

Guidance for Scheduler Users

This guide will let you know how to manage appointment bookings in Salesforce Scheduler.

For guidance on the tools which give you greater oversight of setting types of appointments, where they are and when they happen, see the separate guide: Managing Appointment Types, Locations and Availability.

To complete the actions outlined in this guide, you will need Scheduler User 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.

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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

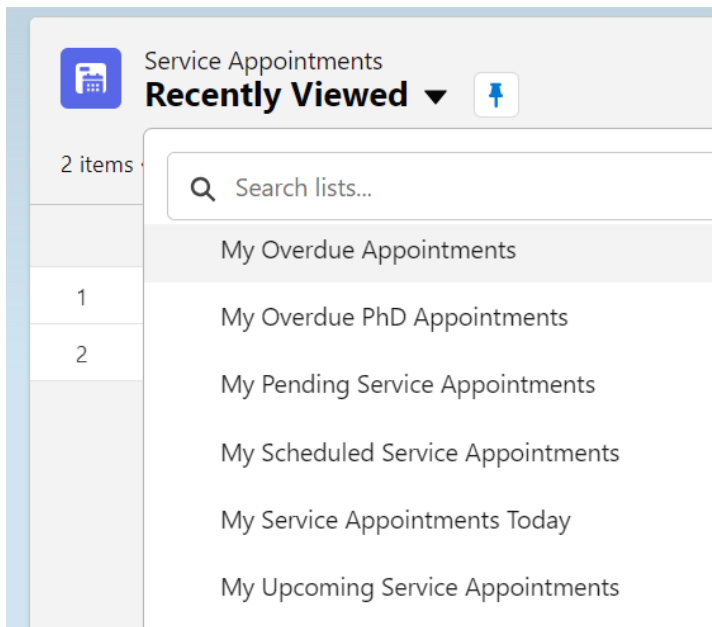
Salesforce doesn't create an appointment record **until the appointment slot is booked**. Prior to the slot being booked, the appointment record does not exist, and won't appear in anyone's calendar.

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:

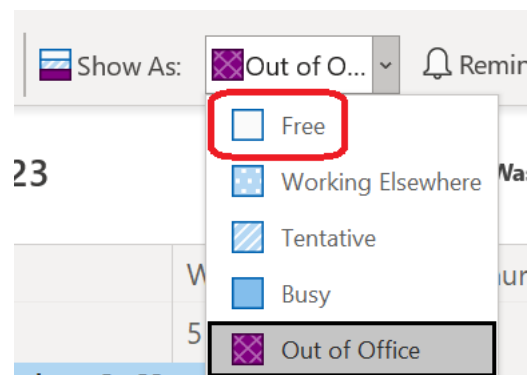
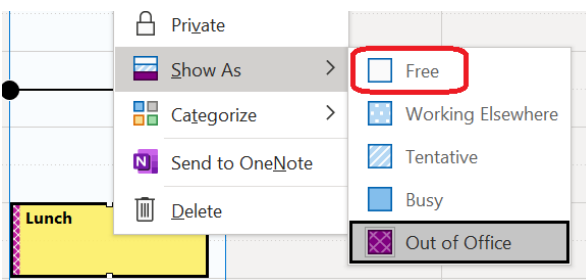


Outlook event statuses (only relevant when Outlook integration is activated)

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:

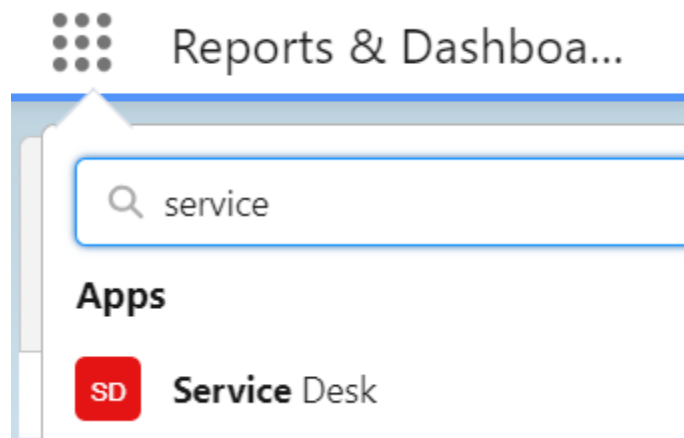
1. Right-click the event, select “Show as”, then select the option you would like.
2. On the taskbar look for the “Show as” icon, select the drop-down menu next to it, then select the option you would like.



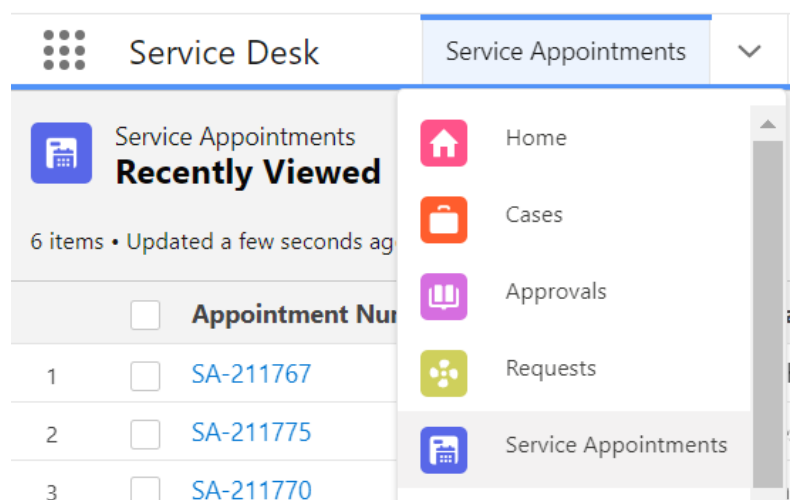
Salesforce will consider that time ‘bookable’ if it is either completely available (it features no calendar events) or any events have the status of “Free” (circled in red above). [A number of other factors](#) also determine whether that slot is offered to attendees.

