Guidance for Scheduler Administrators

This guide will let you know how to manage appointment types, locations and general availability in Salesforce Scheduler.

For guidance on managing appointments themselves and completing tasks such as scheduling, rescheduling or cancelling appointments, see the guide named Managing Appointments.

To complete the actions outlined in this guide, you will need Scheduler Administrator permissions. If you're not able to complete the actions outlined in this guide you may not have those permissions: speak to your appointments lead who can request the permissions for you from ARDS, if needed.

Requesting a Scheduler licence from ARDS

To request a Scheduler licence for a member of your team, contact Ard.Systems@lse.ac.uk.

If you want to activate this person in Salesforce so attendees can book appointments with them and they're able to manage their own availability, see [View, create or edit Service Resources]

Contents

What is Salesforce?

Salesforce is a cloud computing constituent relationship management (CRM) platform. If you've not used a CRM system before then you may wish to complete the Trailhead 'Salesforce User Basics' module before using Service Appointments. (Trailhead is Salesforce's training website, which you can access with your Salesforce login.)

Salesforce was originally a platform primarily for sales-focussed organisations, and much of its branding, terminology and training materials are designed accordingly. However, many of the technologies that Salesforce offers also have the power to improve student and staff interactions, and management of student data, so LSE is pioneering its use in the UK Higher Education sector.

What is Scheduler?

Scheduler is the name of one of many apps that the School uses to perform functions in Salesforce. It is a tool to manage 1:1 appointments with students. It can also provide much better management information than is possible with traditional email tools such as Outlook, or spreadsheets like Microsoft Excel.

Key concepts and definitions

Salesforce has helpful definitions of several key terms relating to booking appointments, including:

- Service Resource
- Service Territory
- Service Appointment
- Work Type Group
- Work Type
- Skill
- Operating Hours
- Time Slot

It will also be helpful to understand the following key concepts:

How Service Appointments are created

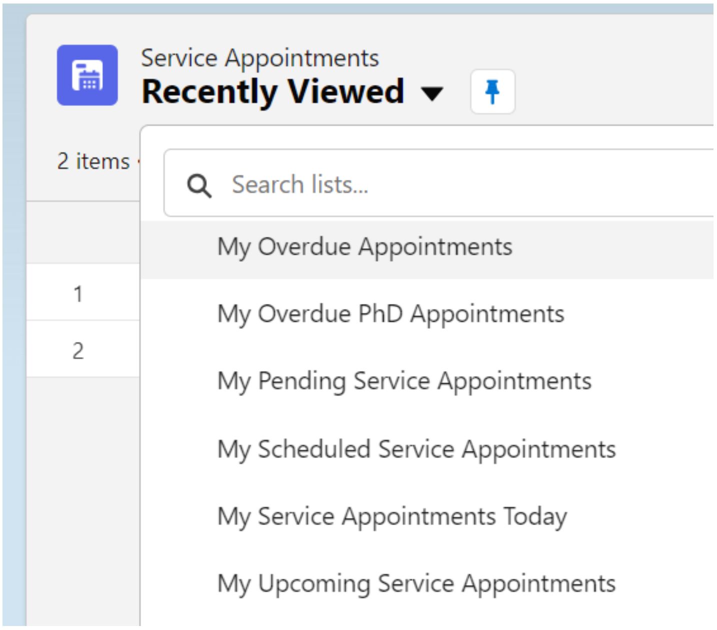
Salesforce doesn't create an appointment record **until the appointment slot is booked**. Prior to the slot being booked, the appointment record does not exist, and won't appear in anyone's calendar.

Salesforce determines which slots to show to attendees by following a number of instructions set by your team's scheduler and (**if** you are using the Outlook integration) looking at the availability in your calendar.

List views

List views appear throughout Salesforce and are one of its most powerful tools. They are a filtered list of records that meet the specified criteria. Unlike the 'folders' concept used for emails in Outlook and for files on your computer, where each record can only appear in one folder, records in Salesforce can appear in any number of list views.

You will have list views set up in Service Appointments to show “My Appointments Today” and “My Upcoming Appointments”, as well as others. It’s easy to make your own personal list views in the app. A few examples of existing list views can be seen below:

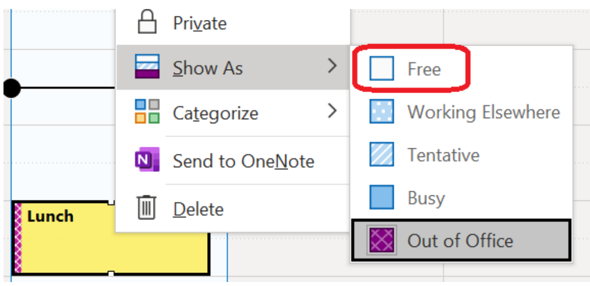


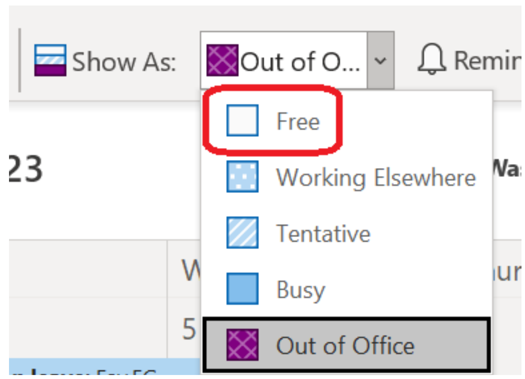
Outlook event statuses (only relevant when Outlook integration is activated)

Every event in your Outlook calendar has a related status which indicates your availability. This is a fundamental aspect of how Salesforce understands whether you're available to be booked for appointments.

You can view or change the status of an Outlook calendar event in two ways:

1. Right-click the event, select "Show as", then select the option you would like.
2. On the taskbar look for the "Show as" icon, select the drop-down menu next to it, then select the option you would like.

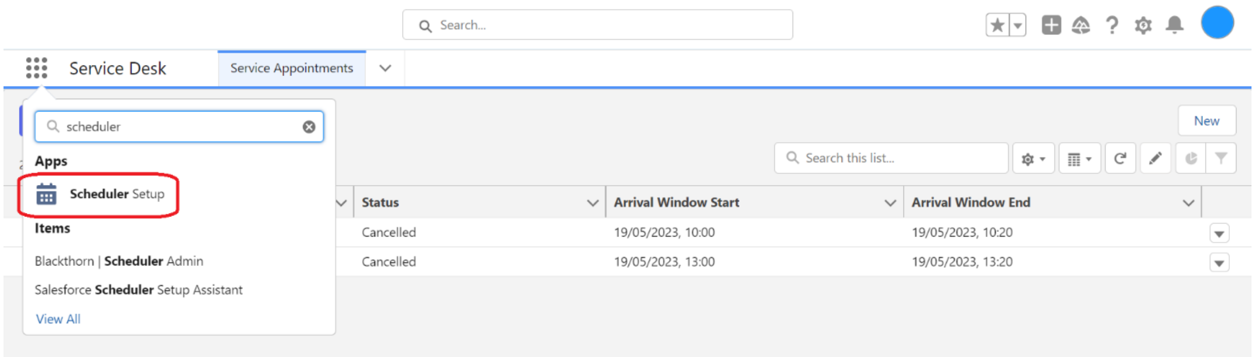




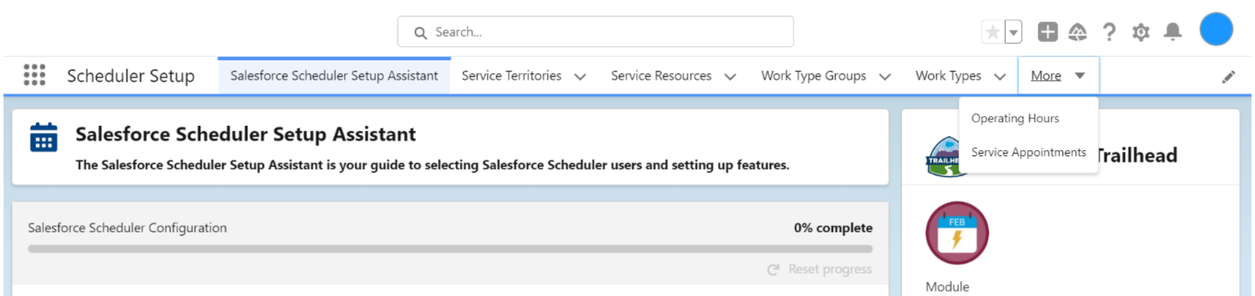
Salesforce will consider that time 'bookable' if it is either completely available (it features no calendar events) or any events have the status of "Free" (circled in red above). [A number of other factors](#) also determine whether that slot is offered to attendees.

Log into Salesforce and access the Scheduler app

1. Select the app launcher and search for “Scheduler setup” (circled in red). Select this option.



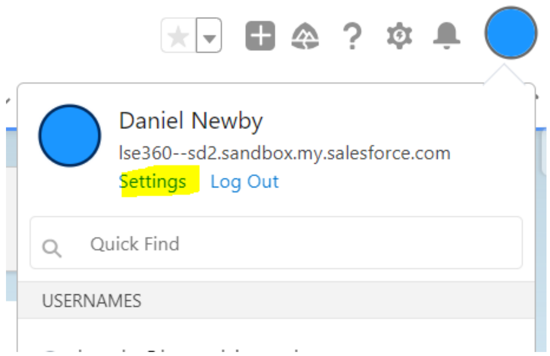
2. Along the top of the app you will see various types of record:
   a. Service Territories: locations in which appointments are held.
   b. Service Resources: staff who are delivering appointments.
   c. Work Type Groups: allows grouping of appointments which fall under the same type of category.
   d. Work Types: types of appointments offered.
   e. Service Appointments: appointments which have been booked. Depending on how you view this list you will be able to see past and upcoming appointments.



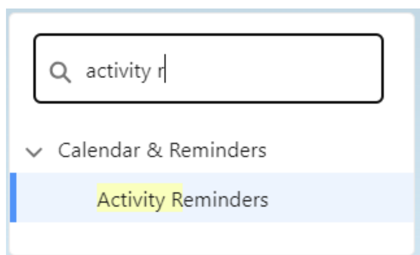
Turn off event reminder notifications in Salesforce

Event reminders are turned on as standard (whether you are using the Outlook integration or not), and you may wish to turn them off.

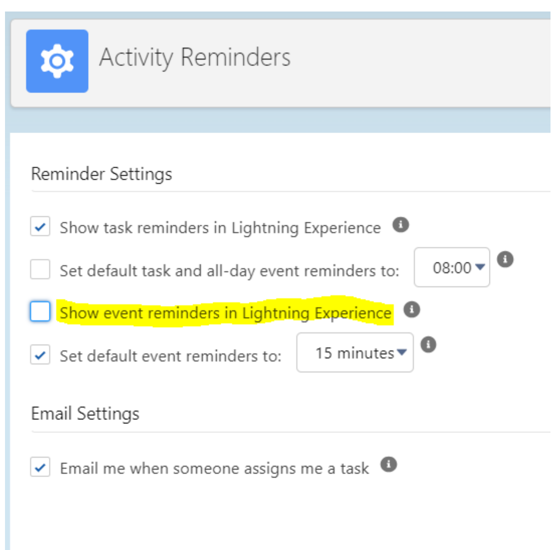
1. Select your user icon in the top right of the screen, and then select 'Settings'.



2. In the 'Quick Find' search box on the left of the page, start typing 'Activity Reminders', until 'Activity Reminders' appears in the list, and then select it.



3. Untick 'Show event reminders in Lightning Experience', then save.

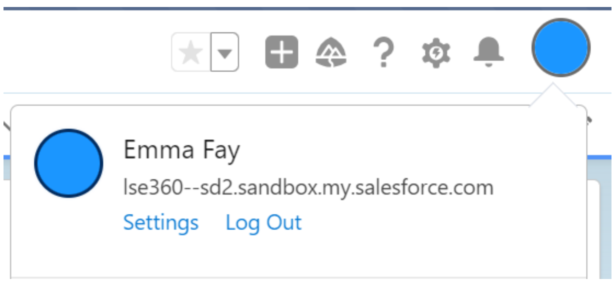


How Salesforce integrates with Outlook

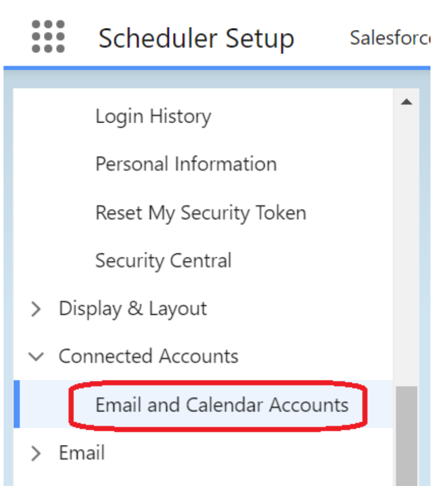
Your team may be using the Salesforce integration with Outlook, which means that your Salesforce and Outlook accounts are connected.

To activate the connection:

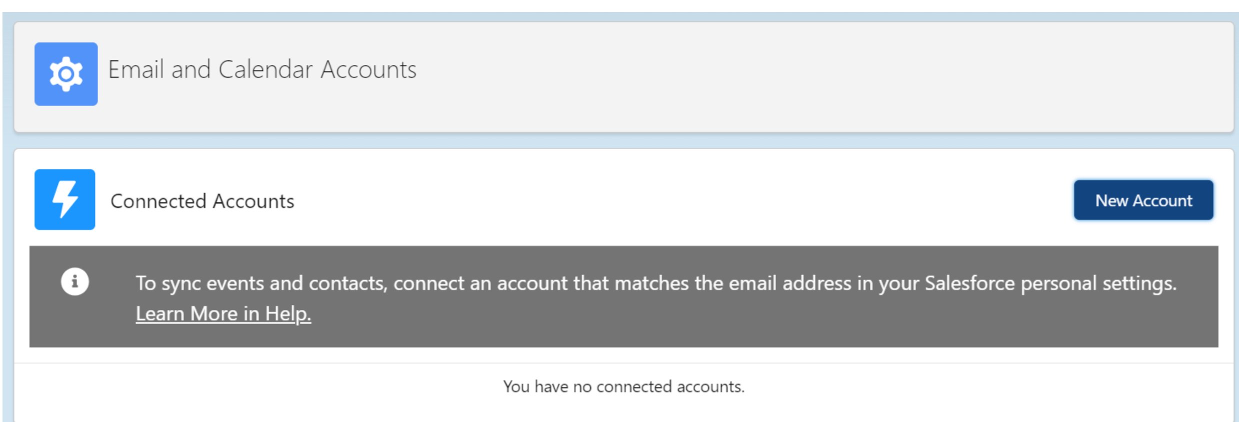
1. Select your user icon (top right of page, in the image it's represented by a blue circle)



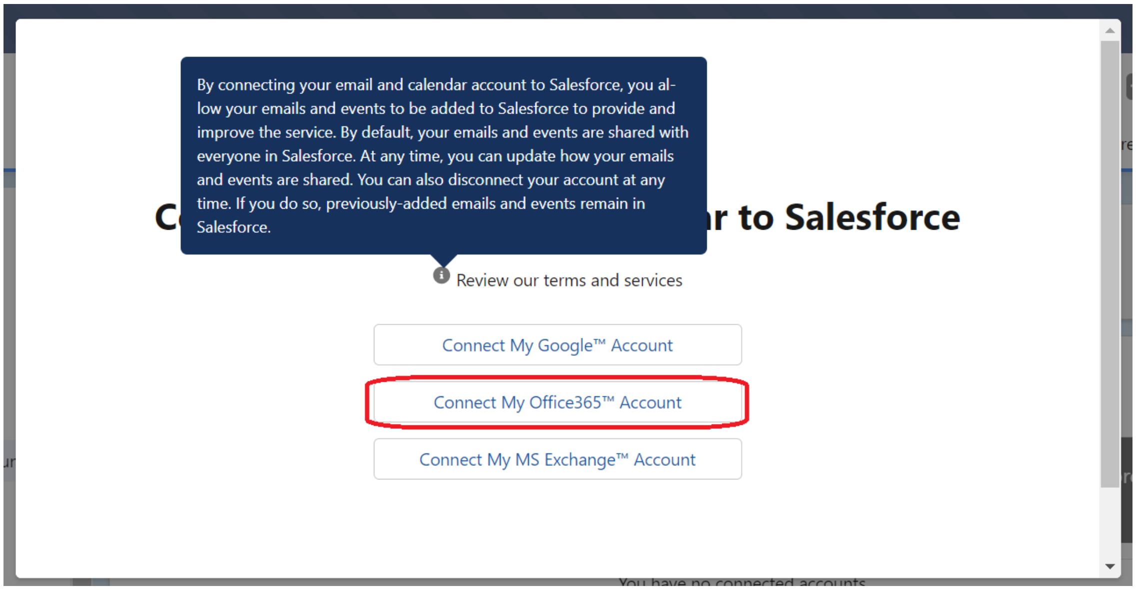
2. Select Settings --> Connected Accounts --> Email and Calendar Accounts (circled in red).



