 'Days'.
TimeframeEnd	**Type**
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specify the timeframe end to show only time slots that end before the duration that is set in Timeframe End.
TimeframeStart	**Type**
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specify the timeframe start to show only time slots that start after the duration that is set in Timeframe Start.

Usage

You can specify meeting preparation and wrap-up time by specifying BlockTimeBeforeAppointment and BlockTimeAfterAppointment. Specify the units of time as minutes or hours. During appointment scheduling, the number of available time slots is automatically adjusted to accommodate the before and after buffer time. By default, 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 appointment buffers on the Salesforce calendar.

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

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 is set in Timeframe Start and end before the duration that is 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.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WorkTypeChangeEvent (API version 48.0)
> Change events are available for the object.

WorkTypeFeed
> Feed tracking is available for the object.

WorkTypeHistory
> History is available for tracked fields of the object.

WorkTypeOwnerSharingRule
> Sharing rules are available for the object.

WorkTypeShare
> Sharing is available for the object.

WorkTypeGroup

Represents a grouping of work types used to categorize types of appointments available in Salesforce Scheduler. This object is available in API version 45.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
AdditionalInformation	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Additional information about the types of appointments this work type group represents.

Field	Details
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** A description of this work type group.
GroupType	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The category of this work type group. Possible values are: • `Default`—A non-capacity group of work types used in Salesforce Scheduler.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this work type group can be used for appointment scheduling.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time that the current user last viewed a record related to this object.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this object.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description
	The name of this work type group.
OwnerId	**Type**
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the user who created this record.
	This is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type
	Lookup
	Refers To
	Group, User

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

WorkTypeGroupFeed

Feed tracking is available for the object.

WorkTypeGroupHistory

History is available for tracked fields of the object.

WorkTypeGroupOwnerSharingRule

Sharing rules are available for the object.

WorkTypeGroupShare

Sharing is available for the object.

WorkTypeGroupDataTranslation

Represents the translated values of the data stored within a WorkTypeGroup record's fields. This object is available in API version 54.0 and later.

Supported Calls

`create()`, `delete()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

- Your organization must be using Enterprise, Performance, Unlimited, or Developer edition.

- Translation Workbench and data translation must be enabled in your org.

- To view this object, you must have the "View Setup and Configuration" permission

Fields

Field	Details
Description	**Type** textarea **Properties** Create, Nillable,Update **Description** The translated value for the WorkTypeGroup description.
IsOutOfDate	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the translation is out-of-date (`true`) or current (`false`). A translation is out-of-date if the parent WorkTypeGroup record is updated after the last translation was filed.
Language	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort **Description** The language for these translated values.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The translated value for the WorkTypeGroup record name. This field is required to translate the text in other fields.
ParentId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update
	Description The record ID of the WorkTypeGroup associated with the data that is being translated. This field is a relationship field.
	Relationship Name Parent
	Relationship Type Lookup
	Refers To WorkTypeGroup

Usage

Use this object to translate the data stored in a WorkTypeGroup record into the different languages supported by Salesforce. If data translation is enabled for custom fields on the WorkTypeGroup object, additional WorkTypeGroupDataTranslation fields exist for translating the data contained within those fields.

You can't use a custom external id field in an upsert call for a WorkTypeGroupDataTranslation object.

SEE ALSO:

   Salesforce Help: Manage Objects' Data Translations

CHAPTER 5   Salesforce Scheduler Custom Objects

This section provides details on custom objects, including junction objects. The Junction Object is a custom object that enables you to link a custom object with a large number of child records and link each child record to a large number of parent objects.

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

Available in: Enterprise, Unlimited, Performance, and Developer editions.

SEE ALSO:

   Create a Many-to-Many Object Relationship

ActionableListMbrInvitation

Represents a relationship between an Actionable List Member and an Appointment Invitation. This object is available in API version 59.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
ActionableListMemberId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the actionable list member that's associated with the actionable list member invitation record. This field is a relationship field. **Relationship Name** ActionableListMember **Relationship Type** Lookup **Refers To** ActionableListMember
AppointmentInvitationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the appointment invitation that's associated with the actionable list member invitation record. This field is a relationship field. **Relationship Name** AppointmentInvitation

Field	Details
	Relationship Type Lookup
	Refers To AppointmentInvitation
LastReferencedDate	**Type** dateTime
	Properties Filter, Nillable, Sort
	Description The date and time when the current user last viewed a related record.
LastViewedDate	**Type** dateTime
	Properties Filter, Nillable, Sort
	Description The date and time when the current user last viewed this record.
Name	**Type** string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description Auto-assigned number that identifies the actionable list member invitation record.
ServiceAppointmentId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the service appointment that's associated with the actionable list member invitation. This field is a relationship field.
	Relationship Name ServiceAppointment
	Relationship Type Lookup
	Refers To ServiceAppointment

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ActionableListMbrInvitationFeed
> Feed tracking is available for the object.

ActionableListMbrInvitationHistory
> History is available for tracked fields of the object.

AppointmentTopicTimeSlot

Represents a lookup to a work type or a work type group for a time slot This object is available in API version 52.0 and later.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()`

Fields

Field	Details
AppointmentTopicTimeSlotKey	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Non-editable validating field used to ensure no two rows have the same time slot and work type or work type group values in an instance.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name or ID of the AppointmentTopicTimeSlot object.
OperatingHoursId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The operating hours that contain the time slot.

Field	Details
	This is a relationship field.
	Relationship Name OperatingHours
	Relationship Type Lookup
	Refers To OperatingHours
TimeSlotId	**Type** reference
	Properties Create, Filter, Group, Sort, Update
	Description The ID of the time slot.
	This is a relationship field.
	Relationship Name TimeSlot
	Relationship Type Lookup
	Refers To TimeSlot
WorkTypeGroupId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The work type group associated with this time slot.
	This is a relationship field.
	Relationship Name WorkTypeGroup
	Relationship Type Lookup
	Refers To WorkTypeGroup
WorkTypeId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	The work type associated with this time slot.
	This is a relationship field.
	Relationship Name
	WorkType
	Relationship Type
	Lookup
	Refers To
	WorkType

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

AppointmentTopicTimeSlotChangeEvent
Change events are available for the object.

AppointmentTopicTimeSlotFeed
Feed tracking is available for the object.

AppointmentTopicTimeSlotHistory
History is available for tracked fields of the object.

AppointmentTopicTimeSlotOwnerSharingRule
Sharing rules are available for the object.

AppointmentTopicTimeSlotShare
Sharing is available for the object.

EngagementChannelType

Represents a channel through which a customer can be reached for communication. The Engagement Channel Type object supports only the English language. This object is available in API version 48.0 and later.

Supported Calls

```
create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(),
retrieve(), search(), undelete(), update(), upsert()
```

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
ContactPointType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The contact point type of the channel. Possible values are: • `InPerson`—In Person • `Phone` • `Video`
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the engagement channel type is active (true) or not (false). This field is available in API version 56.0 and later.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description
	Required. Name of the communication subscription consent record.
OwnerId	**Type**
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the account owner associated with this customer.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type
	Lookup
	Refers To
	Group, User
UsageType	**Type**
	multipicklist
	Properties
	Create, Filter, Nillable, Update
	Description
	Specifies the usage of the engagement channel type. This field is available in API version 56.0 and later.
	Possible values are:
	• `Salesforce Scheduler`

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

EngagementChannelTypeFeed

Feed tracking is available for the object.

EngagementChannelTypeHistory

History is available for tracked fields of the object.

EngagementChannelTypeShare

Sharing is available for the object.

EngagementChannelWorkType

Represents the relationship between an Engagement Channel Type object and a Work Type object for Salesforce Scheduler. This object is available in API version 56.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
`AreAllEngmtChnlSupported`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the work type supports all engagement channels (`true`) or not (`false`).
`EngagementChannelTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the engagement channel type that's related to the work type indicated in the `WorkTypeId` field. This field is a relationship field. **Relationship Name** EngagementChannelType **Relationship Type** Lookup **Refers To** EngagementChannelType
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The date and time that the current user last viewed a record related to this object.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this object.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of this engagement channel-work type relationship.
WorkTypeId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the work type that's related to the engagement channel type indicated in the EngagementChannelTypeId field. This field is a relationship field. **Relationship Name** WorkType **Relationship Type** Lookup **Refers To** WorkType

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

EngagementChannelWorkTypeFeed
Feed tracking is available for the object.

EngagementChannelWorkTypeHistory
>History is available for tracked fields of the object.

ServiceTerritoryWorkType

Represents the relationship between a ServiceTerritory object and a WorkType object for Salesforce Scheduler appointments. This object is available in API version 45.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
IsSlotPublished	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicate whether records in the Shift object are created for the selected Service Territory and Work Type. The default value is `false`.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time that the current user last viewed a record related to this object.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this object.
Name	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The name of this service territory-work type relationship.
ServiceTerritoryId	**Type** reference
	Properties Create, Filter, Group, Sort
	Description The ID of the service territory that's related to the work type indicated in the `WorkTypeId` field. This is a relationship field.
	Relationship Name ServiceTerritory
	Relationship Type Lookup
	Refers To ServiceTerritory
TeamId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Represents the team associated with the service territory for a specific work type. This field is a relationship field and is available in API version 58.0 and later.
	Relationship Name Team
	Relationship Type Lookup
	Refers To Team
WorkTypeId	**Type** reference
	Properties Create, Filter, Group, Sort
	Description The ID of the work type that's related to the service territory indicated in the `ServiceTerritoryId` field.

Field	Details
	This is a relationship field.
	Relationship Name WorkType
	Relationship Type Lookup
	Refers To WorkType

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ServiceTerritoryWorkTypeFeed
Feed tracking is available for the object.

ServiceTerritoryWorkTypeHistory
History is available for tracked fields of the object.

ShiftEngagementChannel

Represents the relationship between a Shift object and an Engagement Channel Type object for Salesforce Scheduler. This object is available in API version 56.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
`AreAllEngmtChnlSupported`	**Type** boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the shift supports all engagement channels (true) or not (false).

Field	Details
EngagementChannelTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the engagement channel type that's related to the shift indicated in the `ShiftId` field. This field is a relationship field. **Relationship Name** EngagementChannelType **Relationship Type** Lookup **Refers To** EngagementChannelType
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time that the current user last viewed a record related to this object.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this object.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of this shift-engagement channel type relationship.
ShiftId	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description
	The ID of the shift that's related to the engagement channel type indicated in the `EngagementChannelTypeId` field.
	This field is a relationship field.
	Relationship Name
	Shift
	Relationship Type
	Lookup
	Refers To
	Shift

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ShiftEngagementChannelFeed

Feed tracking is available for the object.

ShiftEngagementChannelHistory

History is available for tracked fields of the object.

ShiftWorkTopic

Represents the relationship between a Shift object and a Work Type or Work Type Group object for Salesforce Scheduler. This object is available in API version 56.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
`AreAllTopicsSupported`	**Type**
	boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the shift supports all work type or work type groups (`true`) or not (`false`). The default value is `false`.
AttendeeLimit	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The maximum number of attendees for a group service appointment in a shift. This field is considered when the appointment mode is Group. Available in API version 61.0 and later.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time that the current user last viewed a record related to this object.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this object.
MaxAppointments	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The maximum number of appointments allowed for each time slot for a shift. This field is considered when `WorkTypeId` or `WorkTypeGroupId` is provided. This field is available in API version 60.0 and later.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description
	The name of this shift-work topic relationship.

Field	Details
ShiftId	**Type**
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The ID of the shift that's related to the work type indicated in the `WorkTypeId` field or the work type group indicated in the `WorkTypeGroupId` field.
	This field is a relationship field.
	Relationship Name
	Shift
	Relationship Type
	Lookup
	Refers To
	Shift

Field	Details
WorkTypeGroupId	**Type**
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the work type group that's related to the shift indicated in the `ShiftId` field.
	This field is a relationship field.
	Relationship Name
	WorkTypeGroup
	Relationship Type
	Lookup
	Refers To
	WorkTypeGroup

Field	Details
WorkTypeId	**Type**
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the work type that's related to the shift indicated in the `ShiftId` field.
	This field is a relationship field.
	Relationship Name
	WorkType

Field	Details
	Relationship Type Lookup
	Refers To WorkType

Usage

For a ShiftWorkTopic record, you must specify either a work type or a work type group (based on the Salesforce Scheduler for Health Cloud option), or set `AreAllTopicsSupported` as *true*. Use `WorkTypeGroupId` for Salesforce Scheduler and use `WorkTypeId` only when the Salesforce Scheduler for Health Cloud option is enabled.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

ShiftWorkTopicChangeEvent
Change events are available for the object.

ShiftWorkTopicFeed
Feed tracking is available for the object.

ShiftWorkTopicHistory
History is available for tracked fields of the object.

ShiftWorkTopicOwnerSharingRule
Sharing rules are available for the object.

ShiftWorkTopicShare
Sharing is available for the object.

WaitlistServiceResource

Represents the relationship between the Waitlist object and the Service Resource object for Salesforce Scheduler. This object is available in API version 58.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
AccessLevel	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The access level of the user. The level determines the information that's masked from the service resource for a drop-in participant. Possible values are: • `Default` • `Enhanced` The default value is `Default`.
IsAvailable	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the service resource is available to accept a drop-in participant from the waitlist (`true`) or not (`false`). The default value is `false`.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the waitlist service resource record was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the waitlist service resource record was last viewed.
Name	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description Auto-generated number that identifies the waitlist-service resource type record. For example, WSR-0001 and WSR-0002.
ServiceResourceId	**Type** reference
	Properties Create, Filter, Group, Sort
	Description The ID of the service resource that's related to the waitlist. This field is a relationship field.
	Relationship Name ServiceResource
	Relationship Type Lookup
	Refers To ServiceResource
WaitlistId	**Type** reference
	Properties Create, Filter, Group, Sort
	Description The ID of the waitlist that's related to the service resource. This field is a relationship field.
	Relationship Name Waitlist
	Relationship Type Lookup
	Refers To Waitlist

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WaitlistServiceResourceFeed
Feed tracking is available for the object.

WaitlistServiceResourceHistory
History is available for tracked fields of the object.

WaitlistWorkType

Represents the relationship between the Waitlist object and the Work Type object for Salesforce Scheduler. This object is available in API version 58.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the waitlist work type record was last modified. Its label in the user interface is Last Modified Date.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the waitlist work type record was last viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Auto-generated number that identifies the waitlist-work type record. For example, WWT-0001 and WWT-0002.

Field	Details
WaitlistId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the waitlist that's related to the wok type. This field is a relationship field. **Relationship Name** Waitlist **Relationship Type** Lookup **Refers To** Waitlist
WorkTypeId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the work type that's related to the waitlist. This field is a relationship field. **Relationship Name** WorkType **Relationship Type** Lookup **Refers To** WorkType

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

WaitlistWorkTypeFeed

Feed tracking is available for the object.

WaitlistWorkTypeHistory

History is available for tracked fields of the object.

WorkTypeGroupMember

Represents the relationship between a work type and the work type group it belongs to. This object is available in API version 45.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

Salesforce Scheduler must be enabled.

Fields

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time that the current user last viewed a record related to this object.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this object.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Autogenerated number identifying the work type group membership. It uses the format ########.
WorkTypeGroupId	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description
	The ID of the work type group that this record belongs to.
	Relationship Name
	WorkTypeGroup
	Relationship Type
	Lookup
	Refers To
	WorkTypeGroup
WorkTypeId	**Type**
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The ID of the work type that this record corresponds to.
	This is a relationship field.
	Relationship Name
	WorkType
	Relationship Type
	Lookup
	Refers To
	WorkType

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

WorkTypeGroupMemberFeed

Feed tracking is available for the object.

WorkTypeGroupMemberHistory

History is available for tracked fields of the object.

CHAPTER 6   Salesforce Scheduler Platform Events

In this chapter ...

* ServiceAppointmentEvent

Use the ServiceAppointmentEvent platform event to notify subscribers about service appointment details.

This platform event object is available within the Salesforce Scheduler platform.

ServiceAppointmentEvent

Notifies subscribers of the service appointment details that are generated from the event platform. This object is available in API version 59.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

Subscriber	Supported?
Apex Triggers	✔
Flows	
Processes	
Pub/Sub API	✔
Streaming API (CometD)	✔

Subscription Channel

`/event/ServiceAppointmentEvent`

Special Access Rules

This object is available when Salesforce Scheduler is enabled.

Fields

Field	Details
`AsgnRsrcApptSchdDtlEvent`	**Type** AsgnRsrcApptSchdEvent[] **Properties** Nillable **Description** One or multiple assigned resource records related to the scheduler appointment event.
`ChangeType`	**Type** string **Properties** Nillable

Field	Details
	Description The operation that caused the change. For example: CREATE, UPDATE, DELETE.
EventUuid	**Type** string **Properties** Nillable **Description** A universally unique identifier (UUID) that identifies a platform event message.
ReplayId	**Type** string **Properties** Nillable **Description** Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
ServiceApptSchduleEvent	**Type** SvcApptSchdEvent[] **Properties** Nillable **Description** The service appointment related to the scheduler appointment event.

CHAPTER 7   Salesforce Scheduler Metadata API Types

In this chapter ...

- **IndustriesSettings**

Metadata API enables you to access some types and feature settings that you can customize in the user interface. For more information about Metadata API and to find a complete reference of existing metadata types, see **Metadata API Developer Guide**.

IndustriesSettings

Represents settings for Salesforce Scheduler.

This type extends the Metadata metadata type and inherits its `fullName` field.

In the package manifest, all organization settings metadata types are accessed using the Settings name. See Settings for more details.

File Suffix and Directory Location

IndustriesSettings are stored in a single file named `Industries.settings` in the `settings` directory.

Version

Industries settings for Salesforce Scheduler are available in API version 47.0 and later.

Fields

Field Name	Field Type	Description
`appointmentDistributionOrgPref`	boolean	Indicates whether to schedule appointments for service resources based on appointment distribution (`true`) or not (`false`). The default value is `false`. Available in API version 52.0 and later.
`captureResourceUtilizationOrgPref`	boolean	Indicates whether to use a background process to calculate the usage of service resources from service appointments (`true`) or not (`false`). The default value is `false`. Available in API version 52.0 and later.
`enableAnyResourceTypeOrgPref`	boolean	Indicates whether to enable Salesforce Scheduler to consider service resource records with Agent resource type (`true`) or not (`false`). Before enabling this setting, create a service resource record as Main for each user, or update one of the service resource records as Main for each user. The default value is `false`. Available in API version 57.0 and later.
`enableAppFrmAnywhereOrgPref`	boolean	Indicates whether to use engagement channels for setting up shifts, work types, and booking a service appointment (`true`) or not (`false`). The default value is `false`. Available in API version 56.0 and later. See the prerequisites before you enable this setting.
`enableBlockResourceAvailabilityOrgPref`	boolean	Indicates whether Salesforce Scheduler service appointments are added to users' Salesforce calendars. For example, if set to `false`, users don't see their service appointments on their calendars. The default is `false`. Available in API version 47.0 and later. This setting is used in Financial Services Cloud.
`enableCapacitySchedulingPref`	boolean	Indicates whether users can use capacity-based scheduling (`true`) or not (`false`). Use capacity-based scheduling to control the number of appointments that can be scheduled for a given shift and type of work. Available in API version 62.0 and later. See the prerequisite before you enable this setting.

Field Name	Field Type	Description
enableCreateMultiAttendeeEventOrgPref	boolean	Indicates whether users can group individual events, and view the list of all attendees under a single event `true` or not `false`. The default is `false`. See the prerequisites before you enable this setting. Available in API version 55.0 and later. This setting is used in Financial Services Cloud.
enableDropInAppointmentsOrgPref	boolean	Indicates whether users can manage drop-in participants (`true`) or not (`false`). The default value is `false`. Available in API version 58.0 and later. See the prerequisite before you enable this setting.
enableDropInSkillMatchingOrgPref	boolean	Indicates whether skill and skill level matching is enabled for service resources that are assigned to waitlists for a service territory (`true`) or not (`false`). The default value is `false`. Available in API version 58.0 and later.
enableEventManagementOrgPref	boolean	Indicates whether users can add Salesforce Scheduler service appointments to their Salesforce calendars. The default is `false`. Available in API version 47.0 and later. This setting is used in Financial Services Cloud.
enableEventWriteOrgPref	boolean	Indicates whether to publish high-volume platform events when users create, update, or delete service appointments in Salesforce Scheduler (`true`) or not (`false`). If enabled, write these events to an external system to update it with Salesforce Scheduler service appointments. The default value is `false`. Available in API version 49.0 and later.
enableMultipleTopicsForShiftsOrgPref	boolean	Indicates whether the multiple topics for shifts feature is enabled (`true`) or disabled (`false`). The default value is `false`. Available in API version 56.0 and later. See the prerequisite before you enable this setting.
enableMultiResourceOrgPref	boolean	Indicates whether users can add multiple service resources to a service appointment. The default is `false` Available in API version 47.0 and later. This setting is used in Financial Services Cloud.
enableOverbookingOrgPref	boolean	Indicates whether users can add multiple service appointments to a single time slot for a service resource. If set to `false`, concurrent time slots are visible, but can't be modified. The default is `false` Available in API version 47.0 and later. This setting is used in Financial Services Cloud.
enableShareSaWithArOrgPref	boolean	Indicates whether to share service appointments with assigned resources (`true`) or not (`false`). The default value is `false`. Available in API version 55.0 and later.
enableTopicOrTemplate	boolean	Indicates whether to use Salesforce Scheduler to manage Health Cloud appointments (`true`) or not (`false`). The default value is `false`.

Field Name	Field Type	Description
		You must enable the `enableTopicTimeSlot` field before enabling this setting. Available in API version 52.0 and later.
`enableTopicTimeSlot`	boolean	Indicates whether to set operating hours for Service Territory Members for Work Type Groups (`true`) or not (`false`). The default value is `false`. Available in API version 52.0 and later.
		See the prerequisites before you enable this setting. After you enable this setting, you can't disable it.

Declarative Metadata Sample Definition

The following is an example of an Industries.Settings metadata file.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesSettings xmlns="http://soap.sforce.com/2006/04/metadata">
    <appointmentDistributionOrgPref>true</appointmentDistributionOrgPref>
    <captureResourceUtilizationOrgPref>true</captureResourceUtilizationOrgPref>
    <enableBlockResourceAvailabilityOrgPref>true</enableBlockResourceAvailabilityOrgPref>
    <enableCreateMultiAttendeeEventOrgPref>true</enableCreateMultiAttendeeEventOrgPref>
    <enableDropInSkillMatchingOrgPref>true</enableDropInSkillMatchingOrgPref>
    <enableEventManagementOrgPref>true</enableEventManagementOrgPref>
    <enableAppFrmAnywhereOrgPref>true</enableAppFrmAnywhereOrgPref>
    <enableAnyResourceTypeOrgPref>true</enableAnyResourceTypeOrgPref>
    <enableDropInAppointmentsOrgPref>true</enableDropInAppointmentsOrgPref>
    <enableEventWriteOrgPref>true</enableEventWriteOrgPref>
    <enableMultipleTopicsForShiftsOrgPref>true</enableMultipleTopicsForShiftsOrgPref>
    <enableMultiResourceOrgPref>true</enableMultiResourceOrgPref>
    <enableOverbookingOrgPref>true</enableOverbookingOrgPref>
    <enableShareSaWithArOrgPref>true</enableShareSaWithArOrgPref>
    <enableTopicOrTemplate>true</enableTopicOrTemplate>
    <enableTopicTimeSlot>true</enableTopicTimeSlot>
</IndustriesSettings>
```

The following is an example `package.xml` that references the previous definition.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>Industries</members>
        <name>Settings</name>
    </types>
    <version>47.0</version>
</Package>
```

SEE ALSO:

Salesforce Help: Multiple Topics for Shifts

CHAPTER 8   Authenticate Salesforce Scheduler APIs

The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

> **Note:** To build a custom appointment scheduling application using Salesforce Scheduler APIs for prospects or unauthenticated users, you must build it using a logged-in user. For example, an integration user or an administrator.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

When you have this permission, you can connect to Salesforce and authenticate. Then make a request to REST or Connect API and check the response. For more information, see Connect REST API Quick Start.

SEE ALSO:

Connect REST API Developer Guide: Connect REST API Quick Start

CHAPTER 9   Translate SOQL Query Results

To translate SOQL query results into the language of the user who submits the query, use the `toLabel` method. If no translation is available, the method returns the search results in the default language of the organization.

Any organization can use the `toLabel()` method. It's useful for organizations that enabled the data translation. For information on how to enable data translation, see Manage Entities' Data Translation in Salesforce Scheduler Help.

The `toLabel` method uses the following syntax:

```
toLabel(object.field)
```

This method is supported on the `WorkTypeGroup`, `ServiceResource`, and `ServiceTerritory` objects. Use this method to return translated search results on the following fields:

- Name
- Description
- Custom fields of type Text, MultiLine Text, Long Text Area, Rich Text Area, and URL

You can't use the `toLabel()` method in the ORDER BY clause. For limitations that apply to the translation, see Translate Returned SOQL Results in SOQL and SOSL Reference.

Sample Request

Example of data translation request for `WorkTypeGroup`:

```
https://yourInstance.salesforce.com/services/data/vXX.X/
query/?q=SELECT+toLabel(Name),+toLabel(Description),+toLabel(Details_c),+toLabel(Disclaimer_c)+From+WorkTypeGroup
```

Example of data translation request for `ServiceResource`:

```
https://yourInstance.salesforce.com/services/data/vXX.X/
query/?q=SELECT+toLabel(Name),+toLabel(Description),+toLabel(Profile_URL_c)+From+ServiceResource
```

Example of data translation request for `ServiceTerritory`:

```
https://yourInstance.salesforce.com/services/data/vXX.X/
query/?q=SELECT+toLabel(Name),+toLabel(Description),+toLabel(Notes_c)+From+ServiceTerritory
```

Sample Response

Example of translated query results for `WorkTypeGroup`:

```
{
  "totalSize": 6,
  "done": true,
  "records": [
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url":
"/services/data/v54.0/sobjects/WorkTypeGroup/0VSx00000000ZTDGA2"
```

```
        },
        "Name": "□□",
        "Description": "□□",
       "Details__c": "<ul><li><b><i><u>□□□□□□□□□□□</u></i></b><span
 style=\"color: rgb(0, 0, 0);\"></span></li></ul>",
        "Disclaimer__c": "□□"
      },
      {
        "attributes": {
          "type": "WorkTypeGroup",
          "url":
"/services/data/v54.0/sobjects/WorkTypeGroup/0VSx00000000ZTAGA2"
        },
        "Name": "WTG 3",
        "Description": null,
        "Details__c": null,
        "Disclaimer__c": null
      }
    ]
}
```

Example of translated query results for `ServiceResource`:

```
{
  "totalSize": 2,
  "done": true,
  "records": [
    {
      "attributes": {
        "type": "ServiceResource",
        "url":
"/services/data/v54.0/sobjects/ServiceResource/0Hnx000000003I6CAI"

      },
      "Name": "Адам Смит",
      "Description": "описание",
      "Profile_URL__c": "http:// профиль"
    },
    {
      "attributes": {
        "type": "ServiceResource",
        "url":
"/services/data/v54.0/sobjects/ServiceResource/0Hnx000000003I9CAI"

      },
      "Name": "Stacy Simon",
      "Description": null,
      "Profile_URL__c": null
    }
  ]
}
```

Example of translated query results for `ServiceTerritory`:

```
{
  "totalSize": 2,
  "done": true,
  "records": [
    {
      "attributes": {
        "type": "ServiceTerritory",
        "url":
"/services/data/v54.0/sobjects/ServiceTerritory/0Hhx00000000c9tCAA"

      },
      "Name": "l'apollon",
      "Description": "à la mode",
      "Notes__c": "française"
    },
    {
      "attributes": {
        "type": "ServiceTerritory",
        "url":
"/services/data/v54.0/sobjects/ServiceTerritory/0Hhx00000000cgaCAA"

      },
      "Name": "tempST",
      "Description": null,
      "Notes__c": null
    }
  ]
}
```

CHAPTER 10 Salesforce Scheduler Business APIs

In this chapter ...

- REST APIs
- Connect APIs
- Error Codes and Responses

Salesforce Scheduler gives various developer resources that you need to simplify appointment scheduling in Salesforce.

These resources include REST APIs and Connect REST APIs. The APIs don't have full parity, and you may need to use both REST and Connect to accomplish your business goals.

REST APIs

Use Salesforce Scheduler REST APIs to get appointment time slots and available service resources based on work type groups and service territories.

✏️ **Note:** Salesforce Scheduler is built on the Salesforce platform (also known as Lighting Experience). The Salesforce platform specific API rate limits apply to the Salesforce Scheduler REST APIs. For more information on Lightning platform common limits and allocations, see API Request Limits and Allocations.

The following is a list of REST APIs available within the Salesforce Scheduler platform.

Resources

Request Bodies

Response Bodies

SEE ALSO:

REST API Developer Guide: Introducing Lightning Platform REST API

Salesforce Developer Limits and Allocations Quick Reference: About This Quick Reference

Resources

Use Salesforce Scheduler REST APIs to get appointment time slots or available service resources based on work type groups and service territories.

Get Appointment Candidates

Returns a list of service resources (appointment candidates) based on work type group or work type and service territories.

Get Appointment Slots

Returns a list of available appointment time slots for a resource based on given work type group or work type and service territories.

Scheduling

Returns a list of available Salesforce Scheduler REST resources and corresponding URIs. This resource is available in REST API version 45.0 and later.

Get Appointment Candidates

Returns a list of service resources (appointment candidates) based on work type group or work type and service territories.

Set up Salesforce Scheduler before making requests. This setup includes creating or configuring Service Resources, Service Territory Members, Work Type Groups, Work Types, Work Type Group Members, and Service Territory Work Types. See Set Up Salesforce Scheduler for more information.

The appointment time slots are determined based on multiple factors, such as field values, scheduled appointments, absences, Scheduler Settings, and Scheduling Policies to determine available time slots. See How Salesforce Scheduler Determines Available Time Slots for more information.

The following factors are considered for returning start time and end time of resources.

Resource Availability

Determined using service territory member, service territory, work type, and account operating hours fields.

Resource Unavailability

Determined by resource absences, existing appointments that the resource is assigned to. The resource must be marked as a required resource for the appointment with a status that isn't in closed, canceled, or completed.

Appointment Start Time Interval in the Scheduling Policy

Appointment start time interval field in the Scheduling Policy is used to determine when the appointment can start. This interval can be 5, 10, 15, 20, 30, or 60. By default, it's set to 15.

Work Type Duration

The end time is calculated as start time + duration of the work type.

📝 Note: If asset scheduling is enabled, the response also includes asset-based candidates.

Syntax

URI

`/services/data/v`**_XX.X_**`/scheduling/getAppointmentCandidates`

Available version

45.0

Formats

JSON, XML

HTTP methods

POST

Request body

Parameter	Required	Type	Description
accountId	No	String	The ID of the associated account.
allowConcurrentScheduling	No	Boolean	If true, allows scheduling of concurrent appointments in a time slot. If false, concurrent appointments aren't allowed. The default is false. This field is available in API version 47.0 and later.
correlationId	No	String	The ID to pass custom information to the `ServiceResourceScheduleHandler` Apex interface. For example, you can use the correlation ID to identify the app, website, or any other external system that calls this Apex interface implementation. If you don't pass a custom value, a randomly generated identifier is passed. This field is available in API version 53.0 and later.
endTime	No	String	The latest time that a time slot can end (inclusive). 📝 Note: The API only returns time slots up to 31 days from the `startTime`.

Parameter	Required	Type	Description
engagementChannelTypeIds	No	String[]	The ID of the engagement channel type record. The availability of service resources is filtered based on the engagement channel type selected. This field is available in API version 56.0 and later. This field supports only one engagement channel type ID. You can use engagement channel types with the `getAppointmentCandidates` API only if: • The **Schedule Appointments Using Engagement Channels** setting is enabled in Salesforce Scheduler Settings in your Salesforce org. • Shifts are defined in the scheduling policy. For more information on setting up shifts in scheduling policy, see Define Shift Rules in Scheduling Policy. Note: Engagement channel types are not supported with operating hours rules in the scheduling policy.
filterByResources	No	String[]	A comma-separated list of service resource IDs. API returns only eligible service resources that are both in the list and in the selected service territory. The resources are sorted by the order in which the resource IDs are passed. Available in API version 51.0 and later. Note: Scheduler doesn't support appointment Distribution when you've specified a list of resource IDs in the filterByResources parameter.
resourceLimitApptDistribution	No	Integer	Specify the maximum number of service resources that you want to show during appointment scheduling when appointment distribution is enabled. Available in API version 53.0 and later. Note: The filterByResources field takes precedence over the resourceLimitApptDistribution field.
startTime	No	String	The earliest time that a time slot can begin (inclusive). Defaults to the current time of the request, if empty. You can also use a time from the past.
schedulingPolicyId	No	String	The ID of the AppointmentSchedulingPolicy object. If no scheduling policy is passed in the request body, the default configurations are used. All Scheduling Policy Configurations are considered when using this API.
territoryIds	Yes	String[]	List of service territory IDs, where the work that is being requested is performed.
workType	Required if workTypeGroupId isn't given.	Work Type	The type of the work to be performed.

Parameter	Required	Type	Description
workTypeGroupId	Required if workType isn't given.	String	The ID of the work type group containing the work types that are being performed.

📝 Note: To determine the required fields in your request body, consider the following points:

- Provide either the workTypeGroupId or workType parameter in your request body, but not both.
- If the workType parameter is specified, then you must provide either the id or durationInMinutes parameter.
- If id of the workType parameter is specified, then the rest of the workType fields are optional.

Response Body

Execution of a successful request returns the response body containing a list of available appointment resources.

Parameter	Required	Type	Description
candidates	Yes	Candidates on page 143 []	List of available appointment candidates.

Examples

Example Request Body

Using workTypeGroupId:

```
{
  "startTime": "2019-01-23T00:00:00.000Z",
  "endTime": "2019-02-30T00:00:00.000Z",
  "workTypeGroupId": "0VSB0000000KyjBOAS",
  "accountId": "001B000000qAUAWIA4",
  "territoryIds": [
    "0HhB0000000TO9WKAW"
  ],
  "schedulingPolicyId": "0VrB0000000KyjB",
  "engagementChannelTypeIds": [
    "0eFRM00000000Bv2AI"
  ]
}
```

Using workTypeId:

```
{
  "startTime": "2019-01-23T00:00:00.000Z",
  "endTime": "2019-02-30T00:00:00.000Z",
  "workType": {
    "id": "08qRM00000003fkYAA"
  },
  "territoryIds": [
    "0HhRM00000003OZ0AY"
  ],
  "accountId": "001B000000qAUAWIA4",
```

```
    "schedulingPolicyId": "0VrB0000000KyjB",
    "engagementChannelTypeIds": [
      "0eFRM00000000Bv2AI"
    ]
}
```

Example Response Body

```
{
  "candidates": [
    {
      "endTime": "2019-01-23T19:15:00.000+0000",
      "resources": [
        "0HnB0000000D2DsKAK"
      ],
      "startTime": "2019-01-23T16:15:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW",
      "engagementChannelTypeIds": [
        "0eFRM00000000Bv2AI"
      ]
    },
    {
      "endTime": "2019-01-23T19:30:00.000+0000",
      "resources": [
        "0HnB0000000D2DsKAK"
      ],
      "startTime": "2019-01-23T16:30:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW",
      "engagementChannelTypeIds": [
        "0eFRM00000000Bv2AI"
      ]
    },
    {
      "endTime": "2019-01-23T19:45:00.000+0000",
      "resources": [
        "0HnB0000000D2DsKAK"
      ],
      "startTime": "2019-01-23T16:45:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW",
      "engagementChannelTypeIds": [
        "0eFRM00000000Bv2AI"
      ]
    }
  ]
}
```

Get Appointment Slots

Returns a list of available appointment time slots for a resource based on given work type group or work type and service territories.

The appointment time slots are determined based on your Salesforce Scheduler data model configurations. Here are some prerequisites that you can consider while setting up data.

- Set up Salesforce Scheduler before making your requests. The setup includes creating or configuring Service Resources, Service Territory Members, Work Type Groups, Work Types, Work Type Group Members, and Service Territory Work Types. See Manage Business Information in Salesforce Scheduler for more information.

- Configure a work type mapped for each territory in the request body via Service Territory Work Type. Map the same work type to the work type group, via work type group member.

The following factors affect how time slots are calculated and returned.

- Timezones that differ across operating hours are handled and results are always returned in UTC.

- The resource must be marked as a required resource on the assigned resource object.

- The resource is considered unavailable If the status categories of the resource assigned to service appointments are other than `Canceled`, `Cannot Complete`, and `Completed`.

- Resource Absences of all types are considered unavailable from start to end.

- The following fields of Work Type records, if configured, are used to fine-tune time slot requirements. For more information, see Create Work Types in Salesforce Scheduler.

Parameter	Description
`Timeframe Start`	Time slots sooner than `current time` + ***Timeframe Start*** aren't returned.
`Timeframe End`	Time slots later than `current time` + ***Timeframe End*** aren't returned.
`Block Time Before Appointment`	The time period before the appointment is considered as unavailable.
`Block Time After Appointment`	The time period after the appointment is considered as unavailable.
`Operating Hours`	The overlap of all operating hours from the account, work type, service territory, and service territory member are considered while determining time slots. For more information, see Set Up Operating Hours in Salesforce Scheduler.

- Only the time slots within the period of 31 days from the start date are returned.

- Salesforce Scheduler uses multiple factors, such as field values, scheduled appointments, absences, Scheduler Settings, and Scheduling Policies to determine available time slots, including the earliest and latest appointment slots. See How Does Salesforce Scheduler Determine Available Time Slots.

  > Note: If asset scheduling is enabled, you can provide an asset-based service resource in `requiredResourceIds` to retrieve available timeslots for the asset resource.

Syntax

URI

/services/data/v***XX.X***/scheduling/getAppointmentSlots

Available version

45.0

Formats

JSON, XML

HTTP methods

POST

Authentication

```
Authorization: Bearer token
```

Request body

Parameter	Required	Type	Description
accountId	No	String	The ID of the associated account.
allowConcurrentScheduling	No	Boolean	If true, allows scheduling of concurrent appointments in a time slot. If false, concurrent appointments aren't allowed. The default is false. Available in API version 47.0 and later.
correlationId	No	String	The ID to pass custom information to the `ServiceResourceScheduleHandler` Apex interface. For example, you can use the correlation ID to identify the app, website, or any other external system that calls this Apex interface implementation. If you don't pass a custom value, a randomly generated identifier is passed. This field is available in API version 53.0 and later.
endTime	No	String	The latest time that a time slot can end (inclusive).
engagementChannelTypeIds	No	String[]	The ID of the engagement channel type record. The availability of time slots is filtered based on the engagement channel type selected. This field is available in API version 56.0 and later. 📝 **Note:** This field supports only one engagement channel type ID. You can use engagement channel types with the `getAppointmentSlots` API only if: • The **Schedule Appointments Using Engagement Channels** setting is enabled in Salesforce Scheduler Settings in your Salesforce org. • Shifts are defined in the scheduling policy. For more information on setting up shifts in scheduling policy, see Define Shift Rules in Scheduling Policy. 📝 **Note:** Engagement channel types are not supported with operating hours rules in the scheduling policy.
primaryResourceId	No	String	The ID of the primary resource in multi-resource scheduling. This field is available in API version 48.0 and later. 📝 **Note:** This field is required only when multi-resource scheduling is enabled.
requiredResourceIds	Yes	String[]	List of resource IDs that must be available during the time slot.
schedulingPolicyId	No	String	The ID of the AppointmentSchedulingPolicy object. If no scheduling policy is passed in the request body, the default configurations are

Parameter	Required	Type	Description
			used. The only scheduling policy configuration that is used in determining time slots is the enforcement of account visiting hours.
startTime	No	String	The earliest time that a time slot can begin (inclusive). Defaults to the current time of the request, if empty.
territoryIds	Yes	String[]	List of IDs of service territories, where the work that is being requested is performed.
workType	Required if workTypeGroupId isn't specified.	Work Type	The type of the work to be performed.
workTypeGroupId	Required if workType isn't given.	String	The ID of the work type group containing the work types that are being performed.

📝 **Note:** To determine the required fields in your request body, consider the following points:

- Provide either the workTypeGroupId or workType parameter in your request body, but not both.
- If the workType parameter is specified, then you must provide either the id or durationInMinutes parameter.
- If id of the workType parameter is specified, then the rest of the workType fields are optional.

Response Body

Execution of a successful request returns the response body containing a list of available time slots.

Parameter	Required	Type	Description
timeSlots	Yes	TimeSlots on page 144 [ ]	List of time slots included in each territory.

Example

Example Request Body

Using workTypeGroupId:

```
{
  "startTime": "2019-01-23T00:00:00.000Z",
  "endTime": "2019-02-28T00:00:00.000Z",
  "workTypeGroupId": "0VSB0000000KyjBOAS",
  "accountId": "001B000000qAUAWIA4",
  "territoryIds": [
    "0HhB0000000TO9WKAW"
  ],
  "schedulingPolicyId": "0VrB0000000KyjB",
  "requiredResourceIds": [
    "0HnB0000000TO8gKAK"
  ],
```

```
  "engagementChannelTypeIds": [
    "0eFRM00000000Bv2AI"
  ]
}
```

Using `workType`:

```
{
  "startTime": "2019-01-23T00:00:00.000Z",
  "endTime": "2019-02-28T00:00:00.000Z",
  "workType": {
    "id": "08qRM00000003fkYAA"
  },
  "requiredResourceIds": [
    "0HnB0000000TO8gKAK"
  ],
  "territoryIds": [
    "0HhRM00000003OZ0AY"
  ],
  "accountId": "001B000000qAUAWIA4",
  "schedulingPolicyId": "0VrB0000000KyjB",
  "engagementChannelTypeIds": [
    "0eFRM00000000Bv2AI"
  ]
}
```

Example Response Body

```
{
  "timeSlots": [
    {
      "endTime": "2019-01-21T19:15:00.000+0000",
      "startTime": "2019-01-21T16:15:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW"
    },
    {
      "endTime": "2019-01-21T19:30:00.000+0000",
      "startTime": "2019-01-21T16:30:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW"
    },
    {
      "endTime": "2019-01-21T19:45:00.000+0000",
      "startTime": "2019-01-21T16:45:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW"
    }
  ]
}
```

Scheduling

Returns a list of available Salesforce Scheduler REST resources and corresponding URIs. This resource is available in REST API version 45.0 and later.

Syntax

URI

```
/services/data/vXX.X/scheduling/
```

Formats

JSON, XML

HTTP methods

GET

Authentication

```
Authorization: Bearer token
```

Example

Example Response Body

```
{
  "getAppointmentCandidates" : "/services/data/v64.0/scheduling/getAppointmentCandidates",

  "getAppointmentSlots" : "/services/data/v64.0/scheduling/getAppointmentSlots"
}
```

Request Bodies

To perform a POST, PATCH, or PUT request, create a request body formatted in either XML or JSON. This chapter lists the request bodies.

Skill Requirement

List of skills that are required to complete a particular task for a work type.

Work Type

Details about the type of work to be performed.

Skill Requirement

List of skills that are required to complete a particular task for a work type.

Name	Type	Required	Description
skillId	String	Yes	The skill that is required.
SkillLevel	String	No	The level of the skill required. Skill levels can range from zero to 99.99. Depending on your business needs, you might want the skill level to reflect years of experience, certification levels, or license classes.

Work Type

Details about the type of work to be performed.

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Name	Type	Required	Description
id	String	Required if `durationInMinutes` is not given.	Id of the work type.
durationInMinutes	Integer	Required if `id` is not given.	Contains the event length, in minutes.
timeframeStartInMinutes	String	No	The beginning of the timeframe.
timeframeEndInMinutes	String	No	The end of the timeframe.
blockTimeBeforeAppointmentInMinutes	String	No	The time period before the appointment is considered as unavailable.
blockTimeAfterAppointmentInMinutes	String	No	The time period after the appointment is considered as unavailable.
operatingHoursId	String	No	The overlap of all operating hours from the account, work type, service territory, and service territory member are considered while determining time slots.
skillRequirements	Skill Requirement[]	No	List of skills that are required to complete a particular task for a work type.

📝 Note: Provide either `Id` or `durationInMinutes` in the request body, but not both.

Response Bodies

Successful execution of a request to a Salesforce Scheduler resource can return a response body either in JSON or XML format. For example, the request to get appointment time slots returns a list of available time slots for a selection of work type group and territories.

Candidates
Describes the result of Get Appointments Candidates request.

Time Slots
Describes the result of Get Appointments Slots request.

Candidates

Describes the result of Get Appointments Candidates request.

List of available service resources.

Name	Type	Description
endTime	String	The end time of the appointment time slot.
engagementChannelTypeIds	String[]	The engagement channel type ID associated with this resource for that time slot. This field is available in API version 56.0 and later.

Name	Type	Description
resources	String[]	List of service resource IDs that are available. ⊘ **Important:** At present, only one resource is returned on this list. If there is more than one resource included in a territory, a new child object is added for each resource in the response JSON body.
startTime	String	The start time of the appointment time slot.
territoryId	String	The service territory associated with this resource.

Time Slots

Describes the result of Get Appointments Slots request.

List of time slots available for each territory.

Name	Type	Description
endTime	String	The end time of the appointment time slot.
engagementChanneltypeIds	String[]	The engagement channel type ID associated with this time slot. This field is available in API version 56.0 and later.
remainingAppointments	Integer	The number of appointments available in the time slot. `Appointments available in a time slot = Maximum number of appointments defined for the time slot - Number of appointments scheduled so far in the time slot`
startTime	String	The start time of the appointment time slot.
territoryId	String	The service territory associated with this time slot.

Connect APIs

Use Salesforce Scheduler Connect REST APIs to get service territories, get consolidated availability of each service resource within specified territories, and create service appointments.

✏ **Note:** Salesforce Scheduler is built on the Salesforce platform (also known as Lighting Experience). The Salesforce platform specific API rate limits apply to the Salesforce Scheduler Connect APIs. The rate limit for the Connect APIs is per user, per application, per hour limit. Salesforce Scheduler Connect APIs are better equipped to handle a large number of requests and can support the rate limit of 10000 per user, per application, per hour. For more information on Lightning platform common limits and allocations, see Connect REST API Limits.

The following is a list of Connect APIs available within the Salesforce Scheduler platform.

Resources

Connect REST API Request Bodies

To perform a POST, PATCH, or PUT request, pass query parameters or create a request body formatted in either XML or JSON. This chapter lists the request bodies. The query parameters are listed with each resource.

Connect REST API Response Bodies

The successful execution of a request to a Connect REST API resource can return a response body in either JSON or XML format.

SEE ALSO:

Connect REST API Developer Guide: Connect REST API Introduction

Salesforce Developer Limits and Allocations Quick Reference: About This Quick Reference

Resources

Use Salesforce Scheduler REST APIs to get service territories and create service appointments.

Available Territory Slots

Get consolidated availability of each service resource within specified territories.

Engagement Channel Types

Retrieve a list of the engagement channel types from your Salesforce org. The API returns only the channel types that are active and whose usage type is set to Salesforce Scheduler.

Group Appointments (POST)

Get a list of group appointments along with the remaining attendee limit.

Service Appointments

Create and update service appointment records, assign resources, and generate leads, including group appointments with multiple participants.

Service Territories

Get service territories for a `workTypeId` or `workTypeGroupId`. Filter and sort the service territories using the `radius`, `latitude`, `longitude`, `sortBy`, and `sortOrder` properties.

Waitlists

Get waitlist details with the list of participants. A waitlist is a queue that includes participants without a scheduled appointment.

Waitlist Check Ins

Check in or register a participant to a waitlist who arrives at the service territory for a drop-in appointment.

Available Territory Slots

Get consolidated availability of each service resource within specified territories.