Log into Salesforce and access Service Appointments

1. Log into Salesforce
 - 1.1. Select this link: <https://lse360.my.salesforce.com/>
 - 1.2. Select “Log in using LSE staff login”
 - 1.3. Pick your account
 - 1.4. Enter your main LSE account password
 - 1.5. Approve the sign-in request on your Microsoft Authenticator app by entering the number on the screen
2. If you are not automatically taken to the Service Desk app, select the app launcher – the 9-dot symbol near the top left of the screen:
3. Select or search for Service Desk.



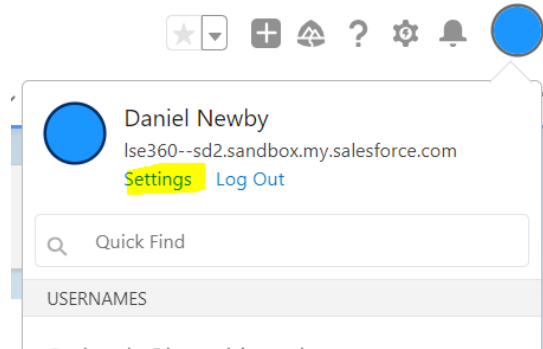
4. Once in the Service Desk app, navigate to the Service Appointments screen. You might need to select “Service Appointments” from the drop-down list next to the Service Desk app tab along the top of the screen.



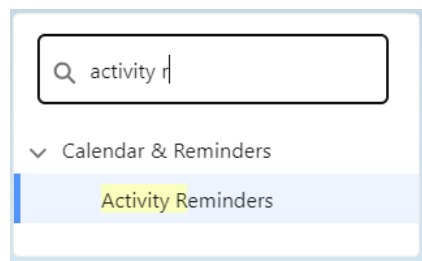
Turn off event reminder notifications in Salesforce

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

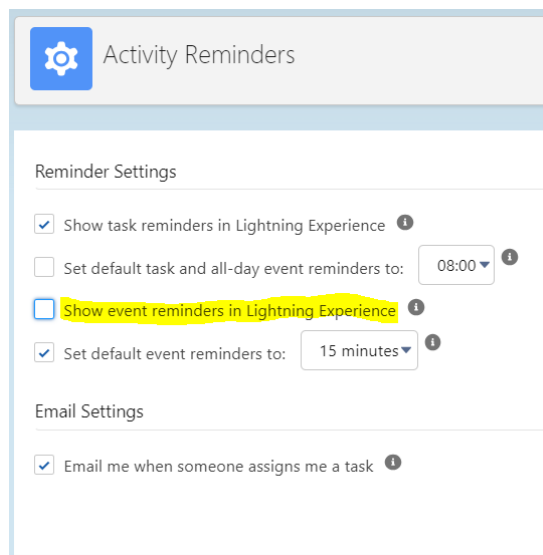
1. Select your user icon in the top right of the screen, and then select 'Settings'.



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.

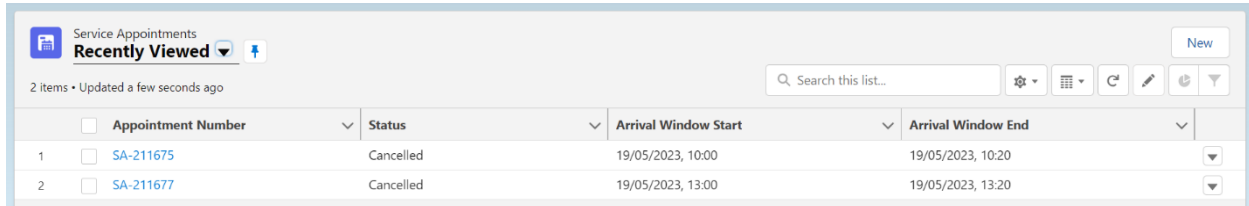


View appointments in Salesforce

This guide will focus on viewing upcoming appointments, although it is possible to view past appointments in list view and also as a report.

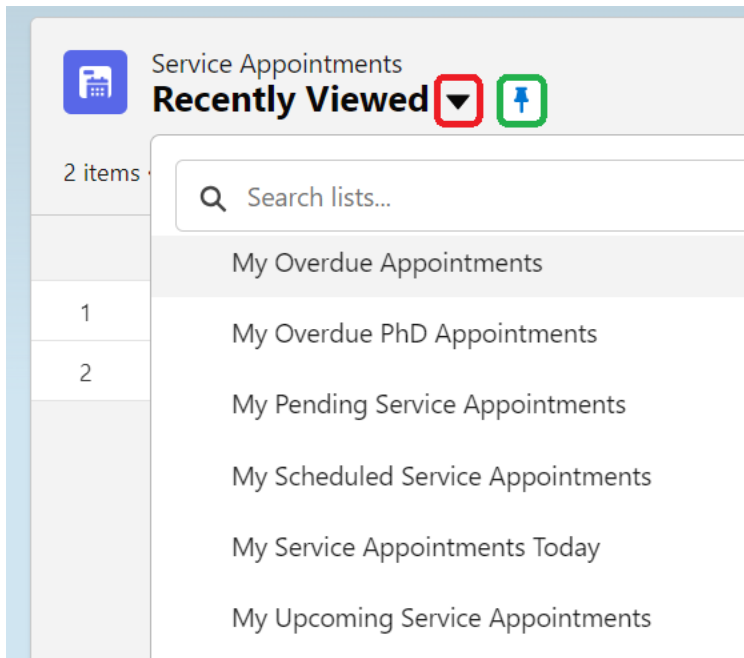
View appointments as a list

1. [Log into Salesforce and access Service Appointments](#)
2. You'll be able to see a "list view" of appointment records: the default list "pinned list" (the list which loads when you load the Home screen) is "Recently Viewed", which will show you all the appointments you have recently viewed.