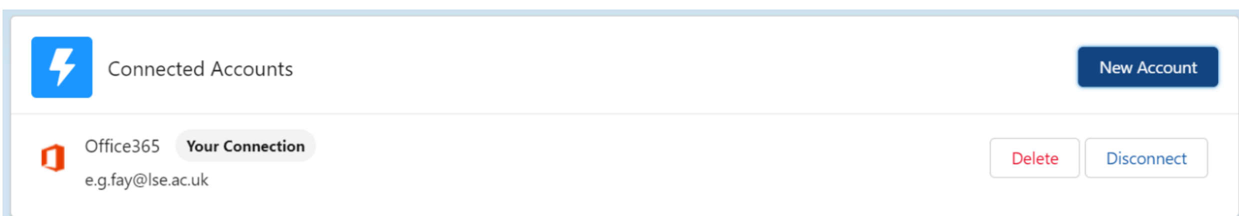
3. Select "Connect Account" or "New Account".



4. Read and accept the terms (see note on terms, below).
5. Select “Connect My Office 365 Account” (circled in red), and then log in with your LSE email address and password.



6. You will now see your account listed under “Connected Accounts”.



A few things to note:

- The terms refer to both emails and calendar events, however our connection to Outlook is only set up to access calendar events, **not emails**. Note also that although the terms state that ‘By default, your emails and events are shared with everyone in Salesforce’, in practice other users will only be able to see your availability, **not** the details of your calendar events.
- Once you have connected your Office 365 account it can take up to 24 hours for the sync process to complete.
- When the sync is turned on, pre-existing Outlook calendar events are not copied to your Salesforce calendar, so to prevent appointment bookings being made at the same time as existing meetings you may need to either delete
- and recreate Outlook calendar events, or create duplicate events at the same time as existing events. New Outlook calendar events created after the sync is turned on will be copied to your Salesforce calendar and prevent appointment bookings being scheduled at the same time.
- You can disconnect your Office 365 account at any time by returning to the ‘Email and Calendar Accounts’ page and selecting ‘Disconnect’.

How Salesforce understands you're available

- There are several factors Salesforce uses to determine what appointment slots to display for someone:
- The days and hours that team is offering appointments (set by a scheduling administrator)
- Any parameters relating to the appointments themselves, e.g. they must be 20 minutes each (set by a scheduling administrator)
- The hours they're available in a particular appointment location (set by a scheduling administrator)
- Any planned absences on their Service Resource record (set by a scheduling administrator)
- **If they have the Outlook integration activated:** when they're available in Outlook (set by the individual)

How to indicate your availability in Outlook

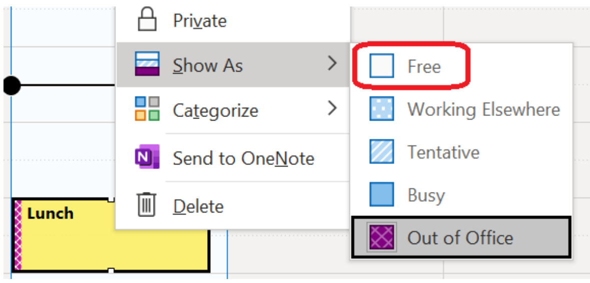
If your team's scheduler has specified that you're delivering virtual appointments from 9.00-11.00 on Monday, Salesforce will check your Outlook calendar to see whether you are available during this time.

- If you have nothing scheduled in your Outlook, Salesforce will automatically generate appointment slots between 9.00-11.00
- If you have an event in your calendar between 9.00-10.00 with the status of "Free", Salesforce will understand that you **can** be booked during this time and will automatically generate appointment slots between 9.00-11.00
- If you have an event in your calendar between 9.00-10.00 with any other status (e.g. Busy, Out of Office, Tentative, Working Elsewhere), Salesforce will understand that you **cannot** be booked during this time and will automatically generate appointment slots between 10.00-11.00

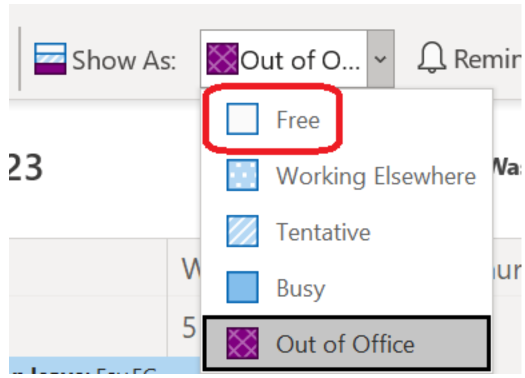
For Salesforce to accurately identify when to schedule appointments for you, it's important that you keep the times you know you're delivering appointments free of events, or to make sure that all events have the status "Free".

You can change the status of an Outlook calendar event in two ways:

3. Right-click the event, select “Show as”, then select “Free” (circled in red).

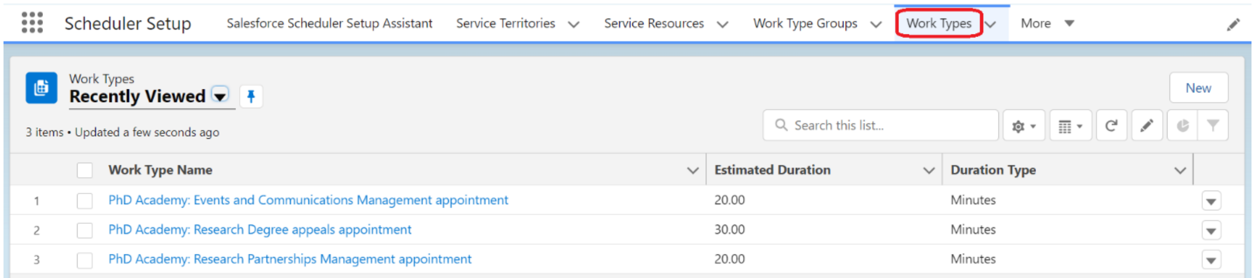


4. On the taskbar look for the “Show as” icon, select the drop-down menu next to it, then select “Free” (circled in red).

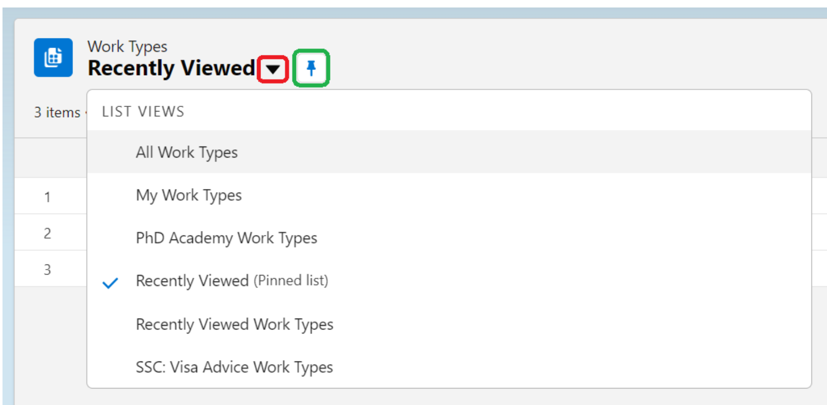


View or edit Work Types

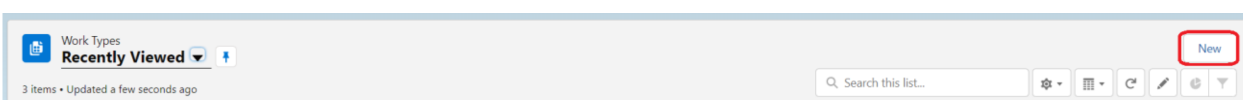
1. After selecting “Work Types” (circled in red), you’ll be taken to a list view.



2. The default is likely to be “Recently viewed”. To see another list view, select the drop-down arrow (circled in red) next to the list name to view other options.
3. If you would like to pin a more suitable option, select the drawing pin icon (circled in green) next to the list name.



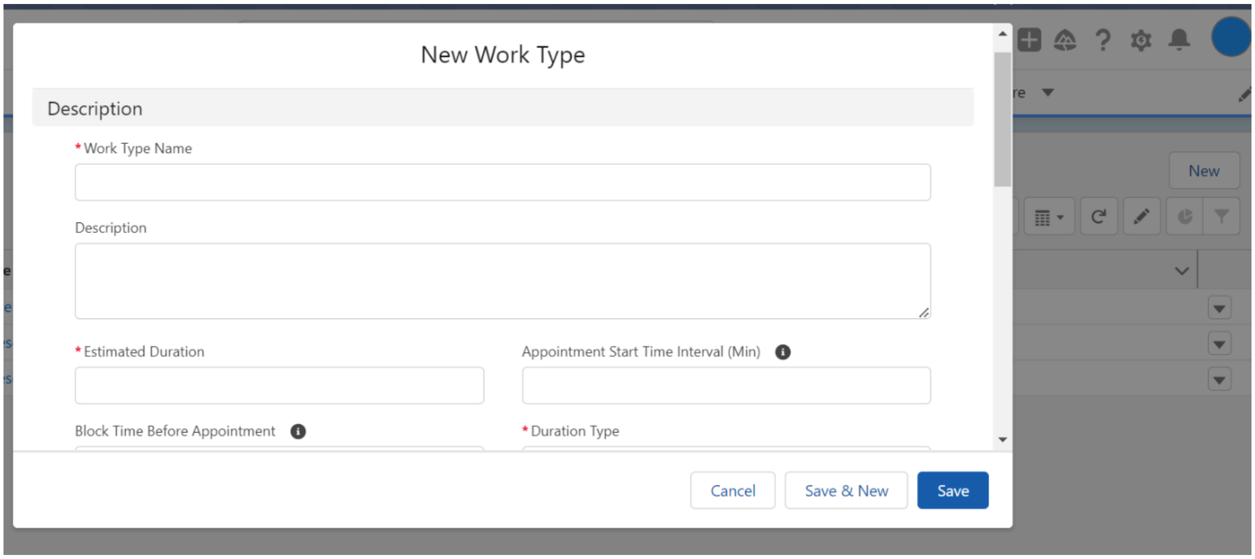
4. To create a new Work Type, select “New” (circled in red).



4.1. You may want to include the following fields, some which Salesforce uses to determine how to offer available slots to attendees:

4.1.1. Work Type Name: name of the type of appointment, which will appear on the appointment selection screen for attendees.

4.1.2. Description: a description of the type of appointment, which will appear on the appointment selection screen for attendees.

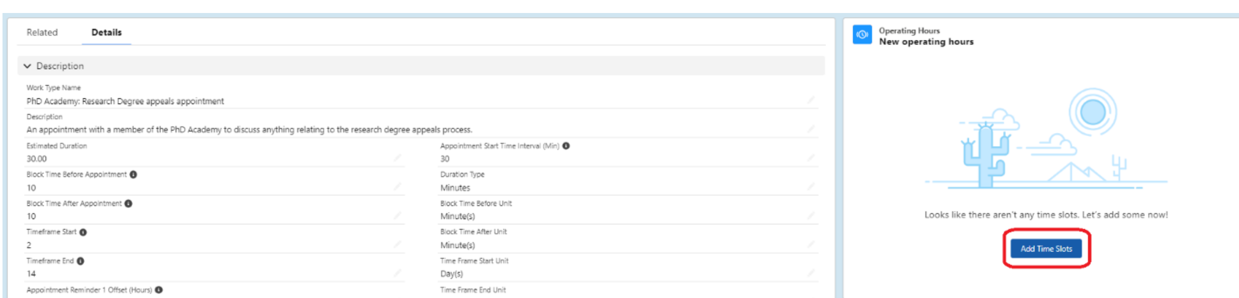


4.1.3. Operating Hours: the hours this Work Type is available. If you want to see the detail of what the Operating Hours for a particular option are, navigate to a Work Type or Work Type Group which uses those Operating Hours, and you'll be able to view and edit them.

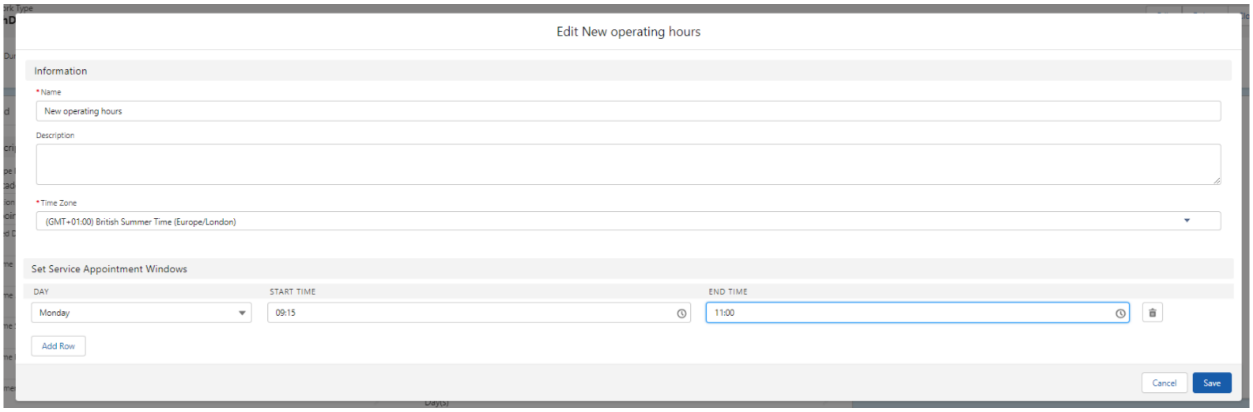
4.1.3.1. When you choose to edit the Operating Hours field (which is optional), a selection of pre-existing Operating Hours will appear. You can select from this list, or add your own by selecting "New Operating Hours".