Resource

```
/connect/scheduling/available-territory-slots
```

Available version

49.0

HTTP methods

POST

Request example

```
{
  "startTime": "2022-07-27T00:00:00.000Z",
  "endTime": "2022-07-29T00:00:00.000Z",
  "workTypeGroupId": "0VSB0000000KyjBOAS",
  "accountId": "001B000000qAUAWIA4",
  "territoryIds": [
    "0HhB0000000TO9WKAW"
  ],
  "schedulingPolicyId": "0VrB0000000KyjB",
  "requiredResourceIds": [
    "0HnB0000000TO8gKAK"
  ],
  "engagementChannelTypeIds": [
    "0eFRM00000000CJ2AY"
  ]
}
```

Request example with only required fields

```
{
  "workType": {
    "id": "08qS70000004DTsIAM"
  },
  "territoryIds": [
    "0HhS70000004DTdKAM"
  ],
  "engagementChannelTypeIds": [
    "0eFRM00000000CJ2AY"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the associated account.	Optional	49.0
allowConcurrent Scheduling	Boolean	Indicates whether concurrent appointments are allowed (`true`) or not allowed (`false`). The default value is `false`.	Optional	49.0
correlationId	String	ID to pass custom information to the `ServiceResourceScheduleHandler` Apex interface. For example, you can use the correlation ID to identify the app, website, or any other external system that calls this Apex interface implementation. If you don't pass a custom value, a randomly generated identifier is passed.	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
endTime	String	Latest time that an appointment can end. 📝 Note: The API only returns time slots up to 31 days from the startTime.	Optional	49.0
engagementChannelTypeIds	String[]	The ID of the engagement channel type record. The resources and their associated time slots are filtered by the specified engagement channel type. 📝 Note: This field supports only one engagement channel type ID. You can use engagement channel types with the available-territory-slots API only if: • **Schedule Appointments Using Engagement Channels** is enabled in Salesforce Scheduler Settings in your Salesforce org. • Shifts are defined in the scheduling policy. For more information on setting up shifts in the scheduling policy, see Define Shift Rules in Scheduling Policy. 📝 Note: Engagement channel types are not supported with operating hours rules in the scheduling policy.	Optional	56.0
filterByResources	String[]	Comma-separated list of service resource IDs. API returns only eligible service resources that are both in the list and in the selected service territory. The resources are sorted by the order in which the resource IDs are passed. 📝 Note: You can either pass filterByResources or requiredResourceIds in a request.	Optional	51.0
required ResourceIds	String[]	List of resource IDs that you want to get available time slots for. When you pass more than one resource ID, the API	Optional	49.0

Name	Type	Description	Required or Optional	Available Version
		returns all the slots where any of the passed resources are available. For example, suppose that you have three qualified resources: A, B, and C. If you pass resource IDs A and B, the API returns all the slots where:		
		• only A is available		
		• only B is available		
		• both A and B are available		
		• both A and C are available		
		• both B and C are available		
		• A, B, and C are all available		
		The API doesn't return the slots where only C is available.		
		If this field is empty, time slots for all qualified resources are returned.		
		Note: The API request doesn't show time slots for the resource specified in `requiredResourceIds` if it does not appear in the list of least utilized resources set for `resourceLimitAppointmentDistribution` For example, if you specify a resource A in `requiredResourceIds` and `resourceLimitAppointmentDistribution` is set to 15, the request doesn't show time slots for this resource, as A isn't among the top 15 least utilized resources.		
`resourceLimit ApptDistribution`	Integer	Specify the maximum number of service resources that you want to show during appointment scheduling when appointment distribution is enabled. Default value is 10. **Note:** The `filterByResources` field takes precedence over the `resourceLimitApptDistribution` field.	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
scheduling PolicyId	String	ID of the AppointmentSchedulingPolicy object. If not provided, the default configurations are considered.	Optional	49.0
startTime	String	Earliest time that an appointment can start. Defaults to the current time of the request, if empty. You can also use a time from the past.	Optional	49.0
territoryIds	String[]	List of IDs of service territories where the specified work is performed.	Required	49.0
workType	Work Type Input	Type of work performed.	Required if workTypeGroupId isn't provided	49.0
workType GroupId	String	ID of the work type group containing all work types performed.	Required if workType isn't provided	49.0

Response example

```
{
"result": {
    "territorySlots": [
      {
        "territoryId": "0HhB0000000TO9WKAW",
        "slots": [
          {
            "endTime": "2019-01-23T19:15:00.000+0000",
            "resources": [
              "0HnB0000000D2DsKAK",
              "0HnB0000000D2DsJKL"
            ],
            "startTime": "2019-01-23T16:15:00.000+0000"
          },
          {
            "endTime": "2019-01-23T19:30:00.000+0000",
            "resources": [
              "0HnB0000000D2DsKAK",
              "0HnB0000000D2DsJKL"
            ],
            "startTime": "2019-01-23T16:30:00.000+0000"
          }
        ]
      },
      {
        "territoryId": "0HhB0000000TO9WERT",
        "slots": [
          {
```

```
          "endTime": "2019-01-23T19:15:00.000+0000",
          "resources": [
            "0HnB0000000D2DsKAK"
          ],
          "startTime": "2019-01-23T16:15:00.000+0000"
        },
        {
          "endTime": "2019-01-23T19:30:00.000+0000",
          "resources": [
            "0HnB0000000D2DsKAK",
            "0HnB0000000D2DsJKL"
          ],
          "startTime": "2019-01-23T16:30:00.000+0000"
        }
      ]
    }
  ]
 }
}
```

Response body for POST

[Available Territory Slots Output](#)

Engagement Channel Types

Retrieve a list of the engagement channel types from your Salesforce org. The API returns only the channel types that are active and whose usage type is set to Salesforce Scheduler.

Resource

```
/connect/scheduling/engagement-channel-types
```

Examples

```
https://yourInstance.salesforce.com/services/data/v56.0/connect
/scheduling/engagement-channel-types
```

```
https://yourInstance.salesforce.com/services/data/v56.0/connect
/scheduling/engagement-channel-types?workTypeGroupIds=0VSRM0000000BgX4AU
```

```
https://yourInstance.salesforce.com/services/data/v56.0/connect
/scheduling/engagement-channel-types?workTypeIds=08q2w000000XmniAAC,08q2w000000XmniAAS
```

Available version

56.0

HTTP methods

GET

Request parameters for GET

> 📝 Note: You can either specify `workTypeGroupIds` or `workTypeIds` in the request to filter the engagement channel type results.

Parameter Name	Type	Description	Required or Optional	Available Version
workTypeGroupIds	String	List of the work type group IDs. The API returns the list of engagement channel type records that are associated with the specified work type group IDs. For example, suppose that you have three engagement channel types: EC1, EC2, and EC3. If you pass work type group IDs WTG1 that is associated with EC1 and EC2 and WTG2 that is associated with EC2, the API returns the list of engagement channel types where: • EC1 is with WTG1 only • EC2 is with both WTG1 and WTG2 Because EC3 is not associated with any of the specified work type group IDs, the API doesn't return the engagement channel type EC3.	Optional	56.0
workTypeIds	String	List of the work type IDs. The API returns the engagement channel type records that are associated with the specified work type IDs. For example, suppose that you have three engagement channel types: EC1, EC2, and EC3. If you pass work type IDs WT1 that is associated with EC1 and EC3 and WT2 that is associated with EC3, the API returns the list of engagement channel types where: • EC1 is with WT1 only • EC3 is with both WT1 and WT2 Because EC2 is not associated with any of the specified work type IDs, the API doesn't return the engagement channel type EC2.	Optional	56.0

Response body for GET
Engagement Channel Type Output

Group Appointments (POST)

Get a list of group appointments along with the remaining attendee limit.

Resource

```
/connect/scheduling/group-appointments
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/group-appointments
```

Available version

61.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "startTime": "2024-01-23T00:00:00.000Z",
  "endTime": "2024-02-28T00:00:00.000Z",
  "filterByWorkTypes": [
    "08qRM00000003fkYAA"
  ],
  "filterByResources": [
    "0HnB0000000TO8gKAK"
  ],
  "filterByTerritories": [
    "0HhRM00000003OZ0AY"
  ],
  "filterByParentRecords": [
    "001B000000qAUAWIA4"
  ],
  "filterByEngagementChannelTypes": [
    "0eFRM00000000Bv2AI"
  ],
  "extendedFieldsToQuery": [
    "subject",
    "description"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
endTime	String	Latest end time for the group appointments to be retrieved.	Optional	61.0
exclude Associated Appts	Boolean	Indicates whether the response excludes appointments where the current user is associated as an attendee or assigned resource (`true`) or not (`false`).	Optional	61.0
extended FieldsToQuery	String[]	List of the extended custom fields to fetch in the output.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
filterBy EngagementChannelTypes	String[]	ID of the engagement channel type record. Group appointments are filtered based on the selected engagement channel type.	Optional	61.0
filterBy ParentRecords	String[]	The ID of the associated parent record.	Optional	61.0
filterBy Resources	String[]	List of the group appointments where all the given resources are present.	Optional	61.0
filterBy Territories	String[]	List of IDs of the service territories where the requested work is performed.	Optional	61.0
filterBy WorkTypeGroups	String[]	IDs of the work type groups containing the work types that are being performed.	Optional	61.0
filterBy WorkTypes	String[]	List of IDs of the work types to be performed.	Optional	61.0
limit	Integer	Maximum number of records to be fetched.	Optional	61.0
offset	Integer	Number of records to be skipped.	Optional	61.0
startTime	String	The earliest start time for the group appointments to be retrieved. If not provided, it defaults to the current time of the request.	Optional	61.0

Response body for POST
   Group Appointments

Service Appointments

Create and update service appointment records, assign resources, and generate leads, including group appointments with multiple participants.

📝 Note: When these parameters aren't specified, the API doesn't check for the availability of time slots. To ensure that duplicate service appointments aren't created, specify these parameters.

- WorkTypeId
- ServiceTerritoryId
- SchedStartTime
- SchedEndTime
- AssignedResources

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Resource

```
/connect/scheduling/service-appointments
```

Example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect
/scheduling/service-appointments
```

Available version

48.0

HTTP methods

POST, PATCH

PATCH is available in version 51.0 and later.

Request body for POST

JSON example

```
{
  "serviceAppointment": {
    "parentRecordId": "0012w000004oZXgAAM",
    "workTypeId": "08q2w000000XmniAAC",
    "serviceTerritoryId": "0Hh2w000000XmoXCAS",
    "engagementChannelTypeId": "0eFRM00000000Bv2AI",
    "schedStartTime": "2020-02-26T15:00:00.000Z",
    "schedEndTime": "2020-02-26T16:00:00.000Z",
    "street": "1 Market Street",
    "city": "San Francisco",
    "state": "CA",
    "postalCode": "94105",
    "country": "USA",
    "appointmentType": "In Person",
    "appointmentMode": "Group",
    "attendeeLimit": "20",
    "extendedFields": [
      {
        "name": "Email",
        "value": "rachel.adams@salesforce.com"
      },
      {
        "name": "Phone",
        "value": "111111111"
      },
      {
        "name": "Description",
        "value": "Test Description"
      }
    ]
  },
  "assignedResources": [
    {
      "serviceResourceId": "0Hn2w000000gDWDCA2",
      "isRequiredResource": true,
      "isPrimaryResource": true,
```

```
      "extendedFields": []
    },
    {
      "serviceResourceId": "0Hn2w000000gCqnCAE",
      "isRequiredResource": true,
      "isPrimaryResource": false,
      "extendedFields": []
    }
  ]
}
```

JSON example for unauthenticated user

```
{
  "serviceAppointment": {
    "workTypeId": "08q2w000000XmniAAC",
    "serviceTerritoryId": "0Hh2w000000XmoXCAS",
    "engagementChannelTypeId": "0eFRM00000000Bv2AI",
    "schedStartTime": "2020-02-26T15:00:00.000Z",
    "schedEndTime": "2020-02-26T16:00:00.000Z",
    "street": "1 Market Street",
    "city": "San Francisco",
    "state": "CA",
    "postalCode": "94105",
    "country": "USA",
    "appointmentType": "In Person",
    "appointmentMode": "Group",
    "attendeeLimit": "20",
    "extendedFields": []
  },
  "assignedResources": [
    {
      "serviceResourceId": "0Hn2w000000gDWDCA2",
      "isRequiredResource": true,
      "isPrimaryResource": true,
      "extendedFields": []
    }
  ],
  "lead": {
    "firstName": "Rachel",
    "lastName": "Adams",
    "phone": "012-345-6789",
    "email": "rachel.adams@salesforce.com",
    "company": "Salesforce",
    "extendedFields": []
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
assignedResources	Assigned Resource Input[]	Service resource who is assigned to a service appointment. 📝 Note: When creating an appointment, you can use `extendedFields` to add values to any of the fields, including custom fields, in `assignedResources` as long as you have edit access to those fields.	Optional	48.0
lead	Lead Input[]	Prospect or lead.	Required if `serviceAppointment` isn't provided 📝 Note: Required to create a service appointment with unauthenticated guest users.	48.0
schedulingPolicyId	String	ID of the `AppointmentSchedulingPolicy` object. If no scheduling policy is passed in the request body, the default configurations are used. The only scheduling policy configuration that is used in determining time slots is the enforcement of account visiting hours.	Optional	48.0
serviceAppointment	Service Appointment Input[]	Appointment to complete a service work for a customer. 📝 Note: When creating an appointment, you can use `extendedFields` to add values to any of the fields, including custom fields, in `serviceAppointment` as long as you have edit access to those fields.	Required if `lead` isn't provided	48.0

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Request body for PATCH

JSON example

```json
{
  "serviceAppointmentId": "08pxx0000004C92AAE",
  "serviceAppointment": {
    "workTypeId": "08pxx0000004C92AAE",
    "serviceTerritoryId": "0Hh2xx0000004CAeCAM",
    "engagementChannelTypeId": "0eFRM0000004CC22AM",
    "schedStartTime": "2020-09-15T16:00:00+0000",
    "schedEndTime": "2020-09-15T17:00:00+0000",
    "street": "1 Market Street",
    "city": "San Francisco",
    "state": "CA",
    "postalCode": "94105",
    "country": "USA",
    "appointmentType": "In Person",
    "appointmentMode": "Group",
    "attendeeLimit": "20",
    "extendedFields": [
      {
        "name": "Email",
        "value": "rachel.adams@salesforce.com"
      },
      {
        "name": "Phone",
        "value": "111111111"
      },
      {
        "name": "Description",
        "value": "Test Description"
      }
    ],
  "assignedResources": [
    {
      "serviceResourceId": "0Hnxx0000004CAeCAM",
      "isRequiredResource": true,
      "isPrimaryResource": false,
      "extendedFields": []
    },
  ]
}
```

Request example to update the scheduled time

> 📝 Note: The API updates the equivalent Salesforce calendar events and block times when the scheduled time is updated.

```json
{
  "serviceAppointmentId": "08pxx0000004C92AAE",
  "serviceAppointment": {
    "schedStartTime": "2020-09-15T16:00:00+0000",
    "schedEndTime": "2020-09-15T17:00:00+0000",
}
```

Request example to update the work type

```
{
  "serviceAppointmentId": "08pxx0000004C92AAE",
  "serviceAppointment": {
    "workTypeId": "08qxx0000004C92AAE",
}
```

Request example to update the service territory

```
{
  "serviceAppointmentId": "08pxx0000004C92AAE",
  "serviceAppointment": {
    "serviceTerritoryId": "0Hhxx0000004CAeCAM"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
assigned Resources	Assigned Resource Input[]	Service resource who is assigned to a service appointment. When updating an appointment, pass the complete list of resources needed. If you don't pass a resource that is assigned to a service appointment, the API deletes that assigned resource. For example, suppose that an existing service appointment has assigned resources: A and B and if you pass assigned resources: B and C. The API checks the resource availability of B and C for existing work type and service territory, and if both are available, the service appointment gets updated with: • Resource A—Deleted • Resource B—Updated • Resource C—Created However, if you don't pass any of the assigned resources, the API assumes there is no change. 📝 Note: When updating an appointment, you can use `extendedFields` to add values to any of the fields, including custom fields, in `assignedResources` as	Optional	51.0

Name	Type	Description	Required or Optional	Available Version
		long as you have edit access to those fields.		
scheduling PolicyId	String	ID of the AppointmentSchedulingPolicy object. If no scheduling policy is passed in the request body, the default configurations are used. The only scheduling policy configuration that is used in determining time slots is the enforcement of account visiting hours.	Optional	51.0
service Appointment	Service Appointment Input[]	Appointment to complete a service work for a customer. When updating an appointment, pass only the fields that need to be updated. Note: When updating an appointment, you can use extendedFields to add values to any of the fields, including custom fields, in serviceAppointment as long as you have edit access to those fields.	Required	51.0
service AppointmentId	String	ID of the service appointment that you want to update.	Required	51.0

Response body for POST and PATCH

Service Appointment Output

Considerations for using engagment channel types with the `service-appointments` resource

- **Schedule Appointments Using Engagement Channels** must be enabled in Salesforce Scheduler Settings in your Salesforce org.

- When you create or modify appointments, shifts must be defined in the scheduling policy. For more information on setting up shifts in the scheduling policy, see Define Shift Rules in Scheduling Policy.

  Note: Engagement channel types are not supported with operating hours rules in the scheduling policy.

- When you use engagement channels and shifts to create or modify a service appointment, Salesforce Scheduler must consider the default value for the Appointment Type (if not specified). However, Salesforce Scheduler only considers the engagement channel and Appointment Type is ignored.

Service Territories

Get service territories for a `workTypeId` or `workTypeGroupId`. Filter and sort the service territories using the `radius`, `latitude`, `longitude`, `sortBy`, and `sortOrder` properties.

Resource

```
/connect/scheduling/service-territories
```

Resource example

```
https://yourInstance.salesforce.com/services/data/64.0/connect/
scheduling/service-territories?workTypeGroupId=0VSRM000000009Z4AQ&latitude=37.79332
&longitude=-122.392761&radius=50&radiusUnit=km&sortBy=Distance&sortOrder=asc
```

Available version

48.0

HTTP methods

GET

Query parameters

Parameter Name	Type	Description	Required or Optional	Available Version
filterBy TerritoryIds	String[]	Comma-separated list of service territory IDs to filter the API response.	Optional	57.0
latitude	Double	Latitude of the service territory area.	Optional	48.0
limit	Integer	Limit of the service territories returned. For example, specify limit=1 to have only one service territory in the service territories list. The default value is 40.	Optional	48.0
longitude	Double	Longitude of the service territory area.	Optional	48.0
offset	Integer	Offset for the service territories returned. The default value is 0.	Optional	48.0
radius	Integer	Radius around the latitude and longitude values to get service territories. Default value is 5 when latitude and longitude values are provided, otherwise there is no default value.	Optional	48.0
radiusUnit	String	Unit for the radius value. Possible values are `mi` for miles and `km` for kilometer. Default value is `mi` when latitude and longitude values are provided, otherwise there is no default value.	Optional	48.0
scheduling PolicyId	String	ID of the `AppointmentSchedulingPolicy` object. If no scheduling policy is passed in the request body, the default	Optional	48.0

Parameter Name	Type	Description	Required or Optional	Available Version
		configurations are used. All Scheduling Policy Configurations are considered when using this API.		
serviceResource Ids	String[]	Comma-separated list of service territory technician or asset IDs to filter the API response.	Optional	48.0
sortBy	String[]	Criteria to sort the service territories list. Possible case-insensitive values are `distance` and `name`. The default value is `distance` when latitude and longitude values are provided, otherwise `name`.	Optional	48.0
sortOrder	String[]	Sorting order of the service territory list. Possible case-insensitive values are `asc` for ascending and `desc` for descending. The default value is `asc`.	Optional	48.0
workTypeGroupId	String	ID of the work type group containing the work types that are being performed.	Required if `workTypeId` isn't given	48.0
workTypeId	String	ID of the type of work to be performed.	Required if `workTypeGroupId` isn't given	48.0

Response body
[Service Territories Output](#)

Sample Response body

```
{
  "result" : {
    "serviceTerritories" : [ {
      "city" : "San Francisco",
      "country" : "United States",
      "id" : "0HhRM00000002U50AI",
      "latitude" : 37.79332,
      "longitude" : -122.392761,
      "name" : "Chase 1 Mission",
      "operatingHoursId" : "0OHRM00000002Ps4AI",
      "postalCode" : "94105",
      "state" : "CA",
      "street" : "1 Mission Street"
    }, {
      "city" : "San Francisco",
      "country" : "United States",
      "id" : "0HhRM00000002Tq0AI",
```

```
      "latitude" : 37.793872,
      "longitude" : -122.394865,
      "name" : "Chase 1 Market",
      "operatingHoursId" : "0OHRM00000002Ps4AI",
      "postalCode" : "94105",
      "state" : "CA",
      "street" : "1 Market Street"
    } ]
  }
}
```

Waitlists

Get waitlist details with the list of participants. A waitlist is a queue that includes participants without a scheduled appointment.

Resource

```
/connect/scheduling/waitlists
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/waitlists?waitlistIds=0010000XKJSMEDD
```

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/waitlists?waitlistIds=0010000XKJSMEDD,0010000XKJSMEDD
```

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/waitlists?serviceTerritoryId=0010000XKJSMEDD&isActive=true
```

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/waitlists?waitlistIds=0010000XKJSMEDD&participantFields=Source__c
```

Available version

59.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
isActive	Boolean	Indicates whether to fetch the active waitlists (`true`) or inactive waitlists (`false`). Used when the `serviceTerritoryId` parameter is specified.	Optional	59.0
maxLimit	Integer	Batch size of the waitlist participant records to fetch for each waitlist ID or service territory ID. The default value is 50.	Optional	59.0
offset	Integer	Number of waitlist participant records to skip from the response, in ascending order as per the created date. The default value is 0. The maximum offset value is 2000.	Optional	59.0

Parameter Name	Type	Description	Required or Optional	Available Version
participant Fields	String[]	Comma-separated list of fields to fetch from the waitlist participant object.	Optional	59.0
requestId	String	For internal use only.	Optional	59.0
service TerritoryId	String	ID of the service territory to fetch the details of the waitlists.	Required if the `waitlistIds` parameter isn't specified.	59.0
waitlistIds	String	Comma-separated list of the waitlist IDs to filter the result.	Required if the ~~serviceTerritoryId~~ parameter isn't specified.	59.0

Response body for GET

Waitlist Output

SEE ALSO:

Salesforce Help: Manage Waitlists

Waitlist Check Ins

Check in or register a participant to a waitlist who arrives at the service territory for a drop-in appointment.

Resource

```
/connect/scheduling/waitlist-checkin
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/waitlist-checkin
```

Available version

59.0

HTTP methods

POST

Request body for POST

Root XML tag

```
<waitlistCheckIn>
```

JSON example

```
{
   "lead": {
       "firstName":"Tom",
       "lastName":"Scott",
       "phone":"012-345-6789",
       "email":"tom.scott@phoenix.com",
```

```
        "company":"Phoenix",
        "extendedFields":[]
    },
    "participantId":"00Q5h00000JdQWzEAN",
    "waitlistId": "0D3B0000000S2SeNOP",
    "workTypeId":"08q5h000000UuEcAAK",
    "workTypeGroupId" : "0VSRM0000004MBk4AM",
    "serviceResourceId":"0Hn0000000S2SeNOP",
    "description": "Registration for a drop-in appointment.",
    "extendedFields":[
        {
            "name":"Source__c",
            "value":"Email"
        }
    ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description of the participant.	Optional	59.0
extended Fields	Extended Field Input[]	Details of the extended custom fields.	Optional	59.0
lead	Lead Input	Details of the prospect or lead.	Required if the participantId parameter isn't specified.	59.0
participant Id	String	ID of the participant with an appointment. The participant can be an account, a contact, or a lead.	Required if the lead parameter isn't specified.	59.0
service ResourceId	String	ID of the service resource.	Optional	59.0
waitlistId	String	ID of the waitlist that the participant is checked in.	Required	59.0
workType GroupId	String	ID of the work type group.	Required if the workTypeId parameter isn't specified.	59.0
workTypeId	String	ID of the work type that represents the topic for the appointment.	Required if the workTypeGroupId parameter isn't specified.	59.0

Response body for POST

Connect REST API Request Bodies

To perform a POST, PATCH, or PUT request, pass query parameters or create a request body formatted in either XML or JSON. This chapter lists the request bodies. The query parameters are listed with each resource.

To create a JSON request body, specify the properties of the request body in JSON format.

This is an example of a Comment request body.

```
{
 "body" : "Let's look for a new solution."
}
```

If a request body is top-level, it has a root XML tag listed. To create an XML request body, nest the properties as XML tags inside the root XML tag.

This is the same Connect request body in XML format:

```
<comment>
 <body>Let's look for a new solution.</body>
</comment>
```

Available Territory Slots Input

Input representation of the available territory slots request.

Assigned Resource Input

Input representation of the assigned resource details.

Extended Fields Input

Input representation for extended fields.

Group Appointments Input

Input representation of the criteria to filter and retrieve group appointments.

Lead Input

Lead input.

Service Appointments Create Input

Input representation for creating a service appointment. You can create service appointments, assign resources, and generate leads with either `parentRecordId` or `lead` but not both.

Service Appointment Update Input

Input representation for updating a service appointment. Use to update the scheduled times, assigned resource(s), service territory or even work type for existing appointments.

Service Appointment Input

Input representation of the service appointment details.

Skill Requirement Input

Skill requirement.

Waitlist Check In Input

Input representation of the participant's waitlist check in request.

Work type.

Available Territory Slots Input

Input representation of the available territory slots request.

Request example

```
{
  "startTime": "2022-07-27T00:00:00.000Z",
  "endTime": "2022-07-29T00:00:00.000Z",
  "workTypeGroupId": "0VSB0000000KyjBOAS",
  "accountId": "001B000000qAUAWIA4",
  "territoryIds": [
    "0HhB0000000TO9WKAW"
  ],
  "schedulingPolicyId": "0VrB0000000KyjB",
  "requiredResourceIds": [
    "0HnB0000000TO8gKAK"
  ],
  "engagementChannelTypeIds": [
    "0eFRM00000000CJ2AY"
  ]
}
```

Request example with only required fields

```
{
  "workType": {
    "id": "08qS70000004DTsIAM"
  },
  "territoryIds": [
    "0HhS70000004DTdKAM"
  ],
  "engagementChannelTypeIds": [
    "0eFRM00000000CJ2AY"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the associated account.	Optional	49.0
allowConcurrent Scheduling	Boolean	Indicates whether concurrent appointments are allowed (`true`) or not allowed (`false`). The default value is `false`.	Optional	49.0
correlationId	String	ID to pass custom information to the `ServiceResourceScheduleHandler` Apex interface. For example, you can use	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
		the correlation ID to identify the app, website, or any other external system that calls this Apex interface implementation. If you don't pass a custom value, a randomly generated identifier is passed.		
endTime	String	Latest time that an appointment can end. **Note:** The API only returns time slots up to 31 days from the `startTime`.	Optional	49.0
engagementChannelTypeIds	String[]	The ID of the engagement channel type record. The resources and their associated time slots are filtered by the specified engagement channel type. **Note:** This field supports only one engagement channel type ID. You can use engagement channel types with the `available-territory-slots` API only if: • **Schedule Appointments Using Engagement Channels** is enabled in Salesforce Scheduler Settings in your Salesforce org. • Shifts are defined in the scheduling policy. For more information on setting up shifts in the scheduling policy, see Define Shift Rules in Scheduling Policy. **Note:** Engagement channel types are not supported with operating hours rules in the scheduling policy.	Optional	56.0
filterByResources	String[]	Comma-separated list of service resource IDs. API returns only eligible service resources that are both in the list and in the selected service territory. The resources are sorted by the order in which the resource IDs are passed. **Note:** You can either pass `filterByResources` or	Optional	51.0

Name	Type	Description	Required or Optional	Available Version
		`requiredResourceIds` in a request.		
`required ResourceIds`	String[]	List of resource IDs that you want to get available time slots for. When you pass more than one resource ID, the API returns all the slots where any of the passed resources are available. For example, suppose that you have three qualified resources: A, B, and C. If you pass resource IDs A and B, the API returns all the slots where: • only A is available • only B is available • both A and B are available • both A and C are available • both B and C are available • A, B, and C are all available The API doesn't return the slots where only C is available. If this field is empty, time slots for all qualified resources are returned. 📝 Note: The API request doesn't show time slots for the resource specified in `requiredResourceIds` if it does not appear in the list of least utilized resources set for `resourceLimitAppointmentDistribution`. For example, if you specify a resource A in `requiredResourceIds` and `resourceLimitAppointmentDistribution` is set to 15, the request doesn't show time slots for this resource, as A isn't among the top 15 least utilized resources.	Optional	49.0
`resourceLimit ApptDistribution`	Integer	Specify the maximum number of service resources that you want to show during appointment scheduling when appointment distribution is enabled. Default value is 10.	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
		📝 **Note:** The `filterByResources` field takes precedence over the `resourceLimitApptDistribution` field.		
scheduling PolicyId	String	ID of the AppointmentSchedulingPolicy object. If not provided, the default configurations are considered.	Optional	49.0
startTime	String	Earliest time that an appointment can start. Defaults to the current time of the request, if empty. You can also use a time from the past.	Optional	49.0
territoryIds	String[]	List of IDs of service territories where the specified work is performed.	Required	49.0
workType	Work Type Input	Type of work performed.	Required if `workTypeGroupId` isn't provided	49.0
workType GroupId	String	ID of the work type group containing all work types performed.	Required if `workType` isn't provided	49.0

Assigned Resource Input

Input representation of the assigned resource details.

Root XML tag

```
<assignedResources>
```

JSON example

```
{
  "assignedResources": [
    {
      "serviceResourceId": "0HnRM0000004Gzy0AE",
      "isRequiredResource": true,
      "isPrimaryResource": true,
      "extendedFields": []
    },
    {
      "serviceResourceId": "0HnRM0000004Mln0AE",
      "isRequiredResource": true,
      "isPrimaryResource": false,
      "extendedFields": []
    }
```

```
    ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
extended Fields	Extended Fields Input[]	Custom fields.	Optional	48.0
isPrimary Resource	Boolean	Indicates whether the assigned resource is the primary resource. For multi-resource appointments, only one resource can be a primary resource.	Required if multi-resource scheduling is enabled.	48.0
isRequired Resource	Boolean	Indicates whether the assigned resource is a required resource.	Required	48.0
service ResourceId	String	Resource who is assigned to the service appointment.	Required	48.0

Extended Fields Input

Input representation for extended fields.

Root XML tag

```
<extendedFields>
```

JSON example

```
{
  "extendedFields": [
    {
      "name": "assigned_to__c",
      "value": "abcd"
    },
    {
      "name": "ownership__c",
      "value": true
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the custom field.	Optional	48.0
value	String	Value of the custom field.	Optional	48.0

Group Appointments Input

Input representation of the criteria to filter and retrieve group appointments.

JSON example

```json
{
  "startTime": "2024-01-23T00:00:00.000Z",
  "endTime": "2024-02-28T00:00:00.000Z",
  "filterByWorkTypes": [
    "08qRM00000003fkYAA"
  ],
  "filterByResources": [
    "0HnB0000000TO8gKAK"
  ],
  "filterByTerritories": [
    "0HhRM00000003OZ0AY"
  ],
  "filterByParentRecords": [
    "001B000000qAUAWIA4"
  ],
  "filterByEngagementChannelTypes": [
    "0eFRM00000000Bv2AI"
  ],
  "extendedFieldsToQuery": [
    "subject",
    "description"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
endTime	String	Latest end time for the group appointments to be retrieved.	Optional	61.0
exclude Associated Appts	Boolean	Indicates whether the response excludes appointments where the current user is associated as an attendee or assigned resource (`true`) or not (`false`).	Optional	61.0
extended FieldsToQuery	String[]	List of the extended custom fields to fetch in the output.	Optional	61.0
filterBy Engagement ChannelTypes	String[]	ID of the engagement channel type record. Group appointments are filtered based on the selected engagement channel type.	Optional	61.0
filterBy ParentRecords	String[]	The ID of the associated parent record.	Optional	61.0
filterBy Resources	String[]	List of the group appointments where all the given resources are present.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
filterBy Territories	String[]	List of IDs of the service territories where the requested work is performed.	Optional	61.0
filterBy WorkTypeGroups	String[]	IDs of the work type groups containing the work types that are being performed.	Optional	61.0
filterBy WorkTypes	String[]	List of IDs of the work types to be performed.	Optional	61.0
limit	Integer	Maximum number of records to be fetched.	Optional	61.0
offset	Integer	Number of records to be skipped.	Optional	61.0
startTime	String	The earliest start time for the group appointments to be retrieved. If not provided, it defaults to the current time of the request.	Optional	61.0

Lead Input

Lead input.

Root XML tag

```
<lead>
```

JSON example

```
{
  "lead": {
    "firstName": "Rachel",
    "lastName": "Adams",
    "phone": "012-345-6789",
    "email": "rachel.adams@jpmc.com",
    "company": "Salesforce",
    "extendedFields": []
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
company	String	Lead's company.	Optional	48.0
email	String	Lead's email address.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields.	Optional	48.0
firstName	String	Lead's first name.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
lastName	String	Lead's last name.	Required	48.0
phone	String	Lead's phone number.	Optional	48.0

Service Appointments Create Input

Input representation for creating a service appointment. You can create service appointments, assign resources, and generate leads with either `parentRecordId` or `lead` but not both.

JSON example

```
{
  "serviceAppointment": {
    "parentRecordId": "0012w000004oZXgAAM",
    "workTypeId": "08q2w000000XmniAAC",
    "serviceTerritoryId": "0Hh2w000000XmoXCAS",
    "engagementChannelTypeId": "0eFRM00000000Bv2AI",
    "schedStartTime": "2020-02-26T15:00:00.000Z",
    "schedEndTime": "2020-02-26T16:00:00.000Z",
    "street": "1 Market Street",
    "city": "San Francisco",
    "state": "CA",
    "postalCode": "94105",
    "country": "USA",
    "appointmentType": "In Person",
    "appointmentMode": "Group",
    "attendeeLimit": "20",
    "extendedFields": [
      {
        "name": "Email",
        "value": "rachel.adams@salesforce.com"
      },
      {
        "name": "Phone",
        "value": "111111111"
      },
      {
        "name": "Description",
        "value": "Test Description"
      }
    ]
  },
  "assignedResources": [
    {
      "serviceResourceId": "0Hn2w000000gDWDCA2",
      "isRequiredResource": true,
      "isPrimaryResource": true,
      "extendedFields": []
    },
    {
      "serviceResourceId": "0Hn2w000000gCqnCAE",
```

```
      "isRequiredResource": true,
      "isPrimaryResource": false,
      "extendedFields": []
    }
  ]
}
```

JSON example for unauthenticated user

```
{
  "serviceAppointment": {
    "workTypeId": "08q2w000000XmniAAC",
    "serviceTerritoryId": "0Hh2w000000XmoXCAS",
    "engagementChannelTypeId": "0eFRM00000000Bv2AI",
    "schedStartTime": "2020-02-26T15:00:00.000Z",
    "schedEndTime": "2020-02-26T16:00:00.000Z",
    "street": "1 Market Street",
    "city": "San Francisco",
    "state": "CA",
    "postalCode": "94105",
    "country": "USA",
    "appointmentType": "In Person",
    "appointmentMode": "Group",
    "attendeeLimit": "20",
    "extendedFields": []
  },
  "assignedResources": [
    {
      "serviceResourceId": "0Hn2w000000gDWDCA2",
      "isRequiredResource": true,
      "isPrimaryResource": true,
      "extendedFields": []
    }
  ],
  "lead": {
    "firstName": "Rachel",
    "lastName": "Adams",
    "phone": "012-345-6789",
    "email": "rachel.adams@salesforce.com",
    "company": "Salesforce",
    "extendedFields": []
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
assignedResources	Assigned Resource Input[]	Service resource who is assigned to a service appointment. Note: When creating an appointment, you can use `extendedFields` to add	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
		values to any of the fields, including custom fields, in `assignedResources` as long as you have edit access to those fields.		
lead	Lead Input[]	Prospect or lead.	Required if `serviceAppointment` isn't provided ✏️ Note: Required to create a service appointment with unauthenticated guest users.	48.0
schedulingPolicyId	String	ID of the `AppointmentSchedulingPolicy` object. If no scheduling policy is passed in the request body, the default configurations are used. The only scheduling policy configuration that is used in determining time slots is the enforcement of account visiting hours.	Optional	48.0
serviceAppointment	Service Appointment Input[]	Appointment to complete a service work for a customer. ✏️ Note: When creating an appointment, you can use `extendedFields` to add values to any of the fields, including custom fields, in `serviceAppointment` as long as you have edit access to those fields.	Required if `lead` isn't provided	48.0

Service Appointment Update Input

Input representation for updating a service appointment. Use to update the scheduled times, assigned resource(s), service territory or even work type for existing appointments.

Limitations

You cannot use the resource to modify the following:

- Parent record ID (`parentRecordId`) and Service appointment ID (`serviceAppointmentId`)
- Canceled appointments.
- Past date appointments.
- `lead` details.
- When multi-resource scheduling is enabled, you can't add a new resource and make it as the primary resource in a single request. Add the new resource in one request and then make another request to add the resource as a primary resource.

JSON example

```
{
  "serviceAppointmentId": "08pxx0000004C92AAE",
  "serviceAppointment": {
    "workTypeId": "08pxx0000004C92AAE",
    "serviceTerritoryId": "0Hh2xx0000004CAeCAM",
    "engagementChannelTypeId": "0eFRM0000004CC22AM",
    "schedStartTime": "2020-09-15T16:00:00+0000",
    "schedEndTime": "2020-09-15T17:00:00+0000",
    "street": "1 Market Street",
    "city": "San Francisco",
    "state": "CA",
    "postalCode": "94105",
    "country": "USA",
    "appointmentType": "In Person",
    "appointmentMode": "Group",
    "attendeeLimit": "20",
    "extendedFields": [
      {
        "name": "Email",
        "value": "rachel.adams@salesforce.com"
      },
      {
        "name": "Phone",
        "value": "111111111"
      },
      {
        "name": "Description",
        "value": "Test Description"
      }
    ],
  "assignedResources": [
    {
      "serviceResourceId": "0Hnxx0000004CAeCAM",
      "isRequiredResource": true,
      "isPrimaryResource": false,
      "extendedFields": []
    },
  ]
}
```

Request example to update the scheduled time

> 📝 Note: The API updates the equivalent Salesforce calendar events and block times when the scheduled time is updated.

```
{
  "serviceAppointmentId": "08pxx0000004C92AAE",
  "serviceAppointment": {
    "schedStartTime": "2020-09-15T16:00:00+0000",
    "schedEndTime": "2020-09-15T17:00:00+0000",
}
```

Request example to update the work type

```
{
  "serviceAppointmentId": "08pxx0000004C92AAE",
  "serviceAppointment": {
    "workTypeId": "08qxx0000004C92AAE",
}
```

Request example to update the service territory

```
{
  "serviceAppointmentId": "08pxx0000004C92AAE",
  "serviceAppointment": {
    "serviceTerritoryId": "0Hhxx0000004CAeCAM"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
assigned Resources	Assigned Resource Input[]	Service resource who is assigned to a service appointment.	Optional	51.0
		When updating an appointment, pass the complete list of resources needed.		
		If you don't pass a resource that is assigned to a service appointment, the API deletes that assigned resource. For example, suppose that an existing service appointment has assigned resources: A and B and if you pass assigned resources: B and C. The API checks the resource availability of B and C for existing work type and service territory, and if both are available, the service appointment gets updated with:		
		• Resource A—Deleted		
		• Resource B—Updated		
		• Resource C—Created		

Name	Type	Description	Required or Optional	Available Version
		However, if you don't pass any of the assigned resources, the API assumes there is no change. 📝 **Note:** When updating an appointment, you can use `extendedFields` to add values to any of the fields, including custom fields, in `assignedResources` as long as you have edit access to those fields.		
scheduling PolicyId	String	ID of the `AppointmentSchedulingPolicy` object. If no scheduling policy is passed in the request body, the default configurations are used. The only scheduling policy configuration that is used in determining time slots is the enforcement of account visiting hours.	Optional	51.0
service Appointment	Service Appointment Input[]	Appointment to complete a service work for a customer. When updating an appointment, pass only the fields that need to be updated. 📝 **Note:** When updating an appointment, you can use `extendedFields` to add values to any of the fields, including custom fields, in `serviceAppointment` as long as you have edit access to those fields.	Required	51.0
service AppointmentId	String	ID of the service appointment that you want to update.	Required	51.0

Service Appointment Input

Input representation of the service appointment details.

Root XML tag

```
<serviceAppointment>
```

JSON example

```
{
  "serviceAppointment": {
    "parentRecordId": "001RM000004PhDgYAK",
    "workTypeId": "08qRM0000004LyJYAU",
    "serviceTerritoryId": "0HhRM0000004MNd0AM",
    "schedStartTime": "2019-10-30T13:00:00.000Z",
    "schedEndTime": "2019-10-30T14:00:00.000Z",
    "street": "1 Market Street",
    "city": "San Francisco",
    "state": "CA",
    "postalCode": "94105",
    "country": "USA",
    "appointmentType": "In Person",
    "appointmentMode": "Group",
    "attendeeLimit": "20",
    "extendedFields": []
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Information	String	Additional information about the service appointment.	Optional	48.0
appointment Type	String	Specifies the API name of the appointment type for the service appointment.	Optional	48.0
appointment Mode	String	Mode of the service appointment. Valid values are: • `Group` • `Regular` The default value is `Regular`.	Optional	60.0
attendeeLimit	Integer	Maximum number of customers that's allowed to attend the service appointment.	Required if the appointment mode is Group.	60.0
city	String	City where the appointment is completed.	Optional	48.0
comments	String	Comments about the appointment.	Optional	48.0
contactId	String	Contact associated with the parent record.	Optional	48.0
country	String	Country where the appointment is completed.	Optional	48.0
description	String	Description of the appointment.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
engagementChannel TypeId	String	ID of the engagement channel type to associate with the appointment.	Optional	56.0
		You can use engagement channel type only if:		
		• **Schedule Appointments Using Engagement Channels** is enabled in Salesforce Scheduler Settings in your Salesforce org.		
		• Shifts are defined in the scheduling policy. For more information on setting up shifts in the scheduling policy, see Define Shift Rules in Scheduling Policy.		
		Note: Engagement channel types are not supported with operating hours rules in the scheduling policy.		
extended Fields	Extended Fields Input[]	Custom fields.	Optional	48.0
parent RecordId	String	Parent record associated with the appointment.	Required	48.0
postalCode	String	Postal code where the appointment is completed.	Optional	48.0
schedEndTime	String	Time at which the appointment is scheduled to end. Ensure the scheduled start time and end time align with the available time slots.	Optional	48.0
sched StartTime	String	Time at which the appointment is scheduled to start. Ensure the scheduled start time and end time align with the available time slots.	Optional	48.0
service TerritoryId	String	Service territory associated with the appointment.	Optional	48.0
state	String	State where the service appointment is completed.	Optional	48.0
street	String	Street number and name where the service appointment is completed.	Optional	48.0
subject	String	Short phrase describing the appointment.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
workTypeId	String	Work type associated with the service appointment. If specified, it is added to the service appointment record.	Optional	48.0

SEE ALSO:

Salesforce Help: How Salesforce Scheduler Determines Available Time Slots

Skill Requirement Input

Skill requirement.

Properties

Name	Type	Description	Required or Optional	Available Version
skillId	String	ID of the skill required.	Required	49.0
skillLevel	Double	Level of the skill required.	Optional	49.0

Waitlist Check In Input

Input representation of the participant's waitlist check in request.

Root XML tag

```
<waitlistCheckIn>
```

JSON example

```
{
    "lead": {
        "firstName":"Tom",
        "lastName":"Scott",
        "phone":"012-345-6789",
        "email":"tom.scott@phoenix.com",
        "company":"Phoenix",
        "extendedFields":[]
    },
    "participantId":"00Q5h00000JdQWzEAN",
    "waitlistId": "0D3B0000000S2SeNOP",
    "workTypeId":"08q5h000000UuEcAAK",
    "workTypeGroupId" : "0VSRM0000004MBk4AM",
    "serviceResourceId":"0Hn0000000S2SeNOP",
    "description": "Registration for a drop-in appointment.",
    "extendedFields":[
        {
            "name":"Source__c",
            "value":"Email"
        }
```

```
    ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description of the participant.	Optional	59.0
extended Fields	Extended Field Input[]	Details of the extended custom fields.	Optional	59.0
lead	Lead Input	Details of the prospect or lead.	Required if the `participantId` parameter isn't specified.	59.0
participantId	String	ID of the participant with an appointment. The participant can be an account, a contact, or a lead.	Required if the `lead` parameter isn't specified.	59.0
service ResourceId	String	ID of the service resource.	Optional	59.0
waitlistId	String	ID of the waitlist that the participant is checked in.	Required	59.0
workType GroupId	String	ID of the work type group.	Required if the `workTypeId` parameter isn't specified.	59.0
workTypeId	String	ID of the work type that represents the topic for the appointment.	Required if the `workTypeGroupId` parameter isn't specified.	59.0

Work Type Input

Work type.

JSON example

```
{
  "id" : "08qRM00000003fkYAA"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
blockTimeAfter AppointmentIn Minutes	Integer	Period after the appointment that is typically blocked for this work type.	Optional	49.0
blockTimeBefore AppointmentIn Minutes	Integer	Period before the appointment that is typically blocked for this work type.	Optional	49.0
durationIn Minutes	Integer	Duration of the appointment in minutes.	Required if `id` isn't provided	49.0
id	String	ID of the work type.	Required if `durationInMinutes` isn't provided	49.0
operatingHoursId	String	ID of the operating hours.	Optional	49.0
operatingHours TimeZone	String	Time zone for the operating hours.	Optional	49.0
skillRequirements	Skill Requirement Input[]	List of skills required to complete the tasks associated with this work type.	Optional	49.0
timeFrame EndInMinutes	Integer	Ending of the appointment in minutes.	Optional	49.0
timeFrame StartInMinutes	Integer	Beginning of the appointment in minutes.	Optional	49.0

Connect REST API Response Bodies

The successful execution of a request to a Connect REST API resource can return a response body in either JSON or XML format.

A request to a Connect REST API resource always returns an HTTP response code, whether the request was successful or not.

Available Territory Slots
Slot's start and end time and available resources in the specified territory.

Available Territory Slots List
Available territory slots.

Available Territory Slots Output
Available territory slots result.

Engagement Channel Type List Result
Output representation of the engagement channel type result.

Engagement Channel Type Result
Output representation of the details of the engagement channel type.

Engagement Channel Type Output

Output representation of the list of the engagement channel types.

Extended Fields

Output representation of the extended fields for Salesforce Scheduler.

Group Appointments

Output representation of the response that contains the retrieved group appointments.

Group Appointments List Result

Output representation of the list of group appointments.

Group Appointment Result

Output representation that contains the details of a specific group appointment.

Service Appointment Output

Output of the service appointment POST method.

Service Appointment Result

Result of the POST method.

Service Territories Output

Output for the service territories GET method.

Service Territories List Result

List of service territories returned as per the query in the GET service territories call.

Service Territories Result

Represents a service territory result.

Waitlist Analytics

Output representation of the waitlist analytics.

Waitlist Check In

Output representation of the waitlist check in request.

Waitlist Check In Result

Output representation of the waitlist check in result.

Waitlist Details

Output representation of the waitlist details.

Waitlist List Result

Output representation of the result of the list of waitlists.

Waitlist Participant Details

Output representation of the waitlist participant details.

Waitlist Participant Result

Output representation of a waitlist participant result. A waitlist participant is a customer who is added to a waitlist.

Waitlist Result

Output representation of the waitlist result.

Waitlist Service Resource

Output representation of the waitlist service resource. Service resources are individual users who can attend customer appointments.

Waitlist Work Type Group

Output representation of the waitlist work type group. A work type group is a general appointment category or topic, such as a home loan or an investment.

Available Territory Slots

Slot's start and end time and available resources in the specified territory.

Property Name	Type	Description	Filter Group and Version	Available Version
endTime	String	End time of the appointment. 📝 Note: The API returns time slots up to 31 days from the startTime.	Small, 49.0	49.0
engagementChannelTypeIds	String[]	List of IDs of the engagement channel types for the service resource.	Small, 56.0	56.0
resources	String[]	List of resources available in the specified territory.	Small, 49.0	49.0
startTime	String	Start time of the appointment.	Small, 49.0	49.0

Available Territory Slots List

Available territory slots.

Property Name	Type	Description	Filter Group and Version	Available Version
territorySlots	Available Territory Slots[]	List of appointment territory slots.	Small, 49.0	49.0

Available Territory Slots Output

Available territory slots result.

Response example

```
{
"result": {
    "territorySlots": [
      {
        "territoryId": "0HhB0000000TO9WKAW",
        "slots": [
          {
            "endTime": "2019-01-23T19:15:00.000+0000",
            "resources": [
              "0HnB0000000D2DsKAK",
              "0HnB0000000D2DsJKL"
            ],
            "startTime": "2019-01-23T16:15:00.000+0000"
          },
          {
            "endTime": "2019-01-23T19:30:00.000+0000",
```

```
            "resources": [
              "0HnB0000000D2DsKAK",
              "0HnB0000000D2DsJKL"
            ],
            "startTime": "2019-01-23T16:30:00.000+0000"
          }
        ]
      },
      {
        "territoryId": "0HhB0000000TO9WERT",
        "slots": [
          {
            "endTime": "2019-01-23T19:15:00.000+0000",
            "resources": [
              "0HnB0000000D2DsKAK"
            ],
            "startTime": "2019-01-23T16:15:00.000+0000"
          },
          {
            "endTime": "2019-01-23T19:30:00.000+0000",
            "resources": [
              "0HnB0000000D2DsKAK",
              "0HnB0000000D2DsJKL"
            ],
            "startTime": "2019-01-23T16:30:00.000+0000"
          }
        ]
      }
    ]
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
result	Available Territory Slots List	All available time slots and resources available for that time slot across each territory.	Small, 49.0	49.0

Engagement Channel Type List Result

Output representation of the engagement channel type result.

Property Name	Type	Description	Filter Group and Version	Available Version
engagementChannelTypes	Get Engagement Channel Type Result[]	Engagement channel type details.	Small, 56.0	56.0

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Engagement Channel Type Result

Output representation of the details of the engagement channel type.

Property Name	Type	Description	Filter Group and Version	Available Version
contactPoint	String	The contact point for the engagement channel type.	Small, 56.0	56.0
contactPointType	String	The contact point type for the engagement channel type. Possible values are: • `InPerson` • `None` • `Phone`—Available in API version 57.0 and later. • `Video`—Available in API version 57.0 and later.	Small, 56.0	56.0
id	String	The ID of the engagement channel type record.	Small, 56.0	56.0
name	String	The name of the engagement channel type.	Small, 56.0	56.0
workTypeGroupIds	String[]	The work type group IDs for the engagement channel type. 📝 Note: When `workTypeID` is specified in the API request, this property is unspecified.	Small, 56.0	56.0
workTypeIds	String[]	The work type Ids for the engagement channel type. 📝 Note: When `workTypeGroupID` is specified in the API request, this property is unspecified.	Small, 56.0	56.0

Engagement Channel Type Output

Output representation of the list of the engagement channel types.

JSON Example

```
{
  "result": {
    "engagementChannelTypes": [
      {
        "id": "0eFRM0000004CBs2AM",
```

```
          "name": "Inperson-2",
          "workTypeGroupIds": [
            "0VSRM0000000BgX4AU"
          ],
          "workTypeIds": []
        },
        {
          "contactPointType": "InPerson",
          "id": "0eFRM00000000BL2AY",
          "name": "A Channel",
          "workTypeGroupIds": [
            "0VSRM0000000BgX4AU"
          ],
          "workTypeIds": []
        },
        {
          "contactPointType": "InPerson",
          "id": "0eFRM00000000Bk2AI",
          "name": "Test",
          "workTypeGroupIds": [
            "0VSRM0000000BgX4AU"
          ],
          "workTypeIds": []
        }
      ]
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
result	Get Engagement Channel Type List Result	List that contains the engagement channel types.	Small, 56.0	56.0

Extended Fields

Output representation of the extended fields for Salesforce Scheduler.

JSON example

```
    "extendedFields":[
     {
      "name":"Source__c",
      "value":"Email"
     }
    ]
```

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the extended field.	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
value	String	Value of the extended field.	Small, 59.0	59.0

Group Appointments

Output representation of the response that contains the retrieved group appointments.

Sample Response

```
{
  "groupAppointments": [
    {
      "appointmentId": "08pxx0000004HlQAAU",
      "attendeeCount": 10,
      "attendeeLimit": 25,
      "parentRecordId": "001B000000qAUAWIA4",
      "endTime": "2024-01-21T19:15:00.000+0000",
      "resourceIds": [
        "0HnB0000000TO8gKAK"
      ],
      "startTime": "2024-01-21T16:15:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW",
      "engagementChannelTypeId": "0eFRM00000000Bv2AI",
      "workTypeId": "08qRM00000003fkYAA",
      "extendedFields": [
        {
          "name": "subject",
          "value": "MSc Internship - Resume workshop"
        },
        {
          "name": "description",
          "value": "Resume workshop for MSc Internship for Section 4"
        }
      ]
    },
    {
      "appointmentId": "08pxx0000003HpQAAU",
      "attendeeCount": 0,
      "attendeeLimit": 15,
      "parentRecordId": "001B000000qAUAWIA4",
      "endTime": "2019-01-21T19:30:00.000+0000",
      "resourceIds": [
        "0HnB0000000TO8gKAK"
      ],
      "startTime": "2019-01-21T16:30:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW",
      "engagementChannelTypeId": "0eFRM00000000Bv2AI",
      "workTypeId": "08qRM00000003fkYAA",
      "extendedFields": [
        {
          "name": "subject",
          "value": "MSc Internship - Resume workshop"
```

```
        },
        {
          "name": "description",
          "value": "Resume workshop for MSc Internship for Section 5"
        }
      ]
    },
    {
      "appointmentId": "08pxx0000009AsQAAU",
      "attendeeCount": 20,
      "attendeeLimit": 20,
      "parentRecordId": "001B000000qAUAWIA4",
      "endTime": "2019-01-21T19:45:00.000+0000",
      "resourceIds": [
        "0HnB0000000TO8gKAK"
      ],
      "startTime": "2019-01-21T16:45:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW",
      "engagementChannelTypeId": "0eFRM00000000Bv2AI",
      "workTypeId": "08qRM00000003fkYAA",
      "extendedFields": [
        {
          "name": "subject",
          "value": "MSc Internship - Resume workshop"
        },
        {
          "name": "description",
          "value": "Resume workshop for MSc Internship for Section 3"
        }
      ]
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
result	Group Appointments List Result	List of result objects for the retrieved group appointments.	Small, 61.0	61.0

Group Appointments List Result

Output representation of the list of group appointments.

Sample Response

```
{
  "groupAppointments": [
    {
      "appointmentId": "08pxx0000004HlQAAU",
      "attendeeCount": 10,
      "attendeeLimit": 25,
```

```
      "parentRecordId": "001B000000qAUAWIA4",
      "endTime": "2024-01-21T19:15:00.000+0000",
      "resourceIds": [
        "0HnB0000000TO8gKAK"
      ],
      "startTime": "2024-01-21T16:15:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW",
      "engagementChannelTypeId": "0eFRM00000000Bv2AI",
      "workTypeId": "08qRM00000003fkYAA",
      "extendedFields": [
        {
          "name": "subject",
          "value": "MSc Internship - Resume workshop"
        },
        {
          "name": "description",
          "value": "Resume workshop for MSc Internship for Section 4"
        }
      ]
    },
    {
      "appointmentId": "08pxx0000003HpQAAU",
      "attendeeCount": 0,
      "attendeeLimit": 15,
      "parentRecordId": "001B000000qAUAWIA4",
      "endTime": "2019-01-21T19:30:00.000+0000",
      "resourceIds": [
        "0HnB0000000TO8gKAK"
      ],
      "startTime": "2019-01-21T16:30:00.000+0000",
      "territoryId": "0HhB0000000TO9WKAW",
      "engagementChannelTypeId": "0eFRM00000000Bv2AI",
      "workTypeId": "08qRM00000003fkYAA",
      "extendedFields": [
        {
          "name": "subject",
          "value": "MSc Internship - Resume workshop"
        },
        {
          "name": "description",
          "value": "Resume workshop for MSc Internship for Section 5"
        }
      ]
    },
    {
      "appointmentId": "08pxx0000009AsQAAU",
      "attendeeCount": 20,
      "attendeeLimit": 20,
      "parentRecordId": "001B000000qAUAWIA4",
      "endTime": "2019-01-21T19:45:00.000+0000",
      "resourceIds": [
        "0HnB0000000TO8gKAK"
      ],
      "startTime": "2019-01-21T16:45:00.000+0000",
```

```
            "territoryId": "0HhB0000000TO9WKAW",
            "engagementChannelTypeId": "0eFRM00000000Bv2AI",
            "workTypeId": "08qRM00000003fkYAA",
            "extendedFields": [
              {
                "name": "subject",
                "value": "MSc Internship - Resume workshop"
              },
              {
                "name": "description",
                "value": "Resume workshop for MSc Internship for Section 3"
              }
            ]
          }
        ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
group Appointments	Group Appointment Result[]	List of group appointments in each territory.	Small, 61.0	61.0

Group Appointment Result

Output representation that contains the details of a specific group appointment.