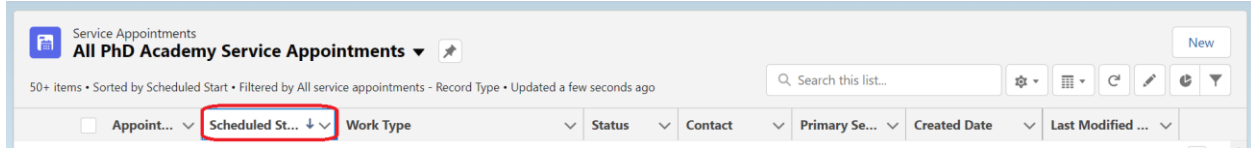


| | Appointment Number | Status | Arrival Window Start | Arrival Window End |
|---|--------------------|-----------|----------------------|--------------------|
| 1 | SA-211675 | Cancelled | 19/05/2023, 10:00 | 19/05/2023, 10:20 |
| 2 | SA-211677 | Cancelled | 19/05/2023, 13:00 | 19/05/2023, 13:20 |


- 2.1. To load other list views, select the downward arrow (circled in red) next to the list view name. You can select from a number of available views.
- 2.2. To change your pinned list, select that list and then select the drawing pin icon (circled in green) next to the list name. A helpful list to pin may be "My Upcoming Service Appointments".

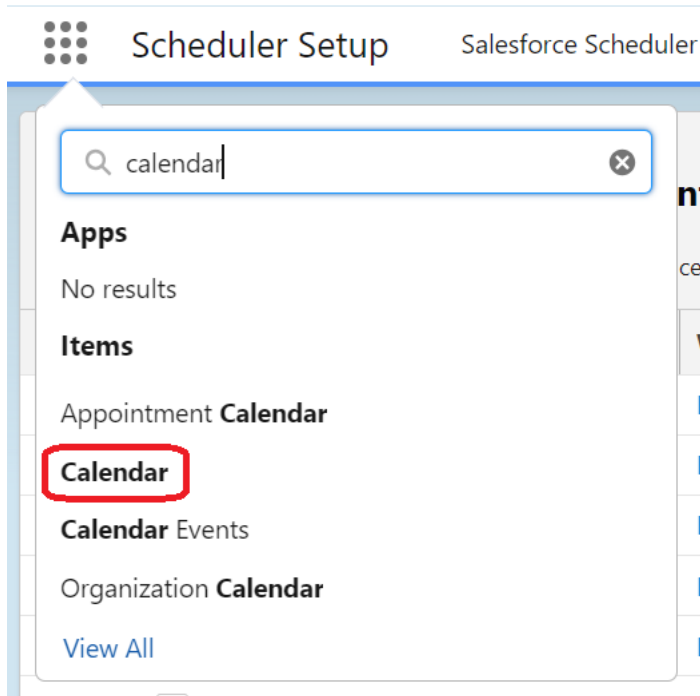


2.3. To sort the list, select the relevant item on the list header. For example, to sort by appointment start time, select “Scheduled Start” (circled in red). To reverse the order (first to last, or last to first), select the header again. It will remain sorted in this order unless you change it.



View appointments as a calendar

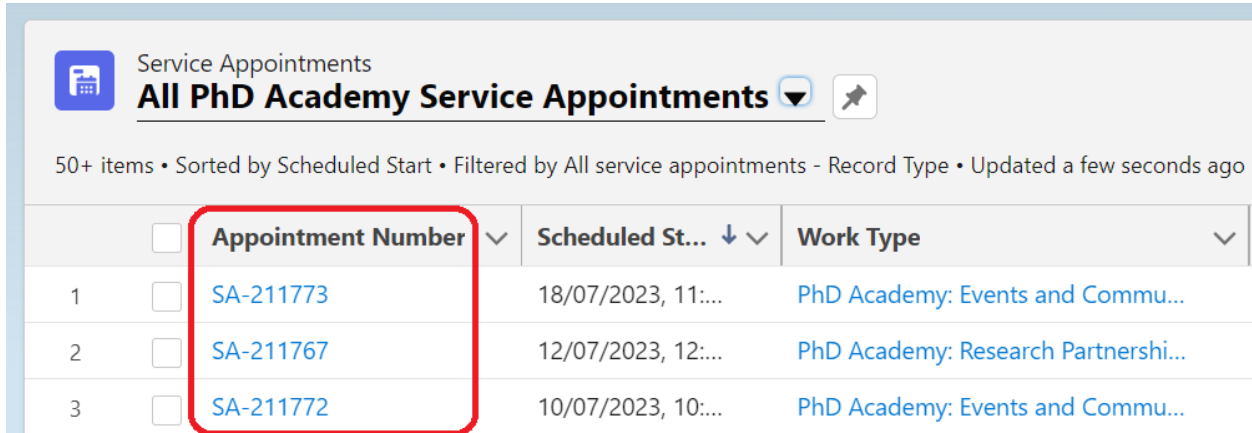
- 2.4. To view these appointments as a calendar, select the app launcher – the 9-dot symbol near the top left of the screen: 
- 2.5. Type “calendar” in the search field.
- 2.6. Select the Calendar app (circled in red).