4.1.3.2. If you would like to add **new** Operating Hours, add the name of the hours, as well as a description and time zone. Select "Save".

4.1.3.3. For **new** Operating Hours, you will then need to add Time Slots (circled in red). A popup window will appear.



4.1.3.4. You now need to add Service Appointment Windows. This is where you get to be more specific about this Work Type’s availability at particular times during the week. Salesforce will assume that this availability occurs on a weekly basis.



4.1.4. Appointment Start Time Interval (Min): the interval in minutes which Salesforce will allocate between appointment start times.
4.1.5. Estimated Duration: estimated duration of appointment.
4.1.6. Duration Type: unit of time of the estimated duration.
4.1.7. Block Time Before Appointment: the available time a member of staff must have before an appointment’s start time, i.e. an appointment cannot be scheduled less than ten minutes after another event in their calendar.
4.1.8. Block Time Before Unit: unit of time of the block time before appointment.
4.1.9. Block Time After Appointment: the available time a member of staff must have after an appointment’s end time, i.e. an appointment cannot be scheduled to end less than ten minutes before another event in their calendar.
4.1.10. Block Time After Unit: unit of time of the block time after appointment.
4.1.11. Timeframe Start: the soonest point at which someone can book an appointment at the time of booking, e.g. if the Timeframe Start is “1 day” and the attendee is booking on Monday 13.00, the attendee will only see appointment slots from Tuesday 13.00.
4.1.12. Time Frame Start Unit: unit of time of the Timeframe Start. This must be the same type of unit as the Time Frame End.
4.1.13. Timeframe End: the latest point at which someone can book an appointment at the time of booking, e.g. if the Timeframe Start is “7 days” and the attendee is booking on Monday 13.00, the latest appointment slot the attendee could book would be Monday in a week’s time at 13.00.
4.1.14. Time Frame End Unit: unit of time of the Timeframe End. This must be the same type of unit as the Time Frame Start.
4.1.15. Appointment Reminder 1 Offset (Hours): the number of hours before an appointment’s start time at which the attendee will receive a reminder email.
4.1.16. Appointment Reminder 2 Offset (Hours): the number of hours before an appointment’s start time at which the attendee will receive a second reminder email.

4.1.17. Allow Anonymous Booking: whether you would like to allow the attendee to book any member of staff who is able to deliver this type of appointment (see View, create or edit Service Resources for more information about how to set that up).

4.1.18. Allow Resource Booking: whether you would like to allow the attendee to book a specific member of staff who is able to deliver this type of appointment.

4.1.19. Collect Additional Information: if ticked, the attendee will be asked additional questions when booking an appointment. Depending on how Scheduler is set up for your team, this might be a generic 'would you like to know anything prior to the appointment?' question, or it could be questions specific to your team or this Work Type.

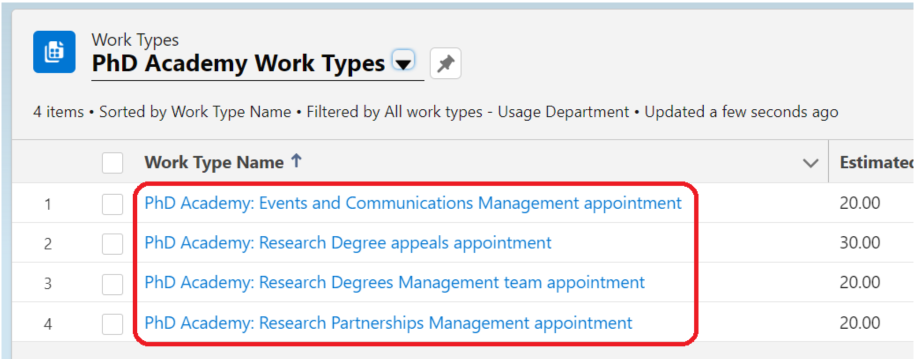
4.1.20. Contact Us URL: this is an optional field which offers the attendee a method of contacting the team. You can use a web URL (beginning with http://) or an email address (beginning with mailto: followed by the email address, e.g. mailto: phdacademy@lse.ac.uk).

4.1.21. Usage Department: the team that owns this Work Type. Be careful changing this field, as changing it may cause you to lose access to the record.

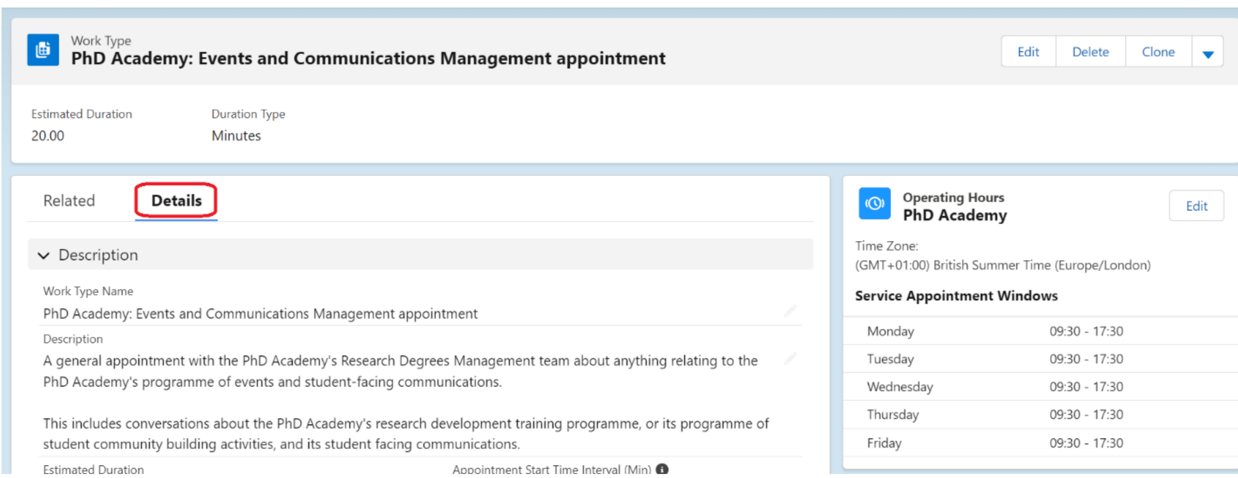
4.1.22. Sub-Team: when the usage team is a sub-team of the Usage Department, e.g. Visa Advice might be a Sub-Team of the SSC Usage Department.

4.1.23. Scheduling Policy: scheduling policies cover things like whether Outlook calendar availability and Service Resource Skills should be considered when offering appointments. Please don't edit this field unless you are absolutely sure of the changes you're making.

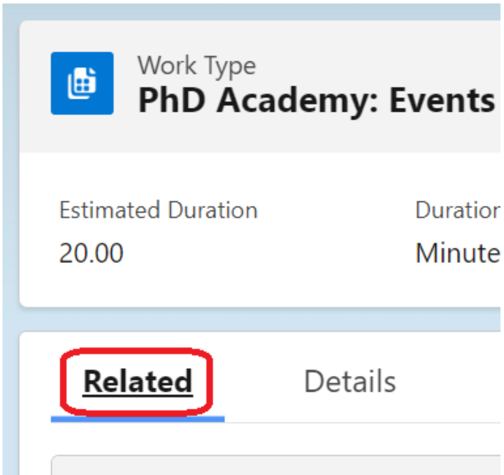
5. To **view or edit** an existing Work Type, select the name of the Work Type (circled in red) from the list.



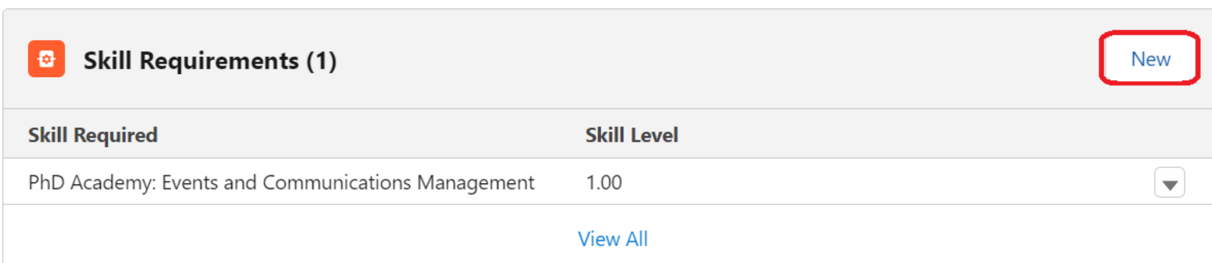
5.1. You'll be taken to a record page where, on the "**Details**" tab (circled in red), you can make changes to the fields listed above.
5.2. Work Types can only be deleted by ARDS, but you can "Deactivate" them on the "Details" tab.



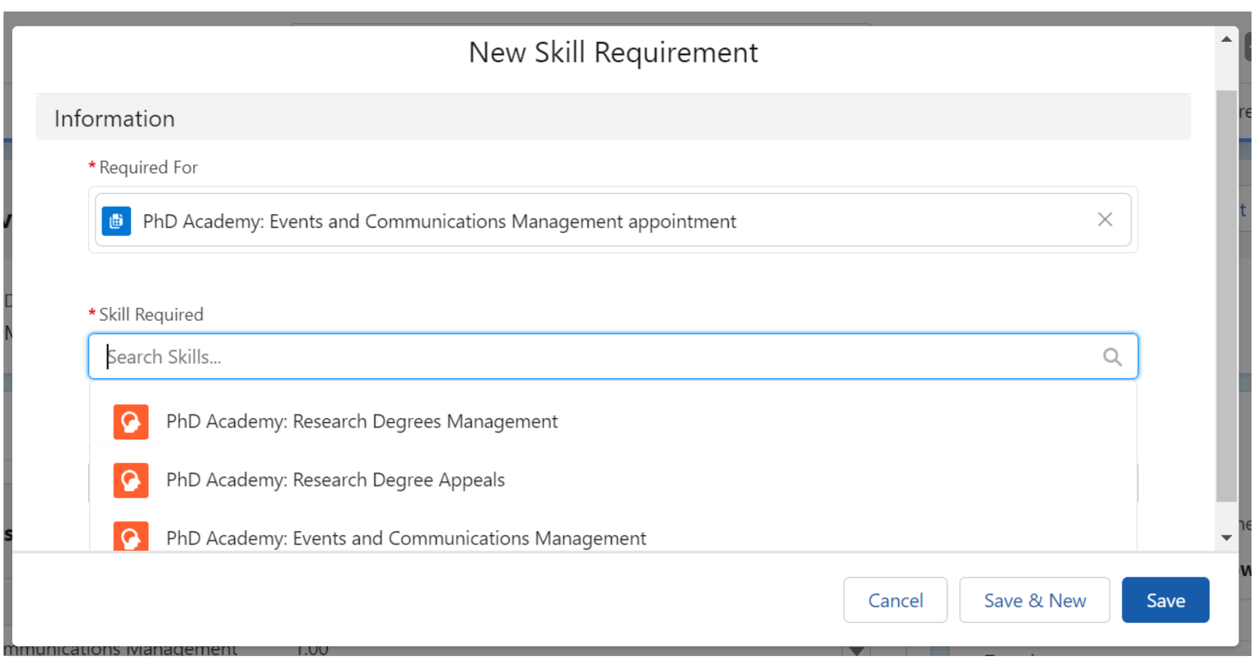
6. You can also select the "**Related**" tab (circled in red) to make changes to the **Skill Requirements, Service Territory Work Types and Work Type Group Members**.



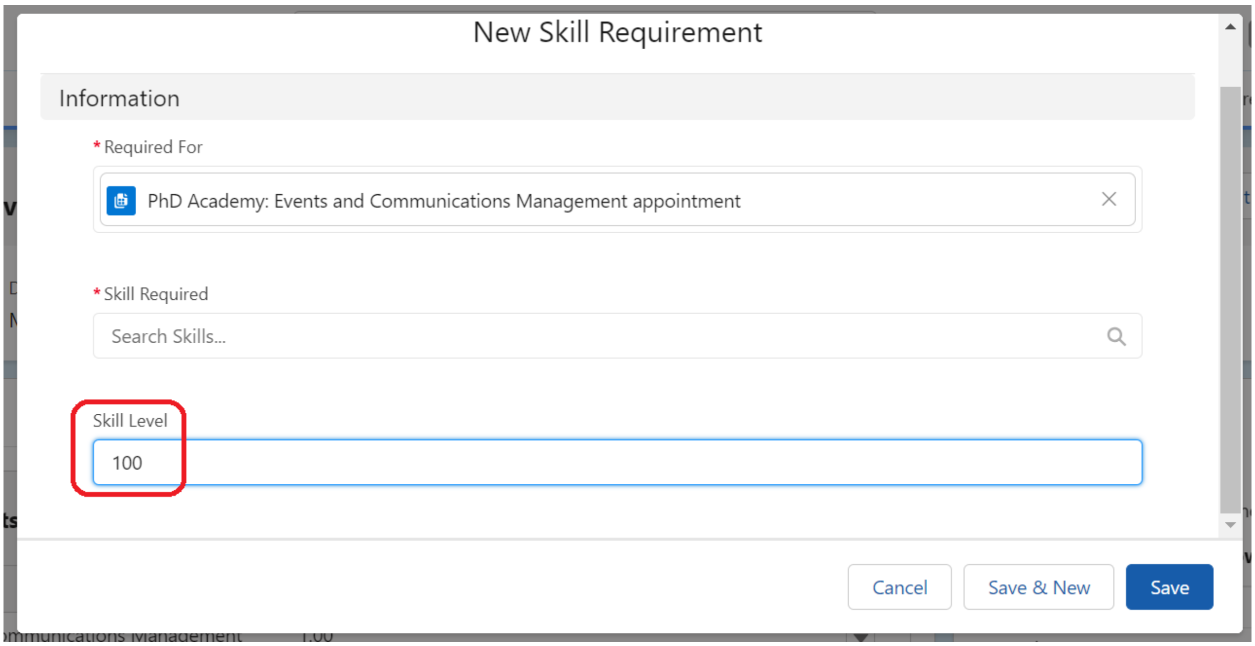
6.1. To **add** a **Skill Requirement**, select "New" (circled in red).



