Schedule an Appointment

Salesforce, Spring '24

'24

CONTENTS

SCHEDULE AN APPOINTMENT

Implement scalable processes to let shoppers schedule appointments.

Get Started

Explore system architecture related to this solution.
- B2C Industry Blueprint
- B2C Reference Architecture
- B2C Solution Architectures
- Salesforce Scheduler Data Model Overview

Take Trailhead modules related to this solution.
- Salesforce Solution Kits: Quick Look
- Customer 360 Guide for Retail: Quick Look
- Customer 360 Guides: Quick Look
- Appointment Booking with Salesforce Scheduler Trail

Providing safe shopping experiences to shoppers increases the opportunity to cultivate relationships and deliver products in a changing world. Enabling scheduling helps retailers assign resources more efficiently and better address customers' shifting needs.

This solution kit helps you:

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

Required Products

- One of more of these clouds:
  - Sales Cloud
  - Service Cloud
  - Industries, for example Health, Manufacturing, Consumer Goods, or Financial Services

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- Salesforce Scheduler Permission Set License
  - One license per schedulable asset or resource being scheduled

Implement This Solution

Understand the Schedule an Appointment Solution Workflow

Learn how data flows through the configurations to schedule an appointment.

Recommended Technology

Use Salesforce Scheduler as the basis of your appointment booking system.

Configurations

Use these configuration steps to schedule an appointment.

Design Considerations

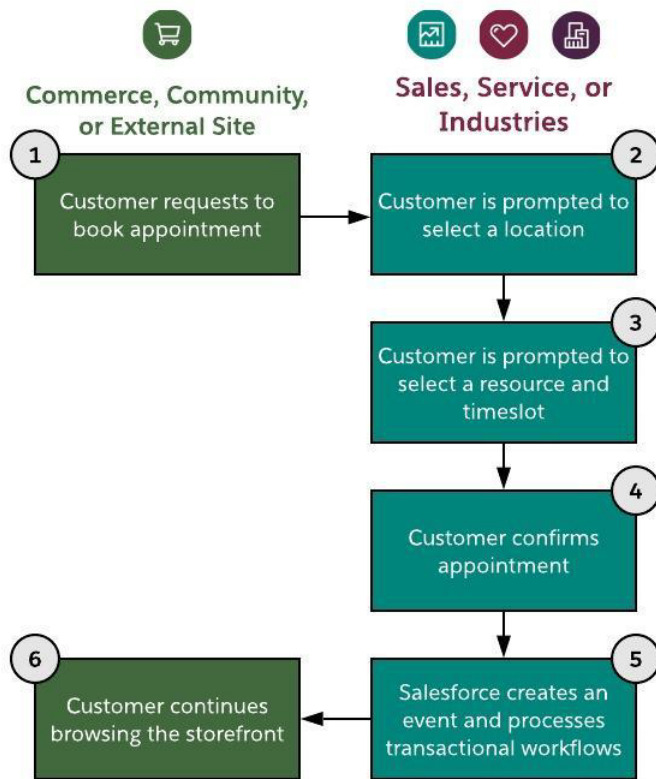Keep these design considerations in mind when you implement your appointment booking system.

SEE ALSO:

Solution Kits for Retail and B2C

Understand the Schedule an Appointment Solution Workflow

Learn how data flows through the configurations to schedule an appointment.

Workflow

1. The customer requests to book an appointment.

2. The customer is prompted to select a location.

3. The customer is prompted to select a resource and a time slot.

4. The customer confirms their selections.

5. Salesforce creates an event and processes transactional workflows.

6. The customer continues browsing the storefront.

Related Content

Review this solution's use case and purpose.

- Schedule an Appointment on page 1

Take the next steps in this implementation.

- Recommended Technology
- Configurations

- • Design Considerations

SEE ALSO:

Trailhead: Get to Know Salesforce Identity

Recommended Technology

Use Salesforce Scheduler as the basis of your appointment booking system.

Salesforce Scheduler supports location- and capacity-controlled booking use cases.

Use Salesforce Scheduler to let customers set appointments with specialized resources, such as a particular retail associate or based on skills needed.

Asset scheduling moves beyond solely resource-booked appointments to provide scheduling based on more complex needs. Allow customers to book based on factors such as retail capacity or private room availability for in-store browsing. Schedule unlimited assets in the same functionality provided for resource-based booking.

General Information

- • Salesforce Scheduler is available for Platform User license. Review the Schedule Resource details when planning licenses.
- • There are limitations to having both Field Service and Scheduler in the same org. Talk with your Success Manager before pursuing Salesforce Scheduler if you already have Field Service installed.
- • Lightning Experience must be turned on for the org before Salesforce Scheduler can be enabled.