Sample Response

```
{
    "groupAppointments": [
        {
            "appointmentId": "08pxx0000004H1QAAU",
            "attendeeCount": 10,
            "attendeeLimit": 25,
            "parentRecordId": "001B000000qAUAWIA4",
            "endTime": "2024-01-21T19:15:00.000+0000",
            "startTime": "2024-01-21T16:15:00.000+0000",
            "resource": {
                "id" : "0HnB0000000TO8gKAK",
                "name" : "Best Resource"
            },
            "territoryId": "0HhB0000000TO9WKAW",
            "engagementChannelTypeId": "0eFRM00000000Bv2AI",
            "workTypeId": "08qRM00000003fkYAA",
            "appointmentChannel": {
                "engagementChannelTypeId" : "0eFRM00000000Bv2AI" ,
                "engagementChannelTypeName" : "Video"
            },
            "workTypeGroup" : {
                "name" : "Wealth Management",
                "id" : "0eFRM00000000Bv2AI"
            },
```

```
            "extendedFields": [
                { "name": "subject",
                "value": "MSc Interniship - Resume workshop" },
                { "name": "description",
                "value": "Resume workshop for MSc Interniship for Section 4" }
            ]
        },
        {
            "appointmentId": "08pxx0000003HpQAAU",
            "attendeeCount": 0,
            "attendeeLimit": 15,
            "parentRecordId": "001B000000qAUAWIA4",
            "endTime": "2019-01-21T19:30:00.000+0000",
            "startTime": "2024-01-21T16:15:00.000+0000",
            "resource": {
                "id" : "0HnB0000000TO8gKAK",
                "name" : "Best Resource"
            },
            "startTime": "2019-01-21T16:30:00.000+0000",
            "territoryId": "0HhB0000000TO9WKAW",
            "engagementChannelTypeId": "0eFRM00000000Bv2AI",
            "workTypeId": "08qRM00000003fkYAA",
            "appointmentChannel": {
                "engagementChannelTypeId" : "0eFRM00000000Bv2AI",
                "engagementChannelTypeName" : "Video"
            },
            "workTypeGroup" : {
                "name" : "Wealth Management",
                "id" : "0eFRM00000000Bv2AI"
            },
            "extendedFields": [
                { "name": "subject",
                "value": "MSc Interniship - Resume workshop" },
                { "name": "description",
                "value": "Resume workshop for MSc Interniship for Section 5" }
            ]
        },
        {
            "appointmentId": "08pxx0000009AsQAAU",
            "attendeeCount": 20,
            "attendeeLimit": 20,
            "parentRecordId": "001B000000qAUAWIA4",
            "endTime": "2019-01-21T19:45:00.000+0000",
            "startTime": "2024-01-21T16:15:00.000+0000",
            "resource": {
                "id" : "0HnB0000000TO8gKAK",
                "name" : "Best Resource"
            },
            "startTime": "2019-01-21T16:45:00.000+0000",
            "territoryId": "0HhB0000000TO9WKAW",
            "engagementChannelTypeId": "0eFRM00000000Bv2AI",
            "workTypeId": "08qRM00000003fkYAA",
            "appointmentChannel": {
                "engagementChannelTypeId" : "0eFRM00000000Bv2AI",
```

```
                    "engagementChannelTypeName" : "Video"
                },
                "workTypeGroup" : {
                    "name" : "Wealth Management",
                    "id" : "0eFRM00000000Bv2AI"
                },
                "extendedFields": [
                    { "name": "subject",
                    "value": "MSc Interniship - Resume workshop" },
                    { "name": "description",
                    "value": "Resume workshop for MSc Interniship for Section 3" }
                ]
            }
        ]
    }
```

Property Name	Type	Description	Filter Group and Version	Available Version
appointmentId	String	ID of the group appointment.	Small, 61.0	61.0
attendeeCount	Integer	Number of attendees who are already associated with the appointment.	Small, 61.0	61.0
attendeeLimit	Integer	Maximum attendee limit that's allowed for the appointment.	Small, 61.0	61.0
appointment Channel	Object	The appointment type, engagement channel type ID, and engagement Channel type name associated with the appointment, based on preferences.	Small, 61.0	61.0
endTime	String	End time of the appointment.	Small, 61.0	61.0
engagement ChannelTypeId	String	ID of the engagement channel type record.	Small, 61.0	61.0
extended Fields	Scheduler Extended Fields[]	Details of the extended custom fields.	Small, 61.0	61.0
parent RecordId	String	ID of the associated parent record.	Small, 61.0	61.0
resourceIds	String[]	Service resource IDs that are associated with the appointment.	Small, 61.0	61.0
startTime	String	Start time of the appointment.	Small, 61.0	61.0
territoryId	String	ID of the service territory that's associated with the appointment.	Small, 61.0	61.0
workTypeGroup	Object	ID and name of the work type group associated with the work type of the appointment.	Small, 61.0	61.0
workTypeId	String	ID of the work type for the appointment.	Small, 61.0	61.0

Service Appointment Output

Output of the service appointment POST method.

Property Name	Type	Description	Filter Group and Version	Available Version
result	Service Appointment Result	Result of the POST method.	Small, 48.0	48.0

Service Appointment Result

Result of the POST method.

Property Name	Type	Description	Filter Group and Version	Available Version
assignedResourceIds	String[]	IDs of the assigned resources	Small, 48.0	48.0
parentRecordId	String	ID of the parent record.	Small, 48.0	48.0
serviceAppointmentId	String	ID of the service appointment created.	Small, 48.0	48.0

Service Territories Output

Output for the service territories GET method.

Property Name	Type	Description	Filter Group and Version	Available Version
result	Service Territories List Result	Result for the GET method.	Small, 48.0	48.0

Service Territories List Result

List of service territories returned as per the query in the GET service territories call.

Property Name	Type	Description	Filter Group and Version	Available Version
serviceTerritories	Service Territories Result[]	List of service territories.	Small, 48.0	48.0

Service Territories Result

Represents a service territory result.

Property Name	Type	Description	Filter Group and Version	Available Version
city	String	Service territory city.	Small, 48.0	48.0
country	String	Service territory country.	Small, 48.0	48.0
id	String	ID of the service territory.	Small, 48.0	48.0
latitude	Double	Latitude of the service territory.	Small, 48.0	48.0
longitude	Double	Longitude of the service territory.	Small, 48.0	48.0
name	String	Name of the service territory.	Small, 48.0	48.0
operatingHoursId	String	ID of the service territory `operatingHours` record.	Small, 48.0	48.0
postalCode	String	Service territory postal code.	Small, 48.0	48.0
state	String	Service territory state.	Small, 48.0	48.0
street	String	Service territory street.	Small, 48.0	48.0

Waitlist Analytics

Output representation of the waitlist analytics.

JSON example

```
"waitlistAnalytics":{
  "currentParticipant": 1,
  "totalWaitingTime": 40,
  "avgWaitingTime": 20,
  "avgParticipants": 24
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
avg Participants	Integer	Count of average participants per day.	Small, 59.0	59.0
avg WaitingTime	Integer	Average waiting time in minutes.	Small, 59.0	59.0
current Participant	Integer	Number of current participants in the waitlist.	Small, 59.0	59.0
total WaitingTime	Integer	Total waiting time in minutes.	Small, 59.0	59.0

Waitlist Check In

Output representation of the waitlist check in request.

JSON example

```
{
   "result" : {
        "participantId" : "00Q5h00000JdQWzEAN",
        "serviceAppointmentId" : "08pxx0000004CYqAAM",
        "waitlistParticipantId" : "12oxx0000004FGiAAM"
   }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
result	Waitlist Check In Result	Result of the waitlist check in request.	Small, 59.0	59.0

Waitlist Check In Result

Output representation of the waitlist check in result.

JSON example

```
{
   "result" : {
        "participantId" : "00Q5h00000JdQWzEAN",
        "serviceAppointmentId" : "08pxx0000004CYqAAM",
        "waitlistParticipantId" : "12oxx0000004FGiAAM"
   }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
participantId	String	ID of the participant who has an appointment.	Small, 59.0	59.0
service AppointmentId	String	ID of the service appointment.	Small, 59.0	59.0
waitlist ParticipantId	String	ID of the waitlist participant.	Small, 59.0	59.0

Waitlist Details

Output representation of the waitlist details.

JSON example

```
{
            "description":"None",
```

```
                         "isActive":true,
                         "name":"Queue_1",
                         "serviceResources":[
                             {
                                 "id": "0Hnxx0000004C92CAE",
                                 "name":"Admin"
                             },
                             {
                                 "id": "0Hnxx0000004CFVCA2",
                                 "name":"Standard User 2 Technician"
                             }
                         ],
                         "waitlistAnalytics":{
                             "currentParticipant":1,
                             "totalWaitingTime":40,
                             "avgWaitingTime":20,
                             "avgParticipants":24
                         },
                         "waitlistId":"11wxx0000005GTHAA2",
                         "waitlistParticipants":[
                             {
                                 "participant":{
                                     "id":"001xx000003GZUZAA4",
                                     "name":"Global Media"
                                 },
                                 "participantIdentifier":"WP-0020",
                                 "serviceAppointmentId":"08pxx0000004CYqAAM",
                                 "serviceResource":{
                                     "id":"0Hnxx0000004C92CAE",
                                     "name":"Admin"
                                 },
                                 "waitlistParticipantId":"12oxx0000004FGiAAM",
                                 "workTypeGroup":{
                                     "id":"0VSxx0000004CoyGAE",
                                     "name":"General Banking WTG"
                                 },
                                 "createdDate" :"2023-05-02T12:23:34",
                                 "extendedFields":[
                                     {
                                         "name":"Source__c",
                                         "value":"Email"
                                     }
                                 ]
                             }
                         ],
                         "workTypeGroups":[
                             {
                                 "id":"0VSxx0000004CoyGAE",
                                 "name":"General Banking WTG"
                             }
                         ]
                     }
```

Property Name	Type	Description	Filter Group and Version	Available Version
description	String	Description of the waitlist.	Small, 59.0	59.0
isActive	Boolean	Indicates whether the waitlist is available to add drop-in customers (`true`) or not (`false`).	Small, 59.0	59.0
name	String	Name of the waitlist.	Small, 59.0	59.0
service Resources	Waitlist Service Resource[]	Details of the service resources that are related to the service appointment.	Small, 59.0	59.0
waitlist Analytics	Waitlist Analytics	Details of the waitlist analytics.	Small, 59.0	59.0
waitlistId	String	ID of the waitlist.	Small, 59.0	59.0
waitlist Participants	Waitlist Participant Result[]	Participants who are added to the waitlist.	Small, 59.0	59.0
workType Groups	Waitlist Work Type Group[]	Details of the work type groups that are related to the service appointment.	Small, 59.0	59.0

Waitlist List Result

Output representation of the result of the list of waitlists.

JSON example

```
"waitlists":[
    {
        "description":"None",
        "isActive":true,
        "name":"Queue_1",
        "serviceResources":[
            {
                "id": "0Hnxx0000004C92CAE",
                "name":"Admin"
            },
            {
                "id": "0Hnxx0000004CFVCA2",
                "name":"Standard User 2 Technician"
            }
        ],
        "waitlistAnalytics":{
            "currentParticipant":1,
            "totalWaitingTime":40,
            "avgWaitingTime":20,
            "avgParticipants":24
        },
        "waitlistId":"11wxx0000005GTHAA2",
        "waitlistParticipants":[
```

```
                                {
                                    "participant":{
                                        "id":"001xx000003GZUZAA4",
                                        "name":"Global Media"
                                    },
                                    "participantIdentifier":"WP-0020",
                                    "serviceAppointmentId":"08pxx0000004CYqAAM",
                                    "serviceResource":{
                                        "id":"0Hnxx0000004C92CAE",
                                        "name":"Admin"
                                    },
                                    "waitlistParticipantId":"12oxx0000004FGiAAM",
                                    "workTypeGroup":{
                                        "id":"0VSxx0000004CoyGAE",
                                        "name":"General Banking WTG"
                                    },
                                    "createdDate" :"2023-05-02T12:23:34",
                                    "extendedFields":[
                                        {
                                            "name":"Source__c",
                                            "value":"Email"
                                        }
                                    ]
                                }
                            ],
                            "workTypeGroups":[
                                {
                                    "id":"0VSxx0000004CoyGAE",
                                    "name":"General Banking WTG"
                                }
                            ]
                        }
                    ]
```

Property Name	Type	Description	Filter Group and Version	Available Version
waitlists	Waitlist Details[]	List of waitlists that are associated with a service appointment.	Small, 59.0	59.0

Waitlist Participant Details

Output representation of the waitlist participant details.

JSON example

```
    "participant":{
        "id":"001xx000003GZUZAA4",
        "name":"Global Media"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the waitlist participant.	Small, 59.0	59.0
name	String	Name of the waitlist participant.	Small, 59.0	59.0

Waitlist Participant Result

Output representation of a waitlist participant result. A waitlist participant is a customer who is added to a waitlist.

JSON example

```
  "waitlistParticipants":[
{
  "participant":{
   "id":"001xx000003GZUZAA4",
   "name":"Global Media"
 },
  "participantIdentifier":"WP-0020",
  "serviceAppointmentId":"08pxx0000004CYqAAM",
     "serviceResource":{
        "id":"0Hnxx0000004C92CAE",
        "name":"Admin"
      },
  "waitlistParticipantId":"12oxx0000004FGiAAM",
  "workTypeGroup":{
      "id":"0VSxx0000004CoyGAE",
      "name":"General Banking WTG"
   },
  "createdDate" :"2023-05-02T12:23:34",
  "extendedFields":[
      {
       "name":"Source__c",
       "value":"Email"
      }
   ]
  }
}
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
createdDate	String	Date when the waitlist participant record was created.	Small, 59.0	59.0
extended Fields	Extended Fields[]	List of extended fields associated with the waitlist participant record.	Big, 59.0	59.0
participant	Waitlist Participant Details	Details of the participant from the waitlist participant record.	Small, 59.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
participant Identifier	String	Alphanumeric unique identifier of the participant in a waitlist. For example, D101, E63, or A5015.	Small, 59.0	59.0
service AppointmentId	String	ID of the service appointment that's related to the waitlist participant.	Small, 59.0	59.0
service Resource	Waitlist Service Resource	Details of the service resource that's related to the service appointment for the waitlist participant.	Small, 59.0	59.0
waitlist ParticipantId	String	ID of the waitlist participant record.	Small, 59.0	59.0
workTypeGroup	Waitlist Work Type Group	Details of the work type group that's associated with the service appointment.	Small, 59.0	59.0

Waitlist Result

Output representation of the waitlist result.

JSON example

```
{
    "result":{
        "waitlists":[
            {
                "description":"None",
                "isActive":true,
                "name":"Queue_1",
                "serviceResources":[
                    {
                        "id": "0Hnxx0000004C92CAE",
                        "name":"Admin"
                    },
                    {
                        "id": "0Hnxx0000004CFVCA2",
                        "name":"Standard User 2 Technician"
                    }
                ],
                "waitlistAnalytics":{
                    "currentParticipant":1,
                    "totalWaitingTime":40,
                    "avgWaitingTime":20,
                    "avgParticipants":24
                },
                "waitlistId":"11wxx0000005GTHAA2",
                "waitlistParticipants":[
                    {
                        "participant":{
                            "id":"001xx000003GZUZAA4",
```

```
                            "name":"Global Media"
                        },
                        "participantIdentifier":"WP-0020",
                        "serviceAppointmentId":"08pxx0000004CYqAAM",
                        "serviceResource":{
                            "id":"0Hnxx0000004C92CAE",
                            "name":"Admin"
                        },
                        "waitlistParticipantId":"12oxx0000004FGiAAM",
                        "workTypeGroup":{
                            "id":"0VSxx0000004CoyGAE",
                            "name":"General Banking WTG"
                        },
                        "createdDate" :"2023-05-02T12:23:34",
                        "extendedFields":[
                            {
                                "name":"Source__c",
                                "value":"Email"
                            }
                        ]
                    }
                ],
                "workTypeGroups":[
                    {
                        "id":"0VSxx0000004CoyGAE",
                        "name":"General Banking WTG"
                    }
                ]
            }
        ]
    }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
result	Waitlist List Result	Details of the waitlist, including the list of participants and work type groups.	Small, 59.0	59.0

Waitlist Service Resource

Output representation of the waitlist service resource. Service resources are individual users who can attend customer appointments.

JSON example

```
"serviceResources":[
 {
  "id": "0Hnxx0000004C92CAE",
  "name":"Admin"
 },
 {
  "id": "0Hnxx0000004CFVCA2",
```

```
        "name":"Standard User 2 Technician"
        }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the service resource.	Small, 59.0	59.0
name	String	Name of the service resource.	Small, 59.0	59.0

Waitlist Work Type Group

Output representation of the waitlist work type group. A work type group is a general appointment category or topic, such as a home loan or an investment.

JSON example

```
"workTypeGroups":[
  {
    "id":"0VSxx0000004CoyGAE",
    "name":"General Banking WTG"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the work type group.	Small, 59.0	59.0
name	String	Name of the work type group.	Small, 59.0	59.0

Error Codes and Responses

When using the APIs in Salesforce Scheduler, you may encounter error codes and messages under certain conditions. For each Scheduler API, it lists the potential error codes, the associated error messages, and a description of what causes the error to occur.

The following is a list of error code details within the Salesforce Scheduler platform.

Appointment Candidates (GET)

Contains the error codes and error code messages related with the Salesforce Scheduler API for `getAppointmentSlots` (GET) resource.

Appointment Slots (GET)

Contains the error codes and error code messages related with Salesforce Scheduler API for the `getAppointmentSlots` (GET) resource.

Available Territory Slots (POST)

Contains the error codes and error code messages related with Salesforce Scheduler API for the `available-territory-slots` (POST) resource.

Contains the error codes and error code messages related with Salesforce Scheduler API for the `service-appointments` (PATCH) resource.

Contains the error codes and error code messages related with Salesforce Scheduler API for the `service-appointments` (POST) resource.

Contains the error codes and error code messages related with Salesforce Scheduler API for the `service-territories` (GET) resource.

SEE ALSO:

Connect REST API Developer Guide: Status Codes and Error Responses

Appointment Candidates (GET)

Contains the error codes and error code messages related with the Salesforce Scheduler API for `getAppointmentSlots` (GET) resource.

This table lists HTTP response code descriptions that are unique to this resource.

HTTP Response Code	Error Code	Description
400	MISSING_ARGUMENT	Specify either a `workTypeGroupId` or `WorkTypeId`.
400	MISSING_ARGUMENT	Specify a `serviceTerritoryId` with either a `workTypeGroupId` or `WorkTypeId`.
400	INVALID_INPUT	This isn't a valid `workTypeGroupId` value. Specify a valid ID for the `workTypeGroupId` parameter.
400	INVALID_INPUT	This isn't a valid `serviceTerritoryId` value. Specify a valid ID for the `territoryId` parameter.

Appointment Slots (GET)

Contains the error codes and error code messages related with Salesforce Scheduler API for the `getAppointmentSlots` (GET) resource.

This table lists HTTP response code descriptions that are unique to this resource.

HTTP Response Code	Error Code	Description
400	BAD_REQUEST	Specify either a `workTypeGroupId` or a `workTypeId` and try again.
400	BAD_REQUEST	This isn't a valid `durationInMinutes` value. Specify a valid duration in minutes for the `durationInMinutes` parameter.
400	BAD_REQUEST	`AppointmentTopicTimeSlot` is not accessible for the current user.

HTTP Response Code	Error Code	Description
400	BAD_REQUEST	Looks like you don't have access to `{WorkTypeGroup}` or `{WorkType}` object. Your Salesforce admin can help with that.
400	BAD_REQUEST	Looks like you don't have access to `{ServiceTerritory}` object. Your Salesforce admin can help with that.
400	BAD_REQUEST	Looks like you don't have access to `{ServiceResource}` object. Your Salesforce admin can help with that.
400	BAD_REQUEST	Remove the `primaryResourceId` from the requiredResourceIds list and try again.
400	BAD_REQUEST	Provide a valid `primaryResourceId` and try again.
400	BAD_REQUEST	The maximum number of required service resources is 5. Reduce the number of service resources in your request and try again.
400	BAD_REQUEST	Provide a resource ID in the `requiredResourceIds` field, and try again.
400	BAD_REQUEST	Specify a valid `workType` and try again.
400	BAD_REQUEST	Provide an end time that's after the start time, and try again.
400	BAD_REQUEST	This isn't a valid `startTime` or `endTime` value. Specify a valid date and time for the `startTime` or `endTime` parameter.
400	BAD_REQUEST	There is no active `workTypeGroup`.

Available Territory Slots (POST)

Contains the error codes and error code messages related with Salesforce Scheduler API for the `available-territory-slots` (POST) resource.

This table lists HTTP response code descriptions that are unique to this resource.

HTTP Response Code	Error Code	Description
400	MISSING_ARGUMENT	Specify a `serviceTerritoryId` with either a `workTypeGroupId` or `WorkTypeId`.
400	INTERNAL_ERROR	You can't specify both `requiredResourceIds` and `filterByResources` in the request body. Specify one or the other and try again.
400	INVALID_INPUT	Specify either a `workTypeGroupId` or a `WorkTypeId`.
400	INVALID_INPUT	This isn't a valid `workTypeGroupId` value. Specify a valid ID for the `workTypeGroupId` parameter.
400	INVALID_INPUT	This isn't a valid `workTypeId` value. Specify a valid ID for the `workTypeId` parameter.

HTTP Response Code	Error Code	Description
400	INVALID_INPUT	Specify either a workTypeId or a value for the durationInMinutes parameter.
400	INVALID_INPUT	This isn't a valid `serviceTerritoryId` value. Specify a valid ID for the `serviceTerritoryId` parameter.
400	INVALID_INPUT	This isn't a valid account ID. Specify a valid ID for the `accountId` parameter.
400	INTERNAL_ERROR	`AppointmentSchedulingPolicy` provided: {id} does not belong to AppointmentSchedulingPolicy.
400	INTERNAL_ERROR	Provide an end date that's after the start date, and try again.
400	INVALID_INPUT	This isn't a valid service resource Id in the `filterByResources` parameter. Specify a valid service resource ID in the `filterByResources` parameter.
400	INTERNAL_ERROR	Something went wrong. Ask your admin for help.
400	INSUFFICIENT_ACCESS	Looks like you don't have access to the `maxAppointments` or `workTypeGroup` field in the TimeSlot object. Your Salesforce admin can help with that.
400	INSUFFICIENT_ACCESS	Looks like you don't have access to the `{Service Resource}` object. Your Salesforce admin can help with that.
400	INTERNAL_ERROR	Specify a `workTypeGroup` with a custom_workType associated with an appointment category with a Scheduled type, and try again.
400	INTERNAL_ERROR	{id} (`AppointmentTopicTimeSlot`), is not accessible for the current user.
403	API_DISABLED_FOR_ORG	The Chatter Connect API is not enabled for this organization or user type.

Service Appointments (PATCH)

Contains the error codes and error code messages related with Salesforce Scheduler API for the `service-appointments` (PATCH) resource.

This table lists HTTP response code descriptions that are unique to this resource.

HTTP Response Code	Error Code	Description
400	INSUFFICIENT_ACCESS_OR_READONLY	Insufficient access rights on the `ServiceAppointment` object record.

Service Appointments (POST)

Contains the error codes and error code messages related with Salesforce Scheduler API for the `service-appointments` (POST) resource.

This table lists HTTP response code descriptions that are unique to this resource.

HTTP Response Code	Error Code	Description
400	INTERNAL_ERROR	We couldn't find any resources for your request. Specify a different `schedStartTime` and `schedEndTime` and try again.
400	INVALID_API_INPUT	Only one `assignedResource` can have `isPrimaryResource` set to true. Check the request and try again.
400	INVALID_API_INPUT	You haven't enabled the Schedule Appointments using Engagement Channels setting in your org. Contact your Salesforce admin for assistance.
400	INSUFFICIENT_ACCESS	Looks like you don't have access to the `MaxAppointments` field in the TimeSlot object. Your Salesforce admin can help with that.
400	INSUFFICIENT_ACCESS	Looks like you don't have access to `ServiceAppointment` object. Your Salesforce admin can help with that.

Service Territories (GET)

Contains the error codes and error code messages related with Salesforce Scheduler API for the `service-territories` (GET) resource.

This table lists HTTP response code descriptions that are unique to this resource.

HTTP Response Code	Error Code	Description
400	MISSING_ARGUMENT	Specify either a `workTypeGroupId` or `WorkTypeId`.

CHAPTER 11 Salesforce Scheduler Apex Classes

In this chapter ...

- **ConnectApi Namespace**
- **LxScheduler Namespace**

Salesforce Scheduler provides the `ConnectApi` namespace (also called Connect in Apex) and `LxScheduler` namespace that contains classes for accessing the same data available in the Salesforce Scheduler Business APIs.

You can use these apex classes as an alternative to the Salesforce Scheduler Business APIs to simplify appointment scheduling in Salesforce. For example, use the `createServiceAppointment(createServiceAppointmentInput)` method of the `ConnectApi` namespace as an alternative to the `service-appointments` Connect API to create service appointments.

> **Note:** Salesforce Scheduler is built on the Salesforce platform (also known as Lighting Experience). The Salesforce platform specific Apex governor limits apply to the Salesforce Scheduler Apex classes and methods requests. For more information on the Lightning platform Apex governor limits, see Apex Governor Limits in Salesforce Developer Limits and Allocations Quick Reference.

The following table lists the available Salesforce Scheduler Apex methods, as well as the corresponding Connect REST API.

Apex Method	Connect REST API
`createServiceAppointment(createServiceAppointmentInput)`	`service-appointments (POST)`
`updateServiceAppointment(updateServiceAppointmentInput)`	`service-appointments (PATCH)`
`getAppointmentCandidates(getAppointmentCandidatesInput)`	`getAppointmentCandidates (POST)`
`getAppointmentSlots(getAppointmentSlotsInput)`	`getAppointmentSlots (POST)`

SEE ALSO:

    Salesforce Developer Limits and Allocations Quick Reference: About This Quick Reference

ConnectApi Namespace

The ConnectApi namespace (also called Connect in Apex) provides classes creating and updating service appointments.

The following are the classes and the interface in the ConnectApi namespace.

LightningScheduler Class

Create and update service appointments.

Namespace

ConnectApi

LightningScheduler Methods

These methods are for LightningScheduler. All methods are static.

createServiceAppointment(createServiceAppointmentInput)
Create a service appointment.

updateServiceAppointment(updateServiceAppointmentInput)
Update a service appointment.

createServiceAppointment(createServiceAppointmentInput)

Create a service appointment.

API Version

53.0

Requires Chatter

No

Signature

```
public static ConnectApi.ServiceAppointmentOutput
createServiceAppointment(ConnectApi.CreateServiceAppointmentInput
createServiceAppointmentInput)
```

Parameters

createServiceAppointmentInput
    Type: ConnectApi.CreateServiceAppointmentInput

    Input parameters to create a service appointment.

Return Value

Type: `ConnectApi.ServiceAppointmentOutput`

Usage

Considerations for using engagement channel types with the `service-appointments` resource:

- Enable **Schedule Appointments Using Engagement Channels** in Salesforce Scheduler Settings in your Salesforce org.
- When you create or modify appointments, shifts must be defined in the scheduling policy. For more information on setting up shifts in the scheduling policy, see Define Shift Rules in Scheduling Policy.

  > 📝 Note: Engagement channel types are not supported with operating hours rules in the scheduling policy.

- When you use engagement channel type and shifts to create a service appointment, Salesforce Scheduler considers the default value for the Appointment Type (if not specified). However, Salesforce Scheduler only considers the engagement channel type and Appointment Type is ignored.

Example

For an account (existing user):

```apex
ConnectApi.ExtendedFieldInput extendedFieldEmail = new ConnectApi.ExtendedFieldInput();
extendedFieldEmail.name = 'Email';
extendedFieldEmail.value = 'rachael.adams@salesforce.com';

ConnectApi.ExtendedFieldInput extendedFieldPhone = new ConnectApi.ExtendedFieldInput();
extendedFieldPhone.name = 'Phone';
extendedFieldPhone.value = '1234567890';

List<ConnectApi.ExtendedFieldInput> extendedFieldList = new
List<ConnectApi.ExtendedFieldInput>();
extendedFieldList.add(extendedFieldEmail);
extendedFieldList.add(extendedFieldPhone);

ConnectApi.ServiceAppointmentInput serviceAppInput = new
ConnectApi.ServiceAppointmentInput();
serviceAppInput.extendedFields = extendedFieldList;
serviceAppInput.engagementChannelTypeId = '0eFRM00000000Bv2AI';
serviceAppInput.serviceTerritoryId = '0Hhxx0000004C92CAE';
serviceAppInput.workTypeId = '08qxx0000004C92AAE';
serviceAppInput.parentRecordId = '001xx000003GYR1AAO';
serviceAppInput.schedStartTime = DateTime.valueOf('2021-05-28 12:15:00');
serviceAppInput.schedEndTime = DateTime.valueOf('2021-05-28 12:45:00');
serviceAppInput.appointmentMode = 'Group';
serviceAppInput.attendeeLimit = 20;

ConnectApi.AssignedResourcesInput asResourceInput = new ConnectApi.AssignedResourcesInput();
asResourceInput.serviceResourceId = '0Hnxx0000004CAiCAM';
asResourceInput.isRequiredResource = true;
asResourceInput.isPrimaryResource = true;

List<ConnectApi.AssignedResourcesInput> asResourceInputList = new
List<ConnectApi.AssignedResourcesInput>();
```

```
asResourceInputList.add(asResourceInput);

ConnectApi.CreateServiceAppointmentInput createInput = new
ConnectApi.CreateServiceAppointmentInput();
createInput.serviceAppointment = serviceAppInput;
createInput.assignedResources = asResourceInputList;

try{
    ConnectApi.ServiceAppointmentOutput appointmentResult =
ConnectApi.LightningScheduler.createServiceAppointment(createInput);
    String serviceAppointmentId = appointmentResult.result.serviceAppointmentId;
    List<String> assignedResourceIds = appointmentResult.result.assignedResourceIds;
}catch(ConnectApi.ConnectApiException ex){
    //Handle Exception
}
```

For a lead (authenticated guest user):

```
ConnectApi.LeadInput leadInput = new ConnectApi.LeadInput();
leadInput.firstName = 'Rachel';
leadInput.lastName = 'Adams';
leadInput.phone = '012-345-6789';
leadInput.email = 'rachel.adams@salesforce.com';
leadInput.company = 'Salesforce';

ConnectApi.ExtendedFieldInput extendedFieldEmail = new ConnectApi.ExtendedFieldInput();
extendedFieldEmail.name = 'Email';
extendedFieldEmail.value = 'rachael.adams@salesforce.com';

ConnectApi.ExtendedFieldInput extendedFieldPhone = new ConnectApi.ExtendedFieldInput();
extendedFieldPhone.name = 'Phone';
extendedFieldPhone.value = '1234567890';

List<ConnectApi.ExtendedFieldInput> extendedFieldList = new
List<ConnectApi.ExtendedFieldInput>();
extendedFieldList.add(extendedFieldEmail);
extendedFieldList.add(extendedFieldPhone);

ConnectApi.ServiceAppointmentInput serviceAppInput = new
ConnectApi.ServiceAppointmentInput();
serviceAppInput.extendedFields = extendedFieldList;
serviceAppInput.engagementChannelTypeId = '0eFRM00000000Bv2AI';
serviceAppInput.serviceTerritoryId = '0Hhxx0000004C92CAE';
serviceAppInput.workTypeId = '08qxx0000004C92AAE';
serviceAppInput.schedStartTime = DateTime.valueOf('2021-05-28 12:15:00');
serviceAppInput.schedEndTime = DateTime.valueOf('2021-05-28 12:45:00');

ConnectApi.AssignedResourcesInput asResourceInput = new ConnectApi.AssignedResourcesInput();
asResourceInput.serviceResourceId = '0Hnxx0000004CAiCAM';
asResourceInput.isRequiredResource = true;
asResourceInput.isPrimaryResource = true;

List<ConnectApi.AssignedResourcesInput> asResourceInputList = new
List<ConnectApi.AssignedResourcesInput>();
```

```
asResourceInputList.add(asResourceInput);

ConnectApi.CreateServiceAppointmentInput createInput = new
ConnectApi.CreateServiceAppointmentInput();
createInput.serviceAppointment = serviceAppInput;
createInput.assignedResources = asResourceInputList;
createInput.lead = leadInput;

try{
    ConnectApi.ServiceAppointmentOutput appointmentResult =
ConnectApi.LightningScheduler.createServiceAppointment(createInput);
    String serviceAppointmentId = appointmentResult.result.serviceAppointmentId;
    List<String> assignedResourceIds = appointmentResult.result.assignedResourceIds;
}catch(ConnectApi.ConnectApiException ex){
    //Handle Exception
}
```

updateServiceAppointment(updateServiceAppointmentInput)

Update a service appointment.

API Version

53.0

Requires Chatter

No

Signature

```
public static ConnectApi.ServiceAppointmentOutput
updateServiceAppointment(ConnectApi.UpdateServiceAppointmentInput
updateServiceAppointmentInput)
```

Parameters

updateServiceAppointmentInput
    Type: ConnectApi.UpdateServiceAppointmentInput

    Input parameters to update a service appointment.

Return Value

Type: ConnectApi.ServiceAppointmentOutput

Usage

Considerations for using engagement channel types with the `service-appointments` resource:

- Enable **Schedule Appointments Using Engagement Channels** in Salesforce Scheduler Settings in your Salesforce org.

- When you create or modify appointments, shifts must be defined in the scheduling policy. For more information on setting up shifts in the scheduling policy, see Define Shift Rules in Scheduling Policy.

  📝 **Note:** Engagement channel types are not supported with operating hours rules in the scheduling policy.

- When you use engagement channel type and shifts to modify an appointment, Salesforce Scheduler considers the default value for the Appointment Type (if not specified). However, Salesforce Scheduler only considers the engagement channel type and Appointment Type is ignored.

Example

```
ConnectApi.ExtendedFieldInput extendedFieldEmail = new ConnectApi.ExtendedFieldInput();
extendedFieldEmail.name = 'Email';
extendedFieldEmail.value = 'rachel.adams@salesforce.com.example';

ConnectApi.ExtendedFieldInput extendedFieldPhone = new ConnectApi.ExtendedFieldInput();
extendedFieldPhone.name = 'Phone';
extendedFieldPhone.value = '0123456789';

ConnectApi.ExtendedFieldInput extendedFieldStatus = new ConnectApi.ExtendedFieldInput();
extendedFieldStatus.name = 'Status';
extendedFieldStatus.value = 'None';

List<ConnectApi.ExtendedFieldInput> extendedFieldList = new
List<ConnectApi.ExtendedFieldInput>();
extendedFieldList.add(extendedFieldEmail);
extendedFieldList.add(extendedFieldPhone);
extendedFieldList.add(extendedFieldStatus);

ConnectApi.ServiceAppointmentInput serviceAppInput = new
ConnectApi.ServiceAppointmentInput();
serviceAppInput.extendedFields = extendedFieldList;
serviceAppInput.serviceTerritoryId = '0Hhxx0000004C92CAE';
serviceAppInput.workTypeId = '08qxx0000004C92AAE';
serviceAppInput.schedStartTime = DateTime.valueOf('2021-05-28 12:15:00');
serviceAppInput.schedEndTime = DateTime.valueOf('2021-05-28 12:45:00');

ConnectApi.AssignedResourcesInput asResourceInput = new ConnectApi.AssignedResourcesInput();
asResourceInput.serviceResourceId = '0Hnxx0000004CAiCAM';
asResourceInput.isRequiredResource = true;
asResourceInput.isPrimaryResource = true;

//Multi-resource
ConnectApi.AssignedResourcesInput asResourceInputReq = new
ConnectApi.AssignedResourcesInput();
asResourceInputReq.serviceResourceId = '0Hnxx0000004CAgCAM';
asResourceInputReq.isRequiredResource = true;
asResourceInputReq.isPrimaryResource = false;

List<ConnectApi.AssignedResourcesInput> asResourceInputList = new
List<ConnectApi.AssignedResourcesInput>();
asResourceInputList.add(asResourceInput);
asResourceInputList.add(asResourceInputReq);
```

```
ConnectApi.UpdateServiceAppointmentInput updateInput = new
ConnectApi.UpdateServiceAppointmentInput();
updateInput.serviceAppointment = serviceAppInput;
updateInput.assignedResources = asResourceInputList;
updateInput.serviceAppointmentId = '08pxx0000004CYqAAM';

try{
    ConnectApi.ServiceAppointmentOutput appointmentResult =
ConnectApi.LightningScheduler.updateServiceAppointment(updateInput);
    String serviceAppointmentId = appointmentResult.result.serviceAppointmentId;
    List<String> assignedResourceIds = appointmentResult.result.assignedResourceIds;
}catch(ConnectApi.ConnectApiException ex){
    //Handle Exception
}
```

`ConnectApi` Input Classes

Some `ConnectApi` methods take arguments that are instances of `ConnectApi` input classes.

Input classes are concrete unless marked abstract in this documentation. Concrete input classes have public constructors that have no parameters.

Some methods have parameters that are typed with an abstract class. You must pass in an instance of a concrete child class for these parameters.

Most input class properties can be set. Read-only properties are noted in this documentation.

ConnectApi.CreateServiceAppointmentInput

Contains information to create a service appointment.

Property	Type	Description	Required or Optional	Available Version
assignedResources	<ConnectApi.AssignedResourceInput>	Represents the service resources to be assigned to a service appointment. 📝 Note: When creating an appointment, use `extendedFields` to add values to any of the fields, including custom fields, in `assignedResources` as long as you have edit access to those fields.	Optional	53.0
lead	ConnectApi.LeadInput	Represents a prospect or lead. 📝 Note: Required to create a service appointment for unauthenticated guest users.	Required if `serviceAppointment` isn't provided.	53.0

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Property	Type	Description	Required or Optional	Available Version
schedulingPolicyId	String	The ID of the `AppointmentSchedulingPolicy` object. If no scheduling policy is passed in the request body, the default configurations are used. The only scheduling policy configuration that is used in determining time slots is the enforcement of account visiting hours.	Optional	53.0
serviceAppointment	ConnectApi.ServiceAppointmentInput	Represents the service appointment details to book an appointment. 📝 Note: When creating an appointment, use `extendedFields` to add values to any of the fields, including custom fields, in `assignedResources` as long as you have edit access to those fields.	Required if `lead` isn't provided.	53.0

ConnectApi.ExtendedFieldInput

Contains information about the extended field.

Property	Type	Description	Required or Optional	Available Version
name	String	The name of the field, including custom field.	Optional	53.0
value	String	The value of the field.	Optional	53.0

ConnectApi.LeadInput

Contains information about a lead or guest user.

Property	Type	Description	Required or Optional	Available Version
company	String	The company of the lead.	Optional	53.0
email	String	The email address of the lead.	Optional	53.0
extendedFields	List<ConnectApi.ExtendedFieldInput>	Use to add values to any of the fields, including custom fields.	Optional	53.0
firstName	String	The first name of the lead.	Optional	53.0

Property	Type	Description	Required or Optional	Available Version
lastName	String	The last name of the lead.	Optional	53.0
phone	String	The phone number of the lead.	Optional	53.0

ConnectApi.ServiceAppointmentInput

Contains information about the service appointment.

Property	Type	Description	Required or Optional	Available Version
additionalInformation	String	Additional details about the service appointment.	Optional	53.0
appointmentMode	ConnectApiSvcApptModeEnum	Mode of the service appointment. • Group— Service appointment mode is Group. • Regular— Default mode of service appointment.	Optional	60.0
appointmentType	String	Type of the appointment.	Optional	53.0
attendeeLimit	Integer	Maximum number of customers that's allowed to attend the service appointment.	Required if the appointment mode is Group.	60.0
city	String	Name of the city.	Optional	53.0
comments	String	Comments about the appointment.	Optional	53.0
contactId	String	ID of the contact associated with the parent record.	Optional	53.0
country	String	Name of the country.	Optional	53.0
description	String	Description of the appointment.	Optional	53.0
engagementChannelTypeId	String	ID of the engagement channel type to associate with the appointment. You can use engagement channel type only if: • **Schedule Appointments Using Engagement Channels** is enabled in Salesforce Scheduler Settings in your Salesforce org. • Shifts are defined in the scheduling policy. For more information on setting	Optional	56.0

Property	Type	Description	Required or Optional	Available Version
		up shifts in the scheduling policy, see Define Shift Rules in Scheduling Policy.		
		📝 **Note:** Engagement channel types are not supported with operating hours rules in the scheduling policy.		
extendedFields	ConnectApi.ExtendedFieldInput	Values to add to any of the fields, including custom fields.	Optional	53.0
parentRecordId	String	ID of the parent record associated with the account.	Required if `lead` isn't provided.	53.0
postalCode	String	Postal code of the city.	Optional	53.0
schedEndTime	Datetime	Time at which the appointment is scheduled to end.	Optional	53.0
schedStartTime	Datetime	Time at which the appointment is scheduled to start.	Optional	53.0
serviceTerritoryId	String	ID of the service territory associated with the service appointment.	Optional	53.0
state	String	Name of the state.	Optional	53.0
street	String	Name of the street.	Optional	53.0
subject	String	Short phrase describing the appointment.	Optional	53.0
workTypeId	String	ID of the work type associated with the service appointment. If specified, it is added to the service appointment record.	Optional	53.0

`ConnectApi` Output Classes

Most `ConnectApi` methods return instances of `ConnectApi` output classes.

All properties are read-only, except for instances of output classes created within test code.

All output classes are concrete unless marked abstract in this documentation.

All concrete output classes have no-argument constructors that you can invoke only from test code. See Testing ConnectApi Code.

ConnectApi.ServiceAppointmentOutput

Output of the create service appointment request.

Property Name	Type	Description	Available Version
result	ConnectApi.ServiceAppointmentResult	Result of the create or update service appointment request.	53.0

ConnectApi.ServiceAppointmentResult

Contains result of the service appointment.

Property Name	Type	Description	Available Version
assignedResourceIds	List<String>	The IDs of the assigned resources.	53.0
parentRecordId	String	The ID of the parent record.	53.0
serviceAppointmentId	String	The ID of the service appointment record.	53.0

LxScheduler Namespace

The `LxScheduler` namespace provides an interface and classes for retrieving service resources and time slots to create an appointment.

The following are the classes and the interface in the `LxScheduler` namespace.

GetAppointmentCandidatesInput Class

Contains information about the available service resources (appointment candidates) based on work type group and service territories.

Set up Salesforce Scheduler before making requests. This setup includes creating or configuring Service Resources, Service Territory Members, Work Type Groups, Work Types, Work Type Group Members, and Service Territory Work Types. See Set Up Salesforce Scheduler for more information.

The appointment time slots are determined based on multiple factors, such as field values, scheduled appointments, absences, Scheduler Settings, and Scheduling Policies to determine available time slots. See How Salesforce Scheduler Determines Available Time Slots for more information.

The following factors are considered for returning start time and end time of resources.

Resource Availability

Determined using service territory member, service territory, work type, and account operating hours fields.

Resource Unavailability

Determined by resource absences, existing appointments that the resource is assigned to. The resource must be marked as a required resource for the appointment with a status that isn't in closed, canceled, or completed.

Appointment Start Time Interval in the Scheduling Policy

Appointment start time interval field in the Scheduling Policy is used to determine when the appointment can start. This interval can be 5, 10, 15, 20, 30, or 60. By default, it's set to 15.

Work Type Duration

The end time is calculated as start time + duration of the work type.

📝 Note: If asset scheduling is enabled, the response also includes asset-based candidates.

Namespace

[LxScheduler](#)

Usage

The constructor for this class can't be called directly. Create an instance of this class using the [GetAppointmentCandidatesInputBuilder.build()](#) method.

This example shows how to get a list of available appointment candidates based on `workTypeGroupId`:

```
//Build input for GetAppointmentCandidates API
    lxscheduler.GetAppointmentCandidatesInput input = new
lxscheduler.GetAppointmentCandidatesInputBuilder()
        .setWorkTypeGroupId('0VSRM0000000ABc4AM')
        .setTerritoryIds(new List<String>{'0HhRM0000000FXd0AM'})
        .setStartTime(System.now().format('yyyy-MM-dd\'T\'HH:mm:ssZ','America/New_York'))

.setEndTime(System.now().addDays(5).format('yyyy-MM-dd\'T\'HH:mm:ssZ','America/New_York'))

        .setAccountId('001RM0000053iQgYAI')
        .setSchedulingPolicyId('0VrRM00000000Bx')
        .setApiVersion(Double.valueOf('50.0'))
        .build();

    String response = lxscheduler.SchedulerResources.getAppointmentCandidates(input);
```

This example shows how to get a list of available appointment candidates based on `workType`:

```
//Build WorkType
    lxscheduler.WorkType workType = new lxscheduler.WorkTypeBuilder()
        .setId('08qRM0000000G9RYAU')
        .build();

    lxscheduler.GetAppointmentCandidatesInput input = new
lxscheduler.GetAppointmentCandidatesInputBuilder()
        .setWorkType(workType)
        .setTerritoryIds(new List<String>{'0HhRM0000000FXd0AM'})
        .setStartTime(System.now().format('yyyy-MM-dd\'T\'HH:mm:ssZ','America/New_York'))

.setEndTime(System.now().addDays(5).format('yyyy-MM-dd\'T\'HH:mm:ssZ','America/New_York'))

        .setAccountId('001RM0000053iQgYAI')
        .setSchedulingPolicyId('0VrRM00000000Bx')
        .setApiVersion(Double.valueOf('50.0'))
        .build();

    String response = lxscheduler.SchedulerResources.getAppointmentCandidates(input);
```

This example shows how to get a list of available candidate appointments based on `durationInMinutes` and without the `workTypeGroupId` or `workType` fields:

⊘ **Important:** If you're using shifts, you must specify the `workTypeGroupId` or `workType` field.

```
//Build SkillRequirement
    lxscheduler.SkillRequirement skillReq = new lxscheduler.SkillRequirementBuilder()
        .setSkillId('0C5RM0000004EZS0A2')
        .setSkillLevel(90)
        .build();

//Build WorkType
    lxscheduler.WorkType workType = new lxscheduler.WorkTypeBuilder()
        .setDurationInMinutes(15)
        .setBlockTimeBeforeAppointmentInMinutes(5)
        .setBlockTimeAfterAppointmentInMinutes(5)
        .setTimeFrameStartInMinutes(10080)
        .setTimeFrameEndInMinutes(40320)
        .setOperatingHoursId('0OHRM0000000FmG4AU')
        .setSkillRequirements(new List<lxscheduler.SkillRequirement>{skillReq})
        .build();

    lxscheduler.GetAppointmentCandidatesInput input = new
lxscheduler.GetAppointmentCandidatesInputBuilder()
        .setWorkType(workType)
        .setTerritoryIds(new List<String>{'0HhRM0000000FXd0AM'})
        .setSchedulingPolicyId('0VrRM00000000Bx')
        .setApiVersion(Double.valueOf('50.0'))
        .build();

    String response = lxscheduler.SchedulerResources.getAppointmentCandidates(input);
```

This example shows a sample response of a list of available candidates:

```
[
    {
        "startTime": "2021-02-16T16:15:00.000+0000",
        "endTime": "2021-02-16T16:16:00.000+0000",
        "resources": [
            "0Hnxx0000004C9BCAU"
        ],
        "territoryId": "0Hhxx0000004C92CAE"
    },
    {
        "startTime": "2021-02-16T16:30:00.000+0000",
        "endTime": "2021-02-16T16:31:00.000+0000",
        "resources": [
            "0Hnxx0000004C9BCAU"
        ],
        "territoryId": "0Hhxx0000004C92CAE"
    },
]
```

GetAppointmentCandidatesInputBuilder Class

Contains methods to build an instance of the `lxscheduler.GetAppointmentCandidatesInput` class.

A Builder object is obtained by invoking one of the `GetAppointmentCandidatesInputBuilder` methods defined by the `GetAppointmentCandidatesInput` class.

Namespace

LxScheduler

GetAppointmentCandidatesInputBuilder Methods

The following are methods for `GetAppointmentCandidatesInputBuilder`.

build()

Returns an instance of the `lxscheduler.GetAppointmentCandidatesInput` object.

Signature

```
public lxscheduler.GetAppointmentCandidatesInput build()
```

Return Value

Type: lxscheduler.GetAppointmentCandidatesInput

setAccountId(accountId)

Sets the ID of the associated account for which you want to create the appointments.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setAccountId(String accountId)
```

Parameters

accountId
    Type: String

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setAllowConcurrent(allowConcurrent)

Allows the scheduling of concurrent appointments.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setAllowConcurrent(Boolean
allowConcurrent)
```

Parameters

allowConcurrent
> Type: Boolean

> If true, allows scheduling of concurrent appointments in a time slot. The default is false.

> Available in API version 47.0 and later.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setApiVersion(apiVersion)

Sets the API version of the business logic for the `getAppointmentCandidates` method.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setApiVersion(Double apiVersion)
```

Parameters

apiVersion
> Type: Double

Usage

The specified parameter must use the correct API version. For example, if API version is set to 45.0 and *filterByResources* is set (which is available in API version 51.0 and later), then this field is ignored. If no API version or incorrect API version is passed in the request body, by default the latest version is used.

> Note: The API is available since version 45.0.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setCorrelationId(correlationId)

Sets the correlation ID.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setCorrelationId(String correlationId)
```

Parameters

correlationId
> Type: String

ID to pass custom information to the `ServiceResourceScheduleHandler` Apex interface. For example, you can use the correlation ID to identify the app, website, or any other external system that calls this Apex interface implementation. If you don't pass a custom value, a randomly generated identifier is passed. Available in API version 53.0 and later.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setEndTime(endTime)

Sets the scheduling end time.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setEndTime(String endTime)
```

Parameters

endTime
   Type: String

   The latest time that a time slot can end (inclusive).

   📝 **Note:** If end time is not specified, it defaults to 31 days.

Usage

The specified string should use the standard date format "['yyyy-MM-dd\'T\'HH:mm:ssZ']" in the local time zone. Defaults to the user's time zone.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setEngagementChannelTypeIds(engagementChannelTypeIds)

Sets an engagement channel type.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder
setEngagementChannelTypeIds(List<String> engagementChannelTypeIds)
```

Parameters

engagementChannelTypeIds
   Type: List<String>

   The ID of the engagement channel type record. The availability of service resources is filtered based on the engagement channel type selected. This field is available in API version 56.0 and later.

   📝 **Note:** This field supports only one engagement channel type ID.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

Usage

You can use engagement channel types only in these cases:

- The **Schedule Appointments Using Engagement Channels** setting is enabled in Salesforce Scheduler Settings in your Salesforce org.
- Shifts are defined in the scheduling policy. For more information on setting up shifts in scheduling policy, see Define Shift Rules in Scheduling Policy.

  > 📝 Note: Engagement channel types are not supported with operating-hours rules in the scheduling policy.

setFilterByResources(filterByResources)

Enables filtering resources using a comma-separated list of service resource IDs.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setFilterByResources(List<String>
filterByResources)
```

Parameters

filterByResources
  Type: List<String>

  Gets only eligible resources that are both in the list and in the selected service territory sorted by the order in which the resource IDs are passed. This field is available in API version 51.0 and later.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setResourceLimitApptDistribution(resourceLimitApptDistribution)

Sets the number of service resources to show during appointment scheduling.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder
setResourceLimitApptDistribution(Integer resourceLimitApptDistribution)
```

Parameters

resourceLimitApptDistribution
  Type: Integer

  Specify the maximum number of service resources that you want to show during appointment scheduling when appointment distribution is enabled. Available in API version 53.0 and later.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setSchedulingPolicyId(schedulingPolicyId)

Sets the ID of the AppointmentSchedulingPolicy object.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setSchedulingPolicyId(String
schedulingPolicyId)
```

Parameters

schedulingPolicyId
    Type: String

    The ID of the `AppointmentSchedulingPolicy` object. If no scheduling policy is passed in the request body, the default
    configurations are used.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setStartTime(startTime)

Sets the scheduling start time to the specified time.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setStartTime(String startTime)
```

Parameters

startTime
    Type: String

    The earliest time that a time slot can begin (inclusive). You can also use a time from the past.