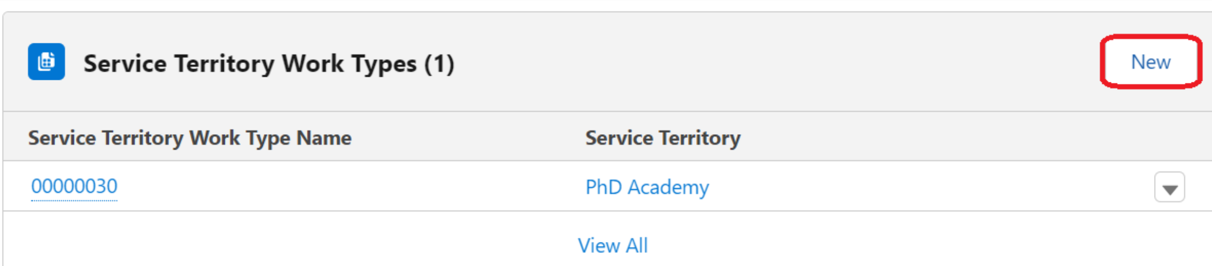
6.1.1. Search for the required skill(s) and select from the list



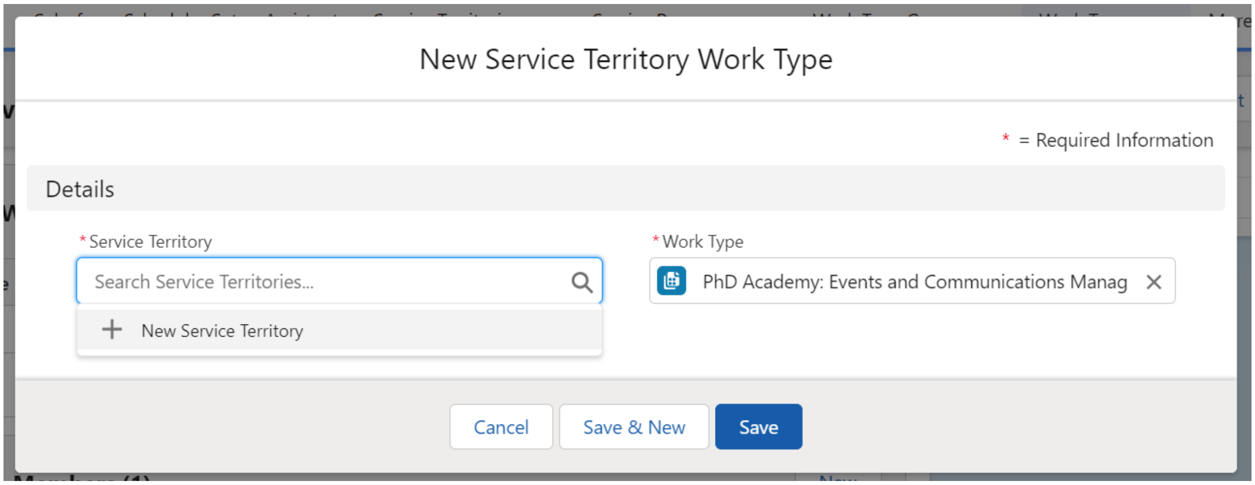
6.1.2. You may also add a Skill Level (circled in red). If this particular Work Type requires a certain level of skill, set the threshold at the point you would like between 0-100. Only members of staff who have that particular skill above that threshold will be included in the bookings offered. If you don't set a Skill Level, every staff member who has that Skill will be included in the bookings offered. For adding Skills to team members, see Assign particular Skills to an individual member of staff



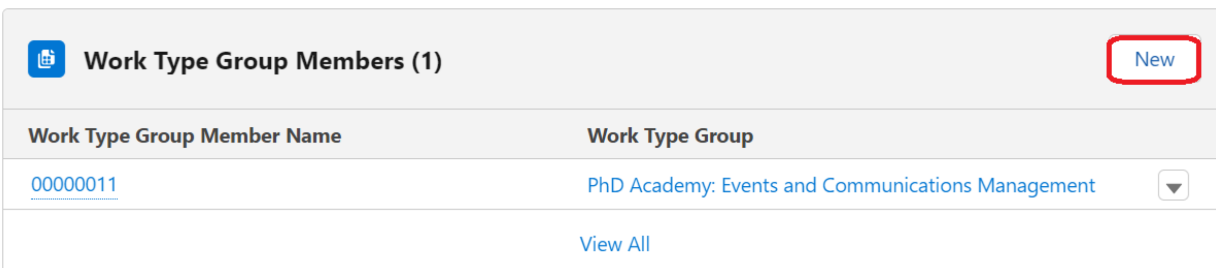
6.2. To **add** a **Service Territory** in which this Work Type is delivered, select "New" (circled in red).



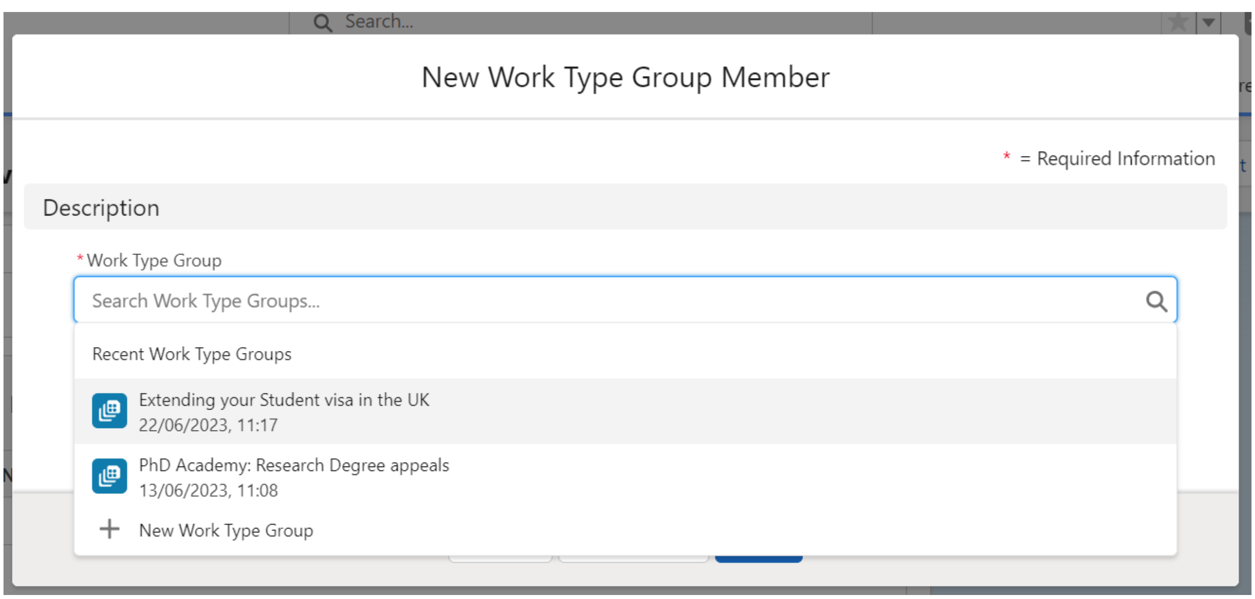
6.2.1. Search for the relevant Service Territory and select from the list. If the relevant Service Territory isn't listed, you may need to add it to available territories.



6.3. To **add** a **Work Type Group** which includes this Work Type select "New" (circled in red).



6.3.1. Search for the relevant Work Type Group and select from the list.

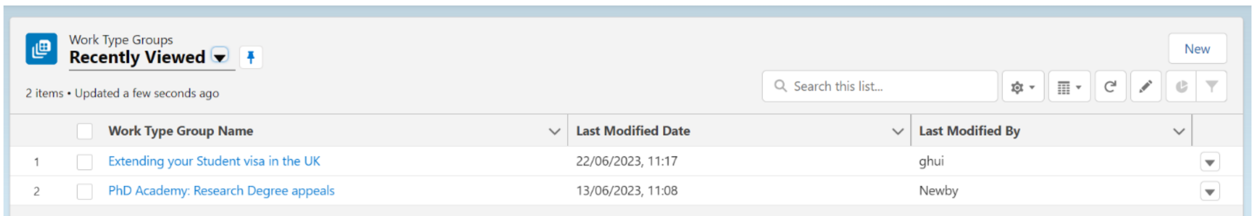


View or edit Work Type Groups

A Work Type Group is a general appointment topic or category. It acts as an umbrella category into which more than one Work Type may fall: for example, the Work Type Group 'Applications' might feature Work Types such as where to apply, application feedback etc.

Not all teams are using this grouping feature. You should be able to see from viewing the available Work Type Groups whether your team's feature multiple Work Types. If you still have questions, Ard.Systems@lse.ac.uk will be able to confirm your team's setup.

1. After selecting "Work Type Groups", you'll be taken to a list view.



2. The default is likely to be "Recently viewed". To see another list view, select the drop-down arrow (circled in red) next to the list name to view other options.
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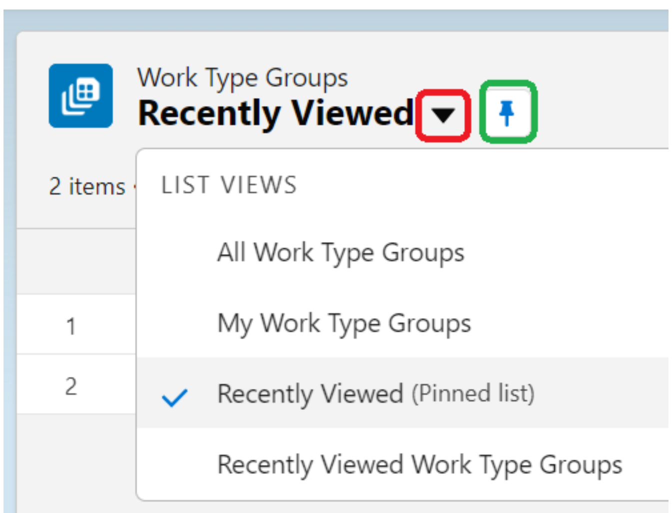
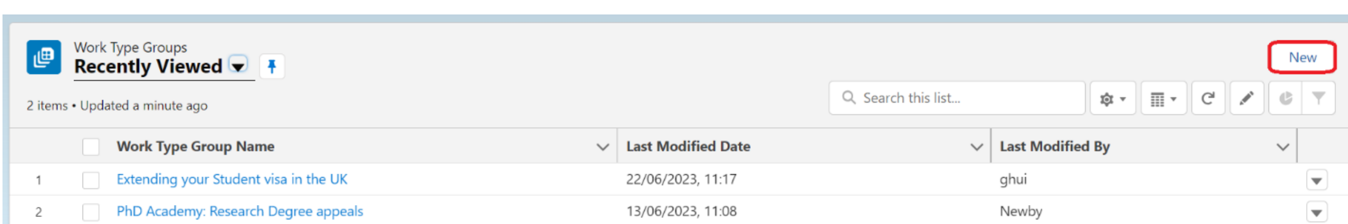
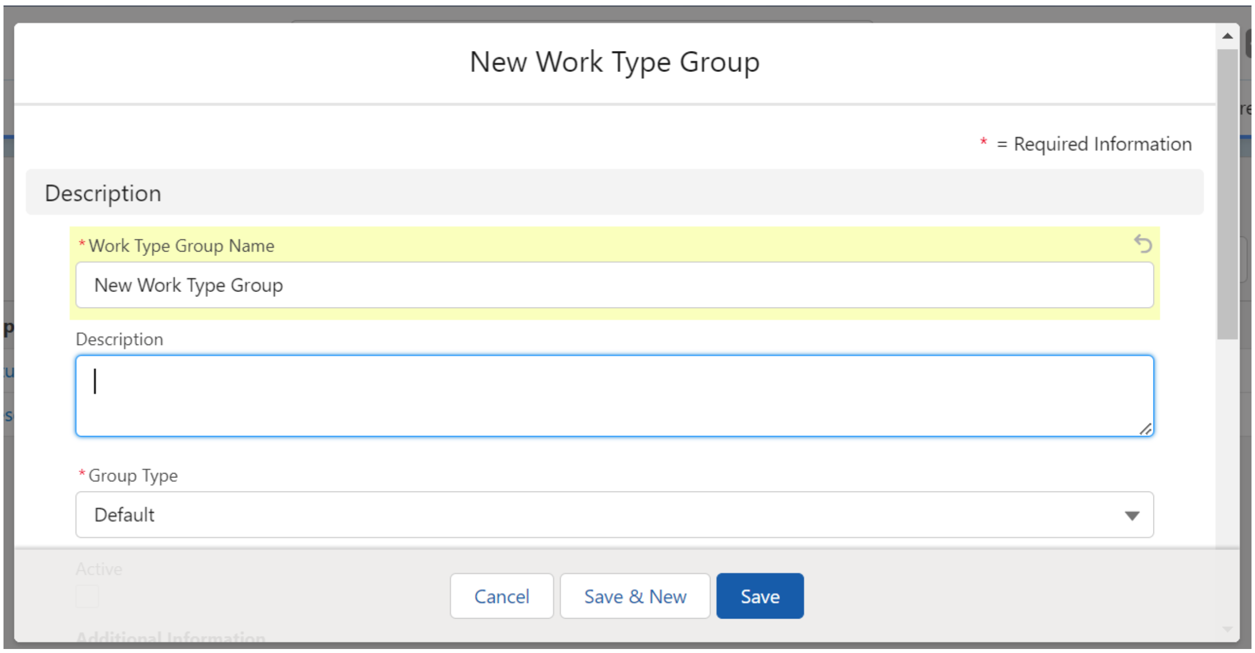


4. To create a new Work Type Group, select "New" (circled in red).

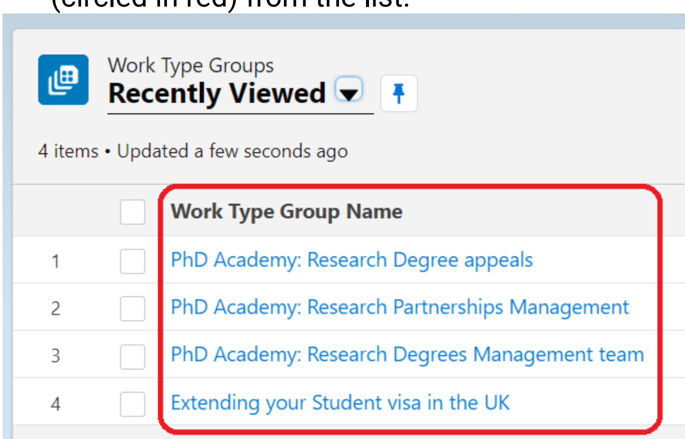


4.1. You may want to include the following fields:

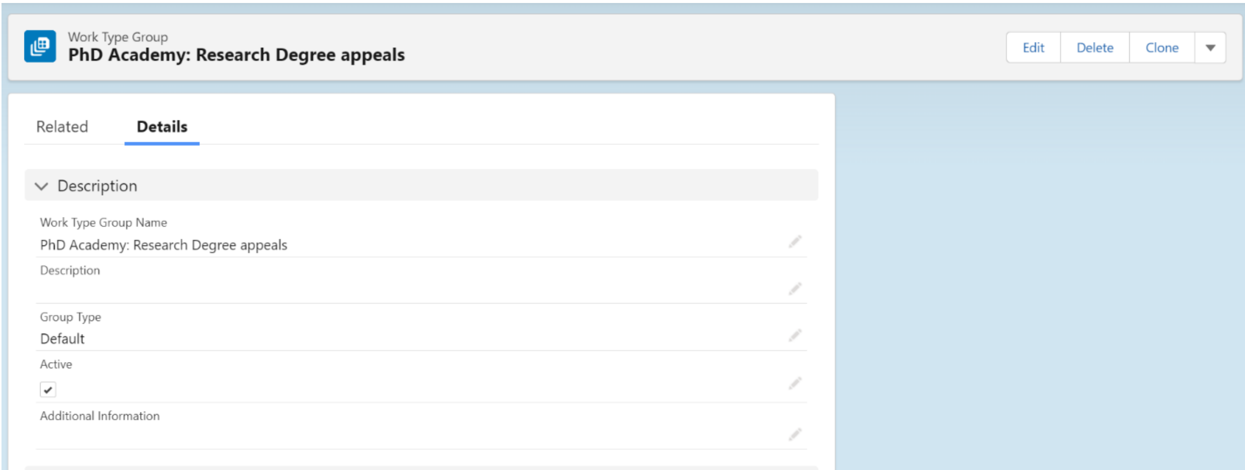
4.1.1. Work Type Group Name: name which clearly represents the Work Type Group.
4.1.2. Description: optional description to provide further clarification.
4.1.3. Group Type: can be Default or Capacity. Always select Default.
4.1.4. Active: if the Work Type Group is in use, check this tick box.