Functionality Considerations

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

Flow Builder Considerations

- • Start from Salesforce Scheduler Standard Flow Template. Configure a personalized experience by enhancing flow templates with Flow Lightning Components or Apex Actions.

  Use API or customer components to support use cases where mobile responsiveness and multiple timezone booking requirements are critical. When designing custom API solutions, review out-of-the-box templates for workflow considerations.

- • Scheduler flows can be used out-of-the-box in Communities and Embedded Services, or extended through custom Lightning Components and APIs.

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

Outbound Scheduling:

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

Inbound Scheduling:

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

General Limits

- Salesforce Scheduler limits and limitations apply.
- For guest users, times display using the site's default time zone, not the customer's current time zone.

Optional Technology

- Use Marketing Cloud Personalization Web Campaigns to present the scheduler to shoppers who meet defined criteria or show exit intent from your site.

Related Content

←	Review earlier steps in this solution. • Understand the Schedule an Appointment Solution Workflow on page 2
→	Take the next steps in this implementation. • Configurations • Design Considerations

SEE ALSO:

Salesforce Scheduler Implementation Guidelines

Configurations

Use these configuration steps to schedule an appointment.

Prerequisites

Appointment time slots are determined based on your Salesforce Scheduler data model configurations. Before exposing Salesforce Scheduler Inbound or Outbound actions to your users, set up records for the following objects.

- Service Resources
- Assets
- Service Territory Members

- Work Type Groups
- Work Types
- Work Type Group Members
- Service Territory Work Types

If your use case requires Guest Site User Scheduling, configure Guest Profile Access. Set the default timezone for the guest user profile for the Scheduler. Additional customization is required to support the timezone mapping for guest appointments that can be passed via APIs if out-of-the-box flow templates don't support use cases.

Set Organization Wide Sharing for external access to default to Public Read Only on the following objects.

- Work Type
- Work Type Group
- Service Resource
- Service Territory
- User

To allow a guest to schedule appointments, update the Guest User Profile to allow guests users to

- Run flows.
    - Open guest user access for your custom guest appointment flow.
        1. To create a custom flow, open your custom Inbound New Guest Appointment flow template and save it.
        2. To surface your flow for public consumption, follow these instructions to select **Override default behavior and restrict access to enabled profiles or permission sets**. Don't add anything to enabled profiles.
        3. Navigate to your guest user profile, then click **Flow Access**.
        4. Click **Edit** and add your Inbound New Guest User customer flow to the list of enabled flows.
    - If your org has Run Flows permission, you can leverage that permission. However, the Run Flows permission will sunset Summer '22.

- Edit events within Salesforce. Guest users are allowed to create objects such as booking but not edit objects such as service appointments.

Create sharing rules for guest users.

- Determine which records to expose to your Experience Cloud Community's guests.
- Set create criteria-based record-sharing rules to match your business process for the following objects.
    - Service Resource
    - Service Territory
    - Work Type
    - Work Type Group

- Optionally, configure field level security for the Asset field on the Service Resource object.
    - The Asset field becomes available only when your org has an Asset Scheduling license enabled and provisioned in the instance.
    - Grant Edit permission to profiles that book appointments for Assets, including guest profiles.

- Add the Asset field to the page layout for the Service Resource object.

    📝 Note: Without defining sharing rules for guests, unauthenticated users can't access the records required for the Inbound New Guest Appointment flow. This requirement applies to Embedded Services hosted in an Experience Cloud community or external site.

Technical Architecture

Choose how you wish to customize, extend, or enhance Salesforce Scheduler from available implementation approaches. Review all available documentation to understand the product, such as Salesforce Scheduler, Salesforce Scheduler Implementation Guide, and the Salesforce Scheduler Developer Guide. Study the data model. The Salesforce Scheduler product is a unique data-driven engine in which the ERD and object model works along with the actual data input in records within the object to function.

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

Keep in mind other ways to extend the Salesforce Scheduler.

- Chatbots
- Email and SMS
- Event Management and Sync

Declarative Low Development Appointment Setup

- This option requires minimal development, but styling options are limited and testing is completed manually. This option is generally a great starting point to any implementation.
- This method offers the quickest time to a live solution. This method is also a great low-effort proof-of-concept to show stakeholders what Salesforce Scheduler has to offer.
- Use the Standard Flow Template configuration with configurable customizations from Flow Builders.
- Use the Embedded Service component to add Salesforce Scheduler in a Salesforce Experience Cloud Community.
- Enable Salesforce Scheduler using the Embedded Service components in a Scheduler component, Live Agent Chat, or chatbot. Use Experience Builder and Lightning Template with standard Embedded Services components configuration.

