Appointment scheduling configuration manual (2026-04 release)

With the Appointment Planner it is possible to send an invitation to candidates or contacts, where the participant makes the appointment based on the available time or in reserved time blocks. Both personal agendas and group calendars can be viewed.

You can email the invitation to the participant or send it via WhatsApp. When you send an email, the conversation participant opens an Experience Cloud portal that has been set up specifically for this functionality.

With this functionality, you can set up a fully automated process:

- The candidate applies for a vacancy. In the confirmation email, he or she will immediately receive a link to schedule an appointment with the recruiter.
- The candidate will receive a questionnaire. Based on the answers given, the candidate will immediately receive a WhatsApp message to schedule an appointment.

If you only send invitations via WhatsApp, it is not necessary to set up the Experience Cloud. Then go directly to the paragraph Configuration steps.

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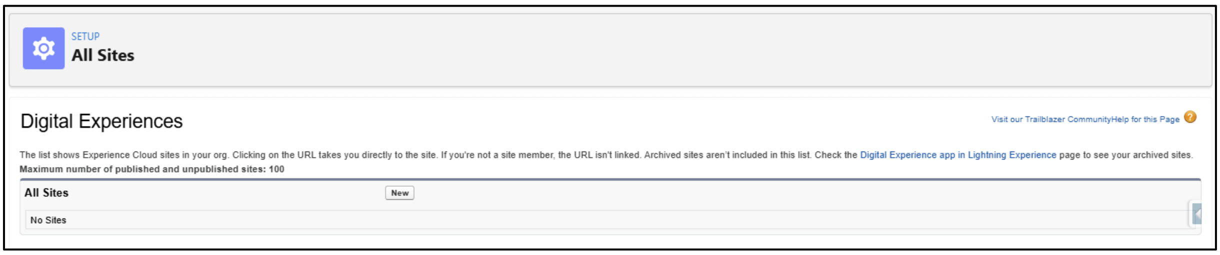
Experience Cloud

To send conversation participants a link with which they can schedule an appointment, the Experience Cloud from Salesforce is used. The application described in this guide does not require any additional licenses. Specifically for making the appointment, a site can be set up consisting of one page. An existing Experience Cloud site can also be used, within which a page is set up to plan the appointments.

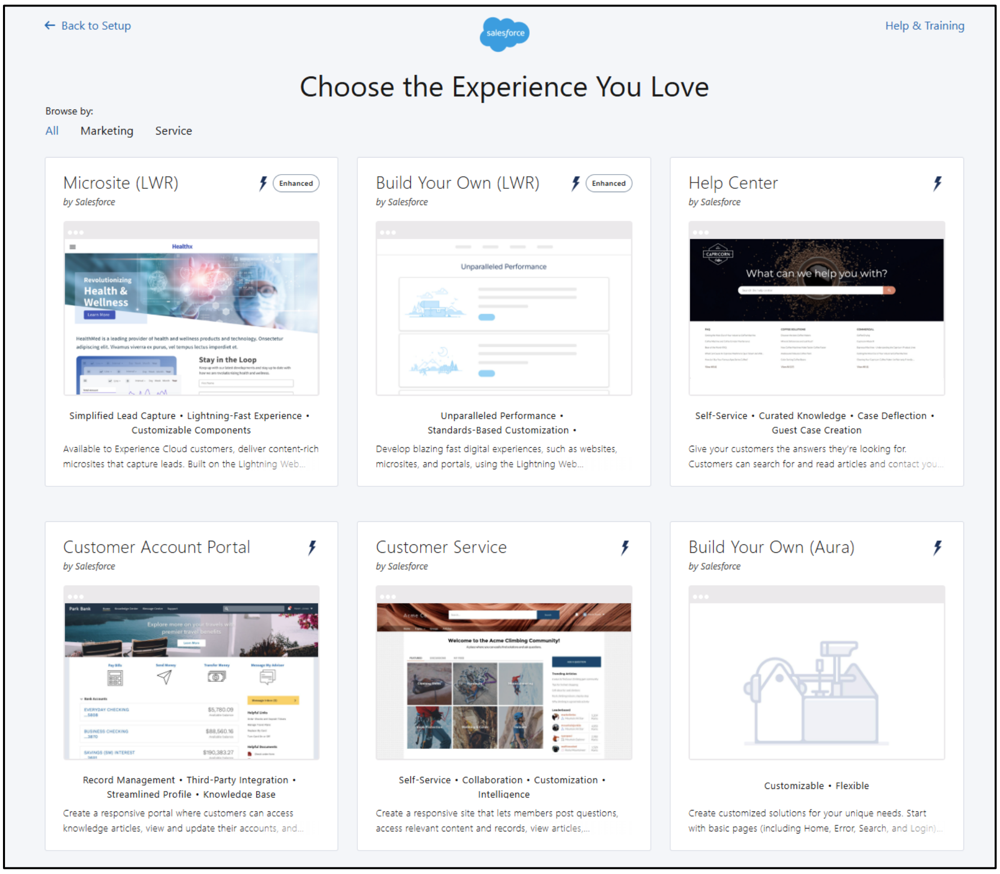
The steps below are based on setting up a new Experience Cloud portal.