Usage

The specified string should use the standard date format "['yyyy-MM-dd\'T\'HH:mm:ssZ']" in the local time zone. Defaults to the user's
time zone.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setTerritoryIds(territoryIds)

Sets the service territory IDs.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setTerritoryIds(List<String>
territoryIds)
```

Parameters

territoryIds

Type: List<String>

List of service territory IDs, where the work that is being requested is performed. This is a required field.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setWorkType(workType)

Sets the type of work to be performed.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setWorkType(lxscheduler.WorkType
workType)
```

Parameters

workType

Type: lxscheduler.WorkType

This method takes input as an instance of the `lxscheduler.WorkType` class. Build the instance of the input class using the `lxscheduler.WorkTypeBuilder` class.

Required if *workTypeGroupId* is not given. If id of the *workType* is given, the rest of *workType* fields are optional.

Usage

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

setWorkTypeGroupId(workTypeGroupId)

Sets the ID of the work type group.

Signature

```
public lxscheduler.GetAppointmentCandidatesInputBuilder setWorkTypeGroupId(String
workTypeGroupId)
```

Parameters

workTypeGroupId
Type: String

The ID of the work type group containing the work types that are being performed. Required if `workType` is not given. If `workType` is given, then you must provide either `id` or `durationInMinutes`, but not both.

Return Value

Type: LxScheduler.GetAppointmentCandidatesInputBuilder

GetAppointmentSlotsInput Class

Contains information about the available appointment time slots for a resource based on given work type group and territories.

The appointment time slots are determined based on your Salesforce Scheduler data model configurations. Here are some prerequisites that you can consider while setting up data.

- Set up Salesforce Scheduler before making your requests. The setup includes creating or configuring Service Resources, Service Territory Members, Work Type Groups, Work Types, Work Type Group Members, and Service Territory Work Types. See Manage Business Information in Salesforce Scheduler for more information.
- Configure a work type mapped for each territory in the request body via Service Territory Work Type. Map the same work type to the work type group, via work type group member.

The following factors affect how time slots are calculated and returned.

- Timezones that differ across operating hours are handled and results are always returned in UTC.
- The resource must be marked as a required resource on the assigned resource object.
- The resource is considered unavailable If the status categories of the resource assigned to service appointments are other than `Canceled`, `Cannot Complete`, and `Completed`.
- Resource Absences of all types are considered unavailable from start to end.
- The following fields of Work Type records, if configured, are used to fine-tune time slot requirements. For more information, see Create Work Types in Salesforce Scheduler.

Parameter	Description
Timeframe Start	Time slots sooner than `current time + ` **Timeframe Start** aren't returned.
Timeframe End	Time slots later than `current time + ` **Timeframe End** aren't returned.
Block Time Before Appointment	The time period before the appointment is considered as unavailable.
Block Time After Appointment	The time period after the appointment is considered as unavailable.
Operating Hours	The overlap of all operating hours from the account, work type, service territory, and service territory member are considered while determining time slots. For more information, see Set Up Operating Hours in Salesforce Scheduler.

- Only the time slots within the period of 31 days from the start date are returned.

- Salesforce Scheduler uses multiple factors, such as field values, scheduled appointments, absences, Scheduler Settings, and Scheduling Policies to determine available time slots, including the earliest and latest appointment slots. See How Does Salesforce Scheduler Determine Available Time Slots.

> 📝 **Note:** If asset scheduling is enabled, you can provide an asset-based service resource in `requiredResourceIds` to retrieve available timeslots for the asset resource.

Namespace

LxScheduler

Usage

The constructor for this class can't be called directly. Create an instance of this class using the GetAppointmentSlotsInputBuilder.build() method.

This example shows how to get a list of available time slots based on `workTypeGroupId`:

```
//Build input for GetAppointmentSlots API
   lxscheduler.GetAppointmentSlotsInput input = new
lxscheduler.GetAppointmentSlotsInputBuilder()
      .setWorkTypeGroupId('0VSxx0000004C92GAE')
      .setTerritoryIds(new List<String>{'0Hhxx0000004C92CAE'})
      .setStartTime(System.now().format('yyyy-MM-dd\'T\'HH:mm:ssZ'))
      .setEndTime(System.now().addDays(1).format('yyyy-MM-dd\'T\'HH:mm:ssZ'))
      .setAccountId('001xx000003GYK0AAO')
      .setRequiredResourceIds(new List<String>{'0Hnxx0000004C92CAE'})
      .setSchedulingPolicyId('0Vrxx0000004CAe')
      .setApiVersion(Double.valueOf('48.0'))
      .build();

String response = lxscheduler.SchedulerResources.getAppointmentSlots(input);
```

This example shows how to get a list of available time slots based on `workType`:

```
//Build WorkType
   lxscheduler.WorkType workType = new lxscheduler.WorkTypeBuilder()
      .setId('08qxx0000004C92AAE')
      .build();

   lxscheduler.GetAppointmentSlotsInput input = new
lxscheduler.GetAppointmentSlotsInputBuilder()
      .setWorkType(workType)
      .setTerritoryIds(new List<String>{'0Hhxx0000004C92CAE'})
      .setStartTime(System.now().format('yyyy-MM-dd\'T\'HH:mm:ssZ'))
      .setEndTime(System.now().addDays(1).format('yyyy-MM-dd\'T\'HH:mm:ssZ'))
      .setAccountId('001xx000003GYK0AAO')
      .setRequiredResourceIds(new List<String>{'0Hnxx0000004C92CAE'})
      .setSchedulingPolicyId('0Vrxx0000004CAe')
      .setApiVersion(Double.valueOf('48.0'))
      .build();

String response = lxscheduler.SchedulerResources.getAppointmentSlots(input);
```

This example shows how to get a list of available time slots based on `durationInMinutes` and without `workTypeGroupId` or `workType` fields:

```
//Build WorkType
   lxscheduler.WorkType workType = new lxscheduler.WorkTypeBuilder()
      .setDurationInMinutes(60)
      .build();

   lxscheduler.GetAppointmentSlotsInput input = new
lxscheduler.GetAppointmentSlotsInputBuilder()
      .setWorkType(workType)
      .setTerritoryIds(new List<String>{'0Hhxx0000004C92CAE'})
      .setRequiredResourceIds(new List<String>{'0Hnxx0000004C92CAE'})
      .setApiVersion(Double.valueOf('48.0'))
      .build();

   String response = lxscheduler.SchedulerResources.getAppointmentSlots(input);
```

This example shows a sample response of a list of available time slots:

```
[
    {
      "territoryId": "0Hhxx0000004C92CAE",
      "startTime": "2021-02-10T16:00:00.000+0000",
      "endTime": "2021-02-10T16:15:00.000+0000",
      "remainingAppointments": 1
    },
    {
      "territoryId": "0Hhxx0000004C92CAE",
      "startTime": "2021-02-10T16:15:00.000+0000",
      "endTime": "2021-02-10T16:30:00.000+0000",
      "remainingAppointments": 1
    },
]
```

GetAppointmentSlotsInputBuilder Class

Contains methods to build an instance of the `lxscheduler.GetAppointmentSlotsInput` class.

A Builder object is obtained by invoking one of the `GetAppointmentSlotsInputBuilder` methods defined by the `GetAppointmentSlotsInput` class.

Namespace

LxScheduler

GetAppointmentSlotsInputBuilder Methods

The following are methods for `GetAppointmentSlotsInputBuilder`.

build()

Returns an instance of the `lxscheduler.GetAppointmentSlotsInput` object.

Signature

```
public lxscheduler.GetAppointmentSlotsInput build()
```

Return Value

Type: lxscheduler.GetAppointmentSlotsInput

setAccountId(accountId)

Sets the ID of the associated account for which you want to create appointments.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setAccountId(String accountId)
```

Parameters

accountId
    Type: String

    The ID of the associated account.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setAllowConcurrentScheduling(allowConcurrentScheduling)

Allows the scheduling of concurrent appointments.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setAllowConcurrentScheduling(Boolean
allowConcurrentScheduling)
```

Parameters

allowConcurrentScheduling
    Type: Boolean

    If true, allows scheduling of concurrent appointments in a time slot. If false, concurrent appointments are not allowed. The default
    is false. Available in API version 47.0 and later.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setApiVersion(apiVersion)

Sets the API version of the business logic for the getAppointmentSlots method.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setApiVersion(Double apiVersion)
```

Parameters

apiVersion
    Type: Double

Usage

The specified parameter must use the correct API version. For example, if API version is set to 45.0 and *primaryResourceId* is set (which is available in API version 48.0 and later), then this field is ignored. If no API version or incorrect API version is passed in the request body, by default the latest version is used.

📝 **Note:** The API is available since version 45.0.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setCorrelationId(correlationId)

Sets the correlation ID.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setCorrelationId(String correlationId)
```

Parameters

correlationId
    Type: String

    ID to pass custom information to the `ServiceResourceScheduleHandler` Apex interface. For example, you can use the correlation ID to identify the app, website, or any other external system that calls this Apex interface implementation. If you don't pass a custom value, a randomly generated identifier is passed. Available in API version 53.0 and later.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setEndTime(endTime)

Sets the scheduling end time.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setEndTime(String endTime)
```

Parameters

endTime
   Type: String

   The latest time that a time slot can end (inclusive). If end time is not specified, it defaults to 31 days.

Usage

The specified string should use the standard date format "['yyyy-MM-dd\'T\'HH:mm:ssZ']" in the local time zone. Defaults to the user's time zone.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setEngagementChannelTypeIds(engagementChannelTypeIds)

Sets an engagement channel type.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder
setEngagementChannelTypeIds(List<String> engagementChannelTypeIds)
```

Parameters

engagementChannelTypeIds
   Type: List<String>

   The ID of the engagement channel type record. The availability of time slots is filtered based on the engagement channel type selected. This field is available in API version 56.0 and later.

   📝 **Note:** This field supports only one engagement channel type ID.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

Usage

You can use engagement channel types only in these cases:

- The **Schedule Appointments Using Engagement Channels** setting is enabled in Salesforce Scheduler Settings in your Salesforce org.
- Shifts are defined in the scheduling policy. For more information on setting up shifts in scheduling policy, see Define Shift Rules in Scheduling Policy.

   📝 **Note:** Engagement channel types are not supported with operating-hours rules in the scheduling policy.

setPrimaryResourceId(primaryResourceId)

Sets the ID of the primary resource.

Signature

<code>public lxscheduler.GetAppointmentSlotsInputBuilder setPrimaryResourceId(String primaryResourceId)</code>

Parameters

primaryResourceId
    Type: String

    The ID of the primary resource in multi-resource scheduling. Required only when multi-resource scheduling is enabled. Available in API version 48.0 and later.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setRequiredResourceIds(requiredResourceIds)

Sets the resource IDs.

Signature

<code>public lxscheduler.GetAppointmentSlotsInputBuilder setRequiredResourceIds(List<String> requiredResourceIds)</code>

Parameters

requiredResourceIds
    Type: List<String>

    List of resource IDs that must be available during the time slot. This is a required field.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setSchedulingPolicyId(schedulingPolicyId)

Sets the ID of the `AppointmentSchedulingPolicy` object.

Signature

<code>public lxscheduler.GetAppointmentSlotsInputBuilder setSchedulingPolicyId(String schedulingPolicyId)</code>

Parameters

schedulingPolicyId
> Type: String

> If no scheduling policy is passed in the request body, the default configurations are used.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setStartTime(startTime)

Sets the scheduling start time.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setStartTime(String startTime)
```

Parameters

startTime
> Type: String

> The earliest time that a time slot can begin (inclusive). Defaults to the current time of the request, if empty.

Usage

The specified string should use the standard date format "['yyyy-MM-dd\'T\'HH:mm:ssZ']" in the local time zone. Defaults to the user's time zone.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setTerritoryIds(territoryIds)

Sets the IDs of service territories.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setTerritoryIds(List<String> territoryIds)
```

Parameters

territoryIds
> Type: List<String>

> List of IDs of service territories, where the work that is being requested is performed. This is a required field.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setWorkType(workType)

Sets the type of work to be performed.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setWorkType(lxscheduler.WorkType
workType)
```

Parameters

workType
   Type: lxscheduler.WorkType

   This method takes input as an instance of the `lxscheduler.WorkType` class. Build the instance of the input class using the
   `lxscheduler.WorkTypeBuilder` class.

   Required if *workTypeGroupId* is not given.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

setWorkTypeGroupId(workTypeGroupId)

Sets the ID of the work type group.

Signature

```
public lxscheduler.GetAppointmentSlotsInputBuilder setWorkTypeGroupId(String
workTypeGroupId)
```

Parameters

workTypeGroupId
   Type: String

   The ID of the work type group containing the work types that are being performed.

Return Value

Type: lxscheduler.GetAppointmentSlotsInputBuilder

SchedulerResources Class

Contains methods that holds the business logic to get resources availability.

Namespace

[LxScheduler](#)

Implementation Considerations

Apex implementation of the methods in the `SchedulerResources` class should adhere to Apex Governor Limits. It includes synchronous heap size limit, synchronous CPU time limit, and synchronous concurrent transactions for long running transactions. To avoid governor limits, you must tune the input by reducing the time frame, limiting number of service resources, or limiting number or territories at a time. This will reduce the overall transaction time and response size of the implementation. For more information on standard Apex Governer Limits, see [Salesforce Developer Limits and Allocations Quick Reference](#).

Example

To get list of available service resources (appointment candidates):

```
String response = lxscheduler.SchedulerResources.getAppointmentCandidates(input);
```

To get a list of available appointment time slots for a resource:

```
String response = lxscheduler.SchedulerResources.getAppointmentSlots(input);
```

SchedulerResources Methods

The following are methods for `SchedulerResources`.

getAppointmentCandidates(getAppointmentCandidatesInput)

Returns a list of service resources based on work type group or work type and service territories.

Set up Salesforce Scheduler before making requests. This setup includes creating or configuring Service Resources, Service Territory Members, Work Type Groups, Work Types, Work Type Group Members, and Service Territory Work Types. See [Set Up Salesforce Scheduler](#) for more information.

The appointment time slots are determined based on multiple factors, such as field values, scheduled appointments, absences, Scheduler Settings, and Scheduling Policies to determine available time slots. See [How Salesforce Scheduler Determines Available Time Slots](#) for more information.

The following factors are considered for returning start time and end time of resources.

Resource Availability
Determined using service territory member, service territory, work type, and account operating hours fields.

Resource Unavailability
Determined by resource absences, existing appointments that the resource is assigned to. The resource must be marked as a required resource for the appointment with a status that isn't in closed, canceled, or completed.

Appointment Start Time Interval in the Scheduling Policy
Appointment start time interval field in the Scheduling Policy is used to determine when the appointment can start. This interval can be 5, 10, 15, 20, 30, or 60. By default, it's set to 15.

Work Type Duration
The end time is calculated as start time + duration of the work type.

> 📝 **Note:** If asset scheduling is enabled, the response also includes asset-based candidates.

Signature

```
public static String getAppointmentCandidates(lxscheduler.GetAppointmentCandidatesInput
getAppointmentCandidatesInput)
```

Parameters

getAppointmentCandidatesInput
    Type: lxscheduler.GetAppointmentCandidatesInput

    This method takes input as an instance of the `lxscheduler.GetAppointmentCandidatesInput` class. Build the instance of the input class using the `lxscheduler.GetAppointmentCandidatesInputBuilder` class.

Return Value

Type: String

`getAppointmentSlots(getAppointmentSlotsInput)`

Returns a list of available appointment time slots for a resource based on given work type group or work type and service territories.

The appointment time slots are determined based on your Salesforce Scheduler data model configurations. Here are some prerequisites that you can consider while setting up data.

- Set up Salesforce Scheduler before making your requests. The setup includes creating or configuring Service Resources, Service Territory Members, Work Type Groups, Work Types, Work Type Group Members, and Service Territory Work Types. See Manage Business Information in Salesforce Scheduler for more information.
- Configure a work type mapped for each territory in the request body via Service Territory Work Type. Map the same work type to the work type group, via work type group member.

The following factors affect how time slots are calculated and returned.

- Timezones that differ across operating hours are handled and results are always returned in UTC.
- The resource must be marked as a required resource on the assigned resource object.
- The resource is considered unavailable If the status categories of the resource assigned to service appointments are other than `Canceled`, `Cannot Complete`, and `Completed`.
- Resource Absences of all types are considered unavailable from start to end.
- The following fields of Work Type records, if configured, are used to fine-tune time slot requirements. For more information, see Create Work Types in Salesforce Scheduler.

Parameter	Description
`Timeframe Start`	Time slots sooner than `current time` + ***Timeframe Start*** aren't returned.
`Timeframe End`	Time slots later than `current time` + ***Timeframe End*** aren't returned.
`Block Time Before Appointment`	The time period before the appointment is considered as unavailable.
`Block Time After Appointment`	The time period after the appointment is considered as unavailable.

Parameter	Description
Operating Hours	The overlap of all operating hours from the account, work type, service territory, and service territory member are considered while determining time slots. For more information, see Set Up Operating Hours in Salesforce Scheduler.

- Only the time slots within the period of 31 days from the start date are returned.
- Salesforce Scheduler uses multiple factors, such as field values, scheduled appointments, absences, Scheduler Settings, and Scheduling Policies to determine available time slots, including the earliest and latest appointment slots. See How Does Salesforce Scheduler Determine Available Time Slots.

  Note: If asset scheduling is enabled, you can provide an asset-based service resource in `requiredResourceIds` to retrieve available timeslots for the asset resource.

Signature

```
public static String getAppointmentSlots(lxscheduler.GetAppointmentSlotsInput
getAppointmentSlotsInput)
```

Parameters

getAppointmentSlotsInput
Type: lxscheduler.GetAppointmentSlotsInput

This method takes input as an instance of the `lxscheduler.GetAppointmentSlotsInput` class. Build the instance of the input class using the `lxscheduler.GetAppointmentSlotsInputBuilder` class.

Return Value

Type: String

setAppointmentCandidatesMock(expectedResponse)

Sets a mock object when running tests for the `getAppointmentCandidates` method.

This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
public static void setAppointmentCandidatesMock(String expectedResponse)
```

Parameters

expectedResponse
Type: String

Return Value

Type: void

This example shows a sample implementation of the `GetAppointmentCandidates` class:

```apex
public class AppointmentCandidateService {
    //Instance members for parsing
    public String startTime;
    public String endTime;
    public List<String> resources;
    public String territoryId;
    public static List<AppointmentCandidateService> getAppointmentCandidates(){
        //Build input for GetAppointmentCandidates API
        lxscheduler.GetAppointmentCandidatesInput input = new
lxscheduler.GetAppointmentCandidatesInputBuilder()
            .setWorkTypeGroupId('0VSRM0000000AGT4A2')
            .setTerritoryIds(new List<String>{'0HhRM0000000G8W0AU'})
          .setStartTime(System.now().format('yyyy-MM-dd\'T\'HH:mm:ssZ','America/Los_Angeles'))


.setEndTime(System.now().addDays(2).format('yyyy-MM-dd\'T\'HH:mm:ssZ','America/Los_Angeles'))

            .setSchedulingPolicyId('0VrRM00000000D0')
            .setApiVersion(Double.valueOf('50.0'))
            .build();
        List<AppointmentCandidateService> vList =
parse(lxscheduler.SchedulerResources.getAppointmentCandidates(input));
        return vList;
    }
    private static List<AppointmentCandidateService> parse(String json) {
        return (List<AppointmentCandidateService>) System.JSON.deserialize(json,
List<AppointmentCandidateService>.class);
    }
}
```

This example shows how to set a sample mock using the `setAppointmentCandidatesMock` method:

```apex
@isTest
private class GetAppointmentCandidatesTest {
    static testMethod void getAppCandidatesTest() {
        String expectedResponse = '[' +
                                  '  {' +
                                  '    \"startTime\": \"2021-03-18T16:00:00.000+0000\",'
 +
                                  '    \"endTime\": \"2021-03-18T17:00:00.000+0000\",'
+
                                  '    \"resources\": [' +
                                  '      \"0HnRM0000000Fxv0AE\"' +
                                  '    ],' +
                                  '    \"territoryId\": \"0HhRM0000000G8W0AU\"' +
                                  '  },' +
                                  '  {' +
                                  '    \"startTime\": \"2021-03-18T19:00:00.000+0000\",'
 +
                                  '    \"endTime\": \"2021-03-18T20:00:00.000+0000\",'
+
```

```
'     \"resources\": [' +
'        \"0HnRM0000000Fxv0AE\"' +
'     ],' +
'     \"territoryId\": \"0HhRM0000000G8W0AU\"' +
'   }' +
']';
    lxscheduler.SchedulerResources.setAppointmentCandidatesMock(expectedResponse);

    Test.startTest();
        List<AppointmentCandidateService> candidateList =
AppointmentCandidateService.getAppointmentCandidates();
        System.assertEquals(2, candidateList.size(), 'Should return only 2 records!');
    Test.stopTest();
    }
}
```

setAppointmentSlotsMock(expectedResponse)

Sets a mock object when running tests for the `getAppointmentSlots` method.

This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
public static void setAppointmentSlotsMock(String expectedResponse)
```

Parameters

expectedResponse
    Type: String

Return Value

Type: void

SkillRequirement Class

Contains information about the set of skills that are required to complete a particular task for a work type.

Namespace

LxScheduler

Usage

The constructor for this class can't be called directly. Create an instance of this class using the SkillRequirementBuilder.build() method.

SkillRequirementBuilder Class

Contains methods to build an instance of the `lxscheduler.SkillRequirement` class.

A Builder object is obtained by invoking one of the `SkillRequirementBuilder` methods defined by the `SkillRequirement` class.

Namespace

LxScheduler

SkillRequirementBuilder Methods

The following are methods for `SkillRequirementBuilder`.

build()

Returns an instance of the `lxscheduler.SkillRequirement` object.

Signature

```
public lxscheduler.SkillRequirement build()
```

Return Value

Type: lxscheduler.SkillRequirement

setSkillId(skillId)

Sets the skill that is required to complete a particular task for a work type. This is a required field.

Signature

```
public lxscheduler.SkillRequirementBuilder setSkillId(String skillId)
```

Parameters

skillId
    Type: String

Return Value

Type: lxscheduler.SkillRequirementBuilder

setSkillLevel(skillLevel)

Sets the level of the skill that is required to complete a particular task for a work type

Signature

```
public lxscheduler.SkillRequirementBuilder setSkillLevel(Double skillLevel)
```

Parameters

skillLevel
  Type: Double

  The skill levels can range from zero to 99.99. Depending on your business needs, you might want the skill level to reflect years of experience, certification levels, or license classes.

Return Value

Type: lxscheduler.SkillRequirementBuilder

WorkType Class

Contains information about the type of work to be performed.

Namespace

LxScheduler

Usage

The constructor for this class can't be called directly. Create an instance of this class using the WorkTypeBuilder.build() method.

WorkTypeBuilder Class

Contains methods to build an instance of the `lxscheduler.WorkType` class.

A Builder object is obtained by invoking one of the `WorkTypeBuilder` methods defined by the `WorkType` class.

Namespace

LxScheduler

WorkTypeBuilder Methods

The following are methods for `WorkTypeBuilder`.

build()

Returns an instance of the `lxscheduler.WorkType` object.

Signature

```
public lxscheduler.WorkType build()
```

Return Value

Type: lxscheduler.WorkType

setBlockTimeAfterAppointmentInMinutes(blockTimeAfterAppointmentInMinutes)

Sets the time period, in minutes.

Signature

```
public lxscheduler.WorkTypeBuilder setBlockTimeAfterAppointmentInMinutes(Integer
blockTimeAfterAppointmentInMinutes)
```

Parameters

blockTimeAfterAppointmentInMinutes
   Type: Integer

   The time period after the appointment is considered unavailable.

Return Value

Type: lxscheduler.WorkTypeBuilder

setBlockTimeBeforeAppointmentInMinutes(blockTimeBeforeAppointmentInMinutes)

Sets the time period, in minutes.

Signature

```
public lxscheduler.WorkTypeBuilder setBlockTimeBeforeAppointmentInMinutes(Integer
blockTimeBeforeAppointmentInMinutes)
```

Parameters

blockTimeBeforeAppointmentInMinutes
   Type: Integer

   The time period before the appointment is considered as unavailable.

Return Value

Type: lxscheduler.WorkTypeBuilder

setDurationInMinutes(durationInMinutes)

Sets the event length.

Signature

```
public lxscheduler.WorkTypeBuilder setDurationInMinutes(Integer durationInMinutes)
```

Parameters

durationInMinutes
   Type: Integer

Contains the event length, in minutes. Required if *id* is not given.

Return Value

Type: lxscheduler.WorkTypeBuilder

setId(id)

Sets the ID of the work type to the specified ID.

Signature

```
public lxscheduler.WorkTypeBuilder setId(String id)
```

Parameters

id
    Type: String

    The ID of the work type. Required if you're using shifts or if *durationInMinutes* is not given.

Return Value

Type: lxscheduler.WorkTypeBuilder

setOperatingHoursId(operatingHoursId)

Sets the overlap of operating hours.

Signature

```
public lxscheduler.WorkTypeBuilder setOperatingHoursId(String operatingHoursId)
```

Parameters

operatingHoursId
    Type: String

    The overlap of all operating hours from the account, work type, service territory, and service territory member are considered while determining time slots.

Return Value

Type: lxscheduler.WorkTypeBuilder

setSkillRequirements(skillRequirements)

Sets the skills that are required to complete a particular task for a work type.

Signature

```
public lxscheduler.WorkTypeBuilder
setSkillRequirements(List<lxscheduler.SkillRequirement> skillRequirements)
```

Parameters

skillRequirements
  Type: List<lxscheduler.SkillRequirement>

  This method takes input as an instance of the `lxscheduler.SkillRequirement` class. Build the instance of the input class using the `lxscheduler.SkillRequirementBuilder` class.

Return Value

Type: lxscheduler.WorkTypeBuilder

setTimeFrameEndInMinutes(timeFrameEndInMinutes)

Sets the end of the timeframe.

Signature

```
public lxscheduler.WorkTypeBuilder setTimeFrameEndInMinutes(Integer
timeFrameEndInMinutes)
```

Parameters

timeFrameEndInMinutes
  Type: Integer

Return Value

Type: lxscheduler.WorkTypeBuilder

setTimeFrameStartInMinutes(timeFrameStartInMinutes)

Sets the beginning of the timeframe.

Signature

```
public lxscheduler.WorkTypeBuilder setTimeFrameStartInMinutes(Integer
timeFrameStartInMinutes)
```

Parameters

timeFrameStartInMinutes
  Type: Integer

Return Value

Type: lxscheduler.WorkTypeBuilder

CHAPTER 12 Build Custom Appointment Booking Experiences Using Salesforce Scheduler APIs

This section demonstrates how to build a seamless appointment booking experience using our Salesforce Scheduler APIs. With these use cases, developers can learn how to build custom scheduling apps with the Salesforce Scheduler APIs.

The sample application currently shows an example implementation for simple appointment booking, automatic resource assignment, and anonymous appointment booking. It also shows an example of an appointment booking modification. These implementations help development teams understand how to use the APIs and begin their own journey of building amazing appointment booking experiences.

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Schedule an Anonymous Appointment

Build a scheduling application using Salesforce Scheduler APIs to book an anonymous appointment by assigning service resources automatically. Account users and guest users don't always know the name of the service resource, and sometimes they don't care which resource they're assigned to. You can automatically assign a service resource based on the time slot that a user selects. To protect users' privacy, you can also hide their names on the review appointment page.

Before you can use the scheduler developer resources to build the app, set up Salesforce Scheduler for your organization. For more information, see Set Up Salesforce Scheduler.

These steps provide a high-level overview of how you can create an app to let users schedule appointments without selecting service resources.
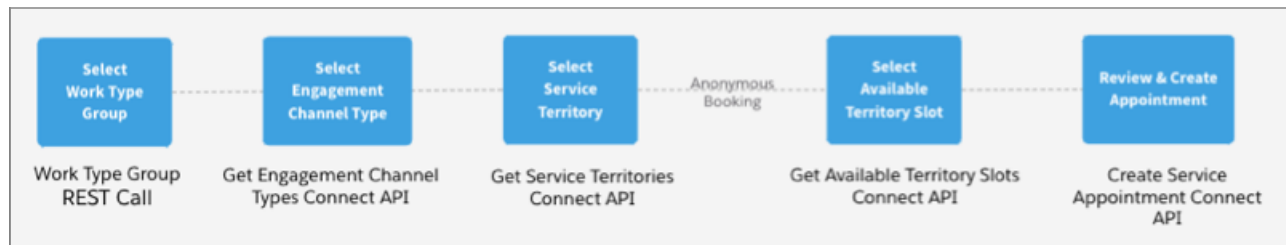
1. Authenticate with a Connected App

   The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

2. Get Work Type Groups

   A work type group represents a general appointment category or topic, such as a home loan or investment. Use the `Query()` method on the WorkTypeGroup object to retrieve a list of work type groups.

3. Get Engagement Channels

   An engagement channel is a medium, such as Phone, Video, and In Person that service resources use to meet customers.

4. Get Service Territories

   A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers. Use the `service-territories` Connect API to fetch a list of service territories based on a work type group or work type.

5. Get Available Territory Slots

   A time slot represents a period in a day when an appointment can be scheduled. Use the `available-territory-slots` Connect API to fetch the consolidated availability of each service resource within the selected territory.

6. Create Service Appointments

   A service appointment represents an appointment booked through Salesforce Scheduler. Make a POST request on the `service-appointments` Connect API to create the appointment.

Authenticate with a Connected App

The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

> **Note:** To build a custom appointment scheduling application using Salesforce Scheduler APIs for prospects or unauthenticated users, you must build it using a logged-in user. For example, an integration user or an administrator.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

When you have this permission, you can connect to Salesforce and authenticate. Then make a request to REST or Connect API and check the response. For more information, see Connect REST API Quick Start.

Get Work Type Groups

A work type group represents a general appointment category or topic, such as a home loan or investment. Use the `Query()` method on the WorkTypeGroup object to retrieve a list of work type groups.

1. Create a page in your app where you can show the work type groups from your org.

2. Use the `Query()` request to retrieve work type groups. For more information, see Execute a SOQL Query.

   Sample Request

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+Id,+Name+From+WorkTypeGroup
   +Where+isActive+=+true+ORDER+BY+NAME+DESC
   ```

   You can use the `toLabel` method to translate the SOQL query results in the language of the user. For more information, see Translate SOQL Query Results on page 129.

   Sample Response

   The method returns the available work type groups from your org.

   ```
   {
     "totalSize" : 3,
     "done" : true,
     "records" : [ {
       "attributes" : {
         "type" : "WorkTypeGroup",
         "url" : "/services/data/v59.0/sobjects/WorkTypeGroup/0VSS700000000sLOAQ"
       },
       "Id" : "0VSS700000000sLOAQ",
       "Name" : "Wealth Management"
     }, {
       "attributes" : {
         "type" : "WorkTypeGroup",
         "url" : "/services/data/v59.0/sobjects/WorkTypeGroup/0VSS700000000sQOAQ"
       },
       "Id" : "0VSS700000000sQOAQ",
       "Name" : "Loans"
     }, {
       "attributes" : {
         "type" : "WorkTypeGroup",
         "url" : "/services/data/v59.0/sobjects/WorkTypeGroup/0VSS700000000sVOAQ"
       },
       "Id" : "0VSS700000000sVOAQ",
       "Name" : "Banking"
     } ]
   }
   ```

3. Parse the JSON response, and display the work type groups on a page in your app so that users can select a work type group during appointment scheduling. Here's how that page can look.

On the next page in your app, you can provide users an option to search for service territories.

Get Engagement Channels

An engagement channel is a medium, such as Phone, Video, and In Person that service resources use to meet customers.

Before using engagement channels for scheduling appointments:

- Enable engagement channels in the Salesforce Scheduler Settings of your instance. See Enable the Scheduling Appointments Using Engagement Channels Setting.

- Set up engagement channels, including setting the required access and creating engagement channels. See Engagement Channels.

- Create the Shift Engagement Channel and Engagement Channel Work Type records for the applicable shifts.

- Define Shift Rules in the scheduling policy. See Define Shift Rules in Scheduling Policy.

1. Create a page to show the engagement channel types. Salesforce Scheduler shows service resources and resource time slots based on the channel that a user selects when creating an appointment.

2. Make a `GET` request on the `engagement-channel-types` Connect API.

   Sample Request

   Filter the engagement channel types by the `workTypeGroupId` selected in the previous step.

   ```
   https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling
   /engagement-channel-types?workTypeGroupIds=0VSS700000000sVOAQ
   ```

   📝 Note: You can filter the engagement channel type results by `workTypeGroupIds` or `workTypeIds`.

   Sample Response

   The request returns the engagement channels for the `workTypeGroupId` specified in the request.

   ```
   {
     "result" : {
       "engagementChannelTypes" : [ {
         "contactPointType" : "Video",
   ```

```
        "id" : "0eFS70000004CGAMA2",
        "name" : "EngagementChannel2",
        "workTypeGroupIds" : [ ],
        "workTypeIds" : [ ]
      }, {
        "contactPointType" : "InPerson",
        "id" : "0eFS70000004CG5MAM",
        "name" : "EngagementChannel1",
        "workTypeGroupIds" : [ ],
        "workTypeIds" : [ ]
      }, {
        "contactPointType" : "Video",
        "id" : "0eFS70000004CGFMA2",
        "name" : "EngagementChannel3",
        "workTypeGroupIds" : [ ],
        "workTypeIds" : [ ]
      } ]
    }
}
```

3. Parse the JSON response, and show the engagement channel types on the page that you created.

Your users can select an engagement channel type for the appointment from the page.

Get Service Territories

A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers. Use the `service-territories` Connect API to fetch a list of service territories based on a work type group or work type.

1. Create a page where you can provide users an option to search for service territories. Here's how a Select Service Territory page can look.

2. Make a GET request on the `service-territories` on page 160 Connect API by passing the user-entered search values and the selected work type group ID as the input parameters in the query string. You can also use a combination of the radius, latitude, longitude, sortBy, and sortOrder parameters to filter and sort the service territories.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-territories
```

Sample Request

This sample GET request specifies the query string on the service territories Connect API.

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-territories?workTypeGroupId=0VSS700000000sVOAQ
&latitude=44.357422&longitude=-73.193952&radius=5&radiusUnit=mi&sortBy=Distance&sortOrder=asc
```

Sample Response

The API returns the available service territories based on the passed work type group ID and search criteria.

```
{
  "result": {
    "serviceTerritories": [
      {
        "city": "Charlotte",
        "country": "United States",
        "id": "0HhS700000001DYKAY",
        "latitude": 44.357422,
        "longitude": -73.193952,
        "name": "Spear Street Branch",
        "operatingHoursId": "0OHS700000001HlOAI",
        "postalCode": "05445",
        "state": "VT",
        "street": "121 Spear Street"
      }
    ]
  }
}
```

3. Parse the JSON response, and show the available service territories on the Select Service Territory page so that the user can select a service territory.

Here's a Select Service Territory page showing the available service territories.

Here's how the service territory details are displayed when the user selects a service territory.

On the next page in your app, you can show the available time slots for the appointment.

Get Available Territory Slots

A time slot represents a period in a day when an appointment can be scheduled. Use the `available-territory-slots`
Connect API to fetch the consolidated availability of each service resource within the selected territory.

1. Create a page in your app where you can show the available time slots based on the work type group and service territory.

2. Make a POST request on the `available-territory-slots` `on` `page` `145` Connect API by passing the required
   `workTypeGroupId` and `territoryIds` parameters.

   Resource URI

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/available-territory-slots
   ```

   For an Existing User (Account)

   To consider an existing user's preferred visiting hours, pass `accountId` in the input request body. The preference is enforced
   when the Enforce Account's Visiting Hours policy rule is enabled.

   Sample Request

   ```
   {
       "accountId" : "001S7000001pFlJIAU",
       "workTypeGroupId" : "0VSS700000000sVOAQ",
       "territoryIds" : [
           "0HhS700000001DYKAY"
       ],
    "engagementChannelTypeIds": [
         "0eFS70000004CG5MAM"
       ]
   }
   ```

   Sample Response

   The API returns the available time slots and service resources.

   ```
   {
     "result" : {
       "territorySlots" : [ {
         "slots" : [{
           "endTime" : "2023-11-29T20:00:00.000Z",
   ```

```
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T19:00:00.000Z"
    }, {
      "endTime" : "2023-11-29T20:15:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T19:15:00.000Z"
    }, {
      "endTime" : "2023-11-29T20:30:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T19:30:00.000Z"
    }, {
      "endTime" : "2023-11-29T20:45:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T19:45:00.000Z"
    }, {
      "endTime" : "2023-11-29T21:00:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T20:00:00.000Z"
    }, {
      "endTime" : "2023-11-29T21:15:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T20:15:00.000Z"
    }, {
      "endTime" : "2023-11-29T21:30:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T20:30:00.000Z"
    }, {
      "endTime" : "2023-11-29T21:45:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T20:45:00.000Z"
    }, {
      "endTime" : "2023-11-29T22:00:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T21:00:00.000Z"
    }, {
      "endTime" : "2023-11-29T22:15:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T21:15:00.000Z"
    }, {
      "endTime" : "2023-11-29T22:30:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-29T21:30:00.000Z"
    }, {
```

```
        "endTime" : "2023-11-29T22:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T21:45:00.000Z"
      }, {
        "endTime" : "2023-11-29T23:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T22:00:00.000Z"
      }, {
        "endTime" : "2023-11-29T23:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T22:15:00.000Z"
      }, {
        "endTime" : "2023-11-29T23:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T22:30:00.000Z"
      }, {
        "endTime" : "2023-11-29T23:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T22:45:00.000Z"
      }, {
        "endTime" : "2023-11-30T00:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T23:00:00.000Z"
      }, {
        "endTime" : "2023-11-30T00:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T23:15:00.000Z"
      }, {
        "endTime" : "2023-11-30T00:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T23:30:00.000Z"
      }, {
        "endTime" : "2023-11-30T00:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T23:45:00.000Z"
      }, {
        "endTime" : "2023-11-30T01:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T00:00:00.000Z"
      }, {
        "endTime" : "2023-11-30T01:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T00:15:00.000Z"
```

```
    }, {
      "endTime" : "2023-11-30T01:30:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T00:30:00.000Z"
    }, {
      "endTime" : "2023-11-30T01:45:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T00:45:00.000Z"
    }, {
      "endTime" : "2023-11-30T02:00:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T01:00:00.000Z"
    }, {
      "endTime" : "2023-11-30T18:00:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T17:00:00.000Z"
    }, {
      "endTime" : "2023-11-30T18:15:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T17:15:00.000Z"
    }, {
      "endTime" : "2023-11-30T18:30:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T17:30:00.000Z"
    }, {
      "endTime" : "2023-11-30T18:45:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T17:45:00.000Z"
    }, {
      "endTime" : "2023-11-30T19:00:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T18:00:00.000Z"
    }, {
      "endTime" : "2023-11-30T19:15:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T18:15:00.000Z"
    }, {
      "endTime" : "2023-11-30T19:30:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
      "startTime" : "2023-11-30T18:30:00.000Z"
    }, {
      "endTime" : "2023-11-30T19:45:00.000Z",
      "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
      "resources" : [ "0HnS700000002jAKAQ" ],
```

```
          "startTime" : "2023-11-30T18:45:00.000Z"
        }, {
          "endTime" : "2023-11-30T20:00:00.000Z",
          "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
          "resources" : [ "0HnS700000002jAKAQ" ],
          "startTime" : "2023-11-30T19:00:00.000Z"
        }, {
          "endTime" : "2023-11-30T20:15:00.000Z",
          "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
          "resources" : [ "0HnS700000002jAKAQ" ],
          "startTime" : "2023-11-30T19:15:00.000Z"
        }, {
          "endTime" : "2023-11-30T20:30:00.000Z",
          "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
          "resources" : [ "0HnS700000002jAKAQ" ],
          "startTime" : "2023-11-30T19:30:00.000Z"
        }, {
          "endTime" : "2023-11-30T20:45:00.000Z",
          "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
          "resources" : [ "0HnS700000002jAKAQ" ],
          "startTime" : "2023-11-30T19:45:00.000Z"
        }, {
          "endTime" : "2023-11-30T21:00:00.000Z",
          "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
          "resources" : [ "0HnS700000002jAKAQ" ],
          "startTime" : "2023-11-30T20:00:00.000Z"
        }, {
          "endTime" : "2023-11-30T21:15:00.000Z",
          "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
          "resources" : [ "0HnS700000002jAKAQ" ],
          "startTime" : "2023-11-30T20:15:00.000Z"
        }],
        "territoryId" : "0HhS700000001DYKAY"
    } ]
  }
}
```

For a Guest User (Lead)

Sample Request

```
{
   "workTypeGroupId" : "0VSS700000000sVOAQ",
   "territoryIds" : [
      "0HhS700000001DYKAY"
   ],
 "engagementChannelTypeIds": [
    "0eFS70000004CG5MAM"
   ]
}
```

Sample Response

The API returns the available time slots and service resources.

```json
{
  "result" : {
    "territorySlots" : [ {
      "slots" : [{
        "endTime" : "2023-11-29T20:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T19:00:00.000Z"
      }, {
        "endTime" : "2023-11-29T20:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T19:15:00.000Z"
      }, {
        "endTime" : "2023-11-29T20:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T19:30:00.000Z"
      }, {
        "endTime" : "2023-11-29T20:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T19:45:00.000Z"
      }, {
        "endTime" : "2023-11-29T21:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T20:00:00.000Z"
      }, {
        "endTime" : "2023-11-29T21:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T20:15:00.000Z"
      }, {
        "endTime" : "2023-11-29T21:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T20:30:00.000Z"
      }, {
        "endTime" : "2023-11-29T21:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T20:45:00.000Z"
      }, {
        "endTime" : "2023-11-29T22:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T21:00:00.000Z"
      }, {
        "endTime" : "2023-11-29T22:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
```

```
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T21:15:00.000Z"
      }, {
        "endTime" : "2023-11-29T22:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T21:30:00.000Z"
      }, {
        "endTime" : "2023-11-29T22:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T21:45:00.000Z"
      }, {
        "endTime" : "2023-11-29T23:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T22:00:00.000Z"
      }, {
        "endTime" : "2023-11-29T23:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T22:15:00.000Z"
      }, {
        "endTime" : "2023-11-29T23:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T22:30:00.000Z"
      }, {
        "endTime" : "2023-11-29T23:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T22:45:00.000Z"
      }, {
        "endTime" : "2023-11-30T00:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T23:00:00.000Z"
      }, {
        "endTime" : "2023-11-30T00:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T23:15:00.000Z"
      }, {
        "endTime" : "2023-11-30T00:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T23:30:00.000Z"
      }, {
        "endTime" : "2023-11-30T00:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-29T23:45:00.000Z"
      }, {
        "endTime" : "2023-11-30T01:00:00.000Z",
```

```
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T00:00:00.000Z"
      }, {
        "endTime" : "2023-11-30T01:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T00:15:00.000Z"
      }, {
        "endTime" : "2023-11-30T01:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T00:30:00.000Z"
      }, {
        "endTime" : "2023-11-30T01:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T00:45:00.000Z"
      }, {
        "endTime" : "2023-11-30T02:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T01:00:00.000Z"
      }, {
        "endTime" : "2023-11-30T18:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T17:00:00.000Z"
      }, {
        "endTime" : "2023-11-30T18:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T17:15:00.000Z"
      }, {
        "endTime" : "2023-11-30T18:30:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T17:30:00.000Z"
      }, {
        "endTime" : "2023-11-30T18:45:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T17:45:00.000Z"
      }, {
        "endTime" : "2023-11-30T19:00:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T18:00:00.000Z"
      }, {
        "endTime" : "2023-11-30T19:15:00.000Z",
        "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
        "resources" : [ "0HnS700000002jAKAQ" ],
        "startTime" : "2023-11-30T18:15:00.000Z"
      }, {
```

```
            "endTime" : "2023-11-30T19:30:00.000Z",
            "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
            "resources" : [ "0HnS700000002jAKAQ" ],
            "startTime" : "2023-11-30T18:30:00.000Z"
          }, {
            "endTime" : "2023-11-30T19:45:00.000Z",
            "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
            "resources" : [ "0HnS700000002jAKAQ" ],
            "startTime" : "2023-11-30T18:45:00.000Z"
          }, {
            "endTime" : "2023-11-30T20:00:00.000Z",
            "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
            "resources" : [ "0HnS700000002jAKAQ" ],
            "startTime" : "2023-11-30T19:00:00.000Z"
          }, {
            "endTime" : "2023-11-30T20:15:00.000Z",
            "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
            "resources" : [ "0HnS700000002jAKAQ" ],
            "startTime" : "2023-11-30T19:15:00.000Z"
          }, {
            "endTime" : "2023-11-30T20:30:00.000Z",
            "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
            "resources" : [ "0HnS700000002jAKAQ" ],
            "startTime" : "2023-11-30T19:30:00.000Z"
          }, {
            "endTime" : "2023-11-30T20:45:00.000Z",
            "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
            "resources" : [ "0HnS700000002jAKAQ" ],
            "startTime" : "2023-11-30T19:45:00.000Z"
          }, {
            "endTime" : "2023-11-30T21:00:00.000Z",
            "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
            "resources" : [ "0HnS700000002jAKAQ" ],
            "startTime" : "2023-11-30T20:00:00.000Z"
          }, {
            "endTime" : "2023-11-30T21:15:00.000Z",
            "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
            "resources" : [ "0HnS700000002jAKAQ" ],
            "startTime" : "2023-11-30T20:15:00.000Z"
          }],
          "territoryId" : "0HhS700000001DYKAY"
      } ]
    }
}
```

3. Parse the JSON response, and show only the available time slots on the page. Don't show the service resources to maintain their privacy.

Here's how a page showing the available time slots can look.

4. Write custom code to randomly select a service resource for the appointment based on the time slot that the user selects. This sample code automatically selects a service resource and stores it in `serviceResourceId` property.

5. Pass the list of service resources available for the selected time slot in `resources`.

On the next page in your app, you can show the appointment details for the user to review and create the appointment.

Create Service Appointments

A service appointment represents an appointment booked through Salesforce Scheduler. Make a POST request on the `service-appointments` Connect API to create the appointment.

1. Create a page where the user can review the appointment details and create the appointment. Here's how a Review Service Appointment page can look.

    📝 Note: To keep the service resource private, hide the resource's name on the review appointment page.

2. Link the Next button to a POST request on the `service-appointments on page 153` Connect API to create the service appointment.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-appointments
```

For an Existing User (Account)

Sample Request

Pass the account ID as `parentRecordId` in the input request body.

Set `IsAnonymousBooking` to `true` to indicate that the appointment is anonymous.

```
{
    "serviceAppointment": {
        "serviceTerritoryId": "0HhS700000001DYKAY",
        "parentRecordId" : "001S7000001pFlJIAU",
        "schedStartTime" : "2023-11-29T20:00:00.000Z",
        "schedEndTime": "2023-11-29T21:00:00.000Z",
        "street": "121 Spear Street",
        "city": "Charlotte",
        "state": "VT",
        "postalCode": "05445",
        "country": "United States",
        "engagementChannelTypeId" : "0eFS70000004CG5MAM",
        "extendedFields" : [ {
            "name": "IsAnonymousBooking",
            "value": "true"
```

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```
      } ]
    },
    "assignedResources": [
      {
        "serviceResourceId": "0HnS700000002jAKAQ",
        "isRequiredResource": true,
        "extendedFields" : []
      }
    ]
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result" : {
    "assignedResourceIds" : [ "03rS700000000oMIAQ" ],
    "serviceAppointmentId" : "08pS700000001G3IAI"
  }
}
```

For a Guest User (Lead)

Sample Request

Pass the required lead details in the input request body.

Set `IsAnonymousBooking` to `true` to indicate that the appointment is anonymous.

```
{
    "serviceAppointment": {
        "serviceTerritoryId": "0HhS700000001DYKAY",
        "schedStartTime" : "2023-11-29T22:15:00.000Z",
        "schedEndTime": "2023-11-29T23:15:00.000Z",
        "street": "121 Spear Street",
        "city": "Charlotte",
        "state": "VT",
        "postalCode": "05445",
        "country": "United States",
        "engagementChannelTypeId" : "0eFS70000004CG5MAM",
        "extendedFields" : [ {
          "name": "IsAnonymousBooking",
          "value": "true"
        } ]
    },
    "assignedResources": [
      {
        "serviceResourceId": "0HnS700000002jGKAQ",
        "isRequiredResource": true,
        "extendedFields" : []
      }
    ],
     "lead": {
        "firstName": "Tom",
        "lastName": "Smith",
        "phone": "(555) 555-1234",
```

```
        "email": "info@salesforce.com",
        "company": "MedLife, Inc.",
        "extendedFields" : []
    }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result" : {
    "assignedResourceIds" : [ "03rS700000000oRIAQ" ],
    "parentRecordId" : "00QS7000000sfcnMAA",
    "serviceAppointmentId" : "08pS700000001G8IAI"
  }
}
```

Create a page to show confirmation when the service appointment is created successfully.

Here's how a sample confirmation page can look.
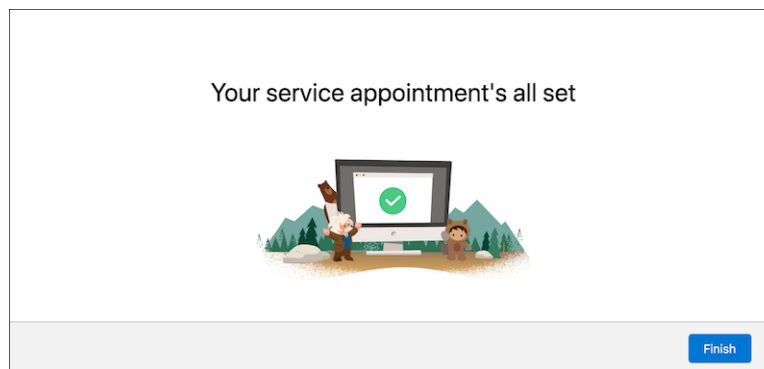
Schedule Anonymous Appointments with Appointment Distribution

Build a scheduling app by using Salesforce Scheduler APIs to book anonymous service appointments via phone calls and video conferences within a large, virtual service territory. For territories with too many associated resources, use Appointment Distribution to show only the least consumed resources.

Before you begin:

Before building the app, set up Salesforce Scheduler for your org. For more information, see Set Up Salesforce Scheduler.

Appointment distribution helps to maintain balance and avoid situations where one resource is overloaded with all the meetings while others' calendars remain free.

About this task:

Here's a high-level overview of how to create an app to schedule anonymous appointments.
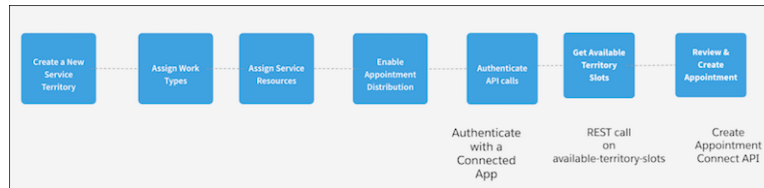
For more information on modifying Appointment Distribution, see *Modify an Anonymous Appointment*.

1. Create a Service Territory

   Create a large, virtual service territory using Salesforce Scheduler and add service resources. Set the new territory as the secondary territory for service resources. You can assign a relatively large number of service resources to the territory. Use the territory exclusively for virtual appointments via phone calls and video conferences.

2. Assign Service Territory to Work Types

   To use the new virtual service territory, assign the territory to work types in Salesforce Scheduler.

3. Assign Service Resources

   To choose appointment candidates from the new virtual service territory, assign service resources to the territory in Salesforce Scheduler. Set this new territory as the secondary territory for each service resource.

4. Enable Appointment Distribution

   Make resource selection for territories with relatively large numbers of resources easier by setting Appointment Distribution to show only a short list of least-consumed resources from your resource pool.

5. Authenticate API Calls with Salesforce Scheduler APIs

   Use OAuth—the most secure SOAP and REST API call authentication method—to get an access token.

6. Get Appointment Time Slots

   A time slot is a period in a day when an appointment can be scheduled. Use the `available-territory-slots` Connect API to fetch the consolidated availability of each service resource within the selected territory.

7. Create Service Appointments

   A service appointment represents an appointment booked through Salesforce Scheduler. To create an appointment, make a POST request on the `service-appointments` Connect API.

Create a Service Territory

Create a large, virtual service territory using Salesforce Scheduler and add service resources. Set the new territory as the secondary territory for service resources. You can assign a relatively large number of service resources to the territory. Use the territory exclusively for virtual appointments via phone calls and video conferences.

For information on creating a service territory, see Set Up Service Territories in Salesforce Scheduler.

Assign Service Territory to Work Types

To use the new virtual service territory, assign the territory to work types in Salesforce Scheduler.

For information on assigning service territories, see Assign Service Territories to Work Types in Salesforce Scheduler.

Assign Service Resources

To choose appointment candidates from the new virtual service territory, assign service resources to the territory in Salesforce Scheduler. Set this new territory as the secondary territory for each service resource.

For information on assigning service resources to the new service territory, see Assign Service Resources to Service Territories in Salesforce Scheduler.

Enable Appointment Distribution

Make resource selection for territories with relatively large numbers of resources easier by setting Appointment Distribution to show only a short list of least-consumed resources from your resource pool.

For information on enabling appointment distribution, see Enable Appointment Distribution.

Authenticate API Calls with Salesforce Scheduler APIs

Use OAuth—the most secure SOAP and REST API call authentication method—to get an access token.

📝 **Note:** You can't modify an existing appointment via a guest user profile. You can use an integration user who has permissions to read and update only the required objects.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

Get Appointment Time Slots

A time slot is a period in a day when an appointment can be scheduled. Use the `available-territory-slots` Connect API to fetch the consolidated availability of each service resource within the selected territory.

Create a page in your app where you can show the available time slots based on the work type group and service territory.

Make a POST request on the `available-territory-slots` `on page 145` Connect API by passing the required `workType` and `territoryIds` parameters.

Restrict the number of service resources returned by the request by passing a finite, integer value to the `resourceLimit ApptDistribution` parameter.

📝 **Note:** When appointment distribution is enabled, Salesforce Scheduler fetches and shows a list of appointment time slots based on the resource utilisation calculation frequency: monthly, parameter-based, or weekly. The Salesforce Scheduler uses the service resources' utilization score for a specific period to suggest time slots for the least occupied resources. For more information, see How Appointment Distribution Works.

💡 **Tip:** In the custom app, you can hard code most of the parameters, including `territoryIds` and `resourceLimit ApptDistribution`. Set the `territoryIds` parameter to the ID of the new virtual territory that you created in the beginning of this procedure. If the new territory is assigned to multiple work types, you can let your end user select a value for `workType`.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/available-territory-slots
```

For an Existing User (Account)

To consider an existing user's preferred visiting hours, pass `accountId` in the input request body.