- 2.7. Your Salesforce calendar should be displayed on the screen, and you can navigate using arrows or calendar dates.





View and edit individual appointment records

- From the list view, select the "Appointment Number" (circled in red). Don't select the appointment name as this will take you to the Work Type record, not the Service Appointment record for the individual appointment.



Service Appointments
All PhD Academy Service Appointments  

50+ items • Sorted by Scheduled Start • Filtered by All service appointments - Record Type • Updated a few seconds ago

| | <input type="checkbox"/> | Appointment Number  | Scheduled St...   | Work Type  |
|---|--------------------------|--|---|---|
| 1 | <input type="checkbox"/> | SA-211773 | 18/07/2023, 11:... | PhD Academy: Events and Commu... |
| 2 | <input type="checkbox"/> | SA-211767 | 12/07/2023, 12:... | PhD Academy: Research Partnershi... |
| 3 | <input type="checkbox"/> | SA-211772 | 10/07/2023, 10:... | PhD Academy: Events and Commu... |

4. This will take you through to an individual appointment record where you'll see all the key information relating to the appointment, including:
 - 4.1. **Headline information** – this is a read-only version of key information included below:
 - 4.1.1. **Contact:** name of the person attending the appointment.
 - 4.1.2. **Primary Service Resource:** name of the staff member delivering the appointment.
 - 4.1.3. **Work Type:** type of appointment
 - 4.1.4. **Status,** includes several types:
 - 4.1.4.1. Cancelled
 - 4.1.4.2. Cannot Complete
 - 4.1.4.3. Completed
 - 4.1.4.4. Dispatched
 - 4.1.4.5. In Progress
 - 4.1.4.6. None
 - 4.1.4.7. No Show
 - 4.1.4.8. Rescheduled
 - 4.1.4.9. Scheduled
 - 4.1.5. **Scheduled Start:** the date and time the appointment is due to begin.
 - 4.1.6. **Appointment Mode:** the format of the appointment
 - 4.1.6.1. In-person
 - 4.1.6.2. Online
 - 4.1.6.3. Telephone
 - 4.1.6.4. Drop-in
 - 4.1.6.5. Other

| Contact | Primary Service Resource | Work Type | Status | Scheduled Start | Appointment Mode |
|-------------------------------|----------------------------|---|-----------|-------------------|------------------|
| Test Tester 1 | Matt Brack | PhD Academy: Research Degree appeals appoint... | Scheduled | 05/07/2023, 15:00 | Online |

- 4.2. In the **Appointment Details** section, each of the fields with a pencil icon next to it **can** be edited. You don't necessarily need to edit all fields: only those which are required, and which are useful information for the appointment:
- 4.2.1. **Appointment Number:** the unique reference number assigned by Salesforce to each individual appointment.
 - 4.2.2. **Contact:** name of the person attending the appointment.
 - 4.2.3. **Send Status Notification:** if the status of an appointment is changing and you would like to send an email notification to the attendee relating to the change, select this tick box. Please note that the only statuses with related notifications are Scheduled, Rescheduled and Cancelled.
 - 4.2.4. **Cancellation Reason:** an optional field in which you can write a reason an appointment is being cancelled. This reason will then be incorporated into the email sent to the attendee to notify them of the cancellation, if you select the field "Send Status notification".
 - 4.2.5. **Scheduled Start:** appointment start date and time.
 - 4.2.6. **Scheduled End:** appointment end date and time.
 - 4.2.7. **Appointment Information:** any information submitted by the attendee at the time of booking the appointment. File names are listed here, and the actual file can be seen in the right-hand panel of the screen. Information included in this field is visible to attendees.
 - 4.2.8. **Service Note:** notes for internal use, not ordinarily visible to attendees unless requested. You may want to agree with your team how best to use this field, as it can be an important source of information shared only with the team relating to the appointment context and relevant information not contained in other existing fields.
 - 4.2.9. **Subject:** a brief explanation of what the appointment is about. It works in the same way as for example, an Outlook calendar event subject or an email subject.
 - 4.2.10. **Primary Service Resource:** name of the staff member delivering the appointment.
 - 4.2.11. **Work Type:** type of appointment.
 - 4.2.12. **Service Territory:** the location in which the appointment will be held.
 - 4.2.13. **Address:** the address of the location in which the appointment will be held. For virtual appointments, this section contains explanatory text about how the attendee can access the appointment.



Service Appointment
SA-211770

▼ Appointment Details

Appointment Number
SA-211770

Contact
[Test Tester 1](#)

Status
Scheduled

Send Status Notification ⓘ

Cancellation Reason ⓘ

Scheduled Start
05/07/2023, 15:00

Scheduled End
05/07/2023, 15:30

Service Territory Name
PhD Academy

Appointment Information ⓘ

Subject
Meeting with Matt Brack, PhD Academy

Primary Service Resource
[Matt Brack](#)

Work Type
[PhD Academy: Research Degree appeals appointment](#)

Service Territory
[PhD Academy](#)

Appointment Mode ⓘ
Online

Address
Your appointment host will call you on Microsoft Teams at y...