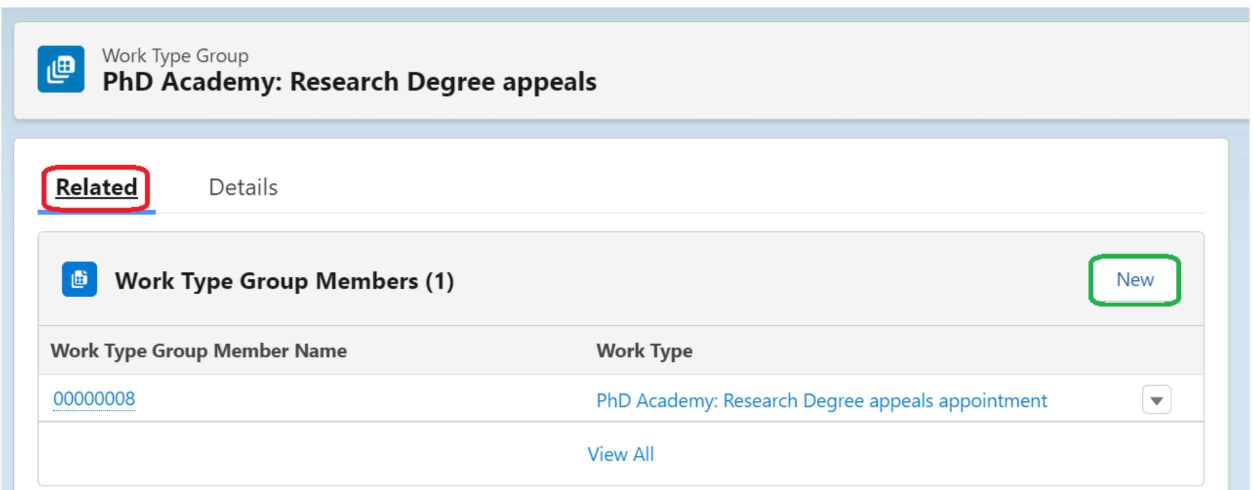
5. To **view or edit** an existing Work Type Group, select the name of the Work Type Group (circled in red) from the list.



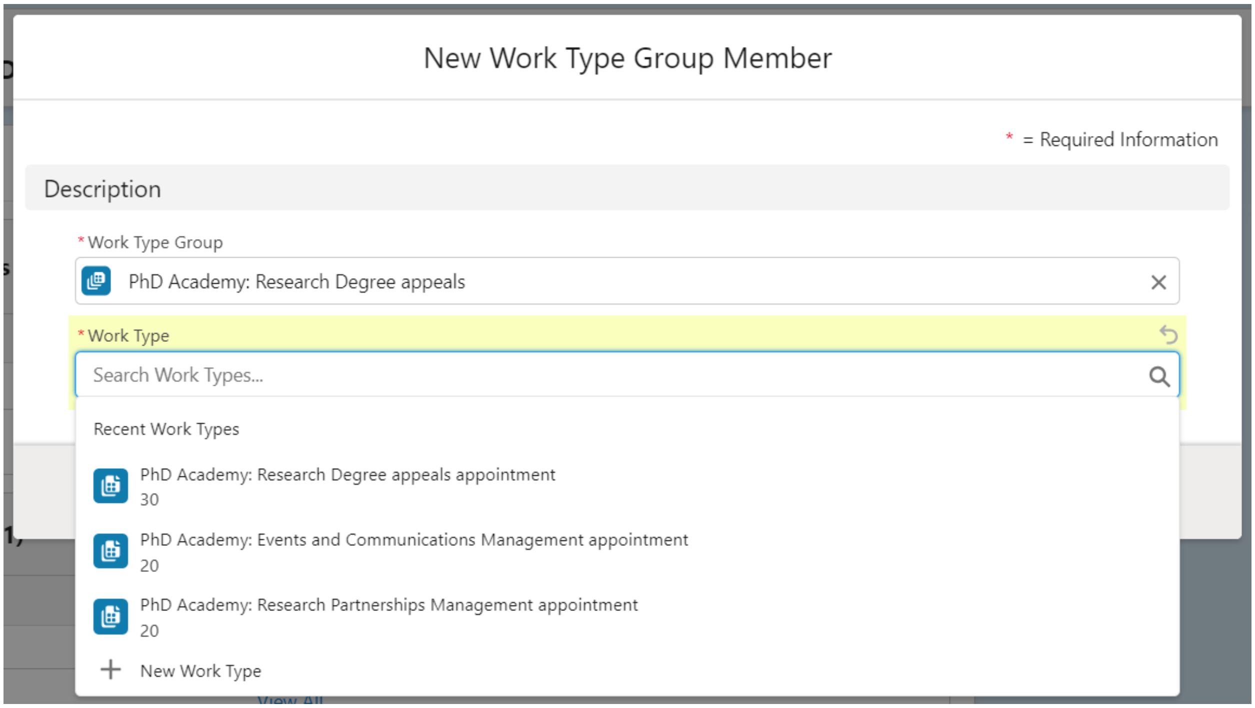
5.1. You'll be taken to a record page where you can make changes to the fields listed above.
5.2. Work Type Groups can only be deleted by ARDS, but you can "Deactivate" them on the "Details" tab



5.3. To **add** Work Types to the group, select the "Related" tab (circled in red), then select "New" on Work Type Group Members (circled in green).



5.4. Search for the relevant Work Type(s) and add as needed. Select “Save”.



Add or edit Skills

A skill is a named ability, expertise, or certification which can be linked to the people (Service Resources) in your team. Salesforce Scheduler uses skills to ensure that Service Resources with the required expertise are assigned to Service Appointments based on appointment topics.

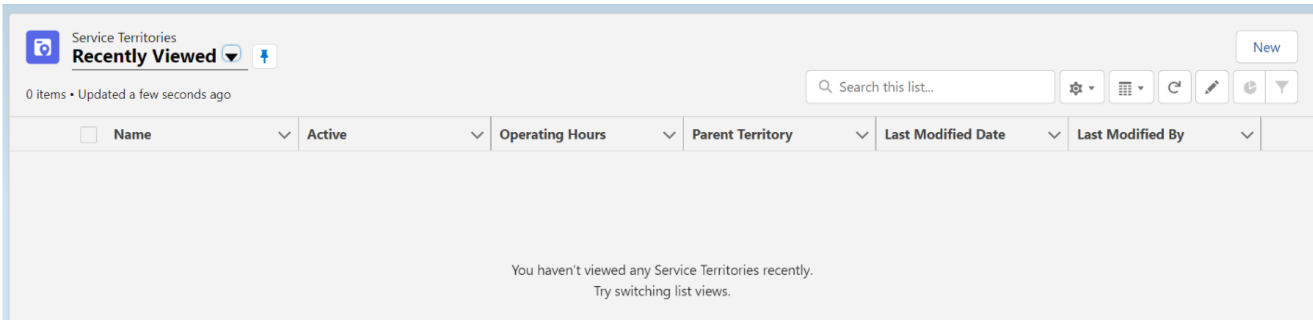
Skills must be added or edited by ARD Systems. To request any additions or changes, contact Ard.Systems@lse.ac.uk. Please include the information:

- Name of the skill
- For a new Skill: the details of any members of staff who have it
- For edits: any requested changes

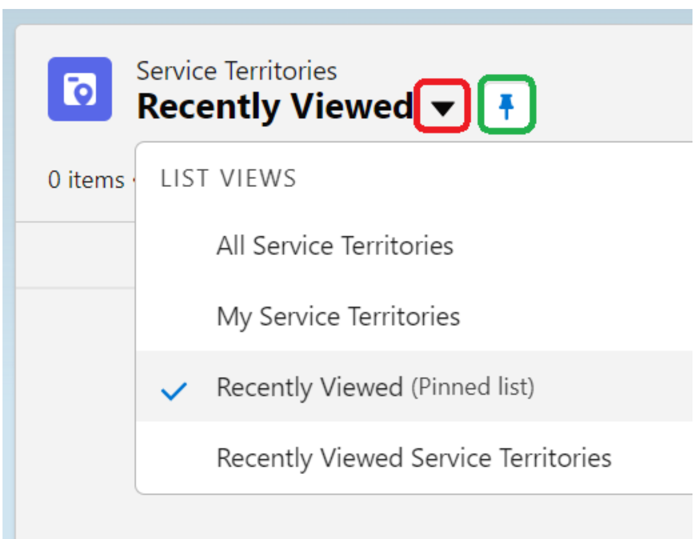
View or edit Service Territories

A Service Territory is the location in which an appointment is taking place. This includes both on campus and virtual locations.

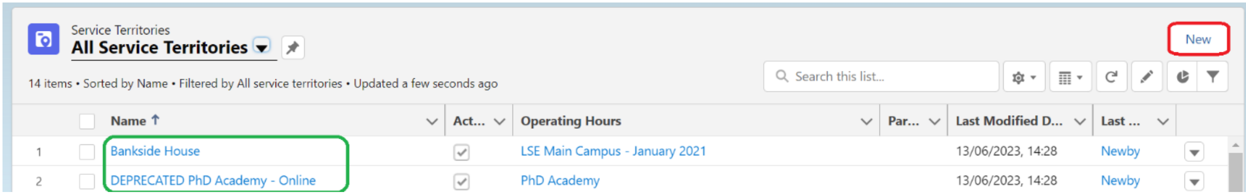
1. After selecting “Service Territories”, you’ll be taken to a list view.



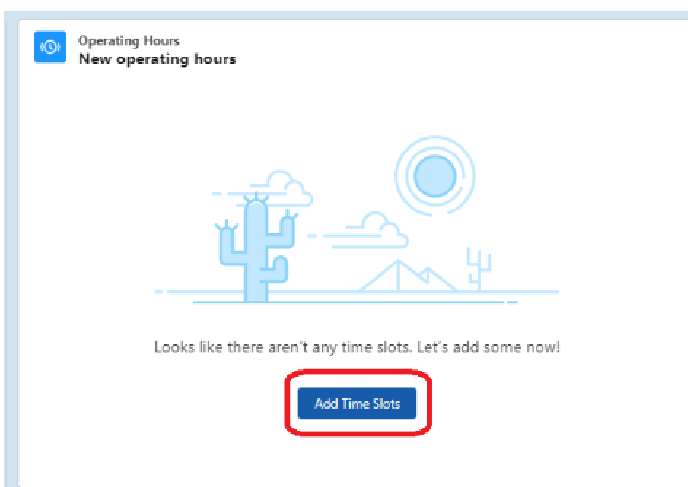
2. The default is “Recently viewed”. To see another list view, select the drop-down arrow (circled in red) next to the list name to view other options.
3. If you would like to pin a more suitable option, select the drawing pin icon (circled in green) next to the list name.



4. To create a new Service Territory, select "New" (circled in red).



4.1. You may want to include the following fields:
  4.1.1. **Name:** name of the location.
  4.1.2. **Active:** whether it is currently in use or not.
  4.1.3. **Operating Hours:** Service Territory opening hours, which can be select from a drop-down list. If you would like to see the detail of a particular option, navigate to a Service Territory which uses those Operating Hours, and it can be seen on the right-hand panel of the screen. Please note that these are not the hours in which specific staff will be available in these locations. If you specify that the location is open all week, this will only be a contributing factor to which appointments are displayed to attendees when booking. The other factors will include which staff member has been assigned to that territory for a specified period of time (see Schedule bookable slots for individual members of staff).
    4.1.3.1. When you choose to edit the Operating Hours field (which is optional), a selection of pre-existing Operating Hours will appear. You can select from this list, or add your own by selecting "New Operating Hours".
    4.1.3.2. If you would like to add **new** Operating Hours, add the name of the hours, as well as a description and time zone. Select "Save".
    4.1.3.3. For **new** Operating Hours, you will then need to add Time Slots (circled in red). A popup window will appear.



4.1.3.4. You now need to add **Service Appointment Windows**. This is where you get to be more specific about this Service Territory's availability at particular times during the week. Salesforce will assume that this availability occurs on a weekly basis.

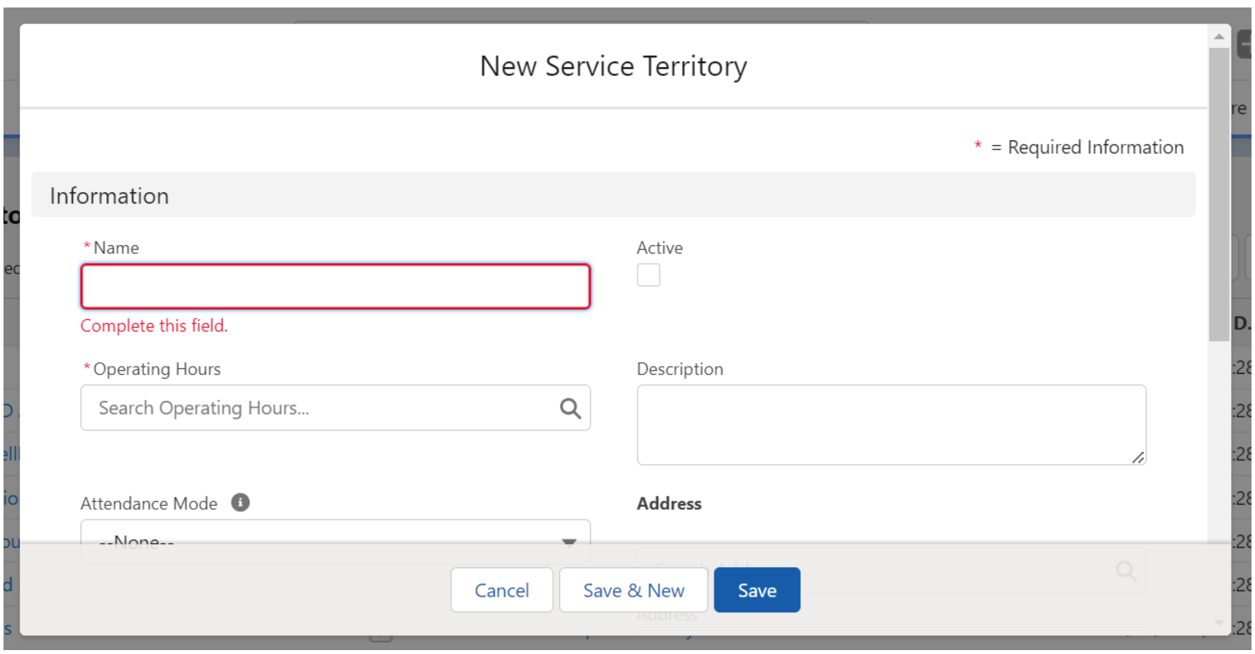
4.1.4. **Description:** short description of the location.