You can also specify the `startTime` and `endTime` parameters with the request.

The preference is enforced when the Enforce Account's Visiting Hours policy rule is enabled.

Sample Request

```
{
    "accountId" : "001B000001McLhMIAV",
    "workType" :  {
        "id": "0VS2x000000PVu5GAG"
      },
    "resourceLimitApptDistribution" : 10,
    "territoryIds" : [
       "0Hh2w000000XmoXCAS"
    ]
  }
```

Sample Response

The API returns the available time slots and service resources based on resource utilization. The response returns only 10 least consumed resources, as specified by the `resourceLimitApptDistribution` parameter.

📝 Note: Setting a maximum number of resources you want to show for scheduling makes it possible to optimise performance for large territories, such as virtual or tele scenarios.

```
{
    "result" : {
       "territorySlots" : [ {
       "slots" : [ {
          "endTime" : "2021-05-24T17:00:00.000Z",
          "resources" : [ "0HnB0000000LVbfKAG", "0HnB0000000TavDKAS",
"0HnB0000000Tav3KAC", "0HnB0000000TauyKAC", "0HnB0000000TavMQAS" ],
          "startTime" : "2021-05-24T16:00:00.000Z"
       }, {
          "endTime" : "2021-05-24T17:30:00.000Z",
          "resources" : [ "0HnB0000000Tav3KAC", "0HnB0000000TaozKAL",
"0HnB0000000TavMQAS", "0HnB0000000TaiOKCS", "0HnB0000000TacOLCM" ],
          "startTime" : "2021-05-24T16:30:00.000Z"
       }, {
          "endTime" : "2021-05-24T18:00:00.000Z",
          "resources" : [ "0HnB0000000Tav3KAC", "0HnB0000000TauyKAC",
"0HnB0000000LVgfKBG", "0HnB0000000TayMQQS", "0HnB0000000TacOLCM" ],
          "startTime" : "2021-05-24T17:00:00.000Z"
       }, {
          "endTime" : "2021-05-24T18:30:00.000Z",
          "resources" : [ "0HnB0000000Tav3KAC", "0HnB0000000TauyKAC",
"0HnB0000000LVgfKBG", "0HnB0000000TayMQQS", "0HnB0000000TacOLCM" ],
          "startTime" : "2021-05-24T17:30:00.000Z"
       }, {
          "endTime" : "2021-05-24T19:00:00.000Z",
          "resources" : [ "0HnB0000000LVbfKAG", "0HnB0000000TavDKAS",
"0HnB0000000Tav3KAC", "0HnB0000000TauyKAC", "0HnB0000000TavMQAS" ],
          "startTime" : "2021-05-24T18:00:00.000Z"
       }, {
          "endTime" : "2021-05-24T19:30:00.000Z",
          "resources" : [ "0HnB0000000LVbfKAG", "0HnB0000000TavDKAS",
```

```
"0HnB0000000Tav3KAC", "0HnB0000000TauyKAC", "0HnB0000000TavMQAS" ],
        "startTime" : "2021-05-24T18:30:00.000Z"
      }, {
        "endTime" : "2021-05-24T20:00:00.000Z",
        "resources" : [ "0HnB0000000LVbfKAG", "0HnB0000000TavDKAS",
"0HnB0000000Tav3KAC", "0HnB0000000TauyKAC", "0HnB0000000TavMQAS" ],
        "startTime" : "2021-05-24T19:00:00.000Z"
      }],
      "territoryId" : "0Hh2w000000XmoXCAS"
      } ]
    }
  }
```

For a Guest User (Lead)

Sample Request

```
{
    "workType" :  {
       "id": "0VS2x000000PVu5GAG"
     },
    "resourceLimitApptDistribution" : 10,
    "territoryIds" : [
      "0Hh2w000000XmoXCAS"
    ]
 }
```

Sample Response

The API returns the available time slots and service resources based on resource utilization. The response returns only 10 least consumed resources, as specified by the resourceLimitApptDistribution parameter.

📝 Note: Setting a maximum number of resources you want to show for scheduling makes it possible to optimise performance for large territories, such as virtual or tele scenarios.

```
{
    "result" : {
      "territorySlots" : [ {
      "slots" : [ {
        "endTime" : "2021-05-24T17:00:00.000Z",
        "resources" : [ "0HnB0000000LVbfKAG", "0HnB0000000TavDKAS",
"0HnB0000000Tav3KAC", "0HnB0000000TauyKAC", "0HnB0000000TavMQAS" ],
        "startTime" : "2021-05-24T16:00:00.000Z"
      }, {
        "endTime" : "2021-05-24T17:30:00.000Z",
        "resources" : [ "0HnB0000000Tav3KAC", "0HnB0000000TaozKAL",
"0HnB0000000TavMQAS", "0HnB0000000TaiOKCS", "0HnB0000000TacOLCM" ],
        "startTime" : "2021-05-24T16:30:00.000Z"
      }, {
        "endTime" : "2021-05-24T18:00:00.000Z",
        "resources" : [ "0HnB0000000Tav3KAC", "0HnB0000000TauyKAC",
"0HnB0000000LVgfKBG", "0HnB0000000TayMQQS", "0HnB0000000TacOLCM" ],
        "startTime" : "2021-05-24T17:00:00.000Z"
      }, {
        "endTime" : "2021-05-24T18:30:00.000Z",
```

```
                "resources" : [ "0HnB0000000Tav3KAC", "0HnB0000000TauyKAC",
"0HnB0000000LVgfKBG", "0HnB0000000TayMQQS", "0HnB0000000TacOLCM" ],
                "startTime" : "2021-05-24T17:30:00.000Z"
            }, {
                "endTime" : "2021-05-24T19:00:00.000Z",
                "resources" : [ "0HnB0000000LVbfKAG", "0HnB0000000TavDKAS",
"0HnB0000000Tav3KAC", "0HnB0000000TauyKAC", "0HnB0000000TavMQAS" ],
                "startTime" : "2021-05-24T18:00:00.000Z"
            }, {
                "endTime" : "2021-05-24T19:30:00.000Z",
                "resources" : [ "0HnB0000000LVbfKAG", "0HnB0000000TavDKAS",
"0HnB0000000Tav3KAC", "0HnB0000000TauyKAC", "0HnB0000000TavMQAS" ],
                "startTime" : "2021-05-24T18:30:00.000Z"
            }, {
                "endTime" : "2021-05-24T20:00:00.000Z",
                "resources" : [ "0HnB0000000LVbfKAG", "0HnB0000000TavDKAS",
"0HnB0000000Tav3KAC", "0HnB0000000TauyKAC", "0HnB0000000TavMQAS" ],
                "startTime" : "2021-05-24T19:00:00.000Z"
            }],
            "territoryId" : "0Hh2w000000XmoXCAS"
            } ]
        }
    }
```

Parse the JSON response, and show only the available time slots on the page so that users can select a time slot for their appointment. To ensure privacy, don't show the service resources.

Here's how a page showing the available time slots can look.

Write custom code to select the least utilized resource or to randomly select a service resource for the appointment based on the time slot that the user selects.

This sample code automatically selects the least utilized resource from the list available for the selected time slot.

```
var serviceResourceId=resources[0]
```

This sample code automatically selects a service resource and stores it in `serviceResourceId`. Pass the list of service resources available for the selected time slot in `resources`.

```
var index = Math.floor(Math.random() * Math.floor(resources.length));
var serviceResourceId=resources[index]
```

On the next page, you can show the appointment details for the user to review and create the appointment.

Create Service Appointments

A service appointment represents an appointment booked through Salesforce Scheduler. To create an appointment, make a POST request on the `service-appointments` Connect API.

Create a page where the user can review the appointment details and create the appointment. Here's how a Review Service Appointment page can look.

📝 **Note:** To keep the service resource private, hide the resource's name on the review appointment page.

Link the Next button to a POST request on the Connect API to create the service appointment.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-appointments
```

For an Existing User (Account)

Sample Request

Pass the account ID as `parentRecordId` in the input request body.

Set `IsAnonymousBooking` to `true` to indicate that the appointment is anonymous.

```
{
    "serviceAppointment": {
        "serviceTerritoryId": "0Hh2w000000XmoXCAS",
        "parentRecordId" : "001B000001McLhMIAV", //accountId
        "schedStartTime" : "2021-05-24T15:30:00.000+0000",
        "schedEndTime": "2021-05-24T16:30:00.000+0000",
        "street": "1 Market Street",
        "city": "San Francisco",
        "state": "CA",
        "postalCode": "94105",
        "country": "USA",
        "extendedFields" : [ {
          "name": "IsAnonymousBooking",
          "value": "true"
        } ]
    },
    "assignedResources": [
        {
          "serviceResourceId": "0HnB0000000LVbfKAG",
          "extendedFields" : []
        }
    ]
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
    "result" : {
        "assignedResourceIds" : [ "0HnB0000000LVbfKAG" ],
        "serviceAppointmentId" : "08pB0000000hvR6IAI"
    }
}
```

For a Guest User (Lead)

Sample Request

Pass the required lead details in the input request body.

Set `IsAnonymousBooking` to `true` to indicate that the appointment is anonymous.

```
{
    "serviceAppointment": {
        "serviceTerritoryId": "0Hh2w000000XmoXCAS",
        "schedStartTime" : "2021-05-24T15:30:00.000+0000",
        "schedEndTime": "2021-05-24T16:30:00.000+0000",
        "street": "1 Market Street",
        "city": "San Francisco",
        "state": "CA",
```

```
          "postalCode": "94105",
          "country": "USA",
          "extendedFields" : [ {
            "name": "IsAnonymousBooking",
            "value": "true"
          } ]
     },
     "assignedResources": [
          {
            "serviceResourceId": "0HnB0000000LVbfKAG",
            "isRequiredResource": true,
            "isPrimaryResource": true,
            "extendedFields" : []
          }
     ],
     "lead": {
          "firstName": "Mark",
          "lastName": "Taylor",
          "phone": "012-345-6789",
          "email": "mtaylor@company.com",
          "company": "Company1",
          "extendedFields" : []
     }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
   "result" : {
       "assignedResourceIds" : [ "0HnB0000000LVbfKAG" ],
       "parentRecordId" : "00QB00000094lOZMAY",
       "serviceAppointmentId" : "08pB0000000hvR1IAI"
   }
}
```

Create a page to show confirmation when the service appointment creation is completed.

Here's how a sample confirmation page can look.
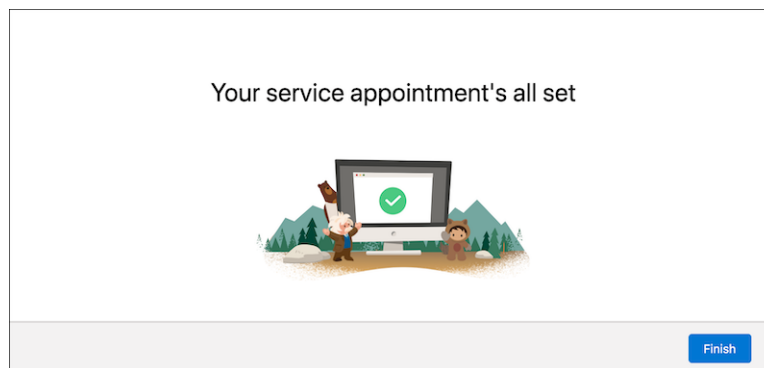
Schedule Appointments by Selecting Location First

This use case explains how you can build a scheduling app to have the service location selection first in your appointment scheduling experience using Salesforce Scheduler APIs.

If you prefer to have the service location selection first, unlike the regular appointment scheduling experience that comes with out-of-the-box scheduler templates, this approach is for you.

These steps provide a high-level overview of how you can build a scheduling app to have the service location selection first, which is explained in detail in the following sections.

1. Enable Maps and Location Services

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

2. Get Service Territories

   Display the available service territories on the first screen of your appointment scheduling app.

3. Get Work Type Groups

   Display the work type groups for the appointment.

4. Get Work Type

   Default to the work type that is associated with the service territory and work type group.

5. Get Service Resources

   Retrieve the available service resources based on the selected work type group or work type, and service territory.

6. Create Service Appointments

   The last step in the scheduling application is to show the service appointment details for the user to review and create the appointment.

Enable Maps and Location Services

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

For information on enabling maps and location services, see Enable Maps and Location Services in Salesforce Scheduler.

Get Service Territories

Display the available service territories on the first screen of your appointment scheduling app.

A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers.

Create a page where you can provide users an option to search for service territories. Here's how a Select Service Territory page can look.

You can search for service territories based on the user-entered name, city, postal code, or state. You can also calculate the distance between two location values, such as between a service territory and the user's current location.

You can Retrieve records with locations within or outside of a certain radius with distance conditions in the WHERE clause of the query. For more information, see the WHERE clause section in Location-Based SOQL Queries.

1. Use the `Query()` request on the ServiceTerritory object to retrieve a list of active service territories from your Salesforce org.

Sample Request

This sample REST API call uses the `Query()` request to retrieve service territories within a range of 1 mile from your current location. Default value is 5 miles.

For more information on using `Query()` request, see Execute a SOQL Query.

```
https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=
SELECT City,Country,Id,Name,State FROM ServiceTerritory WHERE DISTANCE(Address,
GEOLOCATION(17.4358411,78.3467857), 'mi') < 1
```

Sample Response

The request returns the service territory records.

```
{
  "totalSize": 4,
  "done": true,
  "records": [
    {
      "attributes": {
        "type": "ServiceTerritory",
        "url": "/services/data/v55.0/sobjects/ServiceTerritory/0Hhx000000012oOCAQ"
      },
      "City": "Hyderabad",
      "Country": "India",
      "Id": "0Hhx000000012oOCAQ",
      "Name": "Apollo Hyderabad",
      "State": "TG"
    },
    {
      "attributes": {
```

```
          "type": "ServiceTerritory",
          "url": "/services/data/v55.0/sobjects/ServiceTerritory/0Hhx000000012oRCAQ"
        },
        "City": "Nanakaramguda",
        "Country": "India",
        "Id": "0Hhx000000012oRCAQ",
        "Name": "Somewhere",
        "State": "TG"
      },
      {
        "attributes": {
          "type": "ServiceTerritory",
          "url": "/services/data/v55.0/sobjects/ServiceTerritory/0Hhx000000012oQCAQ"
        },
        "City": "Hyderabad",
        "Country": "India",
        "Id": "0Hhx000000012oQCAQ",
        "Name": "Partner Service Territory",
        "State": "TG"
      },
      {
        "attributes": {
          "type": "ServiceTerritory",
          "url": "/services/data/v55.0/sobjects/ServiceTerritory/0Hhx000000012oSCAQ"
        },
        "City": "Hyderabad",
        "Country": "India",
        "Id": "0Hhx000000012oSCAQ",
        "Name": "JPMC Bank, Hyderabad",
        "State": "TG"
      }
    ]
}
```

Parse the JSON response, and show the available service territories on the Select Service Territory page so that the user can select a service territory.

Here's how the service territories are listed based on the users' search.

On the next page in your app, you can show the work type groups.

Get Work Type Groups

Display the work type groups for the appointment.

A work type group represents a general appointment category or topic, such as a home loan or investment.

Create a page in your app where you can show the work type groups from your org.

1. Use the `Query()` request on the `ServiceTerritoryWorkType` object to retrieve the work types associated with the service territory selected on the Select Service Territory screen.

   Sample Request

   This sample REST API call uses the `Query()` request to retrieve the work type records.

   For more information on using `Query()` request, see Execute a SOQL Query.

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=
   SELECT+Id,WorkTypeId,WorkType.Name+FROM+ServiceTerritoryWorkType+WHERE+ServiceTerritoryId+=+'0Hhx000000012oSCAQ'
   ```

   Sample Response

   The request returns the work type records.

   ```
   {
     "totalSize": 2,
     "done": true,
     "records": [
       {
         "attributes": {
           "type": "ServiceTerritoryWorkType",
           "url":
   "/services/data/v55.0/sobjects/ServiceTerritoryWorkType/0VEx00000001CTGGA2"
         },
         "Id": "0VEx00000001CTGGA2",
   ```

```
          "WorkTypeId": "08qx000000014fvAAA",
          "WorkType": {
            "attributes": {
              "type": "WorkType",
              "url": "/services/data/v55.0/sobjects/WorkType/08qx000000014fvAAA"
            },
            "Name": "WT 2"
          }
        },
        {
          "attributes": {
            "type": "ServiceTerritoryWorkType",
            "url":
"/services/data/v55.0/sobjects/ServiceTerritoryWorkType/0VEx00000001Ag4GAE"
          },
          "Id": "0VEx00000001Ag4GAE",
          "WorkTypeId": "08qx000000014fnAAA",
          "WorkType": {
            "attributes": {
              "type": "WorkType",
              "url": "/services/data/v55.0/sobjects/WorkType/08qx000000014fnAAA"
            },
            "Name": "WT 3"
          }
        }
      ]
}
```

2. Use the `Query()` request on the `WorkTypeGroupMember` object to retrieve the work type groups by work types retrieved in the previous step.

Sample Request

This sample REST API call uses the `Query()` request to retrieve work type groups.

For more information on using `Query()` request, see Execute a SOQL Query.

```
https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=
SELECT Id,WorkTypeGroupId,WorkTypeId,WorkTypeGroup.Name FROM WorkTypeGroupMember WHERE
 WorkTypeId in ('08qx000000014fnAAA','08qx000000014fvAAA')
```

📝 Note: You can use the `toLabel` method to translate the SOQL query results in the language of the user. For more information, see Translate SOQL Query Results.

Sample Response

The request returns the work type group records.

```
{
  "totalSize": 2,
  "done": true,
  "records": [
    {
      "attributes": {
        "type": "WorkTypeGroupMember",
        "url": "/services/data/v55.0/sobjects/WorkTypeGroupMember/0Wzx000000013tICAQ"
```

```
        },
        "Id": "0Wzx000000013tICAQ",
        "WorkTypeGroupId": "0VSx000000014DmGAI",
        "WorkTypeId": "08qx000000014fnAAA",
        "WorkTypeGroup": {
          "attributes": {
            "type": "WorkTypeGroup",
            "url": "/services/data/v55.0/sobjects/WorkTypeGroup/0VSx000000014DmGAI"
          },
          "Name": "WTG 2"
        }
      },
      {
        "attributes": {
          "type": "WorkTypeGroupMember",
         "url": "/services/data/v55.0/sobjects/WorkTypeGroupMember/0Wzx000000013tHCAQ"

        },
        "Id": "0Wzx000000013tHCAQ",
        "WorkTypeGroupId": "0VSx000000014DkGAI",
        "WorkTypeId": "08qx000000014fvAAA",
        "WorkTypeGroup": {
          "attributes": {
            "type": "WorkTypeGroup",
            "url": "/services/data/v55.0/sobjects/WorkTypeGroup/0VSx000000014DkGAI"
          },
          "Name": "WTG 1"
        }
      }
    ]
}
```

Parse the JSON response, and display the work type groups on web page so that users can select a work type group for the appointment. Here's how that page can look.

Default to the work type that is associated with the service territory selected on the Select Service Territory screen and the work type group selected on the Select Work Type Group screen.

Get Work Type

Default to the work type that is associated with the service territory and work type group.

A work type group represents a general appointment category or topic, such as a home loan or investment.

1. Use the `Query()` request on the `WorkTypeGroupMember` object to retrieve the work types associated with the work type group selected on the Select Work Type Group screen.

   Sample Request

   This sample REST API call uses the `Query()` request to retrieve the work types.

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=
   SELECT+WorkTypeId,WorkType.Name+FROM+WorkTypeGroupMember+WHERE+WorkTypeGroupId+=+'0VSx000000014DmGAI'
   ```

   Sample Response

   The request returns the work type records.

   ```
   {
     "totalSize": 2,
     "done": true,
     "records": [
       {
         "attributes": {
           "type": "WorkTypeGroupMember",
           "url": "/services/data/v55.0/sobjects/WorkTypeGroupMember/0Wzx000000013tICAQ"

         },
         "WorkTypeId": "08qx000000014fnAAA",
         "WorkType": {
           "attributes": {
             "type": "WorkType",
             "url": "/services/data/v55.0/sobjects/WorkType/08qx000000014fnAAA"
           },
           "Name": "WT 3"
         }
       },
       {
         "attributes": {
           "type": "WorkTypeGroupMember",
           "url": "/services/data/v55.0/sobjects/WorkTypeGroupMember/0Wzx000000013tJCAQ"

         },
         "WorkTypeId": "08qx000000014fwAAA",
         "WorkType": {
           "attributes": {
             "type": "WorkType",
             "url": "/services/data/v55.0/sobjects/WorkType/08qx000000014fwAAA"
           },
           "Name": "WT 4"
   ```

```
            }
        }
    ]
}
```

2. Use the `Query()` request on the `ServiceTerritoryWorkType` object by specifying the work type records retrieved in the previous step to default the work type based on the selected service territory and work type group.

   Sample Request

   This sample REST API call uses the `Query()` request to default the work type.

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=
   SELECT WorkTypeId,WorkType.Name FROM ServiceTerritoryWorkType WHERE ServiceTerritoryId='0Hh0000012s3Q0' AND WorkTypeId IN ('08qx000000014fnAAA','08qx000000014fiAAA')
   ```

   Sample Response

   The request returns the work type records.

   ```
   {
     "totalSize": 1,
     "done": true,
     "records": [
       {
         "attributes": {
           "type": "ServiceTerritoryWorkType",
           "url":
   "/services/data/v55.0/sobjects/ServiceTerritoryWorkType/0VEx00000001Ag4GAE"
         },
         "WorkTypeId": "08qx000000014fnAAA",
         "WorkType": {
           "attributes": {
             "type": "WorkType",
             "url": "/services/data/v55.0/sobjects/WorkType/08qx000000014fnAAA"
           },
           "Name": "WT 3"
         }
       }
     ]
   }
   ```

On the next page in your app, you can show the service resources and their availability.

Get Service Resources

Retrieve the available service resources based on the selected work type group or work type, and service territory.

A service resource is an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients.

Create a page in your app where you can show the available service resources based on the work type group or work type, and service territory.

1. Make a POST request on the getAppointmentCandidates on page 133 REST API by passing the required `workTypeGroupId` or `workTypeId`, and `territoryIds` parameters.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/scheduling/getAppointmentCandidates
```

For an Existing User (Account)

To consider an existing user's preferred visiting hours, pass `accountId` in the input request body. The preference is enforced when the Include Only Required Service Resources and Ignore Excluded Service Resources policy rules are enabled.

Sample Request

Using `workTypeGroupId`:

```
{
  "accountId": "001x0000005DLxpAAG",
  "startTime": "2022-04-19T10:30:00.000+0000",
  "endTime": "2022-04-19T10:40:00.000+0000",
  "workTypeGroupId": "0VSx000000014DmGAI",
  "territoryIds": [
    "0Hhx000000012oSCAQ"
  ]
}
```

Using `workTypeId`:

```
{
    "accountId" : "001x0000005DLxpAAG",
    "startTime" : "2022-04-19T10:30:00.000+0000",
    "endTime" : "2022-04-19T10:40:00.000+0000",
    "workType" : {
                  "id" : "08qx000000014fnAAA"
    },
    "territoryIds" : ["0Hhx000000012oSCAQ"]
}
```

Sample Response

The API returns the service resources and their available time slots.

```
{
  "candidates": [
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GcCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GfCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
```

```
          "endTime": "2022-04-19T10:40:00.000+0000",
          "resources": [
            "0Hnx000000006GbCAI"
          ],
          "startTime": "2022-04-19T10:30:00.000+0000",
          "territoryId": "0Hhx000000012oSCAQ"
        },
        {
          "endTime": "2022-04-19T10:40:00.000+0000",
          "resources": [
            "0Hnx000000006GwCAI"
          ],
          "startTime": "2022-04-19T10:30:00.000+0000",
          "territoryId": "0Hhx000000012oSCAQ"
        },
        {
          "endTime": "2022-04-19T10:40:00.000+0000",
          "resources": [
            "0Hnx000000006GyCAI"
          ],
          "startTime": "2022-04-19T10:30:00.000+0000",
          "territoryId": "0Hhx000000012oSCAQ"
        },
        {
          "endTime": "2022-04-19T10:40:00.000+0000",
          "resources": [
            "0Hnx000000006GuCAI"
          ],
          "startTime": "2022-04-19T10:30:00.000+0000",
          "territoryId": "0Hhx000000012oSCAQ"
        },
        {
          "endTime": "2022-04-19T10:40:00.000+0000",
          "resources": [
            "0Hnx000000006GtCAI"
          ],
          "startTime": "2022-04-19T10:30:00.000+0000",
          "territoryId": "0Hhx000000012oSCAQ"
        },
        {
          "endTime": "2022-04-19T10:40:00.000+0000",
          "resources": [
            "0Hnx000000006GsCAI"
          ],
          "startTime": "2022-04-19T10:30:00.000+0000",
          "territoryId": "0Hhx000000012oSCAQ"
        },
        {
          "endTime": "2022-04-19T10:40:00.000+0000",
          "resources": [
            "0Hnx000000006GmCAI"
          ],
          "startTime": "2022-04-19T10:30:00.000+0000",
          "territoryId": "0Hhx000000012oSCAQ"
```

```
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GnCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GlCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006H4CAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006H2CAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006H3CAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    }
  ]
}
```

For a Guest User (Lead)

Sample Request

Using `workTypeGroupId`:

```
{
  "startTime": "2022-04-19T10:30:00.000+0000",
  "endTime": "2022-04-19T10:40:00.000+0000",
  "workTypeGroupId": "0VSx000000014DmGAI",
  "territoryIds": [
    "0Hhx000000012oSCAQ"
```

```
    ]
}
```

Using `workTypeId`:

```
{
  "startTime": "2022-04-19T10:30:00.000+0000",
  "endTime": "2022-04-19T10:40:00.000+0000",
  "workType": {
    "id": "08qx000000014fnAAA"
  },
  "territoryIds": [
    "0Hhx000000012oSCAQ"
  ]
}
```

Sample Response

The API returns the service resources and their available time slots.

```
{
  "candidates": [
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GcCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GfCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GbCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GwCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
```

```json
      "resources": [
        "0Hnx000000006GyCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GuCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GtCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GsCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GmCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GnCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006GlCAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
```

```
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006H4CAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006H2CAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    },
    {
      "endTime": "2022-04-19T10:40:00.000+0000",
      "resources": [
        "0Hnx000000006H3CAI"
      ],
      "startTime": "2022-04-19T10:30:00.000+0000",
      "territoryId": "0Hhx000000012oSCAQ"
    }
  ]
}
```

Parse the JSON response, and display the available service resources on web page so that users can select a service resource for the appointment. Here's how that page can look.

When users select a resource, show the available time slots for the selected resource. Here's how a page showing the available time slots can look.

On the next page in your app, you can show the appointment details for the user to review and create the appointment.

Create Service Appointments

The last step in the scheduling application is to show the service appointment details for the user to review and create the appointment.

A service appointment represents an appointment booked through Salesforce Scheduler.

Create a page where the user can review the appointment details and create the appointment. Here's how a Review Service Appointment page can look.

1. Link the Next button to a POST request on the `service-appointments` on page 153 Connect API to create the service appointment.

   Resource URI

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-appointments
   ```

   For an Existing User (Account)

   Sample Request

   Pass the account ID as `parentRecordId` in the input request body.

   Set `status` to `Scheduled` to indicate that the appointment is scheduled.

   ```
   {
     "serviceAppointment": {
       "serviceTerritoryId": "0Hhx000000012oSCAQ",
       "parentRecordId": "001x0000005DLxpAAG",
       "workTypeId": "08qx000000014fnAAA",
       "schedStartTime": "2022-04-19T10:30:00.000+0000",
       "schedEndTime": "2022-04-19T10:40:00.000+0000",
       "additionalInformation": "Appointment Scheduling Custom App.",
       "appointmentType": "Testing Purpose",
       "extendedFields": [
         {
           "name": "status",
           "value": "Scheduled"
         }
       ]
     },
     "assignedResources": [
       {
         "serviceResourceId": "0Hnx000000006GcCAI",
         "isRequiredResource": "true"
       }
     ]
   }
   ```

   Sample Response

   The API returns the service appointment ID and the assigned service resources.

   ```
   {
     "result": {
       "assignedResourceIds": [
         "03rx00000001uxJAAQ"
       ],
       "serviceAppointmentId": "08px00000001toRAAQ"
     }
   }
   ```

   For a Guest User (Lead)

   Sample Request

   Pass the required lead details in the input request body.

Set status to Scheduled to indicate that the appointment is scheduled.

```
{
  "serviceAppointment": {
    "serviceTerritoryId": "0Hhx000000012oSCAQ",
    "workTypeId": "08qx000000014fnAAA",
    "schedStartTime": "2022-04-19T10:30:00.000+0000",
    "schedEndTime": "2022-04-19T10:40:00.000+0000",
    "additionalInformation": "Appointment Scheduling Custom App.",
    "appointmentType": "Testing Purpose",
    "extendedFields": [
      {
        "name": "status",
        "value": "Scheduled"
      }
    ]
  },
  "assignedResources": [
    {
      "serviceResourceId": "0Hnx000000006H4CAI",
      "isRequiredResource": "true"
    }
  ],
  "lead": {
    "email": "name@company.com",
    "firstName": "FName",
    "lastName": "LName",
    "company": "CompanyName"
  }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rx00000001uxOAAQ"
    ],
    "parentRecordId": "00Qx0000001cKPoEAM",
    "serviceAppointmentId": "08px00000001toWAAQ"
  }
}
```

Create a page to show confirmation when the service appointment is created successfully.

Here's how a sample confirmation page can look.
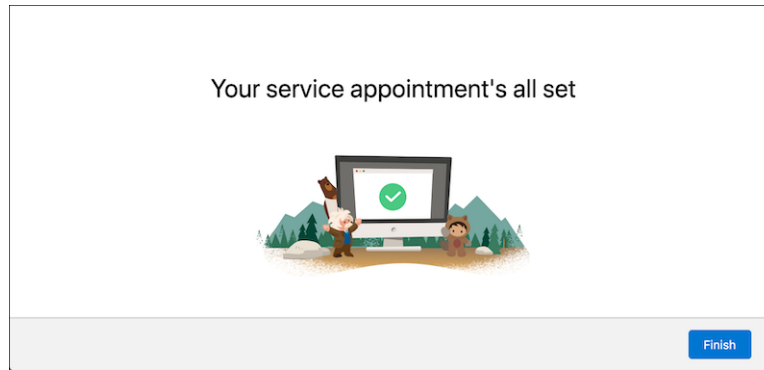
Modify an Anonymous Appointment

This use case explains how to change the service resource of an existing anonymous service appointment by using Salesforce Scheduler APIs.

Typically, anonymous appointments are scheduled when users who don't belong to your organization request for appointments. For example, a subscriber of your app requests for an appliance maintenance appointment from your service app. After a service appointment is scheduled by using the anonymous mechanism, the service resource for the appointment can mark themselves unavailable. In that scenario, as an administrator or an appointment orchestrator for your organization, ensure that you modify the anonymous service appointment and assign a different resource to the appointment.

> **Note:** For the procedure to be successful, ensure that each unavailable resource marks themselves as absent in Salesforce Scheduler. Otherwise, the API request to retrieve the list of service resources continues to include the resources that are currently unavailable or absent.

This flowchart provides an overview of the procedure:

1. Authenticate with a Connected App

   The first step in an API-based integration is to connect to Salesforce and get an access token by using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

2. Get Service Appointments

   The `AssignedResource` object represents a service resource who is assigned to a service appointment in Salesforce Scheduler. Retrieve service appointment IDs of all scheduled appointments associated with specific resources by using the `query` request on the `AssignedResource` object.

3. Get Service Appointment Details

   A service appointment represents an appointment that's booked via Salesforce Scheduler. Use a GET method to fetch the details of a service appointment record.

4. Get Available Resources

   Retrieve the resources that are available for an anonymous appointment.

5. Update Service Appointments

   A service appointment represents an appointment that is booked via Salesforce Scheduler. To update the appointment, run a PATCH request on the `service-appointments` Connect API.

Authenticate with a Connected App

The first step in an API-based integration is to connect to Salesforce and get an access token by using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

📝 **Note:** It's not possible to modify an existing appointment via a guest user profile. You can use an integration user who has permissions to read and update only the required objects.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

When you have this permission, you can connect to Salesforce and authenticate. Then make a request to REST or Connect API and check the response. For more information, see Connect REST API Quick Start.

Get Service Appointments

The `AssignedResource` object represents a service resource who is assigned to a service appointment in Salesforce Scheduler. Retrieve service appointment IDs of all scheduled appointments associated with specific resources by using the `query` request on the `AssignedResource` object.

Sample Request

This sample REST API call uses the `query` request to retrieve the anonymous service appointments that are associated with unavailable resources.

```
https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+ServiceAppointmentId,ServiceResourceId+FROM+AssignedResource+WHERE+ServiceResourceId+='ServiceResourceId'+AND+ServiceAppointment.IsAnonymousBooking=TRUE
```

For more information, see Execute a SOQL Query. Ensure that the filter falls within the query limits.

Sample Response

The method retrieves the list of anonymous appointments that are associated with specific resources.

```
{
  "totalSize" : 2,
  "done" : true,
```

```
    "records" : [
      {
        "attributes" : {
          "type" : "AssignedResource",
          "url" : "/services/data/v53.0/sobjects/AssignedResource/03rB0000000cBVOIA2"
        },
        "ServiceAppointmentId" : "08pB0000000aKeYIAU",
        "ServiceResourceId" : "0HnB0000000Tav3KAC"
      },
      {
        "attributes" : {
          "type" : "AssignedResource",
          "url" : "/services/data/v53.0/sobjects/AssignedResource/03rB0000000cBVsIAM"
        },
        "ServiceAppointmentId" : "08pB0000000aKf2IAE",
        "ServiceResourceId" : "0HnB0000000Tav3KAC"
      }
   ]
}
```

Use a `collection` object to capture all appointment IDs that the GET request retrieved. If you call multiple GET requests, include in the `collection` object the appointment IDs that each request returned.. This task helps you create a list of service appointments that you must update with new resources.

Get Service Appointment Details

A service appointment represents an appointment that's booked via Salesforce Scheduler. Use a GET method to fetch the details of a service appointment record.

This task helps you retrieve additional details of each service appointment that you listed in the previous task.

Sample Request

Here's a sample GET request to retrieve the details of a service appointment.

https://**yourInstance.salesforce.com**/services/data/**vXX.X**/query/?q=SELECT+Id,SchedEndTime,SchedStartTime,ServiceTerritoryId,WorkTypeId+FROM+ServiceAppointment+WHERE+id='08pB0000000aKf2IAE'

Sample Response

The request returns the details of an anonymous service appointment.

```
{
  "totalSize": 1,
  "done": true,
  "records": [
    {
      "attributes": {
        "type": "ServiceAppointment",
        "url": "/services/data/v53.0/sobjects/ServiceAppointment/08pB0000000aKf2IAE"
      },
      "Id": "08pB0000000aKf2IAE",
      "SchedEndTime": "2021-10-25T18:30:00.000+0000",
      "SchedStartTime": "2021-10-25T17:30:00.000+0000",
      "ServiceTerritoryId": "0HhB0000000TaHOKA0",
      "WorkTypeId": "08qB0000000UF63IAG"
    }
```

```
    ]
  }
```

Use a `collection` object to capture all the details of service appointments.

Get Available Resources

Retrieve the resources that are available for an anonymous appointment.

A service resource represents an employee from your organization, such as a loan officer, investment adviser, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients. This task explains how to retrieve service resources that match various criteria such as work type group, territory, start time, and end time from the selected service appointment. Use the `getAppointmentCandidates` REST API to fetch the available service resources based on work type group and service territory.

Make a POST request on the `getAppointmentCandidates` REST API by passing the required `workTypeGroupId`, `territoryIds`, `startTime`, and `endTime` parameters.

Use this URI for the request:

```
https://yourInstance.salesforce.com/services/data/vXX.X/scheduling/getAppointmentCandidates
```

Use this request body with the POST request:

```
{
    "startTime" : startTime,
    "endTime" : endTime,
    "territoryIds" : [territoryIds]
    "workType" :
        {
            "id": workTypeId
        }
}
```

This code snippet is an example request body:

```
{
    "startTime" : "2021-10-25T17:30:00.000+0000",
    "accountId" : "001B000001McLhMIAV",
    "territoryIds" : ["0HhB0000000TaHOKA0"],
    "workType" :
        {
            "id": "08qB0000000UF63IAG"
        }

 }
```

The request returns a list of anonymous resources that match the criteria specified in the request body.

```
{
  "candidates": [
    {
      "endTime" : "2021-10-25T18:30:00.000+0000",
      "resources" : [ "0HnB0000000TavDKAS" ],
      "startTime" : "2021-10-25T17:30:00.000+0000",
      "territoryId" : "0HhB0000000TaHOKA0"
    }, {
```

```
        "endTime" : "2021-10-25T19:00:00.000+0000",
        "resources" : [ "0HnB0000000TavDKAS" ],
        "startTime" : "2021-10-25T18:00:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
    }, {
        "endTime" : "2021-10-25T19:30:00.000+0000",
        "resources" : [ "0HnB0000000TavDKAS" ],
        "startTime" : "2021-10-25T18:30:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
    }, {
        "endTime" : "2021-10-25T20:00:00.000+0000",
        "resources" : [ "0HnB0000000TavDKAS" ],
        "startTime" : "2021-10-25T19:00:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
    }  ]
}
```

Update Service Appointments

A service appointment represents an appointment that is booked via Salesforce Scheduler. To update the appointment, run a PATCH
request on the `service-appointments` Connect API.

Ensure that you make a note of the service appointment IDs that you retrieved in the previous task.

Update service appointments to use new resources by using PATCH requests on the `service-appointments` on page 153
Connect API. Pass the `serviceResourceId` and `serviceAppointmentId` parameters with each request.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-appointments
```

Sample Request

In the input request body, pass the service appointment ID as `serviceAppointmentId` and service resource ID as
`serviceResourceId`.

```
{

    "serviceAppointmentId": "08pB0000000aKf2IAE",
    "serviceAppointment": {
      "schedStartTime": "2021-10-25T17:30:00.000+0000",
      "schedEndTime": "2021-10-25T18:30:00.000+0000",
      "serviceTerritoryId": "0HhB0000000TaHOKA0"
    },
    "assignedResources": [
      {
        "serviceResourceId": "0HnB0000000TavDKAS",
        "isRequiredResource": true
      }
    ]
  }
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
    "result" : {
      "assignedResourceIds" : [ "03rB0000000cBVxIAM" ],
      "serviceAppointmentId" : "08pB0000000aKf2IAE"
    }
  }
```

The request modifies the service appointment with a new service resource.

Run the PATCH request for each service appointment ID that needs you want to modify.

Create a Single-Resource Appointment

This use case explains how you can build a scheduling website to allow users to book service appointments with a single resource using Salesforce Scheduler APIs.

Before you can use the scheduler developer resources to build the app, set up Salesforce Scheduler for your organization. For more information, see Set Up Salesforce Scheduler.

Here are the high level steps building an external web site by using the Salesforce Scheduler APIs, which are outlined in detail later.
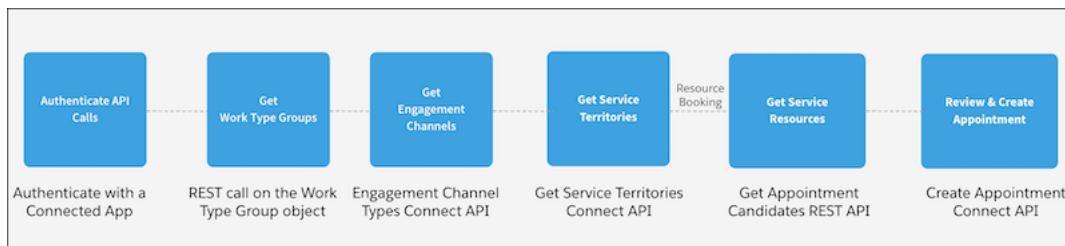
1. Authenticate with a Connected App
   The OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls. Before you use Salesforce Scheduler for API-based integration, authenticate the API calls using OAuth.

2. Get Work Type Groups
   A work type group represents a general appointment category or topic, such as a home loan or investment. Show your users your work type groups on the landing page by retrieving the list of work type groups from your Salesforce instance. Your users can select a work type group from the list while booking appointments.

3. Get Engagement Channels
   An engagement channel is a medium, such as Phone, Video, and In Person that service resources use to meet customers.

4. Get Service Territories
   A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers. Show your users your available service territories on the next page on your website by retrieving a list of active service territories from your Salesforce instance. Your users can search for service territories based on user-entered name, city, postal code, or state. Users can also view the distance between two locations, such as between a service territory and the user's current location.

5. Get Service Resources

   A service resource represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients.

6. Create Service Appointments

   Show your users the details of a service appointment—an appointment booked through Salesforce Scheduler—so that users can review and create the appointment.

Authenticate with a Connected App

The OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls. Before you use Salesforce Scheduler for API-based integration, authenticate the API calls using OAuth.

📝 **Note:** To build a custom appointment scheduling application using Salesforce Scheduler APIs for prospects or unauthenticated users, you must build it using a logged-in user. For example, an integration user or an administrator.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

When you have this permission, you can connect to Salesforce and authenticate. Then make a request to REST or Connect API and check the response. For more information, see Connect REST API Quick Start.

Get Work Type Groups

A work type group represents a general appointment category or topic, such as a home loan or investment. Show your users your work type groups on the landing page by retrieving the list of work type groups from your Salesforce instance. Your users can select a work type group from the list while booking appointments.

1. Create a page to show your work type groups.

2. Use the `Query()` request on the WorkTypeGroup object to retrieve the list of work type groups from your Salesforce instance.

   Sample Request

   ```
   https://yourInstance.salesforce.com/services/data/v64.0/query/?q=SELECT+Id,+Name+From+WorkTypeGroup
   +Where+isActive+=+true+ORDER+BY+NAME
   ```

   Sample Response

   The request returns the work type group records.

   ```
   {
     "totalSize": 3,
     "done": true,
     "records": [
       {
         "attributes": {
           "type": "WorkTypeGroup",
           "url": "/services/data/v57.0/sobjects/WorkTypeGroup/0VSS700000000sLOAQ"
         },
         "Id": "0VSS700000000sLOAQ",
         "Name": "Wealth Management"
       },
       {
         "attributes": {
   ```

```
        "type": "WorkTypeGroup",
        "url": "/services/data/v57.0/sobjects/WorkTypeGroup/0VSS700000000sQOAQ"
      },
      "Id": "0VSS700000000sQOAQ",
      "Name": "Loans"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v57.0/sobjects/WorkTypeGroup/0VSS700000000sVOAQ"
      },
      "Id": "0VSS700000000sVOAQ",
      "Name": "Banking"
    }
  ]
}
```

3. Parse the JSON response, and display the work type groups on a page that you created.

Your users can select a work type group for the appointment from the page.

Get Engagement Channels

An engagement channel is a medium, such as Phone, Video, and In Person that service resources use to meet customers.

Before using engagement channels for scheduling appointments:

- Enable engagement channels in the Salesforce Scheduler Settings of your instance. See Enable the Scheduling Appointments Using Engagement Channels Setting.

- Set up engagement channels, including setting the required access and creating engagement channels. See Engagement Channels.

- Create the Shift Engagement Channel and Engagement Channel Work Type records for the applicable shifts.

- Define Shift Rules in the scheduling policy. See Define Shift Rules in Scheduling Policy.

1. Create a page to show the engagement channel types. Salesforce Scheduler shows service resources and resource time slots based on the channel that a user selects when creating an appointment.

2. Make a `GET` request on the `engagement-channel-types` Connect API.

Sample Request

Filter the engagement channel types by the `workTypeGroupId` selected in the previous step.

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling
/engagement-channel-types?workTypeGroupIds=0VSS700000000sVOAQ
```

📝 Note: You can filter the engagement channel type results by `workTypeGroupIds` or `workTypeIds`.

Sample Response

The request returns the engagement channels for the `workTypeGroupId` specified in the request.

```
{
  "result": {
    "engagementChannelTypes": [
      {
        "contactPointType": "InPerson",
```

```
        "id": "0eFS70000004CG5MAM",
        "name": "EngagementChannel1",
        "workTypeGroupIds": [
          "0VSS700000000sVOAQ"
        ],
        "workTypeIds": []
      },
      {
        "contactPointType": "Video",
        "id": "0eFS70000004CGFMA2",
        "name": "EngagementChannel3",
        "workTypeGroupIds": [
          "0VSS700000000sVOAQ"
        ],
        "workTypeIds": []
      }
    ]
  }
}
```

3. Parse the JSON response, and show the engagement channel types on the page that you created.

Your users can select an engagement channel type for the appointment from the page.

Get Service Territories

A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers. Show your users your available service territories on the next page on your website by retrieving a list of active service territories from your Salesforce instance. Your users can search for service territories based on user-entered name, city, postal code, or state. Users can also view the distance between two locations, such as between a service territory and the user's current location.

1. Create a page for users to search for service territories.

Here's how a Select Service Territory page can look.

2. To retrieve a list of active service territories from your Salesforce instance, use the `service-territories` Connect API request.

Sample Request

This sample REST API call uses the `service-territories` request to retrieve service territories within a range of 10 miles from your current location. The default value is 5 miles.

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling
/service-territories?workTypeGroupId=0VSS700000000sVOAQ
```

Sample Response

The request returns the service territory records.

```
{
  "result": {
    "serviceTerritories": [
      {
        "city": "Charlotte",
        "country": "United States",
        "id": "0HhS700000001DYKAY",
        "name": "Spear Street Branch",
        "operatingHoursId": "0OHS700000001HlOAI",
        "postalCode": "05445",
        "state": "VT",
        "street": "121 Spear Street"
      }
    ]
  }
}
```

3. Parse the JSON response, and show the available service territories on a page that you created.

Your users can select a service territory for the appointment from the page.

Get Service Resources

A service resource represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients.

1. Create a page to show the available service resources.

2. Make a `POST` request on the `getAppointmentCandidates` REST API by passing the required `workTypeGroupId` and `territoryIds` parameters.

Resource URI

```
https://yourInstance.salesforce.com/services/data/v64.0/scheduling/getAppointmentCandidates
```

Sample Request

To consider an existing user's preferred visiting hours, pass `accountId` in the input request body. The preference is enforced when the Include Only Required Service Resources and Ignore Excluded Service Resources policy rules are enabled. For more information, see Add Service Resource Preferences to Accounts for Salesforce Scheduler.

```
{
  "startTime": "2023-02-15T09:00:00.000+0000",
  "endTime": "2023-02-15T19:00:00.000+0000",
```

```json
    "accountId": "001S7000001pFlJIAU",
    "workTypeGroupId": "0VSS700000000sVOAQ",
    "territoryIds": [
      "0HhS700000001DYKAY"
    ],
    "engagementChannelTypeIds": [
      "0eFS70000004CG5MAM"
    ]
}
```

Sample Response

The API returns the service resources available for the specified time slots.

```json
{
  "candidates" : [ {
    "endTime" : "2023-02-15T18:00:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-02-15T17:00:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-02-15T18:15:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-02-15T17:15:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-02-15T18:30:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-02-15T17:30:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-02-15T18:45:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-02-15T17:45:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-02-15T19:00:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CG5MAM" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-02-15T18:00:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  } ]
}
```

3. Parse the JSON response, and show the actual service resources on a page.

Your users can select a service resource for the appointment from the page.

Create Service Appointments

Show your users the details of a service appointment—an appointment booked through Salesforce Scheduler—so that users can review
and create the appointment.

1. Create a page where the user can review the appointment details and create the appointment.

2. Make a POST request on the `service-appointments` Connect API to create the service appointment.

    Resource URI

    ```
    https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/service-appointments
    ```

    For an Existing User (Account)

    Sample Request

    Pass the account ID as `parentRecordId` in the input request body.

    To indicate that the appointment is scheduled, set `status` to `Scheduled`.

    ```
    {
      "serviceAppointment": {
        "serviceTerritoryId": "0HhS700000001DYKAY",
        "parentRecordId": "001S7000001pFlJIAU",
        "engagementChannelTypeId": "0eFS70000004CG5MAM",
        "schedStartTime": "2023-02-15T17:00:00.000+0000",
        "schedEndTime": "2023-02-15T18:00:00.000+0000",
        "street": "121 Spear Street",
        "city": "Charlotte",
        "state": "VT",
        "postalCode": "05445",
        "country": "United States",
        "extendedFields": [
          {
            "name": "status",
            "value": "Scheduled"
          }
        ]
      },
      "assignedResources": [
        {
          "serviceResourceId": "0HnS700000002jAKAQ",
          "isRequiredResource": true
        }
      ]
    }
    ```

    Sample Response

    The API returns the service appointment ID and the assigned service resources.

    ```
    {
      "result": {
        "assignedResourceIds": [
          "03rS700000000hPIAQ"
        ],
        "serviceAppointmentId": "08pS7000000018wIAA"
    ```

```
    }
}
```

For a Guest User (Lead)

Sample Request

Pass the required lead details in the input request body.

To indicate that the appointment is scheduled, set `status` to `Scheduled`.