4.3. **System information** contains Salesforce-specific information relating to that appointment record. Almost all fields can be ignored (including Earliest Start Permitted and Due Date), but you may want to edit the following fields:

4.3.1. **“Send Reminder 1 and 2”** indicate the dates that the attendee will receive automated reminder emails about their appointment.

The screenshot shows the 'System Information' section for an appointment record. It is organized into two columns of fields. The left column includes: 'Created By' (Test Tester 1, 03/07/2023, 14:43), 'Owner' (Matthew Brack), 'Send Reminder 1' (03/07/2023, 15:00), 'Send Reminder 2' (05/07/2023, 13:00), and 'Record Type' (PhD Academy). The right column includes: 'Last Modified By' (Test Tester 1, 03/07/2023, 14:45), 'Last Modified Date' (03/07/2023, 14:45), 'Parent Record' (Tester 1 Administrative Account), 'Earliest Start Permitted' (03/07/2023, 14:43), and 'Due Date' (10/07/2023, 14:43). Each field has an edit icon (pencil) next to it.

4.4. The right-hand panel of the screen contains several boxes:

4.4.1. **Change the Primary Service Resource:** instructions about how to change the member(s) of staff delivering the appointment.

4.4.2. **Assigned Resources:** the members(s) of staff delivering the appointment.

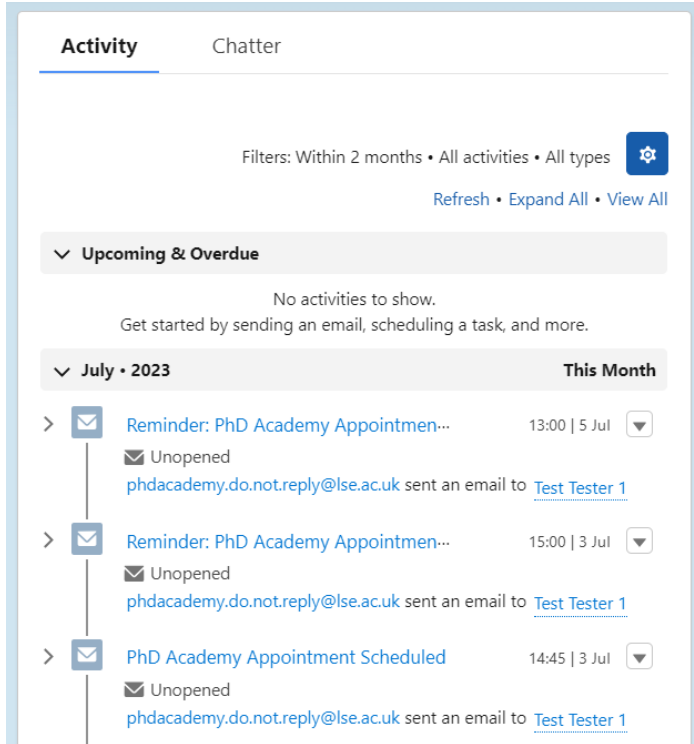
This block contains two screenshots. The top one is a text box titled 'Changing the Primary Service Resource' with instructions: 'To change the Primary Service Resource, select the dropdown next to the Assigned Resource below, then select Edit, change the Service Resource and Save. You may need to refresh the page to see the update.' The bottom screenshot shows the 'Assigned Resources (1)' section. It features a dropdown menu currently showing 'Matt Brack'. Below the dropdown, it displays 'Event: PhD Academy: Research Degree appeals appoint...' and 'Primary Resource: '. A 'View All' link is at the bottom.

4.4.3. **Files:** any files uploaded by the attendee.

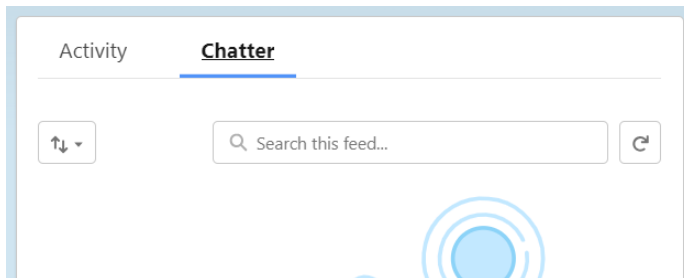
The screenshot shows the 'Files (1)' section. It contains a single file entry: 'Landing page banner-EGI_8037', which was uploaded on '3 Jul 2023' and is '124KB' in size with a 'jpg' extension. A 'View All' link is located at the bottom of the section.

4.4.4. Activity and Chatter:

4.4.4.1. In **Activity** you can see any automated or manually triggered Salesforce emails sent to the attendee about the appointment, including reminders or confirmations of status changes.



4.4.4.2. In **Chatter** you can see... collaborate with other Salesforce users. Its functionality mirrors that of a social media platform, with tagging, @mentioning, and other features such as posting updates or comments in Groups or on a record, sharing files and links, posting polls, "like" and reply to posts and comments, or follow records to see when updates occur.




Reschedule an appointment

1. [View the individual appointment record](#)
2. Select the pencil icon next to the "Status" field (circled in red).

Appointment Details

Appointment Number
SA-211770

Contact
[Test Tester 1](#)

Status
Scheduled 

3. Change the appointment status to "Rescheduled".
4. You may want to select the tick box "Send Status Notification". This will trigger an email to the attendee once you save the record.