4.1.5. **Attendance mode:** how the appointment will be conducted, including in person, online, telephone, drop-in or other.

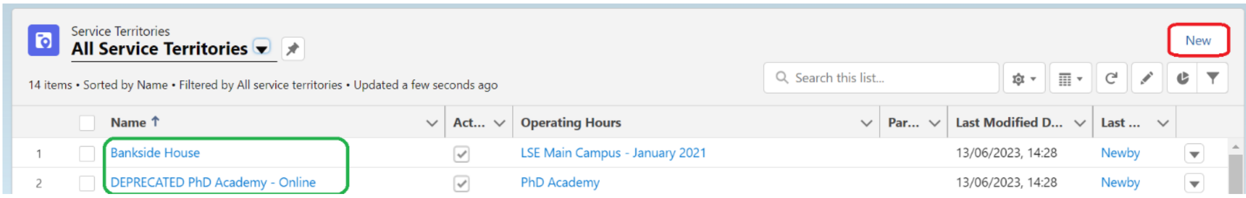
4.1.6. **Address:** information in this field will be included in confirmation email.

4.1.6.1. **For in person appointments** you can include relevant location information.

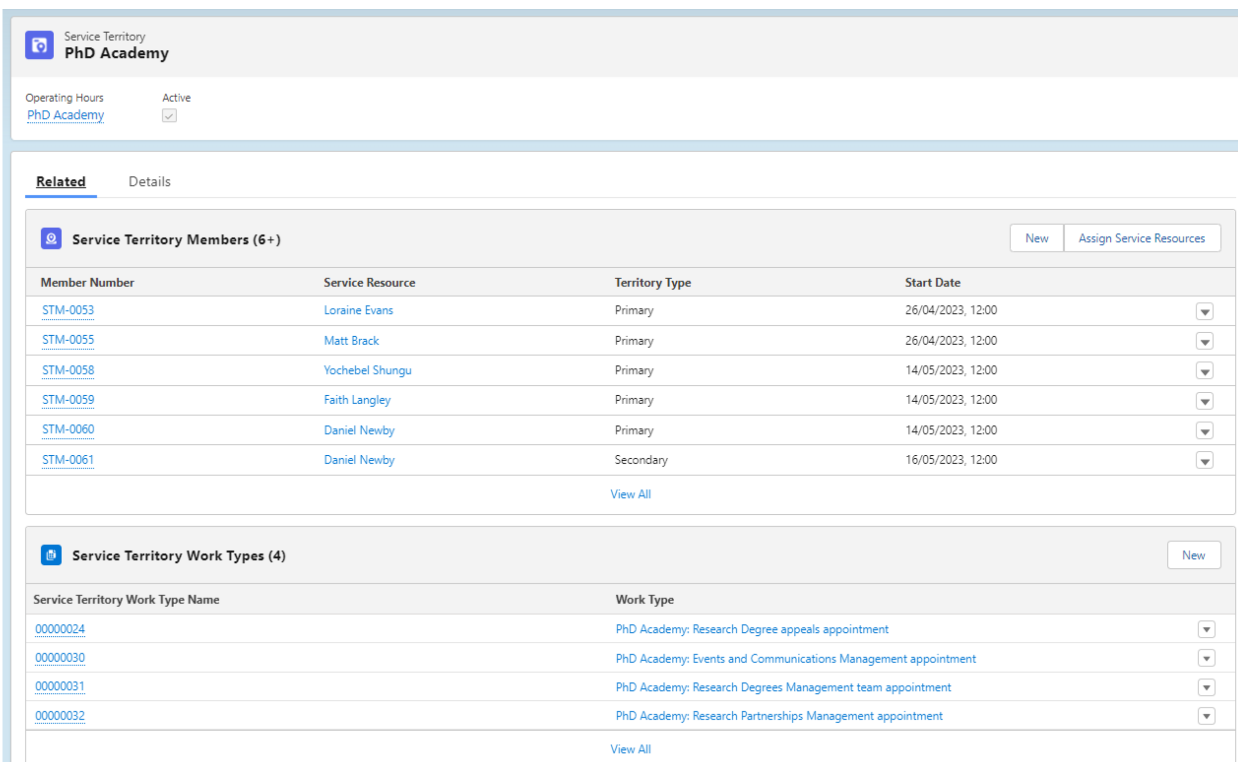
4.1.6.2. **For virtual appointments** include information in the "Address" field only (leaving the others blank) about how the attendee can access the appointment, e.g. *"Your appointment host will call you on Microsoft Teams at your appointment time. Please ensure you are available to receive the call at that time."*



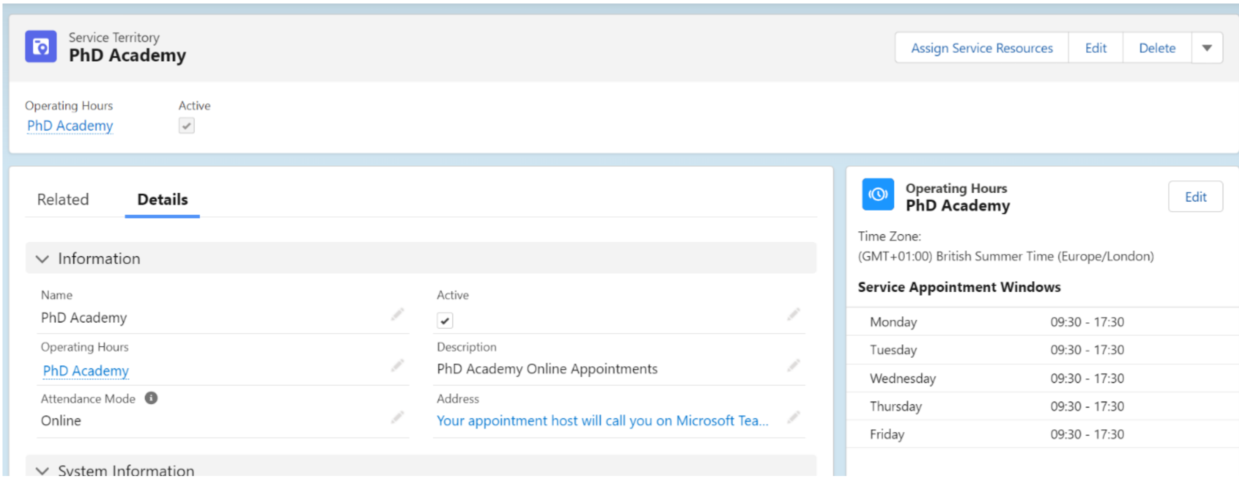
5. To **view or edit** an existing Service Territory, select the name of the Service Territory from the list (circled in green).



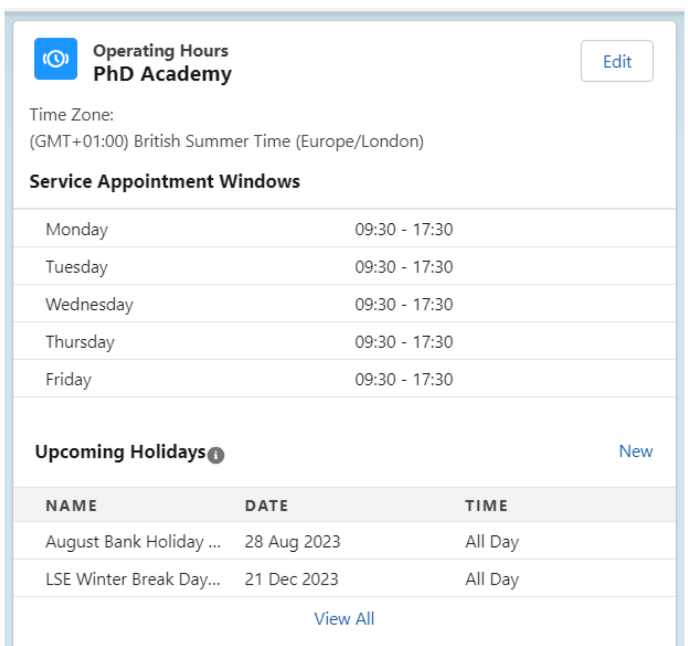
5.1. You'll be taken to a record page where you can make changes to the fields listed above on the "Details" tab..
5.2. Service Territories can only be deleted by ARDS, but you can "Deactivate" them on the "Details" tab
5.3. On the "Related" tab you can see the Service Territory Members and Service Territory Work Types.
  5.3.1. Selecting the Service Territory Member Number will lead you to the record of that staff member in that location. See [Schedule bookable slots for individual members of staff, or remove availability]()
  5.3.2. Selecting the Service Territory Work Type name will lead you to the individual record of that Work Type in this Service Territory. You won't need to make edits to this page, although you can navigate to the parent Work Type record. See [View or edit Work Types]()



5.4. On the right-hand panel you'll see the Operating Hours of that Service Territory.

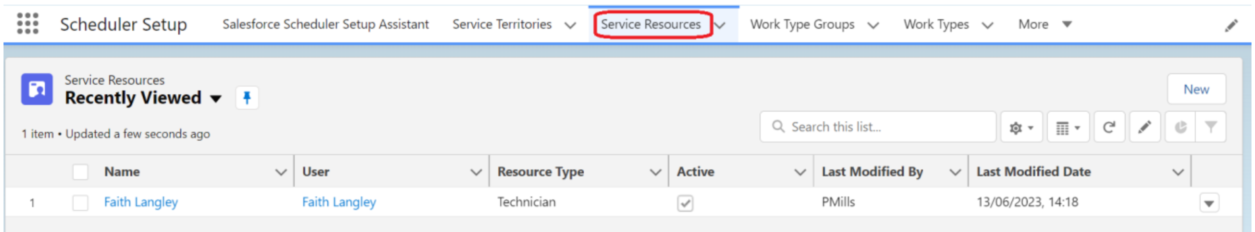


5.5. You will also see the relevant Holidays for that Service Territory. Holidays are set centrally and added to Service Territories by ARDS. Holidays and School closure days will be added to the central list as standard. If you need any additional holidays added or applied to a Service Territory, contact ard.systems@lse.ac.uk.

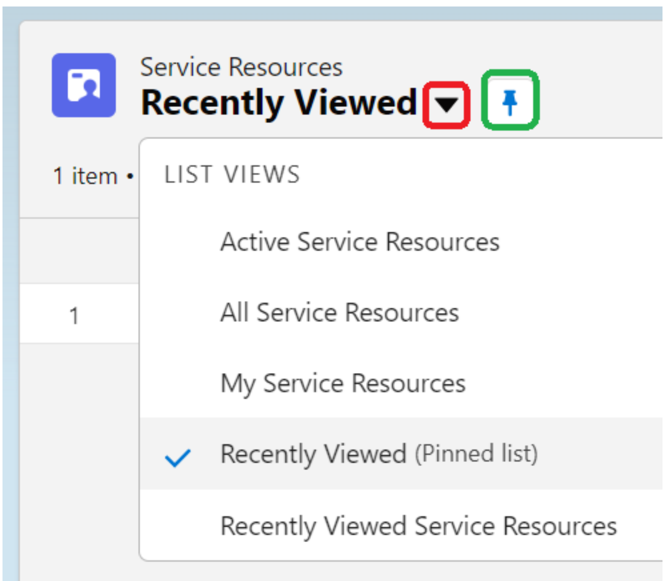


View, create or edit Service Resources

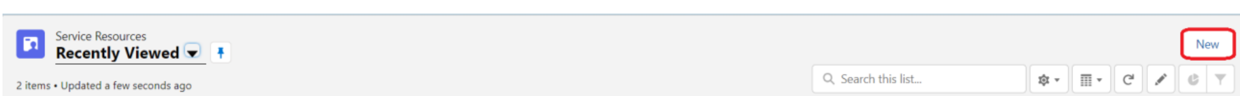
1. After selecting “Service Resources” (circled in red), you'll be taken to a list view.



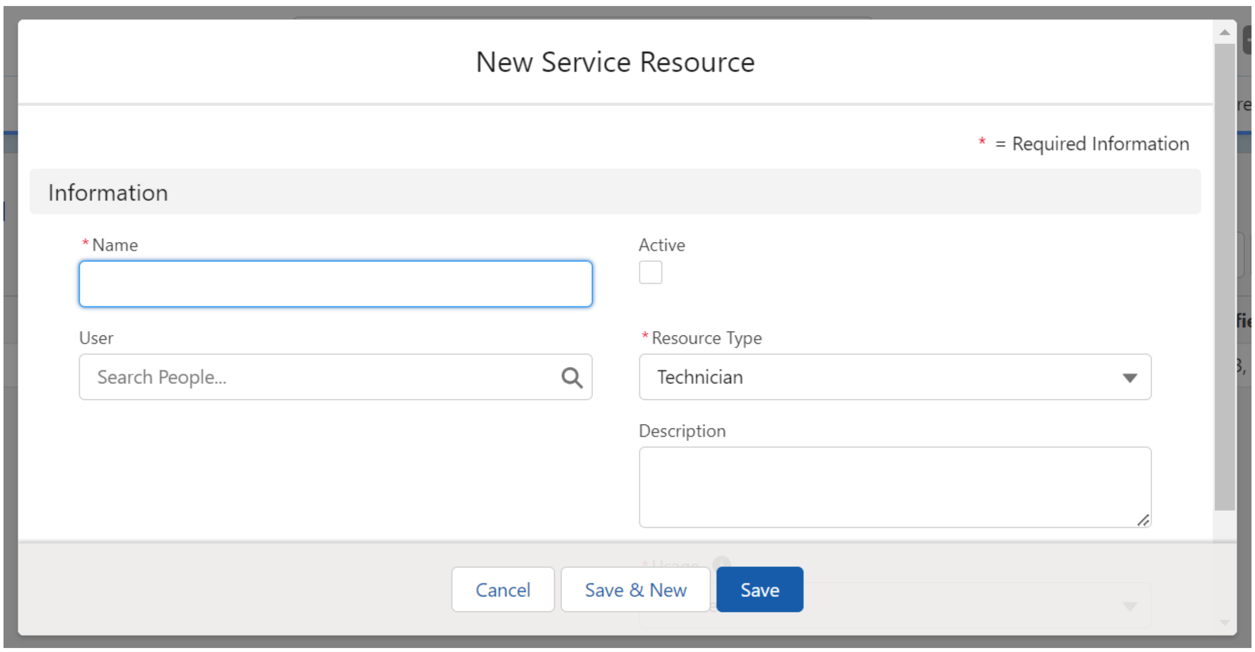
2. The default is likely to be “Recently viewed”. To see another list view, select the drop-down arrow (circled in red) next to the list name to view other options.
3. If you would like to pin a more suitable option, select the drawing pin icon (circled in green) next to the list name.