```
{
  "serviceAppointment": {
    "serviceTerritoryId": "0HhS700000001DYKAY",
    "engagementChannelTypeId": "0eFS70000004CG5MAM",
    "schedStartTime": "2023-02-15T17:00:00.000+0000",
    "schedEndTime": "2023-02-15T18:00:00.000+0000",
    "street": "121 Spear Street",
    "city": "Charlotte",
    "state": "VT",
    "postalCode": "05445",
    "country": "United States",
    "extendedFields": [
      {
        "name": "status",
        "value": "Scheduled"
      }
    ]
  },
  "assignedResources": [
    {
      "serviceResourceId": "0HnS700000002jAKAQ",
      "isRequiredResource": true
    }
  ],
  "lead": {
    "firstName": "Mark",
    "lastName": "Taylor",
    "phone": "012-345-6789",
    "email": "mtaylor@company.com",
    "company": "Company1"
  }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rS700000000hUIAQ"
    ],
    "parentRecordId": "00QS7000000sfbOMAQ",
    "serviceAppointmentId": "08pS70000000191IAA"
```

```
    }
}
```

Create a page to show confirmation when the service appointment is created successfully.

Here's how a sample confirmation page can look.
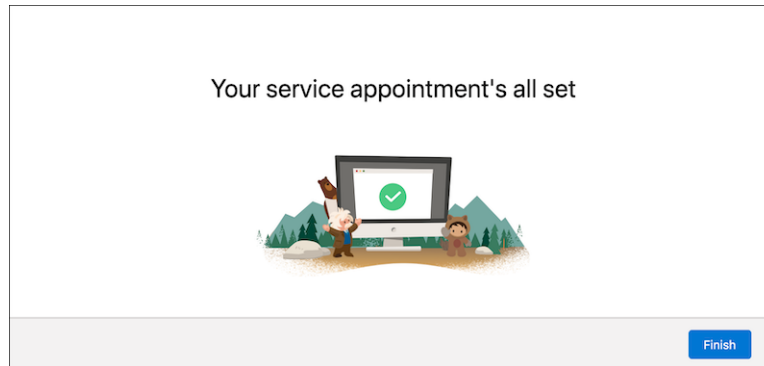
Modify a Service Appointment

Use Salesforce Scheduler APIs to modify a service appointment. This use case explains how you can change the engagement channel, service resource, time slot, or status of an existing appointment. However, you can also modify other details of the appointment in a similar fashion. For example, to change the service territory, use the `service-territories` Connect API.

This topic explains how you can modify an appointment using the custom application that you built for creating appointments.

📝 Note: For the procedure to be successful, ensure that each unavailable resource marks themselves as absent in Salesforce Scheduler. Otherwise, the API request to retrieve the list of service resources continues to include the resources that are currently unavailable or absent.

These steps provide a high-level overview of how you can let users choose a different engagement channel type, service resource, or time slot for an existing service appointment.
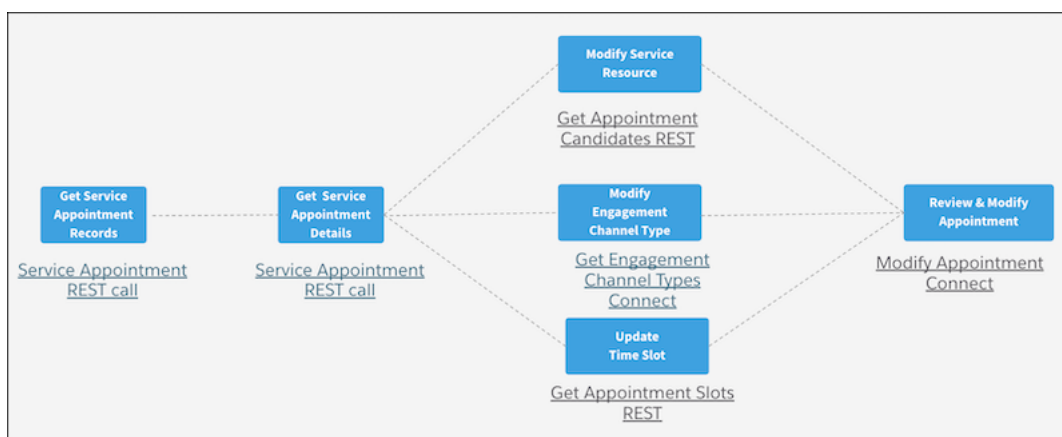
1. Authenticate with a Connected App

   The OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls. Before you use Salesforce Scheduler for API-based integration, authenticate the API calls using OAuth.

2. Get Service Appointments

   A service appointment represents an appointment booked through Salesforce Scheduler.

3. Get Service Appointment Details

   A service appointment represents an appointment booked through Salesforce Scheduler.

4. Change Appointment Details

   This section explains how you can show either the engagement channel types, service resources, or time slots page based on what the user chooses to change for the appointment.

5. Update Service Appointments

   Show your users the details of a service appointment—an appointment modified through Salesforce Scheduler—so that users can review and update the appointment.

Authenticate with a Connected App

The OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls. Before you use Salesforce Scheduler for API-based integration, authenticate the API calls using OAuth.

📝 **Note:** To build a custom appointment scheduling application using Salesforce Scheduler APIs for prospects or unauthenticated users, you must build it using a logged-in user. For example, an integration user or an administrator.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

When you have this permission, you can connect to Salesforce and authenticate. Then make a request to REST or Connect API and check the response. For more information, see Connect REST API Quick Start.

Get Service Appointments

A service appointment represents an appointment booked through Salesforce Scheduler.

1. Create a page to show the service appointments.

2. Use the `Query()` request on the ServiceAppointment object to retrieve the list of service appointments associated with an account.

   Sample Request

   ```
   https://yourInstance.salesforce.com/services/data/v64.0/query/?q=
   SELECT+AppointmentNumber,+Status,+SchedStartTime,+SchedEndTime,+ServiceTerritoryId,+WorkTypeId+From+ServiceAppointment+WHERE+AccountId+='001S700001pF1JIAU'
   ```

   Sample Response

   The method returns the available service appointments.

   ```
   {
     "totalSize": 3,
     "done": true,
     "records": [
       {
         "attributes": {
           "type": "ServiceAppointment",
           "url": "/services/data/v57.0/sobjects/ServiceAppointment/08pS70000000196IAA"
   ```

```
      },
      "AppointmentNumber": "SA-0003",
      "Status": "Scheduled",
      "SchedStartTime": "2023-03-15T16:00:00.000+0000",
      "SchedEndTime": "2023-03-15T17:00:00.000+0000",
      "ServiceTerritoryId": "0HhS700000001DYKAY",
      "WorkTypeId": null
    },
    {
      "attributes": {
        "type": "ServiceAppointment",
        "url": "/services/data/v57.0/sobjects/ServiceAppointment/08pS7000000018wIAA"

      },
      "AppointmentNumber": "SA-0001",
      "Status": "Scheduled",
      "SchedStartTime": "2023-02-15T17:00:00.000+0000",
      "SchedEndTime": "2023-02-15T18:00:00.000+0000",
      "ServiceTerritoryId": "0HhS700000001DYKAY",
      "WorkTypeId": null
    },
    {
      "attributes": {
        "type": "ServiceAppointment",
        "url": "/services/data/v57.0/sobjects/ServiceAppointment/08pS7000000019BIAQ"

      },
      "AppointmentNumber": "SA-0004",
      "Status": "Scheduled",
      "SchedStartTime": "2023-03-15T18:00:00.000+0000",
      "SchedEndTime": "2023-03-15T19:00:00.000+0000",
      "ServiceTerritoryId": "0HhS700000001DYKAY",
      "WorkTypeId": null
    }
  ]
}
```

3. Parse the JSON response, and show the service appointments on a page that you created.

Your users can select a service appointment to modify from the page.

Get Service Appointment Details

A service appointment represents an appointment booked through Salesforce Scheduler.

1. Create a page to show the details of a service appointment record that the user selects.

2. Make a GET request on the ServiceAppointment object.

Sample Request

Here's a sample GET request to retrieve the service appointment details.

```
https://yourInstance.salesforce.com/services/data/v64.0/sobjects/ServiceAppointment/08pS7000000019BIAQ
```

Sample Response

The method returns the service appointment details.

```json
{
  "attributes": {
    "type": "ServiceAppointment",
    "url": "/services/data/v57.0/sobjects/ServiceAppointment/08pS7000000019BIAQ"
  },
  "Id": "08pS7000000019BIAQ",
  "OwnerId": "005S7000000Ipe4IAC",
  "IsDeleted": false,
  "AppointmentNumber": "SA-0004",
  "CreatedDate": "2023-03-13T17:31:23.000+0000",
  "CreatedById": "005S7000000Ipe4IAC",
  "LastModifiedDate": "2023-03-13T17:31:23.000+0000",
  "LastModifiedById": "005S7000000Ipe4IAC",
  "SystemModstamp": "2023-03-13T17:31:28.000+0000",
  "LastViewedDate": "2023-03-13T17:31:23.000+0000",
  "LastReferencedDate": "2023-03-13T17:31:23.000+0000",
  "ParentRecordId": "001S7000001pFlJIAU",
  "ParentRecordType": "Account",
  "AccountId": "001S7000001pFlJIAU",
  "WorkTypeId": "08qS70000004DQsIAM",
  "ContactId": null,
  "Street": "121 Spear Street",
  "City": "Charlotte",
  "State": "VT",
  "PostalCode": "05445",
  "Country": "United States",
  "Latitude": 44.356843,
  "Longitude": -73.194897,
  "GeocodeAccuracy": "Block",
  "Address": {
    "city": "Charlotte",
    "country": "United States",
    "geocodeAccuracy": "Block",
    "latitude": 44.356843,
    "longitude": -73.194897,
    "postalCode": "05445",
    "state": "VT",
    "street": "121 Spear Street"
  },
  "Description": null,
  "EarliestStartTime": "2023-03-13T17:31:23.000+0000",
  "DueDate": "2023-03-20T17:31:23.000+0000",
  "Duration": null,
  "ArrivalWindowStartTime": "2023-03-15T18:00:00.000+0000",
  "ArrivalWindowEndTime": "2023-03-15T19:00:00.000+0000",
  "Status": "Scheduled",
  "SchedStartTime": "2023-03-15T18:00:00.000+0000",
  "SchedEndTime": "2023-03-15T19:00:00.000+0000",
  "ActualStartTime": null,
  "ActualEndTime": null,
  "ActualDuration": null,
```

```
    "DurationType": "Hours",
    "DurationInMinutes": null,
    "ServiceTerritoryId": "0HhS700000001DYKAY",
    "Subject": null,
    "ParentRecordStatusCategory": null,
    "StatusCategory": "Scheduled",
    "ServiceNote": null,
    "AppointmentType": null,
    "Email": null,
    "Phone": null,
    "CancellationReason": null,
    "AdditionalInformation": null,
    "Comments": null,
    "IsAnonymousBooking": false,
    "IsOffsiteAppointment": false,
    "ApptBookingInfoUrl": null,
    "AppointmentInvitationId": null,
    "EngagementChannelTypeId": "0eFS70000004CG5MAM"
}
```

3. Parse the JSON response, and show the service appointments details on the page that you created.

On the next page, you can let users to modify an engagement channel type, a service resource, or a time slot depending on what the user chooses to change.

Change Appointment Details

This section explains how you can show either the engagement channel types, service resources, or time slots page based on what the user chooses to change for the appointment.

Change Engagement Channel Type

An engagement channel is a medium, such as Phone, Video, and In Person that service resources use to meet customers.

Change Service Resource

A service resource represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients.

Change Appointment Time

A time slot represents a period in a day when an appointment can be scheduled.

Change Engagement Channel Type

An engagement channel is a medium, such as Phone, Video, and In Person that service resources use to meet customers.

Before using engagement channels for scheduling appointments:

- Enable engagement channels in the Salesforce Scheduler Settings of your instance. See Enable the Scheduling Appointments Using Engagement Channels Setting.
- Set up engagement channels, including setting the required access and creating engagement channels. See Engagement Channels.
- Create the Shift Engagement Channel and Engagement Channel Work Type records for the applicable shifts.
- Define Shift Rules in the scheduling policy. See Define Shift Rules in Scheduling Policy.

1. Make a GET request to the engagement-channel-types API by passing the required workTypeId or
   workTypeGroupId parameter.

   Sample Request

   This sample API call uses the work type record representing the service territory to filter the engagement channel types.

   ```
   https://yourInstance.salesforce.com/services/data/v64.0/
   connect/scheduling/engagement-channel-types?workTypeIds=08qS70000004DQsIAM
   ```

   Sample Response

   The request returns the engagement channel types.

   ```
   {
     "result" : {
       "engagementChannelTypes" : [ {
         "contactPointType" : "InPerson",
         "id" : "0eFS70000004CG5MAM",
         "name" : "EngagementChannel1",
         "workTypeGroupIds" : [ ],
         "workTypeIds" : [ "08qS70000004DQsIAM" ]
       }, {
         "contactPointType" : "Video",
         "id" : "0eFS70000004CGFMA2",
         "name" : "EngagementChannel3",
         "workTypeGroupIds" : [ ],
         "workTypeIds" : [ "08qS70000004DQsIAM" ]
       } ]
     }
   }
   ```

2. Parse the JSON response, and show the engagement channel types on the page. Your users can select a engagement channel type
   for the appointment from the page.

3. Make a GET request to the getAppointmentSlots REST API to see if the appointment's original time slot is still available for
   the changed engagement channel type. Otherwise, show the available time slots for the selected engagement channel and allow
   your users to select a time slot. See Change Appointment Time.

Change Service Resource

A service resource represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner,
or retail store specialist, who attends appointments with clients.

1. Create a page to show the available service resources.

2. Make a POST request on the getAppointmentCandidates REST API by passing the required workTypeId and
   territoryIds parameters.

   Resource URI

   ```
   https://yourInstance.salesforce.com/services/data/v64.0/scheduling/getAppointmentCandidates
   ```

Sample Request

To consider an existing user's preferred visiting hours, pass `accountId` in the input request body. The preference is enforced when the Include Only Required Service Resources and Ignore Excluded Service Resources policy rules are enabled. For more information, see Add Service Resource Preferences to Accounts for Salesforce Scheduler.

```
{
  "startTime": "2023-03-24T09:00:00.000+0000",
  "endTime": "2023-03-24T19:00:00.000+0000",
  "accountId": "001S7000001pFlJIAU",
  "workType": {
    "id": "08qS70000004DQsIAM"
  },
  "territoryIds": [
    "0HhS700000001DYKAY"
  ],
  "schedulingPolicyId": "2F0VrRM0000004CUV",
  "engagementChannelTypeIds": [
    "0eFS70000004CGFMA2"
  ]
}
```

Sample Response

The API returns the available time slots and service resources.

```
{
  "candidates" : [ {
    "endTime" : "2023-03-24T17:00:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T16:00:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-24T17:15:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T16:15:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-24T17:30:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T16:30:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-24T17:45:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T16:45:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-24T18:00:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T17:00:00.000+0000",
```

```
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-24T18:15:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T17:15:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-24T18:30:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T17:30:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-24T18:45:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T17:45:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-24T19:00:00.000+0000",
    "engagementChannelTypeIds" : [ "0eFS70000004CGFMA2" ],
    "resources" : [ "0HnS700000002jAKAQ" ],
    "startTime" : "2023-03-24T18:00:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  } ]
}
```

3. Parse the JSON response, and show the available resources on the page. Your users can select a service resource for the appointment from the page.

4. Retrieve the available time slots for the selected engagement channel type and service resource. See Change Appointment Time.

Your users can select a resource and a time slot for the appointment from the page.

Change Appointment Time

A time slot represents a period in a day when an appointment can be scheduled.

1. Create a page to show the available time slots for the resource associated with the appointment.

2. Make a POST request on the `getAppointmentSlots` on page 137 REST API by passing the required `workTypeGroupId` or `workTypeId` parameter along with the `.territoryId` parameter.

Resource URI

```
https://yourInstance.salesforce.com/services/data/v64.0/scheduling/getAppointmentSlots
```

Sample Request

Using the `WorkTypeId` parameter.

```
{
  "workType": {
    "id": "08qS70000004DQsIAM"
  },
  "territoryIds": [
```

```
    "0HhS700000001DYKAY"
  ],
  "requiredResourceIds": [
    "0HnS700000002jAKAQ"
  ],
  "accountId": "001S7000001pFlJIAU",
  "schedulingPolicyId": "2F0VrRM0000004CUV",
  "engagementChannelTypeIds": [
    "0eFS70000004CGFMA2"
  ]
}
```

Using the `WorkTypeGroupId` parameter.

```
{
  "workTypeGroupId": "0VS2x0000008ZotGAE",
  "accountId": "001S7000001pFlJIAU",
  "schedulingPolicyId": "2F0VrRM0000004CUV",
  "territoryIds": [
    "0HhS700000001DYKAY"
  ],
  "requiredResourceIds": [
    "0HnS700000002jAKAQ"
  ],
  "engagementChannelTypeIds": [
    "0eFS70000004CGFMA2"
  ]
}
```

Sample Response

The API returns the available time slots for a resource.

```
{
  "timeSlots" : [ {
    "endTime" : "2023-03-26T17:55:00.000+0000",
    "remainingAppointments" : 1,
    "startTime" : "2023-03-26T17:30:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-03-30T16:55:00.000+0000",
    "remainingAppointments" : 1,
    "startTime" : "2023-03-30T16:30:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-04-02T16:55:00.000+0000",
    "remainingAppointments" : 1,
    "startTime" : "2023-04-02T16:30:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  }, {
    "endTime" : "2023-04-04T18:25:00.000+0000",
    "remainingAppointments" : 1,
    "startTime" : "2023-04-04T18:00:00.000+0000",
    "territoryId" : "0HhS700000001DYKAY"
  } ]
}
```

3. Parse the JSON response, and show the available time slots on the page.

Your users can select a time slot for the appointment from the page.

Update Service Appointments

Show your users the details of a service appointment—an appointment modified through Salesforce Scheduler—so that users can review and update the appointment.

1. Create a page where the user can review the appointment details and update the appointment.

Here's how a Review Service Appointment page can look.

2. Make a `PATCH` request to the `service-appointments` Connect API to modify the service appointment.

Resource URI

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/service-appointments
```

Sample Request

> 📝 Note: Specify the scheduling policy ID in which the shift is defined. Additionally, pass the parameters including the standard and custom fields that are not available in the input parameters list as extended fields. Edit access on these fields is required to update their values. For example, pass the `status` field as extended fields with its value set to `Canceled` to indicate that the appointment is canceled.

Update Service Resource and engagement channel type

```
{
  "serviceAppointmentId": "08pS7000000019BIAQ",
  "schedulingPolicyId": "2F0VrRM0000004CUV",
  "serviceAppointment": {
    "schedStartTime": "2023-03-24T18:00:00.000+0000",
    "schedEndTime": "2023-03-24T19:00:00.000+0000",
    "serviceTerritoryId": "0HhS700000001DYKAY",
    "engagementChannelTypeId": "0eFS70000004CGFMA2",
```

```
      "workTypeId": "08qS70000004DQsIAM"
    },
    "assignedResources": [
      {
        "serviceResourceId": "0HnS700000002jAKAQ",
        "isRequiredResource": true,
        "extendedFields": []
      }
    ]
}
```

Update Time Slot

```
{
    "serviceAppointmentId": "08pS7000000019BIAQ",
    "serviceAppointment": {
        "schedStartTime": "2023-03-24T18:00:00.000+0000",
        "schedEndTime": "2023-03-24T19:00:00.000+0000",
    }
}
```

Update Appointment Status

```
{
    "serviceAppointmentId": "08pS7000000019BIAQ",
    "serviceAppointment": {
        "extendedFields": [{
            "name": "status",
            "value": "Canceled"
        }]
    }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rS700000000heIAA"
    ],
    "serviceAppointmentId": "08pS7000000019BIAQ"
  }
}
```

3. Create a page to show confirmation when the service appointment is modified successfully.

Here's how a sample confirmation page can look.

Your service appointment's all set

Finish
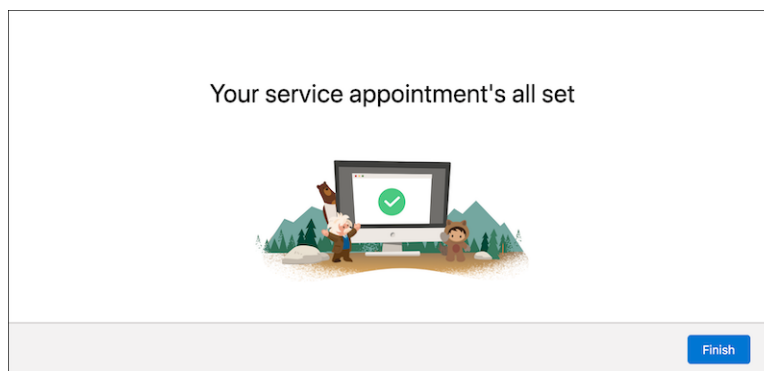
Create a Multi-Resource Appointment

Build a scheduling application using Salesforce Scheduler APIs to book a multi-resource service appointment. Multi-resource scheduling lets users create appointments that include more than one required service resource.

Note: A multi-resource appointment can have a maximum of five required service resources: one primary required service resource plus four required service resources, including asset resources.

Before you can use the scheduler developer resources to build the app, set up Salesforce Scheduler for your organization. For more information, see Set Up Salesforce Scheduler.

These steps provide a high-level overview of how you can build a multi-resource scheduling app, which is explained in detail in the following sections.
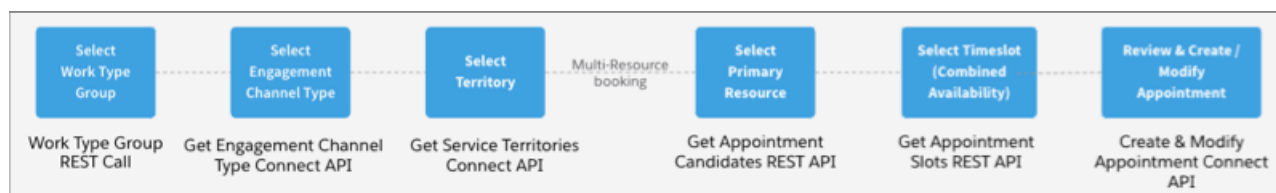
1. Considerations for Multi-Resource Scheduling

   In multi-resource scheduling, a primary service resource anchors the appointment and must be marked required. Primary service resources are the only required resources whose skills are matched to the skill requirements for an appointment. Other required service resources are matched to appointments based on their availability and the primary resource's service territory.

2. Enable Multi-Resource Scheduling

   Enable the Multi-Resource Scheduling setting to let users schedule groups of resources for customer appointments.

3. Update Field Level Security for Multi-Resource Scheduling

   Update the field-level security settings for the Primary Resource field on the Assigned Resource object for user profiles that need to access multi-resource scheduling.

4. Authenticate with a Connected App

   The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

5. Get Work Type Groups

   A work type group represents a general appointment category or topic, such as a home loan or investment. Use the `Query()` method on the WorkTypeGroup object to retrieve a list of work type groups.

6. Get Engagement Channels

   An engagement channel is a medium, such as Phone, Video, and In Person that service resources use to meet customers.

7. Get Service Territories

   A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers. Use the `service-territories` Connect API to fetch a list of service territories based on a work type group or work type.

8. Get Appointment Candidates

   A service resource represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients. Use the `getAppointmentCandidates` REST API to fetch the available service resources based on work type group and service territory.

9. Get Appointment Time Slots

   A time slot represents a period in a day when an appointment can be scheduled. Use the `getAppointmentSlots` REST API to fetch the available time slots for a resource.

10. Create Service Appointments

    A service appointment represents an appointment booked through Salesforce Scheduler. Make a POST request on the `service-appointments` Connect API to create the appointment.

Considerations for Multi-Resource Scheduling

In multi-resource scheduling, a primary service resource anchors the appointment and must be marked required. Primary service resources are the only required resources whose skills are matched to the skill requirements for an appointment. Other required service resources are matched to appointments based on their availability and the primary resource's service territory.

Here's how matching is done for different types of service resources when multi-resource scheduling is enabled.

Matches On	Primary Service Resource	Required Service Resource
Skill Requirements	Yes	No
Service Territory	Yes	Yes
Availability in Time Slots	Yes	Yes

Enable Multi-Resource Scheduling

Enable the Multi-Resource Scheduling setting to let users schedule groups of resources for customer appointments.

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 for the Primary Resource field on the Assigned Resource object for user profiles that need to access multi-resource scheduling.

1. From Setup, open **Object Manager**.

2. Click **Assigned Resource** to open it.

3. Click **Fields & Relationships**, and then select **Primary Resource**.

4. Click **Set Field-Level Security**.

5. Select the **Visible** checkbox for all profiles that need access to multi-resource scheduling in Salesforce Scheduler, including the System Administrator.

6. Save your changes.

Authenticate with a Connected App

The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

📝 Note: To build a custom appointment scheduling application using Salesforce Scheduler APIs for prospects or unauthenticated users, you must build it using a logged-in user. For example, an integration user or an administrator.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

When you have this permission, you can connect to Salesforce and authenticate. Then make a request to REST or Connect API and check the response. For more information, see Connect REST API Quick Start.

Get Work Type Groups

A work type group represents a general appointment category or topic, such as a home loan or investment. Use the `Query()` method on the WorkTypeGroup object to retrieve a list of work type groups.

1. Create a page in your app where you can show the work type groups from your org.

2. Use the `Query()` method to retrieve work type groups. For more information, see Execute a SOQL Query.

   Sample Request

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+Id,+Name+From+WorkTypeGroup
   +Where+isActive+=+true+ORDER+BY+NAME+DESC
   ```

   You can use the `toLabel` method to translate the SOQL query results in the language of the user. For more information, see Translate SOQL Query Results on page 129.

   Sample Response

   The method returns the available work type groups from your org.

   ```
   {
     "totalSize" : 3,
     "done" : true,
     "records" : [ {
       "attributes" : {
         "type" : "WorkTypeGroup",
   ```

```
          "url" : "/services/data/v59.0/sobjects/WorkTypeGroup/0VSS700000000sLOAQ"
      },
      "Id" : "0VSS700000000sLOAQ",
      "Name" : "Wealth Management"
   }, {
      "attributes" : {
        "type" : "WorkTypeGroup",
        "url" : "/services/data/v59.0/sobjects/WorkTypeGroup/0VSS700000000sQOAQ"
      },
      "Id" : "0VSS700000000sQOAQ",
      "Name" : "Loans"
   }, {
      "attributes" : {
        "type" : "WorkTypeGroup",
        "url" : "/services/data/v59.0/sobjects/WorkTypeGroup/0VSS700000000sVOAQ"
      },
      "Id" : "0VSS700000000sVOAQ",
      "Name" : "Banking"
   } ]
}
```

3. Parse the JSON response, and display the work type groups on a page in your app so that users can select a work type group during appointment scheduling. Here's how that page can look.

On the next page in your app, you can provide users an option to search for service territories.

Get Engagement Channels

An engagement channel is a medium, such as Phone, Video, and In Person that service resources use to meet customers.

Before using engagement channels for scheduling appointments:

- Enable engagement channels in the Salesforce Scheduler Settings of your instance. See Enable the Scheduling Appointments Using Engagement Channels Setting.

- Set up engagement channels, including setting the required access and creating engagement channels. See Engagement Channels.

- Create the Shift Engagement Channel and Engagement Channel Work Type records for the applicable shifts.

- Define Shift Rules in the scheduling policy. See Define Shift Rules in Scheduling Policy.

1. Create a page to show the engagement channel types. Salesforce Scheduler shows service resources and resource time slots based on the channel that a user selects when creating an appointment.

2. Make a `GET` request on the `engagement-channel-types` Connect API.

   Sample Request

   Filter the engagement channel types by the `workTypeGroupId` selected in the previous step.

   ```
   https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling
   /engagement-channel-types?workTypeGroupIds=0VSS700000000sVOAQ
   ```

   Note: You can filter the engagement channel type results by `workTypeGroupIds` or `workTypeIds`.

   Sample Response

   The request returns the engagement channels for the `workTypeGroupId` specified in the request.

   ```
   {
     "result": {
       "engagementChannelTypes": [
         {
           "contactPointType": "InPerson",
           "id": "0eFS70000004CG5MAM",
           "name": "EngagementChannel1",
           "workTypeGroupIds": [
             "0VSS700000000sVOAQ"
           ],
           "workTypeIds": []
         },
         {
           "contactPointType": "Video",
           "id": "0eFS70000004CGFMA2",
           "name": "EngagementChannel3",
           "workTypeGroupIds": [
             "0VSS700000000sVOAQ"
           ],
           "workTypeIds": []
         }
       ]
     }
   }
   ```

3. Parse the JSON response, and show the engagement channel types on the page that you created.

Your users can select an engagement channel type for the appointment from the page.

Get Service Territories

A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers. Use the `service-territories` Connect API to fetch a list of service territories based on a work type group or work type.

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1. Create a page where you can provide users an option to search for service territories.

   Here's how a Select Service Territory page can look.

2. Make a GET request on the `service-territories` on page 160 Connect API by passing the user-entered search values and the selected work type group ID as the input parameters in the query string. You can also use a combination of the radius, latitude, longitude, sortBy, and sortOrder parameters to filter and sort the service territories.

   Resource URI

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-territories
   ```

   Sample Request

   This sample GET request specifies the query string on the service territories Connect API.

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-territories?workTypeGroupId=0VSS700000000sVOAQ
   &latitude=44.357422&longitude=-73.193952&radius=5&radiusUnit=mi&sortBy=Distance&sortOrder=asc
   ```

   Sample Response

   The API returns the available service territories based on the passed work type group ID and search criteria.

   ```
   {
     "result": {
       "serviceTerritories": [
         {
           "city": "Charlotte",
           "country": "United States",
           "id": "0HhS700000001DYKAY",
           "latitude": 44.357422,
           "longitude": -73.193952,
           "name": "Spear Street Branch",
           "operatingHoursId": "0OHS700000001HlOAI",
           "postalCode": "05445",
           "state": "VT",
           "street": "121 Spear Street"
         }
       ]
     }
   }
   ```

3. Parse the JSON response, and show the available service territories on the Select Service Territory page so that the user can select a service territory.

Here's a Select Service Territory page showing the available service territories.

Here's how the service territory details are displayed when the user selects a service territory.

On the next page in your app, you can show the available service resources so that the user can select a primary resource for the appointment.

Get Appointment Candidates

A service resource represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients. Use the `getAppointmentCandidates` REST API to fetch the available service resources based on work type group and service territory.

1. Create a page in your app where you can show the available service resources based on the work type group and service territory.

2. Make a POST request on the `getAppointmentCandidates on page 133` REST API by passing the required `workTypeGroupId` and `territoryIds` parameters.

   Resource URI

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/scheduling/getAppointmentCandidates
   ```

For an Existing User (Account)

To consider an existing user's preferred visiting hours, pass `accountId` in the input request body. The preference is enforced when the Include Only Required Service Resources and Ignore Excluded Service Resources policy rules are enabled. See Scheduling Policy Rules in Salesforce Scheduler.

Sample Request

```
{
   "startTime" : "2023-11-01T09:00:00.000+0000",
   "endTime" : "2023-11-25T19:00:00.000+0000",
   "accountId" : "001S7000001pFlJIAU",
   "workTypeGroupId" : "0VSS700000000sVOAQ",
   "territoryIds" : ["0HhS700000001DYKAY"],
   "engagementChannelTypeIds": [
    "0eFS70000004CG5MAM"
   ]
}
```

Sample Response

The API returns the available time slots and service resources.

```
{
  "candidates": [
    {
      "endTime": "2023-11-24T18:00:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T17:00:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T18:15:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T17:15:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T18:30:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T17:30:00.000+0000",
```

```
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T18:45:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T17:45:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T19:00:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T18:00:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T19:15:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T18:15:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T19:30:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T18:30:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    }
  ]
}
```

For a Guest User (Lead)

Sample Request

```
{
    "startTime" : "2023-11-01T09:00:00.000+0000",
```

```
    "endTime" : "2023-11-25T19:00:00.000+0000",
    "workTypeGroupId" : "0VSS700000000sVOAQ",
    "territoryIds" : ["0HhS700000001DYKAY"],
    "engagementChannelTypeIds": [
     "0eFS70000004CG5MAM"
   ]
}
```

Sample Response

The API returns the available time slots and service resources.

```
{
  "candidates": [
    {
      "endTime": "2023-11-24T18:00:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T17:00:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T18:15:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T17:15:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T18:30:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
      "startTime": "2023-11-24T17:30:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-11-24T18:45:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "resources": [
        "0HnS700000002jAKAQ"
      ],
```

```
          "startTime": "2023-11-24T17:45:00.000+0000",
          "territoryId": "0HhS700000001DYKAY"
        },
        {
          "endTime": "2023-11-24T19:00:00.000+0000",
          "engagementChannelTypeIds": [
            "0eFS70000004CG5MAM"
          ],
          "resources": [
            "0HnS700000002jAKAQ"
          ],
          "startTime": "2023-11-24T18:00:00.000+0000",
          "territoryId": "0HhS700000001DYKAY"
        },
        {
          "endTime": "2023-11-24T19:15:00.000+0000",
          "engagementChannelTypeIds": [
            "0eFS70000004CG5MAM"
          ],
          "resources": [
            "0HnS700000002jAKAQ"
          ],
          "startTime": "2023-11-24T18:15:00.000+0000",
          "territoryId": "0HhS700000001DYKAY"
        },
        {
          "endTime": "2023-11-24T19:30:00.000+0000",
          "engagementChannelTypeIds": [
            "0eFS70000004CG5MAM"
          ],
          "resources": [
            "0HnS700000002jAKAQ"
          ],
          "startTime": "2023-11-24T18:30:00.000+0000",
          "territoryId": "0HhS700000001DYKAY"
        }
      ]
    }
```

3. Parse the JSON response, and show the available service resources on the page so that the user can select a primary service resource.

Here's how a Select Service Resource page can look.

Here's how a page can look when the user selects a primary service resource.

On the next page in your app, show the selected primary resource. You can also show the other service resources, including assets, so that users can add them as required resources. Then, show the consolidated time slots for all the selected resources.

Get Appointment Time Slots

A time slot represents a period in a day when an appointment can be scheduled. Use the `getAppointmentSlots` REST API to fetch the available time slots for a resource.

1. Create a page in your app to show the selected primary resource, other required resources, including assets, and the consolidated time slots for the primary service resource and required resources that users select.

   Here's how a page can look.

2. When the user selects one or more required resources, refresh the available time slots by making a POST request to the getAppointmentSlots on page 137 REST API and passing the selected required resources along with the `workTypeGroupId` and `territoryId` parameters.

   Resource URI

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/scheduling/getAppointmentSlots
   ```

   Sample Request

   ```
   {
       "startTime" : "2023-11-30T09:00:00.000+0000",
       "endTime" : "2023-12-01T23:30:00.000+0000",
       "accountId" : "001S7000001pFlJIAU",
       "workTypeGroupId" : "0VSS700000000sVOAQ",
       "territoryIds" : ["0HhS700000001DYKAY"],
       "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
       ],
       "primaryResourceId" : "0HnS700000002jAKAQ",
       "requiredResourceIds" : ["0HnS700000002jKKAQ"]
   }
   ```

   Sample Response

   The API returns the time slots where the selected primary resource and required resources are available for the multi-resource appointment.

   ```
   {
     "timeSlots": [
   ```

```
  {
    "endTime": "2023-11-30T18:00:00.000+0000",
    "engagementChannelTypeIds": [
      "0eFS70000004CG5MAM"
    ],
    "remainingAppointments": 1,
    "startTime": "2023-11-30T17:00:00.000+0000",
    "territoryId": "0HhS700000001DYKAY"
  },
  {
    "endTime": "2023-11-30T19:00:00.000+0000",
    "engagementChannelTypeIds": [
      "0eFS70000004CG5MAM"
    ],
    "remainingAppointments": 1,
    "startTime": "2023-11-30T18:00:00.000+0000",
    "territoryId": "0HhS700000001DYKAY"
  },
  {
    "endTime": "2023-11-30T20:00:00.000+0000",
    "engagementChannelTypeIds": [
      "0eFS70000004CG5MAM"
    ],
    "remainingAppointments": 1,
    "startTime": "2023-11-30T19:00:00.000+0000",
    "territoryId": "0HhS700000001DYKAY"
  },
  {
    "endTime": "2023-11-30T21:00:00.000+0000",
    "engagementChannelTypeIds": [
      "0eFS70000004CG5MAM"
    ],
    "remainingAppointments": 1,
    "startTime": "2023-11-30T20:00:00.000+0000",
    "territoryId": "0HhS700000001DYKAY"
  },
  {
    "endTime": "2023-11-30T22:00:00.000+0000",
    "engagementChannelTypeIds": [
      "0eFS70000004CG5MAM"
    ],
    "remainingAppointments": 1,
    "startTime": "2023-11-30T21:00:00.000+0000",
    "territoryId": "0HhS700000001DYKAY"
  },
  {
    "endTime": "2023-11-30T23:00:00.000+0000",
    "engagementChannelTypeIds": [
      "0eFS70000004CG5MAM"
    ],
    "remainingAppointments": 1,
    "startTime": "2023-11-30T22:00:00.000+0000",
    "territoryId": "0HhS700000001DYKAY"
  },
```

```
    {
      "endTime": "2023-12-01T00:00:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "remainingAppointments": 1,
      "startTime": "2023-11-30T23:00:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-12-01T01:00:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "remainingAppointments": 1,
      "startTime": "2023-12-01T00:00:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    },
    {
      "endTime": "2023-12-01T02:00:00.000+0000",
      "engagementChannelTypeIds": [
        "0eFS70000004CG5MAM"
      ],
      "remainingAppointments": 1,
      "startTime": "2023-12-01T01:00:00.000+0000",
      "territoryId": "0HhS700000001DYKAY"
    }
  ]
}
```

3. Parse the JSON response, and show the available time slots for the selected resources.

Here's how a Select Service Appointment Time page can look.

> 🔲 **Note:** A multi-resource appointment can have a maximum of five required service resources: one primary required service
> resource plus four required service resources, including asset resources.

On the next page in your app, you can show the appointment details for the user to review and create the appointment.

Create Service Appointments

A service appointment represents an appointment booked through Salesforce Scheduler. Make a POST request on the
`service-appointments` Connect API to create the appointment.

1. Create a page where the user can review the appointment details and create the appointment.

Here's how a Review Service Appointment page can look.

2. Link the Next button to a POST request on the `service-appointments on page 153` Connect API to create the service
appointment.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-appointments
```

For an Existing User (Account)

Sample Request

Pass the account ID as `parentRecordId` in the input request body.

Set `status` to `Scheduled` to indicate that the appointment is scheduled.

```
{
    "serviceAppointment": {
        "serviceTerritoryId": "0HhS700000001DYKAY",
        "parentRecordId" : "001S7000001pFlJIAU",
        "schedStartTime" : "2023-11-30T17:00:00.000+0000",
        "schedEndTime": "2023-11-30T18:00:00.000+0000",
```

```
        "street": "121 Spear Street",
        "city": "Charlotte",
        "state": "VT",
        "postalCode": "05445",
        "country": "United States",
        "engagementChannelTypeId" : "0eFS70000004CG5MAM",
        "extendedFields" : [{
          "name": "status",
          "value": "Scheduled"
        }]
      },
      "assignedResources": [
        {
          "serviceResourceId": "0HnS700000002jAKAQ",
          "isRequiredResource": true,
          "isPrimaryResource": true,
          "extendedFields" : []
        }, {
          "serviceResourceId": "0HnS700000002jKKAQ",
          "isRequiredResource": true,
          "isPrimaryResource": false,
          "extendedFields" : []
        }
      ]
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rS700000000ogIAA",
      "03rS700000000ohIAA"
    ],
    "serviceAppointmentId": "08pS700000001GIIAY"
  }
}
```

For a Guest User (Lead)

Sample Request

Pass the required lead details in the input request body.

Set status to Scheduled to indicate that the appointment is scheduled.

```
{
  "serviceAppointment": {
    "serviceTerritoryId": "0HhS700000001DYKAY",
    "schedStartTime" : "2023-11-30T17:00:00.000+0000",
    "schedEndTime": "2023-11-30T18:00:00.000+0000",
    "street": "121 Spear Street",
    "city": "Charlotte",
    "state": "VT",
    "postalCode": "05445",
```

```
      "country": "United States",
      "engagementChannelTypeId" : "0eFS70000004CG5MAM",
      "extendedFields" : [{
        "name": "status",
        "value": "Scheduled"
      }]
    },
    "assignedResources": [
      {
        "serviceResourceId": "0HnS700000002jAKAQ",
        "isRequiredResource": true,
        "isPrimaryResource": true,
        "extendedFields" : []
      }, {
        "serviceResourceId": "0HnS700000002jKKAQ",
        "isRequiredResource": true,
        "isPrimaryResource": false,
        "extendedFields" : []
      }
    ] ,
     "lead": {
       "firstName": "Philip",
       "lastName": "Taylor",
       "phone": "012-345-6789",
       "email": "pmtaylor@company.com",
       "company": "Philip&Taylor Company",
       "extendedFields" : []
    }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rS700000000oqIAA",
      "03rS700000000orIAA"
    ],
    "parentRecordId": "00QS7000000sfcxMAA",
    "serviceAppointmentId": "08pS700000001GSIAY"
  }
}
```

Create a page to show confirmation when the service appointment is created successfully.

Here's how a sample confirmation page can look.
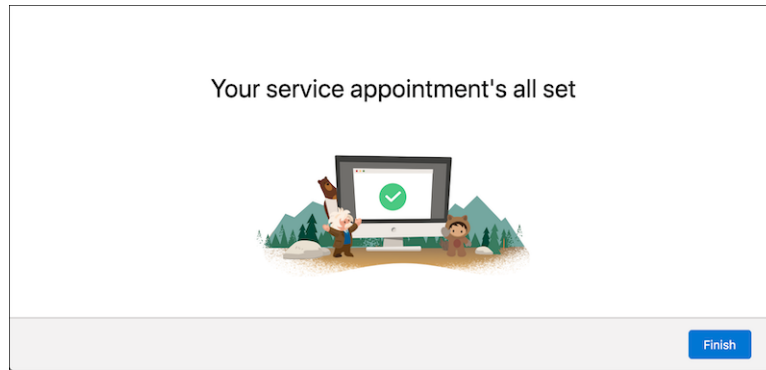
Modify a Multi-Resource Service Appointment

Use Salesforce Scheduler APIs to modify a multi-resource service appointment. This use case explains how you can change the secondary service resources or the time slot of an existing multi-resource appointment.

This topic explains how you can modify a multi-resource appointment by using the custom application that you built for creating appointments.

A multi-resource service appointment includes more than one service resource, with one service resource set as the primary resource. Modifying the resources of a multi-resource service appointment presents an additional challenge. The time slot of such an appointment must match the availability of the resources from a particular work type group within a service territory.

This use case is applicable when a secondary resource of a multi-resource appointment marks themselves absent. In that scenario, the appointment must be updated with an available resource. The absent resources, however, must ensure to mark themselves as absent in Salesforce Scheduler. Otherwise, the API request to retrieve the list of service resources continues to include the resources that are currently unavailable or absent.

The steps in this section provide a high-level overview of how you can let users choose different service resources or an alternate time slot for an existing multi-resource service appointment.

The use case provides the steps to modify the secondary resources. You can't modify the primary resource by using the steps provided in this section. To modify the primary resource of a multi-resource appointment, you must delete the original appointment first. Then, create a new appointment with an available service resource set as the primary resource.

> 📝 Note: Multi-resource appointments do not work when the concurrent scheduling feature is enabled. Make sure the concurrent scheduling feature is disabled in Salesforce Scheduler.
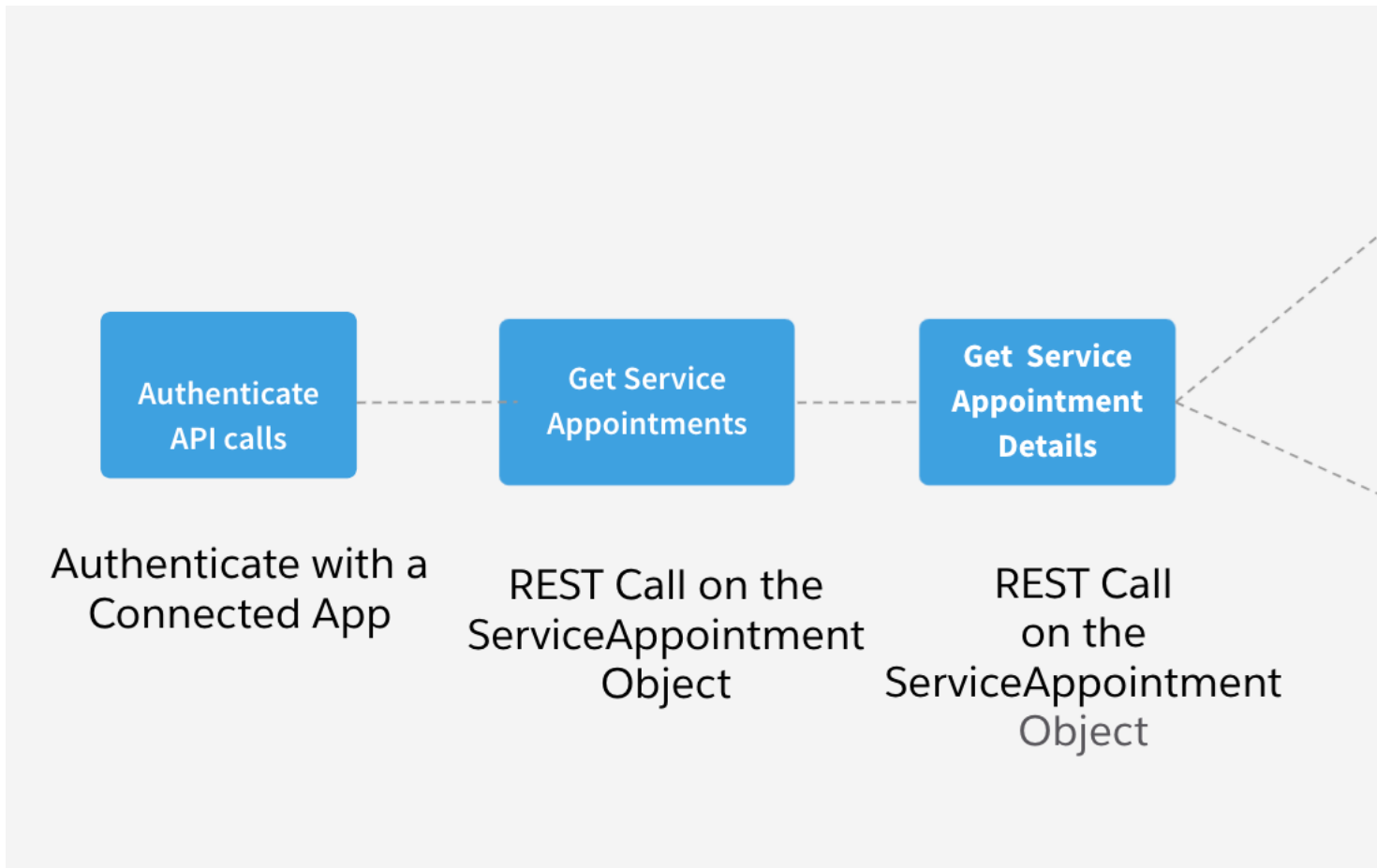
Authenticate with Salesforce Scheduler APIs

The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

Get Service Appointments

A service appointment represents an appointment booked through Salesforce Scheduler. Use the `query` request on the `ServiceAppointment` object to retrieve a list of service appointments.

Get Service Appointment Details

A service appointment represents an appointment booked through Salesforce Scheduler. Use the GET method on the Service Appointment object to fetch the details of a service appointment record.

Change Appointment Details

This section explains how you can show either the service resources or time slots page based on what the user chooses to change for the appointment. Depending on the requirement, you can choose one of the two options.

Update Service Appointments

A service appointment represents an appointment booked through Salesforce Scheduler. Make a PATCH request on the `service-appointments` Connect API to update a multi-resource service appointment.

Authenticate with Salesforce Scheduler APIs

The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

> 📝 **Note:** It's not possible to modify an existing appointment via a guest user profile. You can use an integration user who has permissions to read and update only the required objects.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

Get Service Appointments

A service appointment represents an appointment booked through Salesforce Scheduler. Use the `query` request on the `ServiceAppointment` object to retrieve a list of service appointments.

Create a page where you can show the service appointments for a logged in user.

Sample Request

This sample REST API call uses the `query` resource to retrieve service appointments.

```
https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+AppointmentNumber,
+Id,+Status,+SchedStartTime,+SchedEndTime,+ServiceTerritoryId,+WorkTypeId+From+ServiceAppointment+WHERE+AccountId+=+'001B00001McIhMIAV'
```

For more information, see Execute a SOQL Query.

Sample Response

The method returns the available service appointments.

```
{
  "totalSize" : 5,
  "done" : true,
  "records" : [  {
    "attributes" : {
      "type" : "ServiceAppointment",
      "url" : "/services/data/v53.0/sobjects/ServiceAppointment/08pB0000000aKe4IAE"
    },
    "AppointmentNumber" : "SA-41906",
    "Id" : "08pB0000000aKe4IAE",
    "Status" : "Scheduled",
    "SchedStartTime" : "2021-10-25T15:00:00.000+0000",
    "SchedEndTime" : "2021-10-25T16:00:00.000+0000",
    "ServiceTerritoryId" : "0HhB0000000TakhKAC",
    "WorkTypeId" : null
  },  {
    "attributes" : {
      "type" : "ServiceAppointment",
      "url" : "/services/data/v53.0/sobjects/ServiceAppointment/08pB0000000aKesIAE"
    },
    "AppointmentNumber" : "SA-41911",
    "Id" : "08pB0000000aKesIAE",
    "Status" : "Scheduled",
    "SchedStartTime" : "2021-10-25T15:00:00.000+0000",
    "SchedEndTime" : "2021-10-25T16:00:00.000+0000",
    "ServiceTerritoryId" : "0HhB0000000TaHOKA0",
```

```
      "WorkTypeId" : null
  }, {
    "attributes" : {
      "type" : "ServiceAppointment",
      "url" : "/services/data/v53.0/sobjects/ServiceAppointment/08pB0000000aKexIAE"
    },
    "AppointmentNumber" : "SA-41912",
    "Id" : "08pB0000000aKexIAE",
    "Status" : "Scheduled",
    "SchedStartTime" : "2021-10-22T16:30:00.000+0000",
    "SchedEndTime" : "2021-10-22T18:00:00.000+0000",
    "ServiceTerritoryId" : "0HhB0000000TakhKAC",
    "WorkTypeId" : null
  }, {
    "attributes" : {
      "type" : "ServiceAppointment",
      "url" : "/services/data/v53.0/sobjects/ServiceAppointment/08pB0000000aKf2IAE"
    },
    "AppointmentNumber" : "SA-41913",
    "Id" : "08pB0000000aKf2IAE",
    "Status" : "Scheduled",
    "SchedStartTime" : "2021-10-25T17:30:00.000+0000",
    "SchedEndTime" : "2021-10-25T18:30:00.000+0000",
    "ServiceTerritoryId" : "0HhB0000000TaHOKA0",
    "WorkTypeId" : "08qB0000000UF63IAG"
  }, {
    "attributes" : {
      "type" : "ServiceAppointment",
      "url" : "/services/data/v53.0/sobjects/ServiceAppointment/08pB0000000aKf7IAE"
    },
    "AppointmentNumber" : "SA-41914",
    "Id" : "08pB0000000aKf7IAE",
    "Status" : "Scheduled",
    "SchedStartTime" : "2021-10-22T15:00:00.000+0000",
    "SchedEndTime" : "2021-10-22T15:45:00.000+0000",
    "ServiceTerritoryId" : "0HhB0000000TakhKAC",
    "WorkTypeId" : null
  } ]
}
```

Parse the JSON response, and display the service appointments on a page in your app so that users can select an appointment record to modify.

Here's how that page can look.

On the next page, you can provide users an option to select a service appointment to modify.

Get Service Appointment Details

A service appointment represents an appointment booked through Salesforce Scheduler. Use the GET method on the Service Appointment object to fetch the details of a service appointment record.

Create a page where you can show the details of a multi-resource service appointment record that the user selects.

Sample Request

Here's a sample GET request to retrieve the service appointment details.

```
https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+Id,SchedEndTime,SchedStartTime,ServiceTerritoryId,WorkTypeId+FROM+ServiceAppointment+WHERE+id='08pB0000000aKf7IAE'
```

Sample Response

The method returns the service appointment details.

```
{
  "totalSize" : 1,
  "done" : true,
  "records" : [ {
    "attributes" : {
      "type" : "ServiceAppointment",
      "url" : "/services/data/v53.0/sobjects/ServiceAppointment/08pB0000000aKf7IAE"
    },
    "Id" : "08pB0000000aKf7IAE",
    "SchedEndTime" : "2021-10-22T15:45:00.000+0000",
    "SchedStartTime" : "2021-10-22T15:00:00.000+0000",
    "ServiceTerritoryId" : "0HhB0000000TakhKAC",
    "WorkTypeId" : "08qB0000000Tf1FIAS"
  } ]
}
```

Parse the JSON response, and display the service appointments details on a page so that the user can change the multi-resource service appointment as needed.

On the next page, you can show the user an option to select a different service resource of an existing multi-resource appointment.

Change Appointment Details

This section explains how you can show either the service resources or time slots page based on what the user chooses to change for the appointment. Depending on the requirement, you can choose one of the two options.

Change Appointment Candidates

If the assigned resources mark themselves absent, use the `query` request on the `ServiceTerritoryMember` object to show the list of alternative resources.

Change Appointment Time Slots

A time slot represents a period in a day when an appointment takes place. a multi-resource service appointment can be modified. To show the alternative tome slots for the assigned resources, use the `getAppointmentSlots` REST API.

Change Appointment Candidates

If the assigned resources mark themselves absent, use the `query` request on the `ServiceTerritoryMember` object to show the list of alternative resources.