Service Appointment
SA-211770

Contact
Test Tester 1

Status
Rescheduled

Send Status Notification

Cancellation Reason

Scheduled Start
Date: 05/07/2023 Time: 15:00

Primary Service
Matt Br

Work Type
PhD Ac



Service Territor
PhD Ac

Appointment M
Online



Address

- Amend the start and/or end time as needed. Double check the date(s) and time(s) to ensure they are correct.

Scheduled Start


Date: 05/07/2023  Time: 15:00 


Scheduled End



Date: 05/07/2023  Time: 15:30 


- Make any other changes as needed.
- Select "Save".

Service Appointment SA-211770



Contact: Test Tester 1 


***Status** Rescheduled 


Send Status Notification  


Cancellation Reason 

Scheduled Start

Date: 05/07/2023  Time: 15:00 

Primary Service: Matt Br 

Work Type: PhD Ac 


Service Territory: PhD Ac 

Appointment Mode: Online

Address

8. You should now see the email to the attendee included in the “Activity” panel. You may need to refresh the panel to see it appear.

Activity Chatter


Filters: Within 2 months • All activities • All types 

[Refresh](#) • [Expand All](#) • [View All](#)

▼ **Upcoming & Overdue**

No activities to show.
Get started by sending an email, scheduling a task, and more.

▼ **July • 2023** **This Month**

>  **PhD Academy Appointment ...** 12:16 | Today ▼

✉ Unopened
phdacademy.do.not.reply@lse.ac.uk sent an email to ...


Cancel an appointment

1. [View the individual appointment record](#)
2. Select the pencil icon next to the "Status" field (circled in red)

Appointment Details

Appointment Number
SA-211770

Contact
[Test Tester 1](#)

Status
Scheduled 

3. Change the appointment status to "Cancelled".
4. You may want to select the tick box "Send Status Notification". This will trigger an email to the attendee once you save the record.
5. You may also want to enter a cancellation reason, which will be included in the automated email sent to the attendee.
6. Select "Save".

* Status
Cancelled

Send Status Notification

Cancellation Reason
Appointment no longer needed

Scheduled Start
Date: 10/07/2023 Time: 15:00

Work Type
PhD A

Service Territo
PhD A


Appointment
Online

Address
Street

Cancel Save

7. You should now see the email to the attendee included in the "Activity" panel. You may need to refresh the panel to see it appear.

Activity Chatter



Filters: Within 2 months • All activities • All types 


[Refresh](#) • [Expand All](#) • [View All](#)

▼ **Upcoming & Overdue**

No activities to show.
Get started by sending an email, scheduling a task, and more.

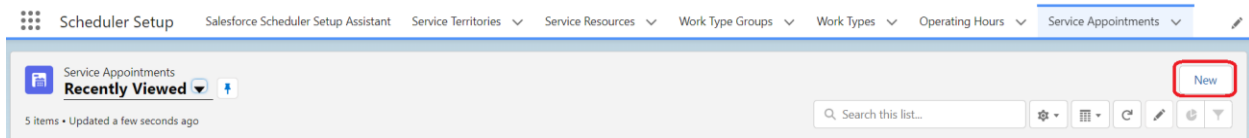
▼ **July • 2023** **This Month**

>  **PhD Academy Appointment ...** 12:21 | Today 

 Unopened
 phdacademy.do.not.reply@lse.ac.uk sent an email to ...

Book a new appointment

1. Access Service Appointments tab.
2. Select “New” (circled in red).



3. Add appointment key details:
 - 3.1. **Contact:** search for the attendee to add to this field. As some attendees have the same name, the best way to search for them is with their email address, as this is unique to them.
 - 3.2. **Status:** for a new appointment, select “Scheduled”.
 - 3.3. **Send Status Notification:** you are likely to want to tick this box, so the attendee receives email confirmation of the appointment being scheduled.
 - 3.4. **Scheduled Start:** start date and time.
 - 3.5. **Scheduled End:** end date and time.
 - 3.6. **Primary Service Resource:** staff member who is delivering the appointment.
 - 3.7. **Work Type:** type of appointment being delivered.
 - 3.8. **Service Territory:** location of the appointment (for virtual appointments, this may be the name of the department or division).
 - 3.9. **Appointment information:** any information the attendee has shared about the appointment. Field is visible to attendees.
 - 3.10. **Service note:** any internal notes about the appointment.

New Service Appointment

Appointment Details

Contact
Test Tester 1

Status
Scheduled

Send Status Notification

Scheduled Start
Date: 11/07/2023 Time: 12:00

Scheduled End
Date: 11/07/2023 Time: 12:30

Primary Service Resource
Troy White

Work Type
PhD Academy; Research Degree appeals appointment

Service Territory
PhD Academy

Appointment Mode and Address will be set automatically based on the Service Territory you select.

Appointment Information (visible to Appointment Contact, e.g. student)

Salesforce Sans 12 B I U

4. Select “Create Appointment”.

Appointment information (visible to Appointment Contact, e.g. student)

Salesforce Sans 12 B I U

Service Note

[Create Appointment](#)

5. You will then see the scheduled Service Appointment Record.

Service Appointment
SA-211775

[+ Follow](#) [Edit](#) [Delete](#) [Sharing](#)

| Contact | Primary Service Resource | Work Type | Status | Scheduled Start | Appointment Mode |
|-------------------------------|----------------------------|--|-----------|-------------------|------------------|
| Test Tester 1 | Troy White | PhD Academy: Research Degree appeals appointment | Scheduled | 11/07/2023, 12:00 | Online |

▼ Appointment Details

| | |
|--|---|
| Appointment Number SA-211775 | Subject Meeting with Troy White, PhD Academy |
| Contact Test Tester 1 | Primary Service Resource Troy White |
| Status Scheduled | Work Type PhD Academy: Research Degree appeals appointment |
| Send Status Notification | Service Territory PhD Academy |
| <input checked="" type="checkbox"/> | Appointment Mode |
| Cancellation Reason | Online |
| Scheduled Start 11/07/2023, 12:00 | Address Your appointment host will call you on Microsoft Teams at y... |

Changing the Primary Service Resource
To change the Primary Service Resource, select the dropdown next to the Assigned Resource below, then select Edit, change the Service Resource and Save. You may need to refresh the page to see the update.