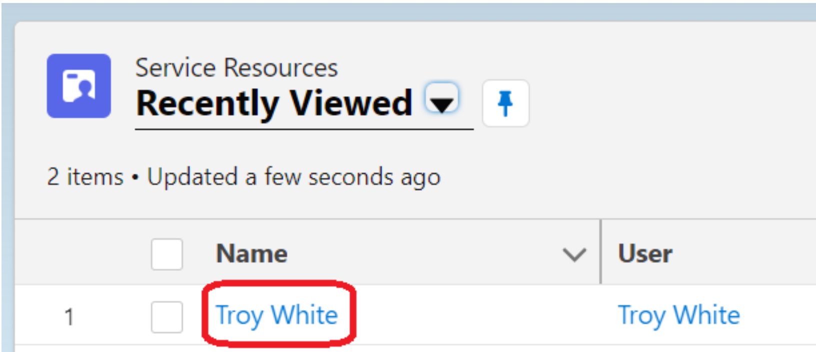
4. To create a new Service Resource, select “New” (circled in red).



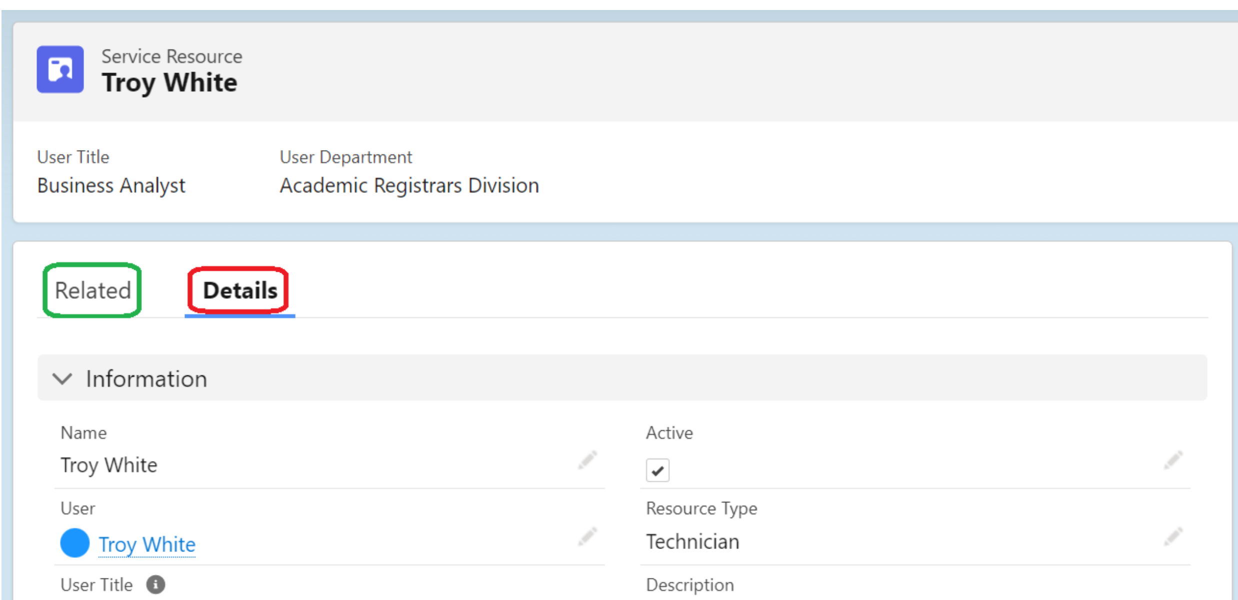
5. You may want to include the following fields:
   5.1. Name: the person's name.
   5.2. Active: whether they are currently delivering appointments.
   5.3. User: the linked Salesforce user account. You must have previously requested a licence from ARD Systems. If someone is not appearing on the available list or contacts, contact ARD Systems at Ard.Systems@lse.ac.uk.
   5.4. Resource Type: this field is not used by the School but is required. Please leave as Technician.
   5.5. Description: optional description of the Service Record user (internal field only: not seen by attendees).
   5.6. Usage: the department in which they are delivering appointments. This is a key field as it ensures that staff only have access to their team's records.



6. To view or edit an existing Service Resource, select the person's name (circled in red) from the list view.

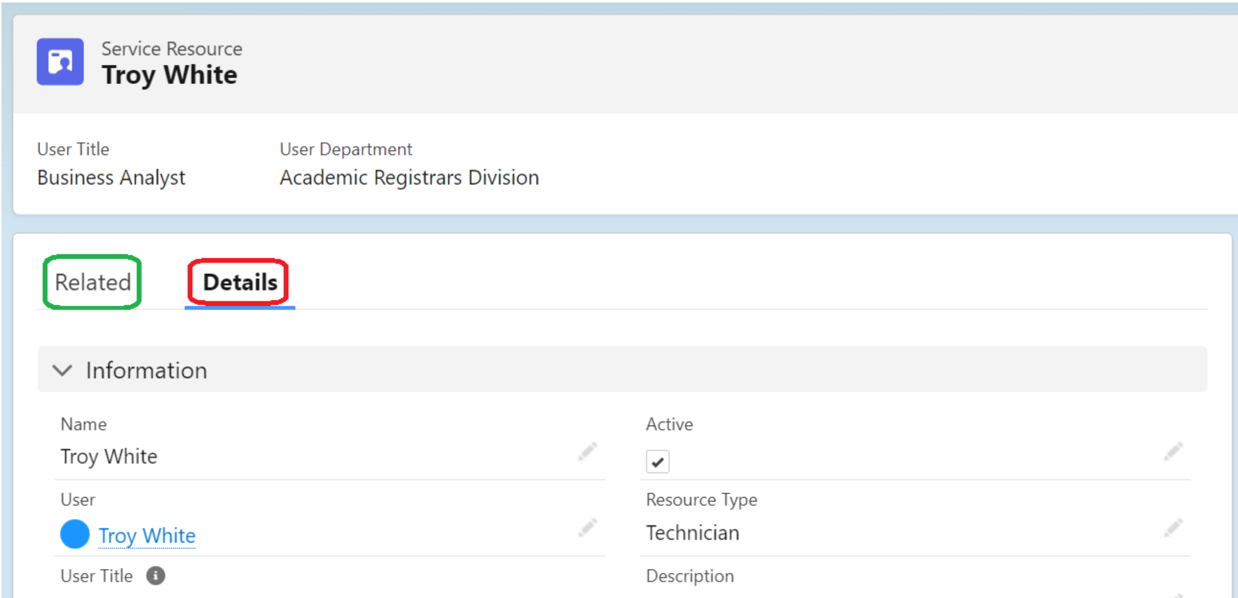


6.1. You'll be taken to a record page where on the "**Details**" tab (circled in red) you can make changes to the fields listed above.
6.2. Service Resources can only be deleted by ARDS, but you can "Deactivate" them on the "Details" tab.
6.3. On the "**Related**" tab (circled in green) you can view a person's Service Resource record, history, Absences, Territories and Skills:
   6.3.1. Service Territories: see [Schedule bookable slots for individual members of staff]
   6.3.2. Absences: see [Schedule bookable slots for individual members of staff]
   6.3.3. Service Resource Skills: see [Assign particular Skills to individual members of staff]

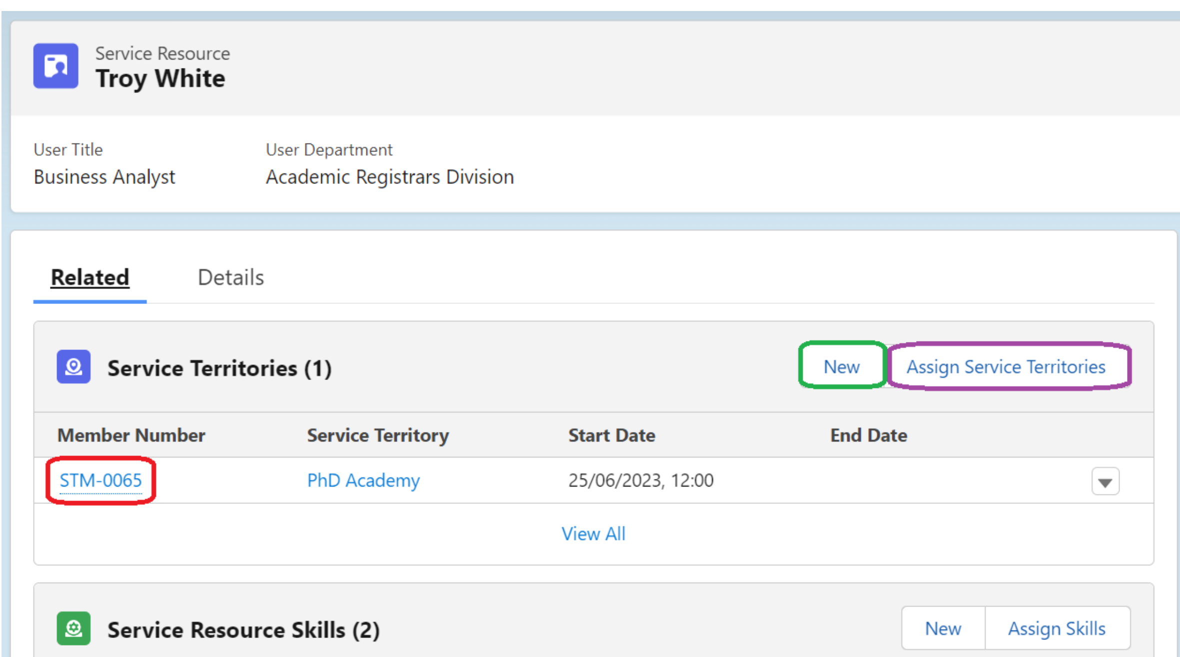


Schedule bookable slots for individual members of staff, or remove availability

1. Navigate to an individual's Service Resource record
2. Select the "Related" tab (circled in green).

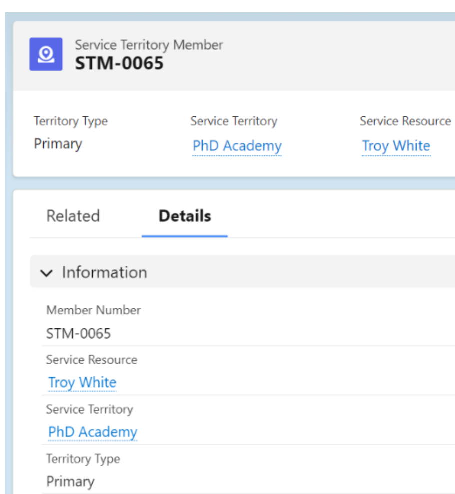


3. Here you can see a list of Service Territories the Service Record is already linked to, if any. If a member of staff works at a particular location, they are said to be a "member" of that Service Territory, which is why you'll see a "Member Number" linked to each Service Territory. You can either assign, view and edit, or create a new Service Territory.
4. To **view or edit** an existing record, select the Member Number (circled in red).