Create a page in your app where you can show the available service resources based on the service territory.

This sample REST API call uses the `query` request to retrieve the alternate resources.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+EffectiveStartDate,EffectiveEndDate,ServiceResourceId,ServiceTerritoryId+FROM+ServiceTerritoryMember
```

Sample Response

The API returns the available time slots and service resources.

```
{
    "totalSize" : 55,
    "done" : true,
    "records" : [
  {
    "attributes" : {
      "type" : "ServiceTerritoryMember",
      "url" : "/services/data/v53.0/sobjects/ServiceTerritoryMember/0HuB0000000TalUKAS"

    },
    "EffectiveStartDate" : "2021-10-22T15:00:00.000+0000",
    "EffectiveEndDate" : null,
    "ServiceResourceId" : "0HnB0000000TbgFKAS",
    "ServiceTerritoryId" : "0HhB0000000TakhKACC"
    }, {
    "attributes" : {
      "type" : "ServiceTerritoryMember",
      "url" : "/services/data/v53.0/sobjects/ServiceTerritoryMember/0HuB0000000TaleKAC"

    },
    "EffectiveStartDate" : "2021-10-22T15:00:00.000+0000",
    "EffectiveEndDate" : null,
    "ServiceResourceId" : "0HnB0000000TbgDKAS",
    "ServiceTerritoryId" : "0HhB0000000TakhKAC"
    }, {
    "attributes" : {
      "type" : "ServiceTerritoryMember",
      "url" : "/services/data/v53.0/sobjects/ServiceTerritoryMember/0HuB0000000TaloKAC"

    },
    "EffectiveStartDate" : "2021-10-22T15:00:00.000+0000",
    "EffectiveEndDate" : null,
    "ServiceResourceId" : "0HnB0000000TbgjKAC",
    "ServiceTerritoryId" : "0HhB0000000TakhKAC"
    }
  ]
}
```

Parse the JSON response, and show the available service resources on the page so that the user can select a primary service resource.

Here's how a **Select Service Resource** page can look.

Here's how a page can look when the user selects a primary service resource.

On the next page in your app, show the selected primary resource. You can also show the other service resources, including assets, so that users can add them as required resources. Then, show the consolidated time slots for all the selected resources.

Change Appointment Time Slots

A time slot represents a period in a day when an appointment takes place. a multi-resource service appointment can be modified. To show the alternative tome slots for the assigned resources, use the `getAppointmentSlots` REST API.

Create a page in your app to show the selected primary resource, other required resources, including assets, and the consolidated time slots for the primary service resource and required resources that users select. Here's how a page can look.

When the user selects one or more required resources, refresh the available time slots by making a POST request to the getAppointmentSlots on page 137 REST API and passing the selected required resources along with the `workTypeGroupId` and `territoryId` parameters.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/scheduling/getAppointmentSlots
```

Sample Request

```
{
    "startTime" : "2021-10-04T17:00:00.000+0000",
    "endTime" : "2021-10-04T18:00:00.000+0000",
    "workTypeId" : {
        "08qB0000000Tf1FIAS"
    },
    "accountId" : "001B000001McLhMIAV",
    "territoryIds" : ["0HhB0000000TaHOKA0"],
    "primaryResourceId" : "0HnB0000000TavDKAS",
    "requiredResourceIds" : ["0HnB0000000DynTKAS", "0HnB0000000Tav3KAC"]
}
```

Sample Response

The API returns the time slots where the selected primary resource and required resources are available for the multi-resource service appointment.

```
{
    "timeSlots" : [ {
        "endTime" : "2021-10-04T18:00:00.000+0000",
        "startTime" : "2021-10-04T17:00:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
```
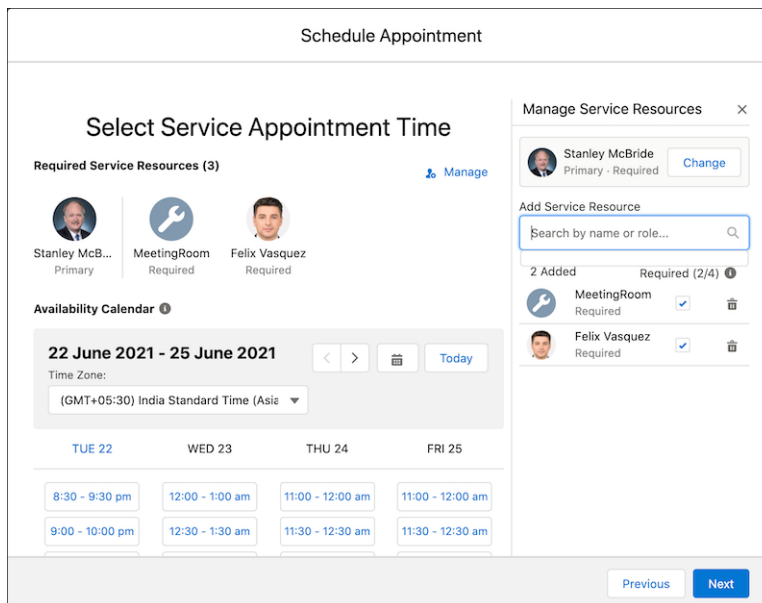
```
    }, {
        "endTime" : "2021-10-04T19:00:00.000+0000",
        "startTime" : "2021-10-04T17:00:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
    }, {
        "endTime" : "2021-10-04T20:00:00.000+0000",
        "startTime" : "2021-10-04T17:30:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
    }, {
        "endTime" : "2021-10-04T18:00:00.000+0000",
        "startTime" : "2021-10-04T17:00:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
    }, {
        "endTime" : "2021-10-04T18:30:00.000+0000",
        "startTime" : "2021-10-04T17:30:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
    }, {
        "endTime" : "2021-10-04T18:00:00.000+0000",
        "startTime" : "2021-10-04T17:00:00.000+0000",
        "territoryId" : "0HhB0000000TaHOKA0"
    } ]
}
```

Parse the JSON response, and show the available time slots for the selected resources. Here's how a Select Service Appointment Time page can look.

Note: A multi-resource appointment can have a maximum of five required service resources: one primary required service resource plus four required service resources, including asset resources.

On the next page in your app, you can show the appointment details for the user to review and create the appointment.

Update Service Appointments

A service appointment represents an appointment booked through Salesforce Scheduler. Make a PATCH request on the `service-appointments` Connect API to update a multi-resource service appointment.

Create a page where the user can review the appointment details and create the appointment. Here's how a Review Service Appointment page can look.

Link the Next button to a PATCH request on the `service-appointments` on page 153 Connect API to update the service appointment.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-appointments
```

Sample Request

Update Service Resource

```
{
  "serviceAppointmentId": "08pB0000000aJKhIAM",
  "serviceAppointment": {
    "schedStartTime": "2021-10-04T17:00:00.000+0000",
    "schedEndTime": "2021-10-04T18:00:00.000+0000",
    "serviceTerritoryId": "0HhB0000000TaHOKA0"
  },
  "assignedResources": [
    {
      "serviceResourceId": "0HnB0000000TavDKAS",
      "isRequiredResource": true,
      "isPrimaryResource": true
    },
    {
      "serviceResourceId": "0HnB0000000DynTKAS",
      "isRequiredResource": true,
      "isPrimaryResource": false
    }
```

```
        ]
}
```

Create a page to show confirmation when the service appointment is modified successfully.

Here's how a sample confirmation page can look.
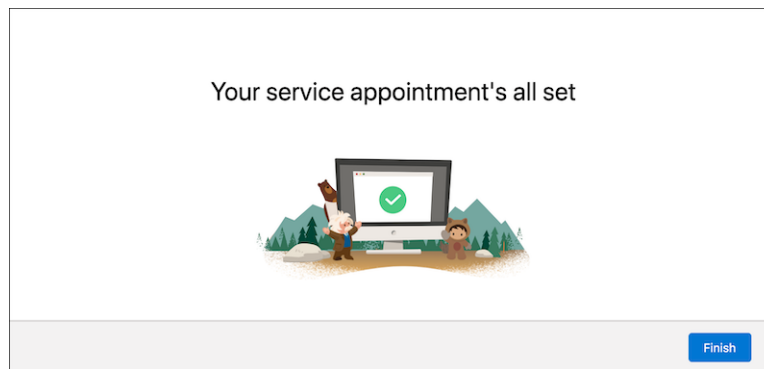
Create a Concurrent Appointment

This use case explains how to build a concurrent appointment scheduling application using Salesforce Scheduler APIs.

Let's think of a situation where you need to schedule multiple appointments within the same time slot. For example, a doctor's office can let several patients book a Monday 1:00 PM to 3:00 PM appointment. So what can you do in this "case"?

Salesforce Scheduler can help you in this "case". Let's drill down on what all we need to accomplish this.

Salesforce Scheduler provides you with the concurrent scheduling feature that makes it easy to schedule multiple service appointments in the same time slot. An event is created for each service appointment.

🖉 Note: A concurrent time slot can have a minimum of 2 and a maximum of 1000 appointments.

These steps provide a high-level overview of how you can build a concurrent scheduling app, which is explained in detail in the following sections.
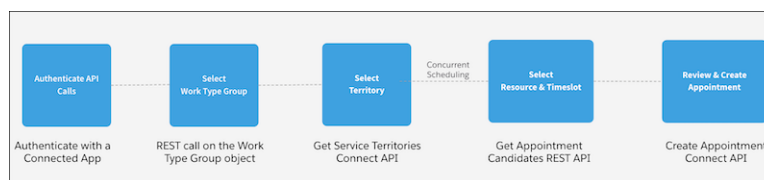
Before you can use the scheduler developer resources to build the concurrent scheduling app, set up Salesforce Scheduler for your organization. For more information, see Set Up Salesforce Scheduler.

Enable and Configure Concurrent Scheduling
You must enable concurrent scheduling to let users schedule multiple service appointments in the same time slot. Also, there are some things to keep in mind when you implement concurrent scheduling.

Assign Concurrent Operating Hours to Service Territory Members

Concurrent time slots are applicable only to service territory members. Assign operating hours to a service territory member using the Operating Hours field on the respective record page.

Authenticate with a Connected App

The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

Get Work Type Groups

After authentication, you need to show the work type groups for the user to select. A work type group represents a general appointment category or topic, such as a home loan or investment.

Get Service Territories

Get a service territory based on the work type group that is selected in the previous step. A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers.

Get Work Types

Get the correct work type record that represents the work type group and service territory that are selected in the previous step.

Get Appointment Candidates

Get a list of service resources based on the work type group or work type, and service territory that are selected in the previous step. A service resource represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients.

Create Service Appointments

The last step in the concurrent scheduling application is to show the service appointment details for the user to review and create the appointment. A service appointment represents an appointment booked through Salesforce Scheduler.

Enable and Configure Concurrent Scheduling

You must enable concurrent scheduling to let users schedule multiple service appointments in the same time slot. Also, there are some things to keep in mind when you implement concurrent scheduling.

For more information, see Enable and Configure Concurrent Scheduling in Salesforce Scheduler Help.

Assign Concurrent Operating Hours to Service Territory Members

Concurrent time slots are applicable only to service territory members. Assign operating hours to a service territory member using the Operating Hours field on the respective record page.

> **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.

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

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

3. Save your changes.

On the first page in your app, you must provide users an option to select a work type group for the appointment.

Authenticate with a Connected App

The first step in an API-based integration is to connect to Salesforce and get an access token using OAuth. OAuth access token authentication is the most secure way to authenticate SOAP and REST API calls.

> **Note:** To build a custom appointment scheduling application using Salesforce Scheduler APIs for prospects or unauthenticated users, you must build it using a logged-in user. For example, an integration user or an administrator.

If you are working in a Salesforce organization that has a Developer Edition, an Enterprise Edition, or above, verify that you have the API Enabled permission. This permission is enabled by default. This permission allows you to access any Salesforce API.

When you have this permission, you can connect to Salesforce and authenticate. Then make a request to REST or Connect API and check the response. For more information, see Connect REST API Quick Start.

Get Work Type Groups

After authentication, you need to show the work type groups for the user to select. A work type group represents a general appointment category or topic, such as a home loan or investment.

Create a page in your app where you can show the work type groups from your org. Use the `Query()` method on the WorkTypeGroup object to retrieve a list of work type groups.

Sample Request

This sample REST API call uses the `Query()` request to retrieve work type groups. For more information, see Execute a SOQL Query.

```
https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+Id,+Name+From+WorkTypeGroup
+Where+isActive+=+true+ORDER+BY+NAME
```

You can use the `toLabel` method to translate the SOQL query results in the language of the user. For more information, see Translate SOQL Query Results on page 129.

Sample Response

The request returns the available work type groups from your org.

```
{
  "totalSize": 6,
  "done": true,
  "records": [
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/vXX.X/sobjects/WorkTypeGroup/0VSB0000000L6XeOAK"
      },
      "Id": "0VSB0000000L6XeOAK",
      "Name": "General Banking Group"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/vXX.X/sobjects/WorkTypeGroup/0VSB0000000L6XyOAK"
      },
      "Id": "0VSB0000000L6XyOAK",
      "Name": "Insurance Management"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/vXX.X/sobjects/WorkTypeGroup/0VSB0000000L71HOAS"
      },
      "Id": "0VSB0000000L71HOAS",
```

```
      "Name": "Investments"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/vXX.X/sobjects/WorkTypeGroup/0VSB0000000L6Y3OAK"
      },
      "Id": "0VSB0000000L6Y3OAK",
      "Name": "Loan Planning"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/vXX.X/sobjects/WorkTypeGroup/0VSB0000000TbhWOAS"
      },
      "Id": "0VSB0000000TbhWOAS",
      "Name": "LSConcurrent Work Type Group"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/vXX.X/sobjects/WorkTypeGroup/0VSB0000000L6Y4OAK"
      },
      "Id": "0VSB0000000L6Y4OAK",
      "Name": "Wealth Planning"
    }
  ]
}
```
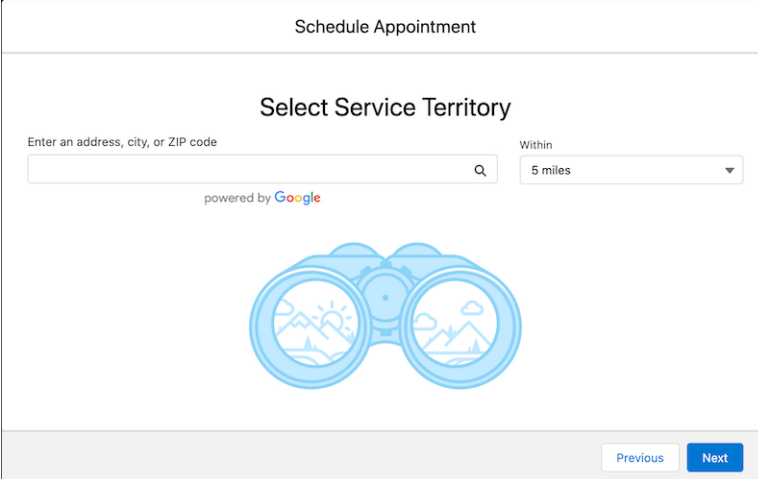
Parse the JSON response, and display the work type groups on a page in your app so that users can select a work type group for the appointment. Here's how that page can look.

On the next page in your app, you can provide users an option to search for service territories.

Get Service Territories

Get a service territory based on the work type group that is selected in the previous step. A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers.

Create a page where you can provide users an option to search for service territories. Here's how a Select Service Territory page can look.

Make a GET request on the `service-territories` on page 160 Connect API by passing the user-entered search values and the selected work type group ID as the input parameters in the query string. You can also use a combination of the radius, latitude, longitude, sortBy, and sortOrder parameters to filter and sort the service territories.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-territories
```

Sample Request

Here's a sample GET request with the query string on the service territories Connect API.

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-territories
?workTypeGroupId=0VSB0000000TbhWOAS
```

Sample Response

The API returns the available service territories based on the passed work type group ID and search criteria.

```
{
  "result" : {
    "serviceTerritories" : [ {
      "city" : "San Francisco",
      "country" : "United States",
      "id" : "0HhB00000001P0PKAU",
      "latitude" : 37.794928,
      "longitude" : -122.394514,
      "name" : "LSConcurrent Service Territory",
      "operatingHoursId" : "0OHB0000000LWkUOAW",
      "postalCode" : "90011",
      "state" : "CA",
      "street" : "2 Market Street"
```

```
        }   ]
    }
}
```

Parse the JSON response, and show the available service territories on the Select Service Territory page so that the user can select a service territory.

Here's a Select Service Territory page showing the available service territories.

Here's how the service territory details are displayed when the user selects a service territory.

After you get a work type group and service territory for the appointment, you must get a work type that is associated with both the work type group and service territory you have selected in the previous steps.

Get Work Types

Get the correct work type record that represents the work type group and service territory that are selected in the previous step.

A work type represents a type of work to be performed in Salesforce Scheduler. A work type is a template representing an appointment topic (work type group) with an appointment location (service territory). It defines key appointment parameters such as appointment duration, preparation and wrap-up buffers, and availability timings.

1. Use the `Query()` request on the WorkTypeGroupMember object to retrieve a work type for the work type group selected in the Get Work Type Groups step.

   Sample Request

   This sample REST API call uses the `Query()` request retrieve work type records that are associated with the selected work type group.

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+Id,Name,
   WorkTypeGroupId,WorkTypeId+FROM+WorkTypeGroupMember+WHERE+WorkTypeGroupId+=+'0VSB0000000TbhWOAS'
   ```

   Sample Response

   The request returns the work type records.

   ```
   {
     "totalSize" : 2,
     "done" : true,
     "records" : [ {
       "attributes" : {
          "type" : "WorkTypeGroupMember",
          "url" : "/services/data/v53.0/sobjects/WorkTypeGroupMember/0WzB0000000TbZcKAK"

       },
       "Id" : "0WzB0000000TbZcKAK",
       "Name" : "00000047",
       "WorkTypeGroupId" : "0VSB0000000TbhWOAS",
       "WorkTypeId" : "08qB00000002ocgIAA"
     }, {
       "attributes" : {
          "type" : "WorkTypeGroupMember",
          "url" : "/services/data/v53.0/sobjects/WorkTypeGroupMember/0WzB0000000Tbm5KAC"

       },
       "Id" : "0WzB0000000Tbm5KAC",
       "Name" : "00000048",
       "WorkTypeGroupId" : "0VSB0000000TbhWOAS",
       "WorkTypeId" : "08qB0000000UF63IAG"
     } ]
   }
   ```

2. Use the `Query()` request on the ServiceTerritoryWorkType object to filter the correct work type for the selected service territory selected in the Get Service Territories step.

   Sample Request

   This sample REST API call uses the `Query()` request to find the correct work type for the selected service territory.

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=SELECT+Id,Name,
   ServiceTerritoryId,WorkTypeId+FROM+ServiceTerritoryWorkType+WHERE+WorkTypeId+=+'08qB00000002ocgIAA'+AND+
   ServiceTerritoryId+=+'0HhB00000001P0PKAU'
   ```

   Sample Response

   The request returns the work type records.

   ```
   {
     "totalSize" : 1,
     "done" : true,
   ```

```
  "records" : [ {
    "attributes" : {
      "type" : "ServiceTerritoryWorkType",
      "url" :
"/services/data/v53.0/sobjects/ServiceTerritoryWorkType/0VEB0000000TbbrOAC"
    },
    "Id" : "0VEB0000000TbbrOAC",
    "Name" : "00000063",
    "ServiceTerritoryId" : "0HhB00000001P0PKAU",
    "WorkTypeId" : "08qB00000002ocgIAA"
  } ]
}
```

On the next page in your app, you can show the service resources and their availability.

Get Appointment Candidates

Get a list of service resources based on the work type group or work type, and service territory that are selected in the previous step. A service resource represents an employee from your organization, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist, who attends appointments with clients.

Create a page in your app where you can show the available service resources based on the work type group or work type, and service territory.

Make a POST request on the getAppointmentCandidates on page 133 REST API by passing the required workTypeGroupId or workTypeId, and territoryIds parameters.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/scheduling/getAppointmentCandidates
```

For an Existing User (Account)

To consider an existing user's preferred visiting hours, pass accountId in the input request body. The preference is enforced when the Include Only Required Service Resources and Ignore Excluded Service Resources policy rules are enabled.

Sample Request

Using workTypeGroupId:

```
{
   "accountId" : "001B000001McLhMIAV",
   "startTime" : "2021-10-29T08:00:00.000+0000",
   "endTime" : "2021-10-29T18:00:00.000+0000",
   "allowConcurrentScheduling" : true,
   "workTypeGroupId" : "0VSB0000000TbhWOAS",
   "territoryIds" : ["0HhB00000001P0PKAU"]
}
```

Using workTypeId:

```
{
   "accountId" : "001B000001McLhMIAV",
   "startTime" : "2021-10-29T08:00:00.000+0000",
   "endTime" : "2021-10-29T18:00:00.000+0000",
```

```
            "allowConcurrentScheduling" : true,
            "workType" : {
                         "id" : "08qB00000002ocgIAA"
            },
            "territoryIds" : ["0HhB00000001P0PKAU"]
}
```

Sample Response

The API returns the available time slots and service resources.

```
{
  "candidates" : [ {
    "endTime" : "2021-10-29T16:00:00.000+0000",
    "resources" : [ "0HnB00000001SJxKAM" ],
    "startTime" : "2021-10-29T15:00:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T16:30:00.000+0000",
    "resources" : [ "0HnB00000001SJxKAM" ],
    "startTime" : "2021-10-29T15:30:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T17:00:00.000+0000",
    "resources" : [ "0HnB00000001SJxKAM" ],
    "startTime" : "2021-10-29T16:00:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T17:30:00.000+0000",
    "resources" : [ "0HnB00000001SJxKAM" ],
    "startTime" : "2021-10-29T16:30:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T18:00:00.000+0000",
    "resources" : [ "0HnB00000001SJxKAM" ],
    "startTime" : "2021-10-29T17:00:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T16:00:00.000+0000",
    "resources" : [ "0HnB00000001SOUKA2" ],
    "startTime" : "2021-10-29T15:00:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T16:30:00.000+0000",
    "resources" : [ "0HnB00000001SOUKA2" ],
    "startTime" : "2021-10-29T15:30:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T17:00:00.000+0000",
    "resources" : [ "0HnB00000001SOUKA2" ],
    "startTime" : "2021-10-29T16:00:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T17:30:00.000+0000",
```

```
       "resources" : [ "0HnB00000001SOUKA2" ],
       "startTime" : "2021-10-29T16:30:00.000+0000",
       "territoryId" : "0HhB00000001P0PKAU"
    }, {
       "endTime" : "2021-10-29T18:00:00.000+0000",
       "resources" : [ "0HnB00000001SOUKA2" ],
       "startTime" : "2021-10-29T17:00:00.000+0000",
       "territoryId" : "0HhB00000001P0PKAU"
    } ]
}
```

For a Guest User (Lead)

Sample Request

Using `workTypeGroupId`:

```
{
   "startTime" : "2021-10-13T08:00:00.000+0000",
   "endTime" : "2021-10-13T18:00:00.000+0000",
   "allowConcurrentScheduling" : true,
   "workTypeGroupId" : "0VSB0000000TbhWOAS",
   "territoryIds" : ["0HhB00000001P0PKAU"],
}
```

Using `workTypeId`:

```
{
   "accountId" : "001B000001McLhMIAV",
   "startTime" : "2021-10-29T08:00:00.000+0000",
   "endTime" : "2021-10-29T18:00:00.000+0000",
   "allowConcurrentScheduling" : true,
   "workType" : {
                  "id" : "08qB00000002ocgIAA"
   },
   "territoryIds" : ["0HhB00000001P0PKAU"]
}
```

Sample Response

The API returns the available time slots and service resources.

```
{
  "candidates" : [ {
    "endTime" : "2021-10-29T16:00:00.000+0000",
    "resources" : [ "0HnB00000001SJxKAM" ],
    "startTime" : "2021-10-29T15:00:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T16:30:00.000+0000",
    "resources" : [ "0HnB00000001SJxKAM" ],
    "startTime" : "2021-10-29T15:30:00.000+0000",
    "territoryId" : "0HhB00000001P0PKAU"
  }, {
    "endTime" : "2021-10-29T17:00:00.000+0000",
```

```
      "resources" : [ "0HnB00000001SJxKAM" ],
      "startTime" : "2021-10-29T16:00:00.000+0000",
      "territoryId" : "0HhB00000001P0PKAU"
    }, {
      "endTime" : "2021-10-29T17:30:00.000+0000",
      "resources" : [ "0HnB00000001SJxKAM" ],
      "startTime" : "2021-10-29T16:30:00.000+0000",
      "territoryId" : "0HhB00000001P0PKAU"
    }, {
      "endTime" : "2021-10-29T18:00:00.000+0000",
      "resources" : [ "0HnB00000001SJxKAM" ],
      "startTime" : "2021-10-29T17:00:00.000+0000",
      "territoryId" : "0HhB00000001P0PKAU"
    }, {
      "endTime" : "2021-10-29T16:00:00.000+0000",
      "resources" : [ "0HnB00000001SOUKA2" ],
      "startTime" : "2021-10-29T15:00:00.000+0000",
      "territoryId" : "0HhB00000001P0PKAU"
    }, {
      "endTime" : "2021-10-29T16:30:00.000+0000",
      "resources" : [ "0HnB00000001SOUKA2" ],
      "startTime" : "2021-10-29T15:30:00.000+0000",
      "territoryId" : "0HhB00000001P0PKAU"
    }, {
      "endTime" : "2021-10-29T17:00:00.000+0000",
      "resources" : [ "0HnB00000001SOUKA2" ],
      "startTime" : "2021-10-29T16:00:00.000+0000",
      "territoryId" : "0HhB00000001P0PKAU"
    }, {
      "endTime" : "2021-10-29T17:30:00.000+0000",
      "resources" : [ "0HnB00000001SOUKA2" ],
      "startTime" : "2021-10-29T16:30:00.000+0000",
      "territoryId" : "0HhB00000001P0PKAU"
    }, {
      "endTime" : "2021-10-29T18:00:00.000+0000",
      "resources" : [ "0HnB00000001SOUKA2" ],
      "startTime" : "2021-10-29T17:00:00.000+0000",
      "territoryId" : "0HhB00000001P0PKAU"
    } ]
}
```

Parse the JSON response, and show the available resources on the page so that the user can select a resource for the appointment.

Here's how a page showing the available service resources can look.

When users select a resource, show the available time slots for the selected resource. Here's how a page showing the available time slots can look.

On the next page in your app, you can show the appointment details for the user to review and create the appointment.

Create Service Appointments

The last step in the concurrent scheduling application is to show the service appointment details for the user to review and create the appointment. A service appointment represents an appointment booked through Salesforce Scheduler.

Create a page where the user can review the appointment details and create the appointment. Here's how a Review Service Appointment page can look.

Link the Next button to a POST request on the `service-appointments` on page 153 Connect API to create the service appointment.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-appointments
```

For an Existing User (Account)

Sample Request

Pass the account ID as `parentRecordId` in the input request body.

Set `status` to `Scheduled` to indicate that the appointment is scheduled.

```
{
    "serviceAppointment": {
        "serviceTerritoryId": "0HhB00000001P0PKAU",
        "parentRecordId" : "001B0000018vs9fIAA",
        "workTypeId" : "08qB00000002ocgIAA",
        "schedStartTime" : "2021-10-29T16:00:00.000+0000",
        "schedEndTime": "2021-10-29T17:00:00.000+0000",
        "additionalInformation" : "Concurrent Booking",
        "appointmentType" : "Training Purpose",
        "extendedFields" : [ {
          "name": "status",
          "value": "Scheduled"
      } ]
    },
    "assignedResources": [
        {
        "serviceResourceId": "0HnB00000001SJxKAM",
        "isRequiredResource" : "true"
        }
    ]
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result" : {
    "assignedResourceIds" : [ "03rB0000000cBZ6IAM" ],
    "serviceAppointmentId" : "08pB0000000aKjMIAU"
  }
}
```

For a Guest User (Lead)

Sample Request

Pass the required lead details in the input request body.

Set status to Scheduled to indicate that the appointment is scheduled.

```
{
  "serviceAppointment": {
    "serviceTerritoryId": "0HhB00000001P0PKAU",
    "schedStartTime" : "2021-10-29T16:00:00.000+0000",
    "schedEndTime": "2021-10-29T17:00:00.000+0000",
    "workTypeId" : "08qB00000002ocgIAA",
    "additionalInformation" : "Concurrent Booking",
    "appointmentType" : "Training Purpose",
    "extendedFields" : [ {
      "name": "status",
      "value": "Scheduled"
    } ]
  },
  "assignedResources": [
    {
    "serviceResourceId": "0HnB00000001SJxKAM",
    "isRequiredResource" : "true"
    }
  ],
  "lead": {
    "email" : "name@company.com",
    "firstName" : "FName",
    "lastName" : "LName",
    "company" : "CompanyName"
  }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result" : {
    "assignedResourceIds" : [ "03rB0000000cBAFIA2" ],
    "parentRecordId" : "00QB000000ASSt5MAH",
    "serviceAppointmentId" : "08pB0000000aKIgIAM"
  }
}
```

Create a page to show confirmation when the service appointment is created successfully.

Here's how a sample confirmation page can look.
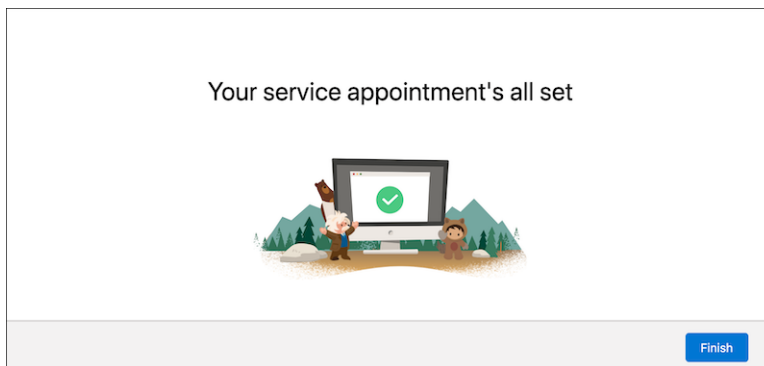
# Schedule Appointments by Using Sharing Availability

This use case describes how to create an external website by using the Salesforce Scheduler APIs that your users can use to book appointments using the invitation URL.

Service resources or their assistants can share the period during which they're available for appointment booking. They can define and share the appointment criteria with the users by creating an invitation URL. Users can book an appointment by going to the invitation URL. The URL takes users to the first week that the service resource is available.

- 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: To book appointments using an invitation URL, users need access to the invitation record, service territory, work type or work type group, and service resources that are associated with the invitation URL. Admins can provide the required read-only access to the records by using the sharing settings or Apex sharing.

Here are the high-level steps for building an external website by using the Salesforce Scheduler APIs, which are outlined in detail later.
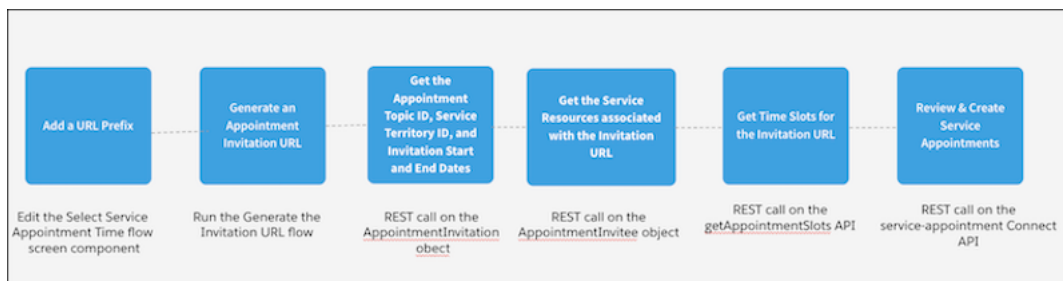
1. Configure Invitation URLs to Open on External Websites

   Admins can add a URL prefix to an invitation URL to directly open the invitation on an external website.

2. Generate an Appointment Invitation URL

   Only admins can generate invitation URLs. Share the invitation URLs with your users so that the users can use the URLs to quickly book appointments.

3. Retrieve the Invitation Key

   Retrieve the unique invitation key from the invitation URL that the user clicks. The invitation URL has two components: the invitation URL prefix and the invitation key. The invitation key is an auto-generated unique identifier.

4. Get the Appointment Invitation Details

   An appointment invitation has information that users can use for booking appointments. Use the `Query()` request to run Salesforce Query Language (SOQL) on the AppointmentInvitation object to retrieve the appointment invitation details, such as the appointment invitation ID, appointment topic ID (work type group ID), appointment topic type, service territory ID, availability start date, and availability end date.

5. Get the Appointment Invitee Details

   An appointment invitee has information about the participant and the resources required for creating an appointment invitation URL. Use the `Query()` request to run Salesforce Query Language (SOQL) on the AppointmentInvitee object to retrieve the appointment invitee details, such as the service territory ID, appointment topic ID, service resource ID, and available booking start and end dates, which you need for retrieving the calendar availability for the invitation URL. You can also retrieve additional details that you need when creating an appointment, such as whether the resources are primary or required.

6. Show Calendar Availability

   A time slot is a period in a day when an appointment can be scheduled. Use the `getAppointmentSlots` API to retrieve the calendar availability of the service resources associated with the appointment invitation.

7. Book Service Appointments

   A service appointment is an appointment booked through Salesforce Scheduler. Use the `service-appointments` API to create an appointment.

Configure Invitation URLs to Open on External Websites

Admins can add a URL prefix to an invitation URL to directly open the invitation on an external website.

1. Set up your website in the Invitation URL Prefix flow attribute.

   For more information, see Flow Screen Component: Select Service Appointment Time.

2. Prefix the invitation URL with your website's domain address in the `https://YourSiteDomain/SiteURL` format.

After you prefix the invitation URL in the flow, activate the flow and generate the appointment invitation URL.

Generate an Appointment Invitation URL

Only admins can generate invitation URLs. Share the invitation URLs with your users so that the users can use the URLs to quickly book appointments.

For more information on how to generate appointment invitations URLs, see Generate an Appointment Invitation URL.

When a user clicks the invitation URL to book an appointment, capture the invitation key from the appointment URL to fetch the appointment details.

Retrieve the Invitation Key

Retrieve the unique invitation key from the invitation URL that the user clicks. The invitation URL has two components: the invitation URL prefix and the invitation key. The invitation key is an auto-generated unique identifier.

1. Capture the invitation key from the invitation URL.

   For example, if the invitation URL is
   `https://YourSiteDomain/SiteURL/f482d103-4792-40ac-864a-57db0c13161b`, the invitation key is
   `f482d103-4792-40ac-864a-57db0c13161b`.

After you capture the invitation key, fetch the invitation appointment details by using the key.

Get the Appointment Invitation Details

An appointment invitation has information that users can use for booking appointments. Use the `Query()` request to run Salesforce Query Language (SOQL) on the AppointmentInvitation object to retrieve the appointment invitation details, such as the appointment invitation ID, appointment topic ID (work type group ID), appointment topic type, service territory ID, availability start date, and availability end date.

For a complete list of AppointmentInvitation object fields, see AppointmentInvitation.

1. Make a `Query()` request on the AppointmentInvitation object.

   Sample REST API Request

   > 📝 Note: To ensure that the invitation URL is active, set the value of the `IsActive` query parameter to true.

   ```
   https://yourInstance.salesforce.com//services/data/vXX.X/query/?q=
   SELECT+AppointmentTopicId,AppointmentTopicType,BookingEndDate,BookingStartDate,
   Id,ServiceTerritoryId+FROM+AppointmentInvitation+
   WHERE+InvitationIdentifier+=+'f482d103-4792-40ac-864a-57db0c13161b'+AND+IsActive+=+true
   ```

   Sample Response

   ```
   {
     "totalSize" : 1,
     "done" : true,
     "records" : [ {
       "attributes" : {
         "type" : "AppointmentInvitation",
         "url" : "/services/data/v55.0/sobjects/AppointmentInvitation/1S8x000000000oHCAQ"
   ```

```
        },
        "AppointmentTopicId" : "0VSx00000002Uh4GAE",
        "AppointmentTopicType" : "WorkTypeGroup",
        "BookingEndDate" : "2022-06-30",
        "BookingStartDate" : "2022-06-14",
        "Id" : "1S8x000000000oHCAQ",
        "ServiceTerritoryId" : "0Hhx00000002LzGCAU"
    } ]
}
```

2. Parse the response to save the values.

You need these values to fetch the invitation availability time slots.

After you fetch the invitation details, retrieve the service resources associated with the invitation URL.

Get the Appointment Invitee Details

An appointment invitee has information about the participant and the resources required for creating an appointment invitation URL. Use the `Query()` request to run Salesforce Query Language (SOQL) on the AppointmentInvitee object to retrieve the appointment invitee details, such as the service territory ID, appointment topic ID, service resource ID, and available booking start and end dates, which you need for retrieving the calendar availability for the invitation URL. You can also retrieve additional details that you need when creating an appointment, such as whether the resources are primary or required.

For a complete list of AppointmentInvitee object fields, see AppointmentInvitee.

1. Make a `Query()` request on the AppointmentInvitee object.

Sample REST API Request

```
https://yourInstance.salesforce.com/services/data/vXX.X/query/?q=
SELECT+AppointmentInvitationId,Id,IsPrimaryResource,IsRequiredResource,
Name,ParticipantServiceResourceId+FROM+AppointmentInvitee+
WHERE+AppointmentInvitationId+=+'1S8x000000000oHCAQ'
```

Sample Response

```
{
  "totalSize" : 1,
  "done" : true,
  "records" : [ {
    "attributes" : {
      "type" : "AppointmentInvitee",
      "url" : "/services/data/v55.0/sobjects/AppointmentInvitee/0y6x000000000pFAAQ"
    },
    "AppointmentInvitationId" : "1S8x000000000oHCAQ",
    "Id" : "0y6x000000000pFAAQ",
    "IsPrimaryResource" : true,
    "IsRequiredResource" : true,
    "Name" : "AITE-0247",
    "ParticipantServiceResourceId" : "0Hnx000000007d7CAA"
  } ]
}
```

2. Parse the response to save the values.

You need these values to fetch the invitation availability time slots.

After you fetch the appointment invitation and appointment invitee details, create a page on your website to show the calendar availability of the service resources associated with the invitation.

Show Calendar Availability

A time slot is a period in a day when an appointment can be scheduled. Use the `getAppointmentSlots` API to retrieve the calendar availability of the service resources associated with the appointment invitation.

Before making an API request to retrieve the invitation time slots, create a page on your website that shows the calendar availability of the service resources associated with the appointment invitation. The calendar availability is determined by the service territory ID, the work type group ID, and the service resource IDs that you obtained previously.

> **Note:** Ensure that the calendar shows only the available time slots for the selected resource between the shared invitation start and end dates.

1. To fetch the calendar availability for an appointment invitation, make a POST request on the `getAppointmentSlots` REST API.

   Resource URI

   ```
   https://yourInstance.salesforce.com/services/data/vXX.X/scheduling/getAppointmentSlots
   ```

   Sample Request

   This sample calls the `getAppointmentSlots` API by passing the work type group ID, territory IDs, resource IDs, and invitation booking start and end dates.

   > **Note:** The `workTypeGroupId` field is required.

   ```
   {
     "startTime": "2022-06-14T00:00:00.000Z",
     "endTime": "2022-06-30T00:00:00.000Z",
     "workTypeGroupId": "0VSx00000002Uh4GAE",
     "territoryIds": [
       "0Hhx00000002LzGCAU"
     ],
     "requiredResourceIds": [
       "0Hnx000000007d7CAA"
     ]
   }
   ```

   Sample Response

   The request returns the calendar availability for the service resources associated with the invitation.

   ```
   {
     "timeSlots": [
       {
         "endTime": "2022-06-14T02:15:00.000+0000",
         "remainingAppointments": 1,
         "startTime": "2022-06-14T01:15:00.000+0000",
         "territoryId": "0Hhx00000002LzGCAU"
       },
       {
         "endTime": "2022-06-14T02:30:00.000+0000",
         "remainingAppointments": 1,
         "startTime": "2022-06-14T01:30:00.000+0000",
         "territoryId": "0Hhx00000002LzGCAU"
   ```

```
    },
    {
      "endTime": "2022-06-14T12:30:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-14T11:30:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-14T12:45:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-14T11:45:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-15T02:15:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-15T01:15:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-15T02:30:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-15T01:30:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-15T12:30:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-15T11:30:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-15T12:45:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-15T11:45:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-16T01:45:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-16T00:45:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-16T02:00:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-16T01:00:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-17T12:30:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-17T11:30:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
```

```
    },
    {
      "endTime": "2022-06-17T12:45:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-17T11:45:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-18T01:45:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-18T00:45:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-18T02:00:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-18T01:00:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-20T02:15:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-20T01:15:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-21T03:15:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-21T02:15:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-21T03:30:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-21T02:30:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-25T07:45:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-25T06:45:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-27T12:30:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-27T11:30:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
    },
    {
      "endTime": "2022-06-27T12:45:00.000+0000",
      "remainingAppointments": 1,
      "startTime": "2022-06-27T11:45:00.000+0000",
      "territoryId": "0Hhx00000002LzGCAU"
```

```
      },
      {
        "endTime": "2022-06-28T02:15:00.000+0000",
        "remainingAppointments": 1,
        "startTime": "2022-06-28T01:15:00.000+0000",
        "territoryId": "0Hhx00000002LzGCAU"
      },
      {
        "endTime": "2022-06-28T02:30:00.000+0000",
        "remainingAppointments": 1,
        "startTime": "2022-06-28T01:30:00.000+0000",
        "territoryId": "0Hhx00000002LzGCAU"
      },
      {
        "endTime": "2022-06-28T02:45:00.000+0000",
        "remainingAppointments": 1,
        "startTime": "2022-06-28T01:45:00.000+0000",
        "territoryId": "0Hhx00000002LzGCAU"
      },
      {
        "endTime": "2022-06-29T12:15:00.000+0000",
        "remainingAppointments": 1,
        "startTime": "2022-06-29T11:15:00.000+0000",
        "territoryId": "0Hhx00000002LzGCAU"
      },
      {
        "endTime": "2022-06-29T12:30:00.000+0000",
        "remainingAppointments": 1,
        "startTime": "2022-06-29T11:30:00.000+0000",
        "territoryId": "0Hhx00000002LzGCAU"
      },
      {
        "endTime": "2022-06-29T12:45:00.000+0000",
        "remainingAppointments": 1,
        "startTime": "2022-06-29T11:45:00.000+0000",
        "territoryId": "0Hhx00000002LzGCAU"
      }
    ]
}
```

2. Parse the response and show the time slots on your relevant website page so that users can choose an appointment time.

Create another page on your website to show the appointment details for users to review and book a selected appointment.

Book Service Appointments

A service appointment is an appointment booked through Salesforce Scheduler. Use the `service-appointments` API to create an appointment.

1. On your website, create a page with a Create button on which you can show the appointment details for the user to review and book the appointment.

2. Link the Create button to a POST request on the `service-appointments` Connect API.

Resource URI

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/scheduling/service-appointments
```

For an Account User

Sample Request

This sample calls the `service-appointments` API to create the appointment record for an account user.

📝 Note: The `parentRecordId` field is required. Pass the account ID as `parentRecordId` in the input request body.

```json
{
  "serviceAppointment": {
    "serviceTerritoryId": "0Hhx00000002LzGCAU",
    "parentRecordId": "001x0000005SEqZAAW",
    "schedStartTime": "2022-06-29T11:30:00.000+0000",
    "schedEndTime": "2022-06-29T12:30:00.000+0000",
    "additionalInformation": "Sharing availability use case using APIs.",
    "appointmentType": "Book Test Appointment1",
    "extendedFields": [
      {
        "name": "status",
        "value": "Scheduled"
      }
    ]
  },
  "assignedResources": [
    {
      "serviceResourceId": "0Hnx000000007d7CAA",
      "isRequiredResource": "true"
    }
  ]
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```json
{
  "result": {
    "assignedResourceIds": [
      "03rx0000000252jAAA"
    ],
    "serviceAppointmentId": "08px000000023bdAAA"
  }
}
```

For a Guest User

Sample Request

This sample calls the `service-appointments` API to create the appointment record for a guest user.

📝 Note: The `lead` field is required. Pass the guest user details, including the first name, last name, email address, and phone number as `lead` in the input request body.

```
{
  "serviceAppointment": {
    "serviceTerritoryId": "0Hhx00000002LzGCAU",
    "schedStartTime": "2022-06-29T11:30:00.000+0000",
    "schedEndTime": "2022-06-29T12:30:00.000+0000",
    "additionalInformation": "Sharing availability use case using APIs.",
    "appointmentType": "Book Test Appointment1",
    "extendedFields": [
      {
        "name": "status",
        "value": "Scheduled"
      }
    ]
  },
  "assignedResources": [
    {
      "serviceResourceId": "0Hnx000000007d7CAA",
      "isRequiredResource": "true"
    }
  ],
  "lead": {
    "email": "Test@company.com",
    "firstName": "FirstName",
    "lastName": "LastName",
    "company": "CompanyName"
  }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rx0000000252oAAA"
    ],
    "parentRecordId": "00Qx0000001cLwwEAE",
    "serviceAppointmentId": "08px000000023biAAA"
  }
}
```

3. If the service appointment creation is successful, then show the user a confirmation message.

Here's a sample confirmation page.

Your service appointment's all set
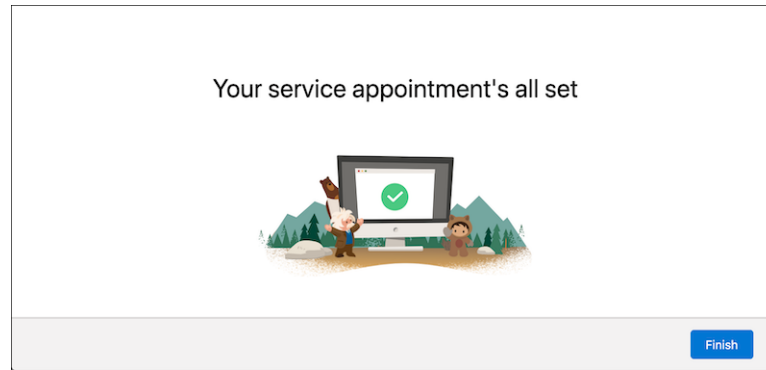
Schedule Appointments with a Dummy Resource and Reassign to Actual Resources

Learn how to create concurrent appointments by using a dummy resource and to reassign the appointments to actual resources later in scenarios where appointments are scheduled before actual resources can be assigned. For example, a wealth management advisory desk that accepts 50 or more appointments for various time slots between 10:00 AM and 5:00 PM. The desk can reassign these appointments to the actual resources only two days before the appointment date. Or, a call center whose resources are assigned randomly in real time, but can schedule 50 appointments for various time slots in a day.

1. Set Up Salesforce Scheduler

   Set up Salesforce Scheduler for your org. Assign permissions and object access for your users. Update related lists and tab visibility. Configure Salesforce Scheduler settings for multi resource scheduling, concurrent scheduling, multiple time zone selection, and map and location services. If necessary, set up Asset Scheduling for Salesforce Scheduler.

2. Book Concurrent Appointments with Dummy Resource

   Use the concurrent scheduling feature of Salesforce Scheduler to easily schedule multiple service appointments in the same time slot. An event is created for each service appointment. Create concurrent appointments by using the dummy resource for the various time slots available for the day.

3. Modify Appointments to Reassign to Actual Resources

   Retrieve and show the service appointments scheduled against the dummy resource. Branch managers or administrators can reassign the retrieved appointments to the actual resources.

Set Up Salesforce Scheduler

Set up Salesforce Scheduler for your org. Assign permissions and object access for your users. Update related lists and tab visibility. Configure Salesforce Scheduler settings for multi resource scheduling, concurrent scheduling, multiple time zone selection, and map and location services. If necessary, set up Asset Scheduling for Salesforce Scheduler.

Create Service Territories

Create service territories, such as branch locations, to represent your branch or call center, to organize your service resources, and to ensure that the service resources are assigned to appointments near the home branch.

Create Service Resources

Create service resources—individual users who can attend customer appointments—so that you can assign appointments to users. You can create a dummy resource, such as DummyResource1, Agent1, or Agent2 that users can schedule appointments with, and then create actual resources to whom these appointments can be assigned later.

Enable Concurrent Scheduling

Enable concurrent scheduling so that users can use the dummy resource to schedule multiple appointments within the same time slot.

Assign Concurrent Operating Hours to the Dummy Resource

Assign operating hours to a service territory member by using the Operating Hours field on the respective member record page. Concurrent time slots are applicable only to service territory members. Assign concurrent time slots to the dummy resource so that only the dummy resource is visible when creating an appointment with concurrent scheduling.

Configure Scheduling Policy to Enforce Operating Hours

Use a scheduling policy to enforce one or more rules to find the best service resources for appointments. Apply a scheduling policy to your scheduling process to ensure that an appointment meets the criteria that the policy rules define. Create a scheduling policy for the dummy resource who has set up operating hours. Ensure that the resource is present only when creating an appointment.

Assign Regular Shifts to Actual Resources

Service resources can set up and update their frequently changing work hours by using shifts. Service resources can set up shifts for different work hours for the same service territory, for hours beyond the service territory's operating hours, and even for multiple service territories. Shifts can also be used 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.

Configure Scheduling Policy to Enforce Shifts

Use a scheduling policy to enforce one or more rules to find the best service resources for appointments. Apply a scheduling policy to your scheduling process to ensure that an appointment meets the criteria that the policy rules define. Create a scheduling policy for the actual resources who have created working hours by using shifts. Ensure that the resources are present only during appointment reassignment.

Create Service Territories

Create service territories, such as branch locations, to represent your branch or call center, to organize your service resources, and to ensure that the service resources are assigned to appointments near the home branch.

For more information on setting up service territories, see Set Up Service Territories in Salesforce Scheduler.

1. On the Service Territories tab, click **New**.

2. Enter a name, such as *ServiceTerritory1*, and a description for your territory.

3. To enable adding members to the territory or relating the territory to appointments, activate the new service territory.

Create Service Resources

Create service resources—individual users who can attend customer appointments—so that you can assign appointments to users. You can create a dummy resource, such as DummyResource1, Agent1, or Agent2 that users can schedule appointments with, and then create actual resources to whom these appointments can be assigned later.

For more information on setting up service resources, see Set Up Service Resources in Salesforce Scheduler.

1. From the App Launcher, find and open the Salesforce Scheduler Setup app.

2. On the Service Resources tab, click **New**.

3. Select a user and enter a resource name—typically, the user's name.

4. To enable assigning the resource to appointments, activate the resource.

5. For resource type, select **Technician**.

6. Save your changes.

After a service resource is created, assign the resource to a service territory, and then add skills of the resource.

Enable Concurrent Scheduling

Enable concurrent scheduling so that users can use the dummy resource to schedule multiple appointments within the same time slot.

For information on what to keep in mind when you implement concurrent scheduling, see Enable and Configure Concurrent Scheduling.

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

2. Enable concurrent scheduling.

Assign Concurrent Operating Hours to the Dummy Resource

Assign operating hours to a service territory member by using the Operating Hours field on the respective member record page. Concurrent time slots are applicable only to service territory members. Assign concurrent time slots to the dummy resource so that only the dummy resource is visible when creating an appointment with concurrent scheduling.

For more information, see Assign Operating Hours to Service Territory Members.

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

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

3. Save your changes.

Configure Scheduling Policy to Enforce Operating Hours

Use a scheduling policy to enforce one or more rules to find the best service resources for appointments. Apply a scheduling policy to your scheduling process to ensure that an appointment meets the criteria that the policy rules define. Create a scheduling policy for the dummy resource who has set up operating hours. Ensure that the resource is present only when creating an appointment.

For more information, see Enfore Scheduling Policies in Salesforce Scheduler.

1. From Setup, in the Quick Find box, enter *Scheduling Policies*, and then select **Scheduling Policies**.

2. Click **New**.

3. Enter a name for your custom scheduling policy, and then deselect the **Use service territory member's shift** rule.

   This rule considers service territory member's operating hours when determining the availability of service resources for appointments.

4. Save your changes.

Assign Regular Shifts to Actual Resources

Service resources can set up and update their frequently changing work hours by using shifts. Service resources can set up shifts for different work hours for the same service territory, for hours beyond the service territory's operating hours, and even for multiple service territories. Shifts can also be used 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. Create and assign regular shifts to the actual resources and your service territory.

   For more information, see Create Shifts in Salesforce Scheduler.

Now filter the resources available for appointment reassignment based on the shifts defined in the scheduling policy.