Assigned Resources (1)

[Troy White](#)

Event: [PhD Academy: Research Degree appeals appoint...](#)

Primary Resource:

[View All](#)

6. If you selected “Send Status Notification”, an email will have been sent to the attendee. You can view this in the Activity section of the Service Appointment record.
7. It will also be added to the Salesforce and Outlook calendar of the person (Service Resource) delivering the appointment.

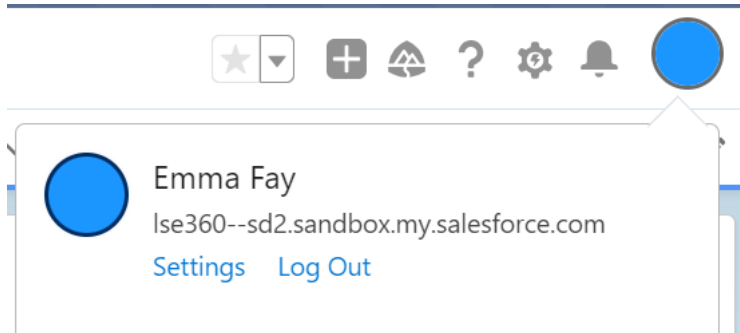
Unlike attendees, who are restricted to booking only predetermined appointment slots via the front end of Salesforce, as a member of staff you have no restrictions on when you can book appointments for and how long they can last. This means that it’s important to double check details such as the date and time when booking, as Salesforce won’t automatically alert you to double bookings, etc.

How Salesforce integrates with Outlook

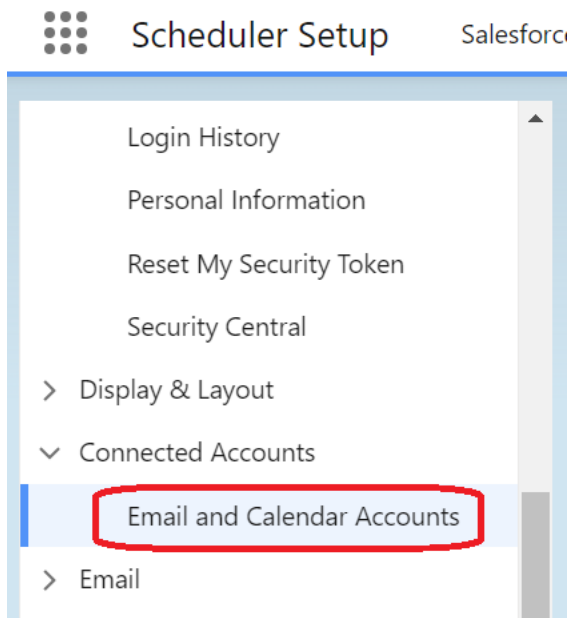
Your team may be using the Salesforce integration with Outlook, which means that your Salesforce and Outlook accounts are connected.

To activate the connection:

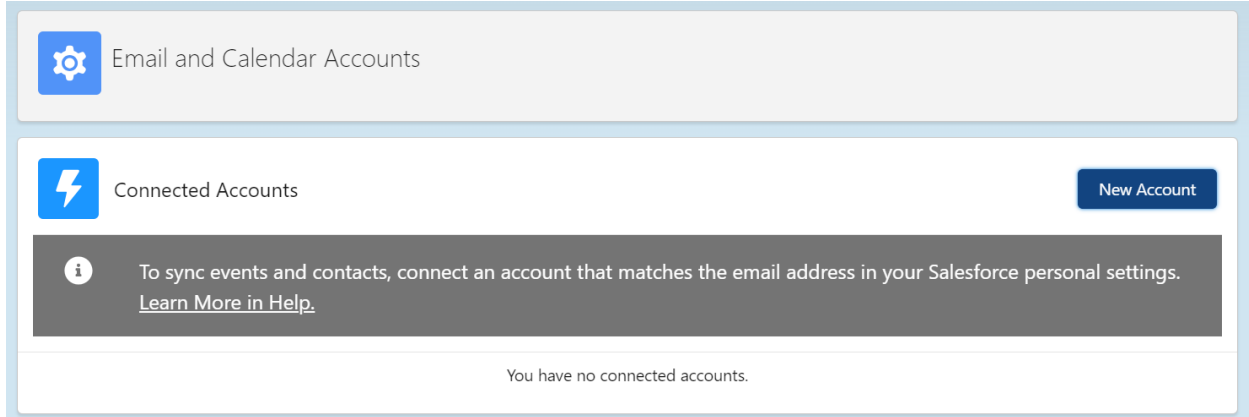
1. Select your user icon (top right of page)