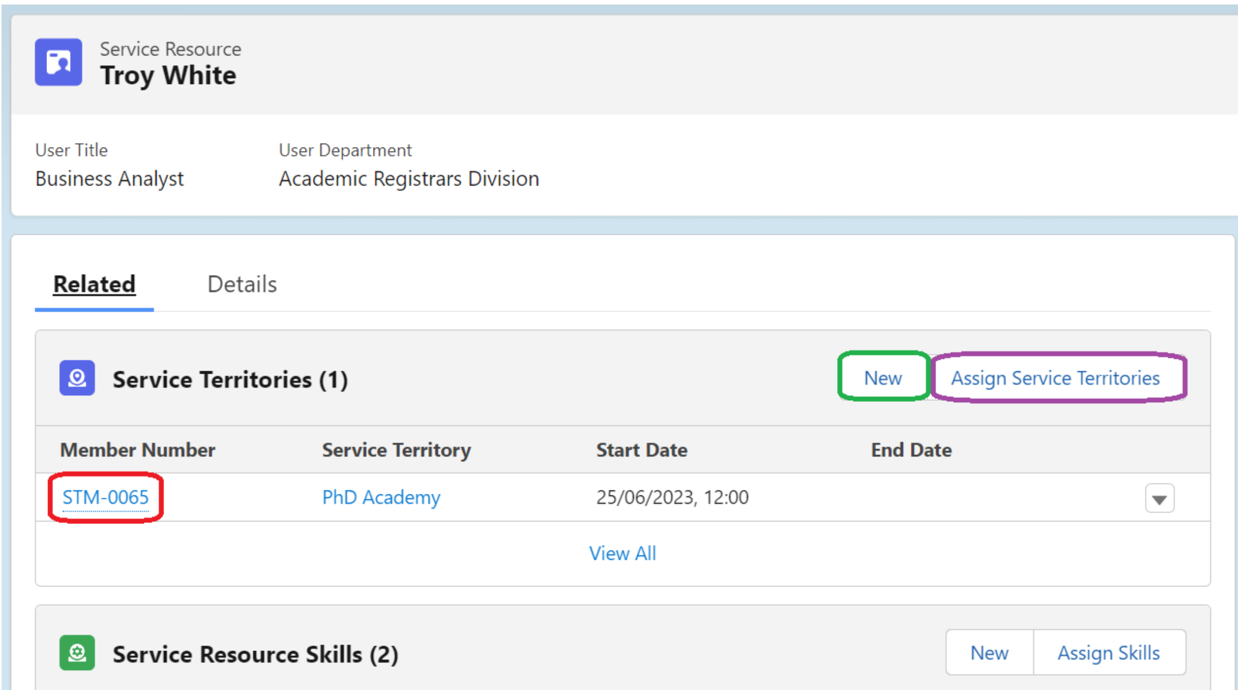


4.1. You'll be taken to an individual record page with the following fields:

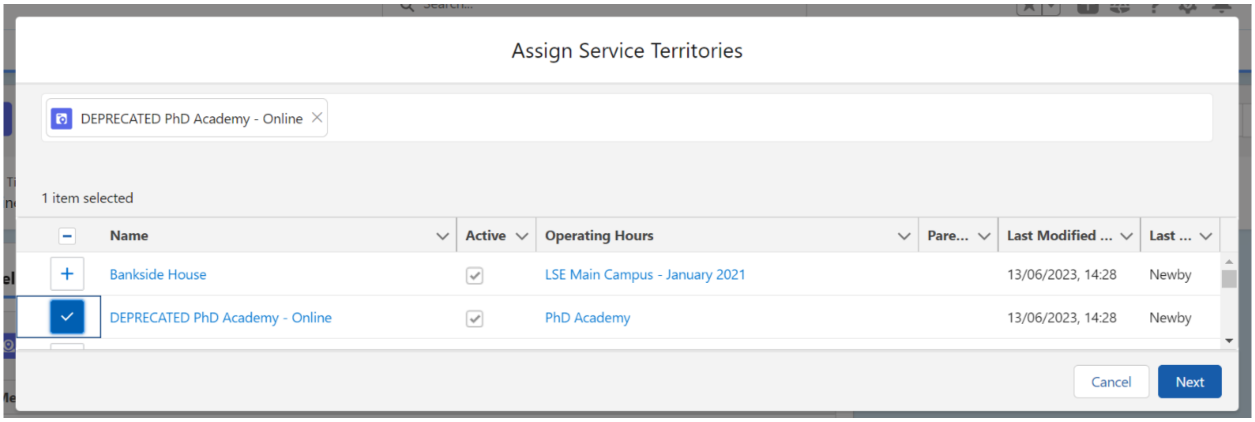
4.1.1. **Member Number:** reference number of the individual record.
4.1.2. **Service Resource:** staff member name.
4.1.3. **Service Territory:** name of the Service Territory.
4.1.4. **Territory Type:** includes Primary, Secondary or Relocation as options. We are only currently using Primary Territory:
  4.1.4.1. Primary Territory: where the majority of someone's work is carried out.
  4.1.4.2. Secondary Territory: where they sometimes have appointments.
  4.1.4.3. Relocation Territory: a temporary alternative location in which they may be working.
4.1.5. **Operating Hours (the hours this person is available in this place):**
  4.1.5.1. If the **Operating Hours** field is blank, the staff member will be bookable for any hours this particular Service Territory is open.
  4.1.5.2. When you choose to edit the Operating Hours field (which is optional), a selection of pre-existing Operating Hours will appear. You can select from this list, or add your own by selecting "New Operating Hours".
  4.1.5.3. If you would like to add **new** Operating Hours, add the name of the hours, as well as a description and time zone. Select "Save".
  4.1.5.4. For **new** Operating Hours, you will then need to add Time Slots, which can be seen in the right-hand panel on the screen. A popup window will appear.
  4.1.5.5. You will now be able to add the Duration, which means the calendar period these hours will apply to. Select the date and time these hours will begin from, followed by the end date and time. Select "Save".
  4.1.5.6. You now need to add **Service Appointment Windows**. This is where you get to be more specific about someone's availability at particular times during the week. Salesforce will assume that this availability occurs on a weekly basis.
  4.1.5.7. You may want to add **Concurrent Service Appointment Windows**, which enables you to make team members available for multiple simultaneous appointments. If you're interested in using this feature please contact ard.systems@lse.ac.uk.
  4.1.5.8. Remember to account for breaks. You can do this in a couple of ways:
    4.1.5.8.1. Ask the team to schedule any breaks in their Outlook calendar, making sure to give the events a status of "Busy" or "Out of office".
    4.1.5.8.2. Agree lunch break times and incorporate that into the Time Slots you schedule.



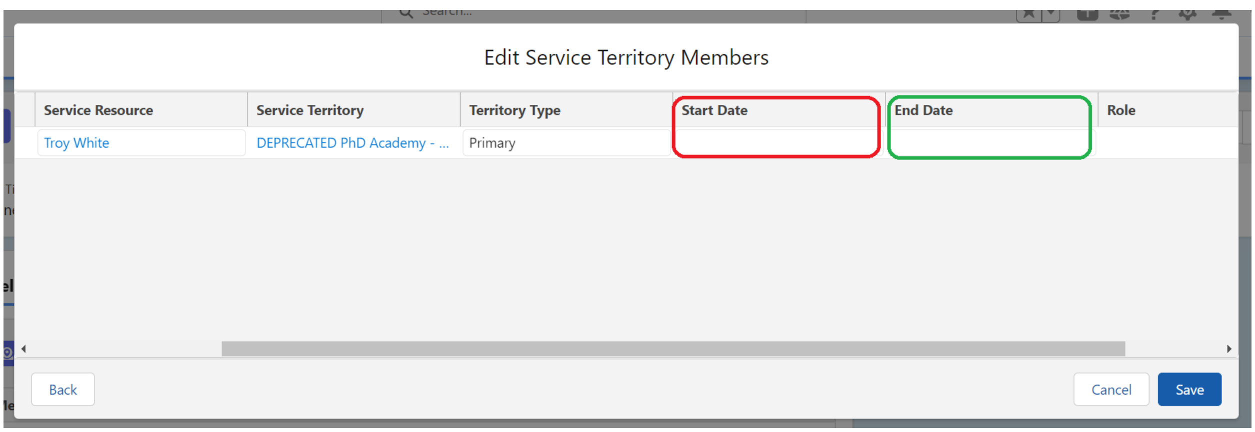
4.2. To **add** a new record, instead of selecting the relevant Service Territory, select “New” (circled in green). You will be asked to input the data outlined above.
4.3. To **assign** someone to an existing Service Territory, select “Assign Service Territory” (circled in purple).



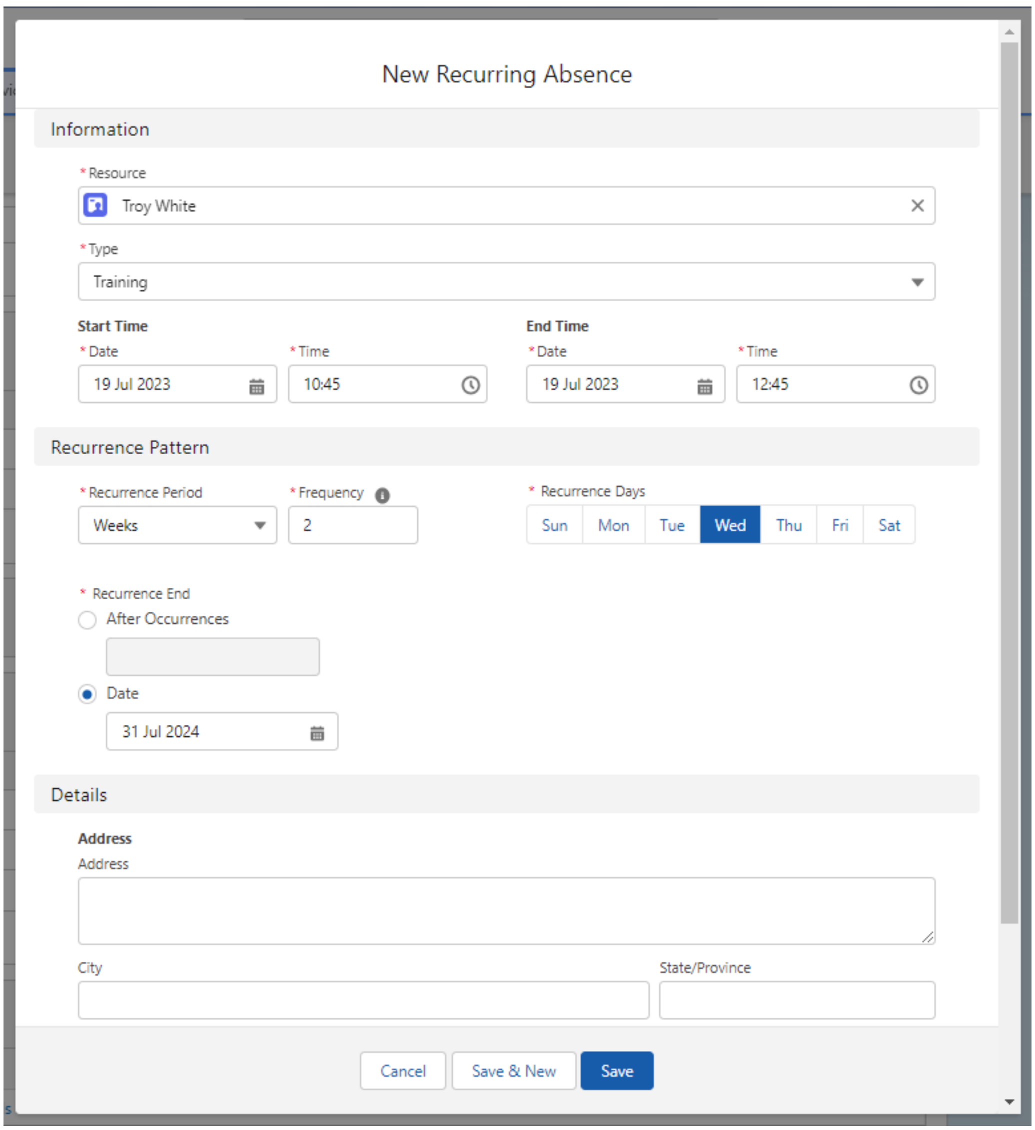
4.4. You will be shown a list of available Territories: select those which are relevant and select “Next”.



4.5. You’ll then be able to specify the length of time this person is assigned to this Service Territory by inputting the start and end dates and times. You must enter a start time (circled in red) for the record to become active, and you can set a start date in the past. If there is no foreseeable end date to when this person will be delivering appointments in this location, you don’t need to enter an end date (circled in green).

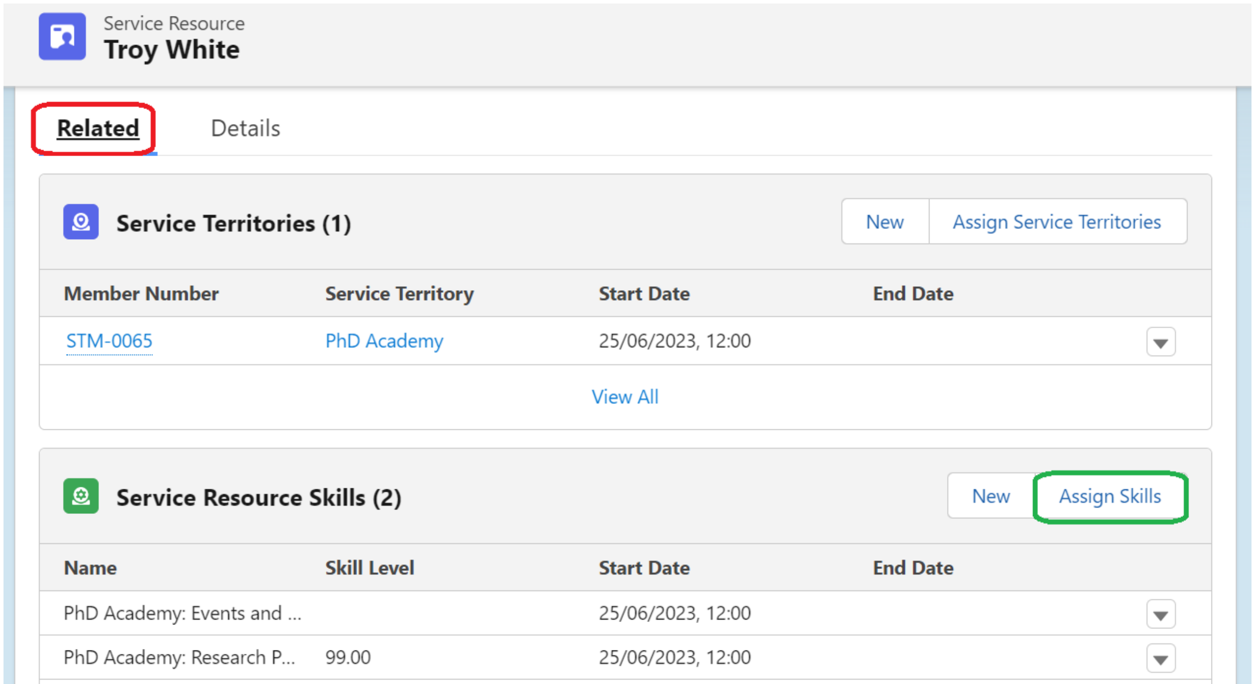


5. You may want to set an **Absence** for someone in your team, particularly if your team (or this individual) does not use the Outlook integration. For a new one-off absence, select “New” and for a new recurring absence, select “New Recurring Absence”.
   5.1. You may want to enter the following fields:
      5.1.1. Type: whether the absence is a Vacation, Meeting, Training or Medical in nature.
      5.1.2. Start/end date and time: when the absence is due to begin and end.
      5.1.3. Recurrence Period: if recurring, the time period and day of the week on which it recurs.
      5.1.4. Frequency: if recurring, the number of recurrence periods between absences. If the absence happens on a fortnightly basis, select a recurrence period of “Weekly” and then a frequency of “2”.
      5.1.5. Recurrence End: after occurrences / date: if recurring, the number of time the absence is set to happen, or the date on which it will end.
      5.1.6. **Details:** here you can add a relevant address (optional).

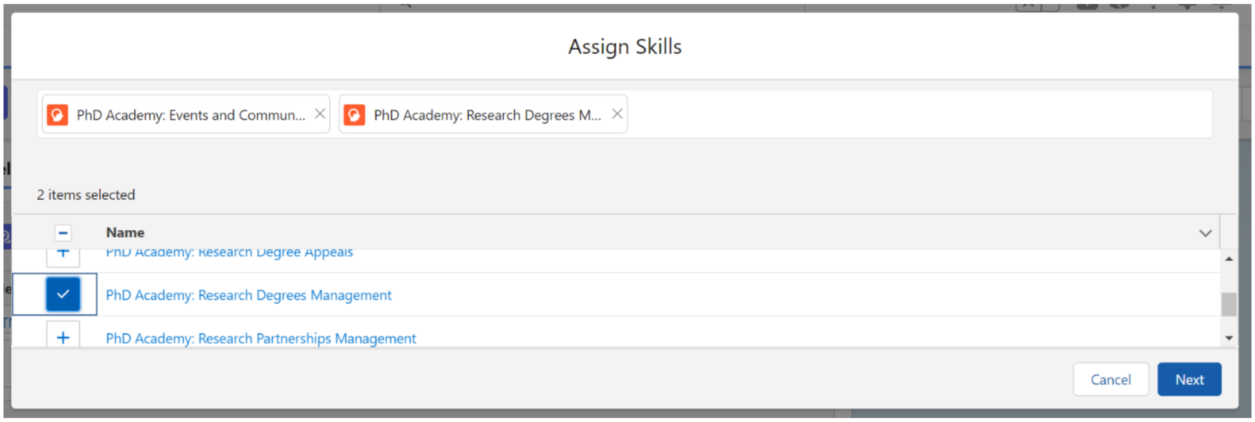


Assign particular Skills to an individual member of staff

1. Navigate to an individual's Service Resource record
2. Select the "Related" tab (circled in red).
3. Select "Assign Skills" (circled in green).



4. Select the + symbol next to any skills you would like to add.
5. Select “Next”.



6. You may want to add a “Skill Level” (circled in red), which is out of 100. This will be relevant if you have specified that someone must have a certain skill level to be able to deliver a particular type of appointment. If you are not using the Skill Level feature and/or want to make sure that Salesforce always includes this person in the slots offered for a certain appointment type (if they are available) then make sure ARDS have configured your Salesforce to disregard the Skill Level field.
7. As with locations, particular skills must have a start date (circled in green) to be activated. You can set a start date in the past.
8. Select “Save”.