Low Development Appointment Setup

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

    > **Note:** Embedded Service requires authentication, which could be either an end user who has gone through the best practice of authentication or an API User. Using Embedded Service does require an Experience Cloud site but doesn't require a site deployed to users. Finally, an Embedded Service can run on an external website.

Moderate Development Appointment Setup

- In this option, use custom code and APIs to customize and host Salesforce Scheduler on an external website. Testing can be automated.
- Add the ltng:allowGuestAccess interface to your Lightning Out dependency app to make it available to guest users on your external website.

    - This interface lets you build your app with Aura components, and deploy it anywhere and to anyone. If a user is authenticated with the Lightning Out endpoint, the session must be set in $Lightning.use().

- > **Note:** The ltng:allowGuestAccess interface is only usable in orgs that have Experience Cloud communities enabled. The Lightning Out app is associated with all Experience Cloud site endpoints that you've defined in the org.

High Development Appointment Setup

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

Virtual Shopping Experience

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

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

AppExchange Partners:

Screenmeet

- Installing Screenmeet in your Salesforce Org
- APEX API Reference

Recursive Labs

- Data Sheet

SightCall

Glance

- Glance for Salesforce Setup Guide

Related Content

⬅ Review earlier steps in this solution.
- Understand the Schedule an Appointment Solution Workflow on page 2
- Recommended Technology on page 4

➡ Take the next steps in this implementation.
- Design Considerations

SEE ALSO:

Salesforce Architect Blog: Introducing the Architect Decision Guides

Design Considerations

Keep these design considerations in mind when you implement your appointment booking system.

Discovery

1. Craft a central vision by deciding on the scope of your changes, identifying a team, and defining key performance indicators.

2. Identify which tools offer the functionality or levels of customization that meet your requirements.

   - Consider the functional, performance, and scalability requirements.

3. Identify crawl, walk, run use cases and scenarios. Consider the following.

   Who

   Customers, guests, or unauthenticated users

   What

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

   How

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

   Where

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

Key Cross-Cloud Considerations

Implement an appropriate cross-cloud engagement data model with Salesforce Scheduler. Unlock REST and SOAP API access across Commerce, Service, and Marketing Cloud. Seamlessly pass data attribute properties to systems for the workflows and use cases.

Salesforce Platform Keys

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

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

Commerce Keys

- CustomerNo: The storefront-assigned customer number that represents the shopper.

- CustomerID: The internal Commerce Cloud identifier representing the shopper's customer profile.
- Contact ID or Person Contact ID: Represents the independent Contact or the Contact related to a Person Account.
- Site ID: Represents the storefront related to a given Customer List.
- Customer List ID: Represents a collection of B2C Commerce customer profiles.

Marketing Cloud

Subscriber Key / Contact Key: Represents the Marketing Cloud Contact and Subscriber.

Commerce Shopper APIs

The Shop API supports Shopper Persona, cart activities, and product detail pages. Shopper APIs are built for high-scale and usage within a storefront and are read-only APIs except for basket-related and order-related fields. Commerce Cloud Shopper APIs target the persona of a storefront shopper.

Use a customer's session identifiers to inspect their shopping session via Commerce Cloud's Open Commerce API (OCAPI). Obtain a session-grant via OCAPI using these dwsid and dwsecuretoken cookie values.

Customer session details are shared with Service to unlock interactions. If you're using Scheduler, Commerce Storefront Commerce Cloud enables customers to browse and use the site without logins.

📝 Note: Rescheduling and cancellation are only available to authenticated users as of Summer '20 Release. If using Salesforce Scheduler within a Commerce Storefront, use OCAPI JWT.

Performance and Scalability Considerations

- When using both Asset Scheduling and Event Management, calendar sync doesn't occur for appointments assigned to an asset-based service resource, as there's no underlying user record.
- Resource absences can be used to block availability for the asset-based service resource. For example, if the asset was unavailable due to other factors, like required maintenance.
- You can't set the owner of a service appointment to the underlying user of an asset-based service resource, as there's no underlying user.
- When planning to use Salesforce Scheduler and an integration to Event Synchronizing, use Einstein Activity Capture to sync contacts and events between Microsoft or Google applications and Salesforce.
- It isn't recommended to use Lightning Sync with Outlook. Users could incur limitations above 30,000 requests per hour. Starting in Winter '21, Lightning Sync isn't available to new Salesforce customers.
- Note high volume use cases up front to best design technical architectures and platform events or API strategies to facilitate high volume concurrent customer requests. Refer to the Salesforce Developer Limits and Allocations Quick Reference for more on limit considerations.
- Salesforce applies a limit on the number of API calls per 24–hour period. The limit is based on the Salesforce edition type and number of licenses. Consider timezone limitations on guest users.

Related Content

← Review earlier steps in this solution.
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