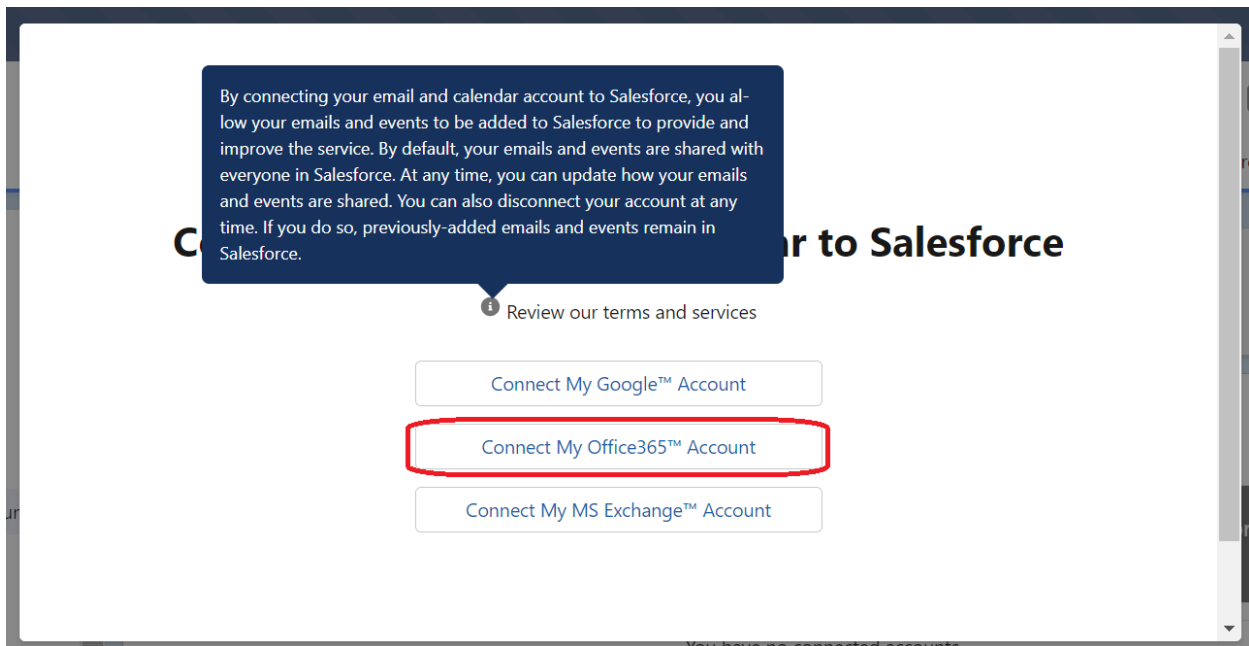
2. Select Settings --> Connected Accounts --> Email and Calendar Accounts.



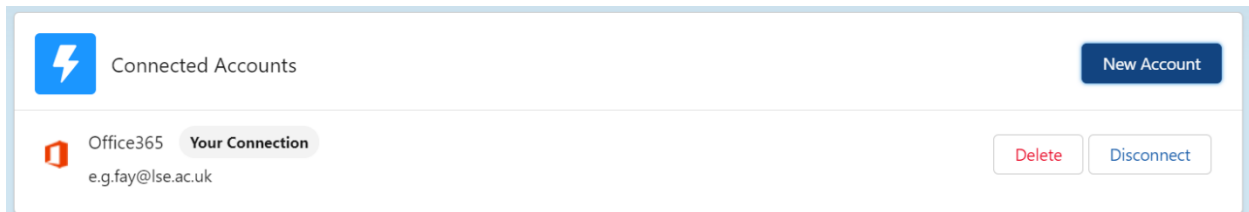
3. Select "Connect Account" or "New Account".



4. Read and accept the terms (see note on terms, below).
5. Select "Connect My Office 365 Account", 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

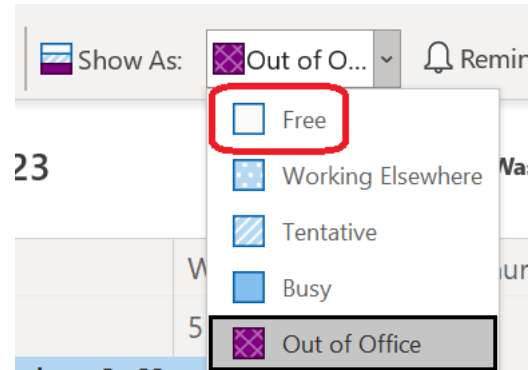
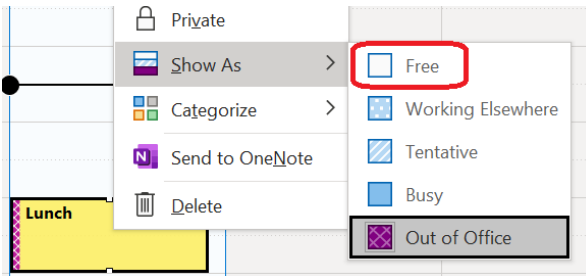
If your team's scheduler has specified that you're delivering virtual appointments from 9.00-11.00 on Monday, Salesforce will check your Outlook calendar to see whether you are available during this time.

- 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

In order for Salesforce to properly understand 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).



What you'll see in your calendar and email

When a new appointment is scheduled for you in Salesforce, you will see it appear in your Outlook calendar.

When an appointment is rescheduled, it will automatically move in your Outlook calendar. You won't currently receive an email update to say this has happened.

When an appointment is cancelled, it will automatically be removed from your Outlook calendar. You won't currently receive an email update to say this has happened.

All changes to appointments must happen within Salesforce. If you reschedule or cancel in Outlook this will not be reflected in the Salesforce record and it won't trigger an email to the attendee to notify them of the changes.