Configure Scheduling Policy to Enforce Shifts

Use a scheduling policy to enforce one or more rules to find the best service resources for appointments. Apply a scheduling policy to your scheduling process to ensure that an appointment meets the criteria that the policy rules define. Create a scheduling policy for the actual resources who have created working hours by using shifts. Ensure that the resources are present only during appointment reassignment.

For more information, see Enfore Scheduling Policies in Salesforce Scheduler.

1. From Setup, in the Quick Find box, enter `Scheduling Policies`, and then select **Scheduling Policies**.

2. Click **New**.

3. Enter a name for your custom scheduling policy, and then select the **Use service territory member's shift** rule.

   This rule considers service territory members' shifts when determining the availability of service resources for appointments.

4. Save your changes.

Book Concurrent Appointments with Dummy Resource

Use the concurrent scheduling feature of Salesforce Scheduler to easily schedule multiple service appointments in the same time slot. An event is created for each service appointment. Create concurrent appointments by using the dummy resource for the various time slots available for the day.

📝 **Note:** A concurrent time slot can have 2 to 1,000 appointments.

Here's a high-level overview of how to build a concurrent scheduling app.
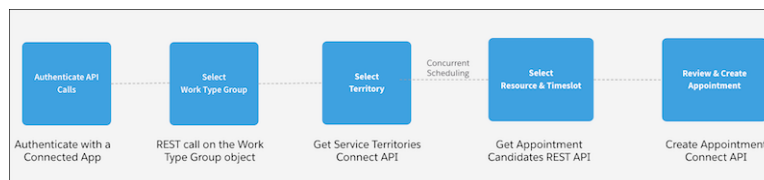
Get Work Type Groups

A work type group represents a general appointment category or topic, such as a home loan or investment. Show your users your work type groupson the landing page of your app by retrieving the list of work type groups from your Salesforce instance. Your users can select a work type group from the list while booking appointments.

Get Service Territories

A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers. Show your users your available service territorieson the next page on your website by retrieving a list of active service territories from your Salesforce instance. Your users can search for service territories based on user-entered name, city, postal code, or state. Users can also view the distance between two locations, such as between a service territory and the user's current location.

Get Dummy Service Resource

Show your users the dummy resource and its availability based on the selected work type group and service territory.

Show your users the details of a service appointment—an appointment booked through Salesforce Scheduler—so that users can review and create the appointment.

Get Work Type Groups

A work type group represents a general appointment category or topic, such as a home loan or investment. Show your users your work type groupson the landing page of your app by retrieving the list of work type groups from your Salesforce instance. Your users can select a work type group from the list while booking appointments.

1. Create a page to show your work type groups.

2. To retrieve the list of work type groups from your Salesforce instance, use the `Query()` request on the `WorkTypeGroup` object.

   Sample Request

   ```
   https://yourInstance.salesforce.com/services/data/v64.0/query/?q=
   SELECT+Id,+Name+From+WorkTypeGroup+Where+isActive+=+true+ORDER+BY+NAME
   ```

   Sample Response

   The request returns the work type group records.

   ```
   {
     "totalSize": 13,
     "done": true,
     "records": [
       {
         "attributes": {
           "type": "WorkTypeGroup",
           "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009NdOAI"
         },
         "Id": "0VSS700000009NdOAI",
         "Name": "Create Account"
       },
       {
         "attributes": {
           "type": "WorkTypeGroup",
           "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009YmOAI"
         },
         "Id": "0VSS700000009YmOAI",
         "Name": "Parent 1"
       },
       {
         "attributes": {
           "type": "WorkTypeGroup",
           "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS70000004DuiOAE"
         },
         "Id": "0VSS70000004DuiOAE",
         "Name": "Parent topic Create"
       },
       {
         "attributes": {
           "type": "WorkTypeGroup",
           "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009YwOAI"
         },
   ```

```
      "Id": "0VSS700000009YwOAI",
      "Name": "test"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009Z1OAI"
      },
      "Id": "0VSS700000009Z1OAI",
      "Name": "test 32"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS70000004DunOAE"
      },
      "Id": "0VSS70000004DunOAE",
      "Name": "test 32"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009ZaOAI"
      },
      "Id": "0VSS700000009ZaOAI",
      "Name": "Virtual WTG"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS70000004DvWOAU"
      },
      "Id": "0VSS70000004DvWOAU",
      "Name": "WorkTypeGrp1"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009TvOAI"
      },
      "Id": "0VSS700000009TvOAI",
      "Name": "Work_Type_Group_48368"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009TqOAI"
      },
      "Id": "0VSS700000009TqOAI",
      "Name": "Work_Type_Group_67304"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
```

```
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009ZVOAY"
      },
      "Id": "0VSS700000009ZVOAY",
      "Name": "Work_Type_Group_96227"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009O7OAI"
      },
      "Id": "0VSS700000009O7OAI",
      "Name": "WTG Block Time"
    },
    {
      "attributes": {
        "type": "WorkTypeGroup",
        "url": "/services/data/v56.0/sobjects/WorkTypeGroup/0VSS700000009Z6OAI"
      },
      "Id": "0VSS700000009Z6OAI",
      "Name": "ytre"
    }
  ]
}
```

3. Parse the JSON response, and display the work type groups on a page that you created. Your users can select a work type group for the appointment.

Get Service Territories

A service territory represents a branch or office location where your service resources (appointment attendees) operate from or meet customers. Show your users your available service territorieson the next page on your website by retrieving a list of active service territories from your Salesforce instance. Your users can search for service territories based on user-entered name, city, postal code, or state. Users can also view the distance between two locations, such as between a service territory and the user's current location.

1. Create a page for users to search for service territories.

   Here's how a Select Service Territory page can look.

2. To retrieve a list of active service territories from your Salesforce instance, use the `service-territories` Connect API request.

Sample Request

This sample REST API call uses the `service-territories` request to retrieve service territories within a range of 10 miles from your current location. The default value is 5 miles.

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling
/service-territories?workTypeGroupId=0VSS70000004DvWOAU
```

Sample Response

The request returns the service territory records.

```
{
  "result": {
    "serviceTerritories": [
      {
        "city": "Hyderabad",
        "country": "India",
        "id": "0HhS70000004F9zKAE",
        "name": "ServiceTerritory1",
        "operatingHoursId": "0OHS70000004FIxOAM",
        "postalCode": "500032",
        "state": "TG"
      }
    ]
  }
}
```

3. Parse the JSON response, and show the available service territories on a page that you created. Your users can select a service territory for the appointment.

Get Dummy Service Resource

Show your users the dummy resource and its availability based on the selected work type group and service territory.

1. Create a page to show your users dummy service resources.

2. Make a `POST` request on the `getAppointmentCandidates` REST API by passing the required `workTypeGroupId` and `territoryIds` parameters. Set `allowConcurrentScheduling` to `true` to get concurrent time slots for the dummy resource.

> **Note:** Specify the operating hour scheduling policy ID to show only the dummy resource who's defined with operating hours for concurrent scheduling. See Configure Scheduling Policy to Enforce Operating Hours.

Resource URI

```
https://yourInstance.salesforce.com/services/data/v64.0/scheduling/getAppointmentCandidates
```

Sample Request

```
{
  "startTime": "2022-10-01T00:00:00.000Z",
  "endTime": "2022-10-08T20:00:00.000Z",
  "allowConcurrentScheduling": true,
```

```
    "schedulingPolicyId": "0VrS7000000004XKAQ",
    "filterByResources": [
      "0HnS70000004EFyKAM"
    ],
    "workTypeGroupId": "0VSS70000004DvWOAU",
    "territoryIds": [
      "0HhS70000004F9zKAE"
    ]
}
```

Sample Response

The API returns the service resources and available time slots.

```
{
  "candidates": [
    {
      "endTime": "2022-10-03T16:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-03T16:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-03T17:00:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-03T16:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-03T17:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-03T17:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-03T18:00:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-03T17:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-03T18:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-03T18:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
```

```
      },
      {
        "endTime": "2022-10-03T19:00:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-03T18:30:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-03T19:30:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-03T19:00:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-03T20:00:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-03T19:30:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-03T20:30:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-03T20:00:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-03T21:00:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-03T20:30:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-03T21:30:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-03T21:00:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-03T22:00:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
```

```
    "startTime": "2022-10-03T21:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-03T22:30:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-03T22:00:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-03T23:00:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-03T22:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-03T23:30:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-03T23:00:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T00:00:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-03T23:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T00:30:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T00:00:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T01:00:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T00:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T01:30:00.000+0000",
    "resources": [
```

```
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-04T01:00:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-04T02:00:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-04T01:30:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-04T02:30:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-04T02:00:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-04T03:00:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-04T02:30:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-04T03:30:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-04T03:00:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-04T04:00:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-04T03:30:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
        "endTime": "2022-10-04T16:30:00.000+0000",
        "resources": [
          "0HnS70000004EFyKAM"
        ],
        "startTime": "2022-10-04T16:00:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      },
      {
```

```json
    "endTime": "2022-10-04T17:00:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T16:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T17:30:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T17:00:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T18:00:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T17:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T18:30:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T18:00:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T19:00:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T18:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T19:30:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T19:00:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-04T20:00:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-04T19:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
```

```json
    },
    {
      "endTime": "2022-10-04T20:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-04T20:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-04T21:00:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-04T20:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-04T21:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-04T21:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-04T22:00:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-04T21:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-04T22:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-04T22:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-04T23:00:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-04T22:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-04T23:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
```

```
      "startTime": "2022-10-04T23:00:00.000+0000",
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    },
    {
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      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-04T23:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-05T00:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-05T00:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-05T01:00:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-05T00:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-05T01:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-05T01:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-05T02:00:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-05T01:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-05T02:30:00.000+0000",
      "resources": [
        "0HnS70000004EFyKAM"
      ],
      "startTime": "2022-10-05T02:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-05T03:00:00.000+0000",
      "resources": [
```

```
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-05T02:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-05T03:30:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-05T03:00:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  },
  {
    "endTime": "2022-10-05T04:00:00.000+0000",
    "resources": [
      "0HnS70000004EFyKAM"
    ],
    "startTime": "2022-10-05T03:30:00.000+0000",
    "territoryId": "0HhS70000004F9zKAE"
  }
 ]
}
```

3. Parse the JSON response, and show the dummy resource on a page that you created. Your users can select the dummy resource for the appointment.

On the next page, you can show the appointment details for the user to review and create the appointment.

Create Service Appointments

Show your users the details of a service appointment—an appointment booked through Salesforce Scheduler—so that users can review and create the appointment.

1. Create a page where the user can review the appointment details and create the appointment.

2. Make a `POST` request on the `service-appointments` Connect API to create the service appointment.

> ✒️ Note: Specify the operating hour scheduling policy ID to show only the dummy resource who's defined with operating hours for concurrent scheduling. See Configure Scheduling Policy to Enforce Operating Hours.

Resource URI

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/service-appointments
```

For an Existing User (Account)

Sample Request

Pass the account ID as `parentRecordId` in the input request body.

```
{
  "schedulingPolicyId": "0VrS7000000004XKAQ",
  "serviceAppointment": {
    "serviceTerritoryId": "0HhS70000004F9zKAE",
    "parentRecordId": "001S7000002br8YIAQ",
    "schedStartTime": "2022-10-03T16:30:00.000+0000",
```

```
    "schedEndTime": "2022-10-03T17:00:00.000+0000",
    "additionalInformation": "Schedule concurrent appointment with a dummy
resource",
    "appointmentType": "Use case purpose."
  },
  "assignedResources": [
    {
      "serviceResourceId": "0HnS70000004EFyKAM",
      "isRequiredResource": "true"
    }
  ]
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rS700000003zrIAA"
    ],
    "serviceAppointmentId": "08pS70000000CxEIAU"
  }
}
```

For a Guest User (Lead)

Sample Request

Pass the required lead details in the input request body.

```
{
  "schedulingPolicyId": "0VrS7000000004XKAQ",
  "serviceAppointment": {
    "serviceTerritoryId": "0HhS70000004F9zKAE",
    "schedStartTime": "2022-10-03T16:30:00.000+0000",
    "schedEndTime": "2022-10-03T17:00:00.000+0000",
    "additionalInformation": "Schedule concurrent appointment with a dummy
resource",
    "appointmentType": "Use case purpose."
  },
  "assignedResources": [
    {
      "serviceResourceId": "0HnS70000004EFyKAM",
      "isRequiredResource": "true"
    }
  ],
  "lead": {
    "firstName": "Patient1",
    "lastName": "Test",
    "email": "test1@company.com",
    "company": "Test Club"
  }
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rS700000003zrIAA"
    ],
    "parentRecordId": "00QRM000004seHz2AI",
    "serviceAppointmentId": "08pRM0000004vdvYAA"
  }
}
```

Create a page to show confirmation when the service appointment is created successfully.

Here's how a sample confirmation page can look.

Modify Appointments to Reassign to Actual Resources

Retrieve and show the service appointments scheduled against the dummy resource. Branch managers or administrators can reassign the retrieved appointments to the actual resources.

Get Service Appointments Assigned to the Dummy Resource

Show your users the service appointments—appointments booked through Salesforce Scheduler—scheduled against the dummy resource by retrieving the list of service appointments. Branch managers or administrators can reassign the appointments to the actual resources.

Get Actual Service Resources

Retrieve the actual service resources—an employee from your company, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist who attends appointments with clients—based on the work type group and service territory that's assigned to a service appointment. Business managers or administrators can then assign an available service resource to an appointment.

Update Service Appointments

Show the details of service appointments—appointments booked through Salesforce Scheduler—on a page of your app so that business managers or administrators can review and update appointments.

Get Service Appointments Assigned to the Dummy Resource

Show your users the service appointments—appointments booked through Salesforce Scheduler—scheduled against the dummy resource by retrieving the list of service appointments. Branch managers or administrators can reassign the appointments to the actual resources.

For the list of AppointmentInvitation object fields, see ServiceAppointment.

1. Create a page to show the service appointments scheduled against the dummy resource.

2. To retrieve the list of service appointments, make a `Query()` request on the ServiceAppointment object.

   - To choose additional columns from the ServiceAppointment object, such as lead and parent record IDs, modify the query.

   - To see upcoming appointments first, sort appointments by start time ascending.

   - To avoid past appointments, add *where currentTime is greater than start time*.

Sample REST API Request

```
https://yourInstance.salesforce.com//services/data/v64.0/query/?q=
SELECT+ServiceAppointmentId,ServiceResourceId,ServiceAppointment.SchedEndTime,ServiceAppointment.SchedStartTime,ServiceAppointment.ServiceTerritoryId,ServiceAppointment.Id+
FROM+AssignedResource+WHERE+ServiceResourceId+=+'0HnS70000004EFyKAM'+ORDER+BY+createdDate+DESC+limit+5
```

Sample Response

```
{
  "totalSize": 5,
  "done": true,
  "records": [
    {
      "attributes": {
        "type": "AssignedResource",
        "url": "/services/data/v56.0/sobjects/AssignedResource/03rS70000000401IAA"
      },
      "ServiceAppointmentId": "08pS70000000CxOIAU",
      "ServiceResourceId": "0HnS70000004EFyKAM",
      "ServiceAppointment": {
        "attributes": {
          "type": "ServiceAppointment",
          "url": "/services/data/v56.0/sobjects/ServiceAppointment/08pS70000000CxOIAU"

        },
        "SchedEndTime": "2022-10-03T17:00:00.000+0000",
        "SchedStartTime": "2022-10-03T16:30:00.000+0000",
        "ServiceTerritoryId": "0HhS70000004F9zKAE",
        "Id": "08pS70000000CxOIAU"
      }
    },
    {
      "attributes": {
        "type": "AssignedResource",
        "url": "/services/data/v56.0/sobjects/AssignedResource/03rS700000003zwIAA"
      },
      "ServiceAppointmentId": "08pS70000000CxJIAU",
      "ServiceResourceId": "0HnS70000004EFyKAM",
      "ServiceAppointment": {
        "attributes": {
          "type": "ServiceAppointment",
```

```
            "url": "/services/data/v56.0/sobjects/ServiceAppointment/08pS70000000CxJIAU"

          },
          "SchedEndTime": "2022-10-03T17:00:00.000+0000",
          "SchedStartTime": "2022-10-03T16:30:00.000+0000",
          "ServiceTerritoryId": "0HhS70000004F9zKAE",
          "Id": "08pS70000000CxJIAU"
        }
      },
      {
        "attributes": {
          "type": "AssignedResource",
          "url": "/services/data/v56.0/sobjects/AssignedResource/03rS700000003zrIAA"
        },
        "ServiceAppointmentId": "08pS70000000CxEIAU",
        "ServiceResourceId": "0HnS70000004EFyKAM",
        "ServiceAppointment": {
          "attributes": {
            "type": "ServiceAppointment",
            "url": "/services/data/v56.0/sobjects/ServiceAppointment/08pS70000000CxEIAU"

          },
          "SchedEndTime": "2022-10-03T17:00:00.000+0000",
          "SchedStartTime": "2022-10-03T16:30:00.000+0000",
          "ServiceTerritoryId": "0HhS70000004F9zKAE",
          "Id": "08pS70000000CxEIAU"
        }
      },
      {
        "attributes": {
          "type": "AssignedResource",
          "url": "/services/data/v56.0/sobjects/AssignedResource/03rS70000004D3WIAU"
        },
        "ServiceAppointmentId": "08pS70000004F3xIAE",
        "ServiceResourceId": "0HnS70000004EFyKAM",
        "ServiceAppointment": {
          "attributes": {
            "type": "ServiceAppointment",
            "url": "/services/data/v56.0/sobjects/ServiceAppointment/08pS70000004F3xIAE"

          },
          "SchedEndTime": "2022-10-03T17:00:00.000+0000",
          "SchedStartTime": "2022-10-03T16:30:00.000+0000",
          "ServiceTerritoryId": "0HhS70000004F9zKAE",
          "Id": "08pS70000004F3xIAE"
        }
      },
      {
        "attributes": {
          "type": "AssignedResource",
          "url": "/services/data/v56.0/sobjects/AssignedResource/03rS700000003zmIAA"
        },
        "ServiceAppointmentId": "08pS70000000Cx9IAE",
        "ServiceResourceId": "0HnS70000004EFyKAM",
```

```
        "ServiceAppointment": {
          "attributes": {
            "type": "ServiceAppointment",
           "url": "/services/data/v56.0/sobjects/ServiceAppointment/08pS70000000Cx9IAE"

          },
          "SchedEndTime": "2022-10-03T17:00:00.000+0000",
          "SchedStartTime": "2022-10-03T16:30:00.000+0000",
          "ServiceTerritoryId": "0HhS70000004F9zKAE",
          "Id": "08pS70000000Cx9IAE"
        }
      }
    ]
}
```

3. Parse the JSON response, and show the service appointments on a page that you created. Branch managers or administrators can reassign the appointments to the actual resources.

Get Actual Service Resources

Retrieve the actual service resources—an employee from your company, such as a loan officer, investment advisor, doctor, nurse practitioner, or retail store specialist who attends appointments with clients—based on the work type group and service territory that's assigned to a service appointment. Business managers or administrators can then assign an available service resource to an appointment.

1. Make a POST request on the getAppointmentCandidates REST API by passing the required workTypeGroupId and territoryIds parameters.

   📝 Note: Specify the shift's scheduling policy ID to show only the actual resources who have set regular working hours with shifts. For more information, see Configure Scheduling Policy to Enforce Shifts.

   Resource URI

   ```
   https://yourInstance.salesforce.com/services/data/v64.0/scheduling/getAppointmentCandidates
   ```

   Sample Request

   ```
   {
     "startTime": "2022-10-01T17:00:00.000+0000",
     "endTime": "2022-10-08T18:00:00.000+0000",
     "workTypeGroupId": "0VSS70000004DvWOAU",
     "schedulingPolicyId": "0VrS70000004CEhKAM",
     "territoryIds": [
       "0HhS70000004F9zKAE"
     ]
   }
   ```

   Sample Response

   The API returns the service resources available for the specified time slots.

   ```
   {
     "candidates": [
       {
         "endTime": "2022-10-01T17:30:00.000+0000",
         "resources": [
           "0HnS700000007xwKAA"
   ```

```
          ],
          "startTime": "2022-10-01T17:00:00.000+0000",
          "territoryId": "0HhS70000004F9zKAE"
        },
        {
          "endTime": "2022-10-01T18:00:00.000+0000",
          "resources": [
            "0HnS700000007xwKAA"
          ],
          "startTime": "2022-10-01T17:30:00.000+0000",
          "territoryId": "0HhS70000004F9zKAE"
        },
        {
          "endTime": "2022-10-01T18:30:00.000+0000",
          "resources": [
            "0HnS700000007xwKAA"
          ],
          "startTime": "2022-10-01T18:00:00.000+0000",
          "territoryId": "0HhS70000004F9zKAE"
        },
        {
          "endTime": "2022-10-01T19:00:00.000+0000",
          "resources": [
            "0HnS700000007xwKAA"
          ],
          "startTime": "2022-10-01T18:30:00.000+0000",
          "territoryId": "0HhS70000004F9zKAE"
        },
        {
          "endTime": "2022-10-01T19:30:00.000+0000",
          "resources": [
            "0HnS700000007xwKAA"
          ],
          "startTime": "2022-10-01T19:00:00.000+0000",
          "territoryId": "0HhS70000004F9zKAE"
        },
        {
          "endTime": "2022-10-01T20:00:00.000+0000",
          "resources": [
            "0HnS700000007xwKAA"
          ],
          "startTime": "2022-10-01T19:30:00.000+0000",
          "territoryId": "0HhS70000004F9zKAE"
        },
        {
          "endTime": "2022-10-01T20:30:00.000+0000",
          "resources": [
            "0HnS700000007xwKAA"
          ],
          "startTime": "2022-10-01T20:00:00.000+0000",
          "territoryId": "0HhS70000004F9zKAE"
        },
        {
          "endTime": "2022-10-01T21:00:00.000+0000",
```

```
      "resources": [
        "0HnS700000007xwKAA"
      ],
      "startTime": "2022-10-01T20:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-01T21:30:00.000+0000",
      "resources": [
        "0HnS700000007xwKAA"
      ],
      "startTime": "2022-10-01T21:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-01T22:00:00.000+0000",
      "resources": [
        "0HnS700000007xwKAA"
      ],
      "startTime": "2022-10-01T21:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-01T22:30:00.000+0000",
      "resources": [
        "0HnS700000007xwKAA"
      ],
      "startTime": "2022-10-01T22:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-01T23:00:00.000+0000",
      "resources": [
        "0HnS700000007xwKAA"
      ],
      "startTime": "2022-10-01T22:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-01T23:30:00.000+0000",
      "resources": [
        "0HnS700000007xwKAA"
      ],
      "startTime": "2022-10-01T23:00:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
    {
      "endTime": "2022-10-02T00:00:00.000+0000",
      "resources": [
        "0HnS700000007xwKAA"
      ],
      "startTime": "2022-10-01T23:30:00.000+0000",
      "territoryId": "0HhS70000004F9zKAE"
    },
```

```
      {
        "endTime": "2022-10-02T00:30:00.000+0000",
        "resources": [
          "0HnS700000007xwKAA"
        ],
        "startTime": "2022-10-02T00:00:00.000+0000",
        "territoryId": "0HhS70000004F9zKAE"
      }
    ]
}
```

2. Parse the JSON response, and show the actual service resources on a page. Business managers or administrators can select an actual resource for the appointment.

Update Service Appointments

Show the details of service appointments—appointments booked through Salesforce Scheduler—on a page of your app so that business managers or administrators can review and update appointments.

To modify appointments, the branch manager or administrator who's reassigning service appointments need these user permissions.

- Read, Create, and Edit on service appointments
- Read on accounts, contacts, operating hours, service resources, service territories, work types, and work type groups

1. Create a page to review the appointment details and update the service appointment.

2. To modify a service appointment, link the Next button to a `PATCH` request on the `service-appointments` Connect API.

Resource URI

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/scheduling/service-appointments
```

Sample Request

Pass the appointment ID as `serviceAppointmentId` and the resource ID of the actual resource as `serviceResourceId` in the request. To indicate that the appointment is scheduled, set `status` to `Scheduled`.

```
{
  "schedulingPolicyId": "0VrS70000004CEhKAM",
  "serviceAppointmentId": "08pS70000000CxOIAU",
  "serviceAppointment": {
    "serviceTerritoryId": "0HhS70000004F9zKAE",
    "extendedFields": [
      {
        "name": "status",
        "value": "Scheduled"
      }
    ]
  },
  "assignedResources": [
    {
      "serviceResourceId": "0HnS700000007xwKAA",
      "isRequiredResource": "true"
    }
  ]
}
```

Sample Response

The API returns the service appointment ID and the assigned service resources.

```
{
  "result": {
    "assignedResourceIds": [
      "03rS70000000406IAA"
    ],
    "serviceAppointmentId": "08pS70000000CxOIAU"
  }
}
```

3. For each service appointment ID that you want to modify, run the PATCH request.

Assign active resources to all customers by modifying the appointments booked against the dummy resource. Usually, Business Location Manager or the person who assigns actual resources performs the modification.

⊘ **Important:** Ensure that the total number of dummy appointments doesn't exceed the total number of available resources for a time slot. Otherwise, when modifying appointments, one requires to update the time slots based on availability. To avoid these scenarios, configure the Concurrent Scheduling Max appointment slots to around 60–80% of total resource capacity.

The request modifies the service appointment with a new service resource.

CHAPTER 13 Integrate Salesforce Scheduler with External Calendars

Salesforce Scheduler provides developer resources that you can use to write appointments directly to, and read events from, external calendars.

For example, use the `LxScheduler.ServiceResourceScheduleHandler` Apex interface to write a custom Apex class to read external calendar events. Then, associate the Apex class with Salesforce Scheduler flows or API calls through the Read External System Events scheduling policy rule. To write appointments to external calendars, first enable the Publish Appointments as Platform Events setting, and subscribe to the new `AppointmentSchedulingEvent` platform event to receive event notifications when users create, modify, or delete appointments. Then, use an API to write the platform events to an external calendar.

The subsequent topics in this section list the provided developer resources for your reference. For detailed instructions about how to use these resources to integrate Salesforce Scheduler with external calendars, see these topics in Salesforce Scheduler help.

SEE ALSO:

Salesforce Help: Check External Calendars to Determine Resource Availability

Salesforce Help: Write Salesforce Scheduler Appointments to External Calendars

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Apex Classes for External Calendars

The LxScheduler namespace provides an interface and classes for integrating Salesforce Scheduler with external calendars and determine the availability of service resources.

The following are the apex interface and classes available for external calendar within the Salesforce Scheduler platform.

ServiceResourceScheduleHandler Interface

Allows an implementing class to check external calendar events to find already booked time slots for the requested service resources. This interface is part of Salesforce Scheduler.

ServiceAppointmentRequestInfo Class

Represents the list of parameters that are passed to the ServiceResourceScheduleHandler interface. This class is implemented internally by Apex.

ServiceResourceInfo Class

Contains information about a service resource.

ServiceResourceSchedule Class

Use this class to pass results from your implemented Apex class to the ServiceResourceScheduleHandler interface methods.

UnavailableTimeslot Class

Use this class to pass the unavailable time slots to the lxscheduler.ServiceResourceSchedule class. Timezones that differ across operating hours are handled and results are always returned in UTC.

ServiceResourceScheduleHandler Interface

Allows an implementing class to check external calendar events to find already booked time slots for the requested service resources. This interface is part of Salesforce Scheduler.

Namespace

LxScheduler

Usage

The `lxscheduler.ServiceResourceScheduleHandler` interface is called by Salesforce Scheduler APIs.

To implement this interface, you must first declare a class with the `implements` keyword as follows:

```
public class ServiceResourceScheduleHandlerImpl implements
LxScheduler.ServiceResourceScheduleHandler{}
```

Next, your class must provide an implementation for the following method:

```
public static List<LxScheduler.ServiceResourceSchedule>
getUnavailableTimeslots(LxScheduler.ServiceAppointmentRequestInfo requestInfo){
      //Your code here
}
```

The implemented method must be declared as `global` or `public`.

ServiceResourceScheduleHandler Methods

ServiceResourceScheduleHandler Methods

The following are methods for `ServiceResourceScheduleHandler`.

getUnavailableTimeslots(var1)

Passes the required information to get unavailable time slots from an external system. The implementation of this method returns the `lxscheduler.ServiceResourceSchedule` class.

getUnavailableTimeslots(var1)

Passes the required information to get unavailable time slots from an external system. The implementation of this method returns the `lxscheduler.ServiceResourceSchedule` class.

Signature

```
public List<lxscheduler.ServiceResourceSchedule>
getUnavailableTimeslots(lxscheduler.ServiceAppointmentRequestInfo var1)
```

Parameters

var1

Type: lxscheduler.ServiceAppointmentRequestInfo

Represents the list of parameters that are passed to the ServiceResourceScheduleHandler interface.

Return Value

Type: List<lxscheduler.ServiceResourceSchedule>

ServiceResourceScheduleHandler Example Implementation

This is an example implementation of the `lxscheduler.ServiceResourceScheduleHandler` interface.

```
/**
 * Implement interface lxscheduler.ServiceResourceScheduleHandler
 * This class is called when fetching service resources and time slots through Salesforce
 Scheduler API.*/
   Public class ServiceResourceScheduleHandlerImpl implements
lxscheduler.ServiceResourceScheduleHandler{

    // The main interface method.
    public static List<lxscheduler.ServiceResourceSchedule>
getUnavailableTimeslots(lxscheduler.ServiceAppointmentRequestInfo requestInfo){
        //Request info values.
        List<lxscheduler.ServiceResourceInfo>
serviceResources=requestInfo.getServiceResources();
        DateTime startDate=requestInfo.getStartDate();
        DateTime endDate=requestInfo.getEndDate();
```

```
        List<lxscheduler.ServiceResourceSchedule> resourceUnavailability = new
List<lxscheduler.ServiceResourceSchedule>();
        Set<lxscheduler.UnavailableTimeslot> unavailabilityIntervals = new
Set<lxscheduler.UnavailableTimeslot>();

        //This is a dummy response. Implement your own business logic to connect to your
internal or external systems.
        for (Integer i = 0; i < 5; i++) {
             //Set the unavailability intervals of a service resource.
            unavailabilityIntervals.add(new
lxscheduler.UnavailableTimeslot(startDate.addMinutes(15*i),startDate.addMinutes(15*(i+1))));

        }

      for (lxscheduler.ServiceResourceInfo ServiceResource:serviceResources) {
            //Set the unavailability of Service resource.
        resourceUnavailability.add(new
lxscheduler.ServiceResourceSchedule(serviceResource.getServiceResourceId(),unavailabilityIntervals));


        }

        return resourceUnavailability;
    }
}
```

This example shows how to set a sample test mock using the `lxscheduler.ServiceResourceScheduleHandler` interface.

```
@isTest
private class ServiceResourceScheduleHandlerImplTest {
    static testMethod void getUnavailableTimeslotsTest() {

      //Initializing the test execution with mock values. Change it according to the
implementation.
      //In case of non-test execution, the lxscheduler.ServiceAppointmentRequestInfo
instance will automatically initialize.

      //Mock values for lxscheduler.ServiceResourceInfo
      String userId = '005D2000000I1N6IAK';
      String userName = 'someuser@example.com';
      String email = 'someuser@example.com';
      String serviceResourceId = '0HnD20000004C9bKAE';
      List<String> territoryIds = new List<String>();
      String resourceType = 'T';
      lxscheduler.ServiceResourceInfo serviceResInfo = new
lxscheduler.ServiceResourceInfo(userId, userName, email,
                                              serviceResourceId, territoryIds,
resourceType);

      //Mock values for lxscheduler.ServiceAppointmentRequestInfo
      DateTime startDate = System.now();
      DateTime endDate = System.now();
      List<lxscheduler.ServiceResourceInfo> serviceResources = new
```

```
List<lxscheduler.ServiceResourceInfo>();
     serviceResources.add(serviceResInfo);
     String schedulingPolicyId = '0VrD20000004C9S';
     String workTypeGroupId = '0VSD20000004C93OAE';
     String accountId = '001D2000002pkXwIAI';
     String primaryResourceId = '0HnD20000004C9bKAE';
     String workTypeId = '08qD20000004C9XIAU';
     String correlationId = 'SOME_ID';

     lxscheduler.ServiceAppointmentRequestInfo mockRequestInfo = new
lxscheduler.ServiceAppointmentRequestInfo(startDate, endDate, serviceResources,
                                                    schedulingPolicyId,
workTypeGroupId, accountId,
                                                    primaryResourceId,
workTypeId, correlationId);

     ServiceResourceScheduleHandlerImpl.getUnavailableTimeslots(mockRequestInfo);
   }
}
```

ServiceAppointmentRequestInfo Class

Represents the list of parameters that are passed to the ServiceResourceScheduleHandler interface. This class is implemented internally by Apex.

Namespace

LxScheduler

ServiceAppointmentRequestInfo Constructors

ServiceAppointmentRequestInfo Methods

ServiceAppointmentRequestInfo Constructors

The following are constructors for `ServiceAppointmentRequestInfo`.

ServiceAppointmentRequestInfo(startDate, endDate, ServiceResources, SchedulingPolicyId, workTypeGroupId, accountId, primaryResourceId, workTypeId, correlationId)
Creates a new instance of the `lxscheduler.ServiceAppointmentRequestInfo` class using the specified start date, end date, service resources, scheduling policy, work type group, accound ID, primary resource, work type, and correlation.

ServiceAppointmentRequestInfo(startDate, endDate, ServiceResources, SchedulingPolicyId, workTypeGroupId, accountId, primaryResourceId, workTypeId, correlationId)

Creates a new instance of the `lxscheduler.ServiceAppointmentRequestInfo` class using the specified start date, end date, service resources, scheduling policy, work type group, accound ID, primary resource, work type, and correlation.

Signature

```
public ServiceAppointmentRequestInfo(Datetime startDate, Datetime endDate,
List<lxscheduler.ServiceResourceInfo> ServiceResources, String SchedulingPolicyId,
String workTypeGroupId, String accountId, String primaryResourceId, String workTypeId,
String correlationId)
```

Parameters

startDate
> Type: Datetime
>
> The start date and time for which unavailable time slots are requested.

endDate
> Type: Datetime
>
> The end date and time for which unavailable time slots are requested.

ServiceResources
> Type: List<lxscheduler.ServiceResourceInfo>
>
> The list of requested service resources for the unavailable time slots.

SchedulingPolicyId
> Type: String
>
> The ID of the scheduling policy .

workTypeGroupId
> Type: String
>
> The work type group ID.

accountId
> Type: String
>
> The account ID of an existing user.

primaryResourceId
> Type: String
>
> The ID of the primary service resource.

workTypeId
> Type: String
>
> The work type ID.

correlationId
> Type: String
>
> A unique identifier for a service appointment request.

ServiceAppointmentRequestInfo Methods

The following are methods for `ServiceAppointmentRequestInfo`.

getAccountId()
Returns the account ID of the customer if the API request contains one.

getCorrelationId()

Returns a unique identifier for a request.

getEndDate()

Returns the end date and time for which unavailable time slots are requested.

getPrimaryResourceId()

Returns the ID of the primary service resource.

getSchedulingPolicyId()

Returns the ID of the scheduling policy that the API request contains.

getServiceResources()

Returns the list of requested service resources for the unavailable time slots.

getStartDate()

Returns the start date and time for which unavailable time slots are requested.

getWorkTypeGroupId()

Returns the work type group ID if the API request contains one.

getWorkTypeId()

Returns the work type ID if the API request contains one.

getAccountId()

Returns the account ID of the customer if the API request contains one.

Signature

```
public String getAccountId()
```

Return Value

Type: String

getCorrelationId()

Returns a unique identifier for a request.

Signature

```
public String getCorrelationId()
```

Return Value

Type: String

getEndDate()

Returns the end date and time for which unavailable time slots are requested.

Signature

```
public Datetime getEndDate()
```

Return Value

Type: Datetime

getPrimaryResourceId()

Returns the ID of the primary service resource.

Signature

```
public String getPrimaryResourceId()
```

Return Value

Type: String

getSchedulingPolicyId()

Returns the ID of the scheduling policy that the API request contains.

Signature

```
public String getSchedulingPolicyId()
```

Return Value

Type: String

getServiceResources()

Returns the list of requested service resources for the unavailable time slots.

Signature

```
public List<lxscheduler.ServiceResourceInfo> getServiceResources()
```

Return Value

Type: List<lxscheduler.ServiceResourceInfo>

getStartDate()

Returns the start date and time for which unavailable time slots are requested.

Signature

```
public Datetime getStartDate()
```

Return Value

Type: Datetime

getWorkTypeGroupId()

Returns the work type group ID if the API request contains one.

Signature

```
public String getWorkTypeGroupId()
```

Return Value

Type: String

getWorkTypeId()

Returns the work type ID if the API request contains one.

Signature

```
public String getWorkTypeId()
```

Return Value

Type: String

ServiceResourceInfo Class

Contains information about a service resource.

Namespace

LxScheduler

ServiceResourceInfo Constructors

ServiceResourceInfo Methods

ServiceResourceInfo Constructors

The following are constructors for `ServiceResourceInfo`.

ServiceResourceInfo(userId, userName, email, serviceResourceId, territoryIds, resourceType)
Creates a new instance of the `lxscheduler.ServiceResourceInfo` class using the specified service resource details.

ServiceResourceInfo(userId, userName, email, serviceResourceId, territoryIds, resourceType)

Creates a new instance of the `lxscheduler.ServiceResourceInfo` class using the specified service resource details.

Signature

```
public ServiceResourceInfo(String userId, String userName, String email, String
serviceResourceId, List<String> territoryIds, String resourceType)
```

Parameters

userId
    Type: String

    The user ID of the service resource.

userName
    Type: String

    The user name of the service resource.

email
    Type: String

    The email ID of the service resource.

serviceResourceId
    Type: String

    The ID of the service resource.

territoryIds
    Type: List<String>

    A list of requested service territories for the service resource.

resourceType
    Type: String

    The type of the service resource such as Technician or Asset.

ServiceResourceInfo Methods

The following are methods for `ServiceResourceInfo`.

getEmail()
Returns the email ID of the service resource.

getResourceType()
Returns the type of the service resource such as Technician or Asset.

getServiceResourceId()
Returns the ID of the service resource.

getTerritoryIds()
Returns a list of requested service territories for the service resource.

getUserId()

Returns the user ID of the service resource.

getUserName()

Returns the user name of the service resource.

getEmail()

Returns the email ID of the service resource.

Signature

```
public String getEmail()
```

Return Value

Type: String

getResourceType()

Returns the type of the service resource such as Technician or Asset.

Signature

```
public String getResourceType()
```

Return Value

Type: String

getServiceResourceId()

Returns the ID of the service resource.

Signature

```
public String getServiceResourceId()
```

Return Value

Type: String

getTerritoryIds()

Returns a list of requested service territories for the service resource.

Signature

```
public List<String> getTerritoryIds()
```

Return Value

Type: List<String>

getUserId()

Returns the user ID of the service resource.

Signature

```
public String getUserId()
```

Return Value

Type: String

getUserName()

Returns the user name of the service resource.

Signature

```
public String getUserName()
```

Return Value

Type: String

ServiceResourceSchedule Class

Use this class to pass results from your implemented Apex class to the ServiceResourceScheduleHandler interface methods.

Namespace

LxScheduler

ServiceResourceSchedule Constructors

ServiceResourceSchedule Properties

ServiceResourceSchedule Constructors

The following are constructors for `ServiceResourceSchedule`.

ServiceResourceSchedule(serviceResourceId, unavailableTimeslots)
Creates a new instance of lxscheduler.ServiceResourceSchedule class.

ServiceResourceSchedule(serviceResourceId, unavailableTimeslots)

Creates a new instance of lxscheduler.ServiceResourceSchedule class.

Signature

```
public ServiceResourceSchedule(String serviceResourceId,
Set<lxscheduler.UnavailableTimeslot> unavailableTimeslots)
```

Parameters

serviceResourceId
  Type: String

  Record ID of the service resource.

unavailableTimeslots
  Type: Set<lxscheduler.UnavailableTimeslot>

  An instance of lxscheduler.UnavailableTimeslot class.

ServiceResourceSchedule Properties

The following are properties for `ServiceResourceSchedule`.

serviceResourceId
Record ID of the service resource.

unavailableTimeslots
An instance of lxscheduler.UnavailableTimeslot class.

serviceResourceId

Record ID of the service resource.

Signature

```
public String serviceResourceId {get; set;}
```

Property Value

Type: String

unavailableTimeslots

An instance of lxscheduler.UnavailableTimeslot class.

Signature

```
public Set<lxscheduler.UnavailableTimeslot> unavailableTimeslots {get; set;}
```

Property Value

Type: Set<lxscheduler.UnavailableTimeslot>

UnavailableTimeslot Class

Use this class to pass the unavailable time slots to the lxscheduler.ServiceResourceSchedule class. Timezones that differ across operating hours are handled and results are always returned in UTC.

Namespace

LxScheduler

UnavailableTimeslot Constructors

UnavailableTimeslot Properties

UnavailableTimeslot Constructors

The following are constructors for `UnavailableTimeslot`.

UnavailableTimeslot(timeMin, timeMax)

Creates an instance of lxscheduler.UnavailableTimeslot class.

UnavailableTimeslot(timeMin, timeMax)

Creates an instance of lxscheduler.UnavailableTimeslot class.

Signature

```
public UnavailableTimeslot(Datetime timeMin, Datetime timeMax)
```

Parameters

timeMin
    Type: Datetime

    Start time of an unavailable time slot.

timeMax
    Type: Datetime

    End time of an unavailable time slot.

UnavailableTimeslot Properties

The following are properties for `UnavailableTimeslot`.

timeMax

End time of an unavailable time slot.

timeMin

Start time of an unavailable time slot.

timeMax

End time of an unavailable time slot.

Signature

```
public Datetime timeMax {get; set;}
```

Property Value

Type: Datetime

timeMin

Start time of an unavailable time slot.

Signature

```
public Datetime timeMin {get; set;}
```

Property Value

Type: Datetime

Platform Events for External Calendars

Use the AppointmentSchedulingEvent to notify subscribers when an appointment schedule is added, updated, or deleted.

The following is the platform event object available within the Salesforce Scheduler platform.

AppointmentSchedulingEvent
Notifies subscribers when an appointment schedule is added, updated, or deleted. This object is available in API version 50.0 and later.

SEE ALSO:

Platform Events Developer Guide

AppointmentSchedulingEvent

Notifies subscribers when an appointment schedule is added, updated, or deleted. This object is available in API version 50.0 and later.

Supported Calls

```
describeSObjects()
```

Special Access Rules

AppointmentSchedulingEvent is available as part of Salesforce Scheduler.

Supported Subscribers

Subscriber	Supported?
Apex Triggers	✔
Flows	
Processes	
Pub/Sub API	✔
Streaming API (CometD)	✔

Subscription Channel

`/event/AppointmentSchedulingEvent`

Event Delivery Allocation Enforced

Yes

Fields

Field	Details
AssignedResourceFields	**Type** AsgnRsrcApptSchdEvent[] **Properties** Nillable **Description** The assigned resources associated with the appointment.
ChangeType	**Type** string **Properties** Nillable **Description** The operation that caused the change. For example: CREATE, UPDATE, DELETE.
CorrelationId	**Type** string **Properties** Nillable

Field	Details
	Description The universally unique identifier (UUID) that correlates the appointment with the platform event.
EventUuid	**Type** string **Properties** Nillable **Description** A universally unique identifier (UUID) that identifies a platform event message. This field is available in API version 52.0 and later.
ReplayId	**Type** string **Properties** Nillable **Description** Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
ServiceAppointmentFields	**Type** SvcApptSchdEvent[] **Properties** Nillable **Description** The service appointments associated with the appointment.

Example

This example event message is for a new appointment with two assigned resources.

```
{
  "schema": "Zog7FKcPWV9DeEIEVHsoug",
  "payload": {
    "CreatedById": "005xx000001X7dlAAC",
    "ChangeType": "CREATE",
    "ServiceAppointmentFields": {
      "ParentRecordId": "001RM000003rwkfYAA",
      "ContactId": "003RM000006EpajYAC",
      "Status": "None",
      "AdditionalInformation": "Sample additional information",
      "ServiceTerritoryId": "0Hhxx0000004mu4",
```

```
        "Comments": "Sample comment",
        "Email": "abc@example.com",
        "Address": "1 Market Street San Francisco CA 94105 United States",
        "WorkTypeId": "08qxx0000004C92",
        "WorkTypeBlockTimeBeforeAppointment": 30,
        "WorkTypeBlockTimeAfterAppointment": 1,
        "WorkTypeBlockTimeBeforeUnit": "minutes",
        "WorkTypeBlockTimeAfterUnit": "hours",
        "ServiceAppointmentId": "08pxx0000005Ip6",
        "ScheduledEndTime": "2020-02-28T00:45:00.000Z",
        "Subject": "Apply for Privileged Customer Card",
        "AppointmentType": "null",
        "StatusCategory": "None",
        "DurationInMinutes": 60,
        "Phone": "4155551212",
        "ScheduledStartTime": "2020-02-27T23:45:00.000Z"
    },
    "AssignedResourceFields": [
      {
        "IsPrimaryResource": true,
        "ServiceResourceUserName": "Rachel Adams",
        "ServiceResourceUserId": "005xx000001X7dl",
        "AssignedResourceId": "03rxx0000004gLc",
        "ServiceResourceId": "0Hnxx0000004C92",
        "ServiceResourceUserEmail": "ra@example.com",
        "IsRequiredResource": true
      },
      {
        "IsPrimaryResource": false,
        "ServiceResourceUserName": "Andrew Collins",
        "ServiceResourceUserId": "005xx000001XPNl",
        "AssignedResourceId": "03rxx0000004gNE",
        "ServiceResourceId": "0Hnxx0000006z8q",
        "ServiceResourceUserEmail": "ac@example.com",
        "IsRequiredResource": false
      }
    ],
    "CreatedDate": "2020-02-25T01:57:39.936Z",
    "CorrelationId": "d7c0bbGiUObLF6BD3NaG"
  },
  "event": {
    "replayId": 3
  }
}
```

AsgnRsrcApptSchdEvent

Represents the assigned resources that are part of various platform events. This object is included in a streamed notification received on the channels for the parent platform events. You can't subscribe to the AsgnRsrcApptSchdEvent channel directly. This object is available in API version 50.0 and later.

SvcApptSchdEvent

Represents the service appointment event. This object is included in a streamed notification received on the channels for the parent platform events. You can't subscribe to the SvcApptSchdEvent channel directly. This object is available in API version 50.0 and later.

AsgnRsrcApptSchdEvent

Represents the assigned resources that are part of various platform events. This object is included in a streamed notification received on the channels for the parent platform events. You can't subscribe to the AsgnRsrcApptSchdEvent channel directly. This object is available in API version 50.0 and later.

Supported Calls

`describeSObjects()`

Parent Platform Events

- AppointmentSchedulingEvent
- ServiceAppointmentEvent

Fields

Field	Details
AssignedResourceId	**Type** string **Properties** Nillable **Description** ID of the assigned resource.
ChangedFields	**Type** complexvalue **Properties** Nillable **Description** A list of fields that changed.
EventUuid	**Type** string **Properties** Nillable **Description** A universally unique identifier (UUID) that identifies a platform event message. This field is available in API version 52.0 and later.
IsPrimaryResource	**Type** boolean **Properties** Defaulted on create

Field	Details
	Description Indicates whether the resource is primary.
IsRequiredResource	**Type** boolean **Properties** Defaulted on create **Description** Indicates whether the resource is required.
ServiceResourceId	**Type** string **Properties** Nillable **Description** ID of the service resource assigned to the event.
ServiceResourceUserEmail	**Type** string **Properties** Nillable **Description** Email of the service resource user assigned to the event.
ServiceResourceUserId	**Type** string **Properties** Nillable **Description** ID of the user record associated with the service resource assigned to the event.
ServiceResourceUserName	**Type** string **Properties** Nillable **Description** Username as per the user record associated with the service resource assigned to the event.

Example

This example shows the assigned resources associated with the event.

```
{
  "IsPrimaryResource": true,
  "ServiceResourceUserName": "Rachel Adams",
  "ServiceResourceUserId": "005xx000001X7dl",
  "AssignedResourceId": "03rxx0000004gLc",
  "ServiceResourceId": "0Hnxx0000004C92",
  "ServiceResourceUserEmail": "ra@example.com",
  "IsRequiredResource": true
}
```

SvcApptSchdEvent

Represents the service appointment event. This object is included in a streamed notification received on the channels for the parent platform events. You can't subscribe to the SvcApptSchdEvent channel directly. This object is available in API version 50.0 and later.

Supported Calls

```
describeSObjects()
```

Parent Platform Events

- AppointmentSchedulingEvent
- ServiceAppointmentEvent

Fields

Field	Details
AdditionalInformation	**Type** string **Properties** Nillable **Description** Additional information about the service appointment.
Address	**Type** string **Properties** Nillable **Description** The address of the service appointment.
AppointmentType	**Type** string

Field	Details
	Properties Nillable
	Description The service appointment type.
ChangedFields	**Type** complexvalue
	Properties Nillable
	Description List of fields that changed.
Comments	**Type** string
	Properties Nillable
	Description Comments about the service appointment.
ContactId	**Type** string
	Properties Nillable
	Description ID of the contact associated with the service appointment.
DurationInMinutes	**Type** double
	Properties Nillable
	Description The duration of the service appointment in minutes.
Email	**Type** string
	Properties Nillable
	Description The email associated with the service appointment.
EventUuid	**Type** string

Field	Details
	Properties Nillable **Description** A universally unique identifier (UUID) that identifies a platform event message. This field is available in API version 52.0 and later.
ParentRecordId	**Type** string **Properties** Nillable **Description** ID of the parent record associated with the service appointment.
Phone	**Type** string **Properties** Nillable **Description** The phone number associated with the service appointment.
ScheduledEndTime	**Type** dateTime **Properties** Nillable **Description** The scheduled end time of the service appointment.
ScheduledStartTime	**Type** dateTime **Properties** Nillable **Description** The scheduled start time of the service appointment.
ServiceAppointmentId	**Type** string **Properties** Nillable **Description** ID of the service appointment.

Field	Details
ServiceTerritoryId	**Type** string **Properties** Nillable **Description** ID of the service territories associated with the service appointment.
Status	**Type** string **Properties** Nillable **Description** The status of the service appointment.
StatusCategory	**Type** string **Properties** Nillable **Description** The status category of the service appointment.
Subject	**Type** string **Properties** Nillable **Description** The subject of the service appointment.
WorkTypeBlockTimeAfterAppointment	**Type** int **Properties** Nillable **Description** The period of time occurring after the appointment that is typically blocked for this work type.
WorkTypeBlockTimeAfterUnit	**Type** string **Properties** Nillable

Field	Details
	Description
	The unit of the period specified for WorkTypeBlockTimeAfterAppointment. Values include `hour` and `minute`.
WorkTypeBlockTimeBeforeAppointment	**Type**
	int
	Properties
	Nillable
	Description
	The period of time occurring before the appointment that is typically blocked for this work type.
WorkTypeBlockTimeBeforeUnit	**Type**
	string
	Properties
	Nillable
	Description
	The unit of the period specified for WorkTypeBlockTimeBeforeAppointment. Values include `hour` and `minute`.
WorkTypeId	**Type**
	string
	Properties
	Nillable
	Description
	ID of the work type associated with the service appointment.

Example

This example shows the service appointment fields associated with the event.

```
{
  "ParentRecordId": "001RM000003rwkfYAA",
  "ContactId": "003RM000006EpajYAC",
  "Status": "None",
  "AdditionalInformation": "Sample additional information",
  "ServiceTerritoryId": "0Hhxx0000004mu4",
  "Comments": "Sample comment",
  "Email": "abc@example.com",
  "Address": "1 Market Street San Francisco CA 94105 United States",
  "WorkTypeId": "08qxx0000004C92",
  "WorkTypeBlockTimeBeforeAppointment": 30,
  "WorkTypeBlockTimeAfterAppointment": 1,
  "WorkTypeBlockTimeBeforeUnit": "minutes",
  "WorkTypeBlockTimeAfterUnit": "hours",
```

```
  "ServiceAppointmentId": "08pxx0000005Ip6",
  "ScheduledEndTime": "2020-02-28T00:45:00.000Z",
  "Subject": "Apply for Chase Sapphire Preferred Card",
  "AppointmentType": "null",
  "StatusCategory": "None",
  "DurationInMinutes": 60,
  "Phone": "4157286216",
  "ScheduledStartTime": "2020-02-27T23:45:00.000Z"
}
```

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