Setting up a digital environment

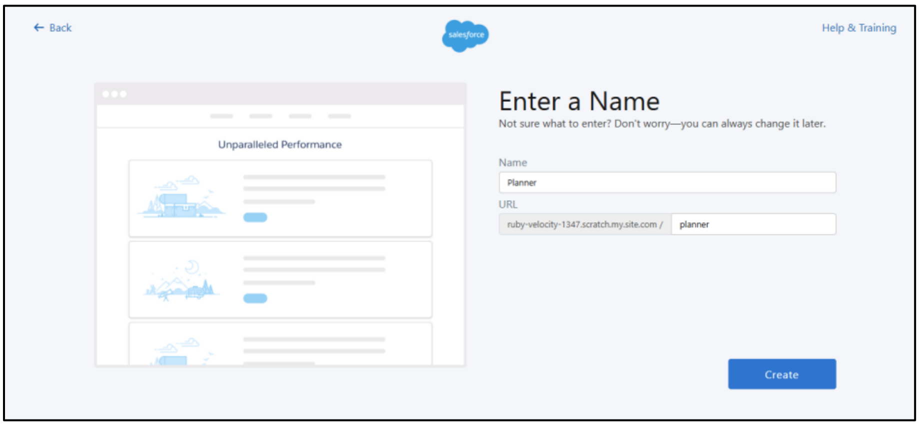
First of all, you need to activate the Digital environment via the Setup, Digital environments, Settings. If Experience Cloud has not been activated before, you will need to configure some basic settings. For this application, the default settings are sufficient. After saving the settings, you will be taken to the screen below and you can create a new site:



Select Build Your Own (LWR) from the list below. Since the appointment scheduling site contains one page, this is the best option.



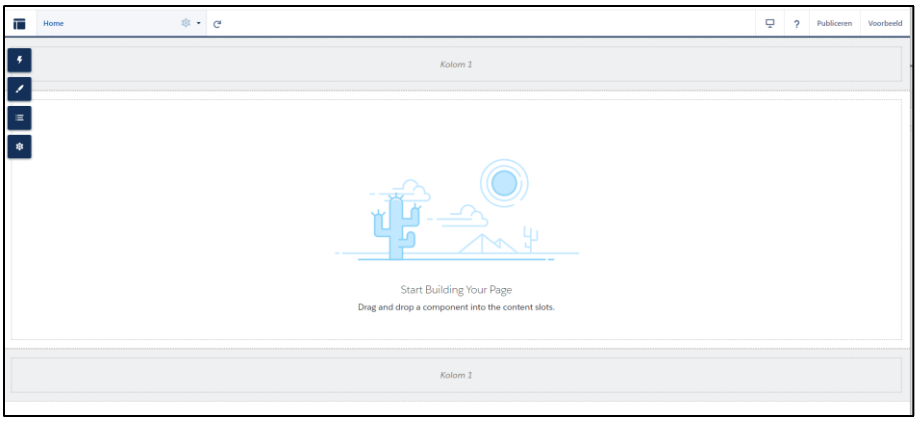
Choose a name and a URL, then create the site.



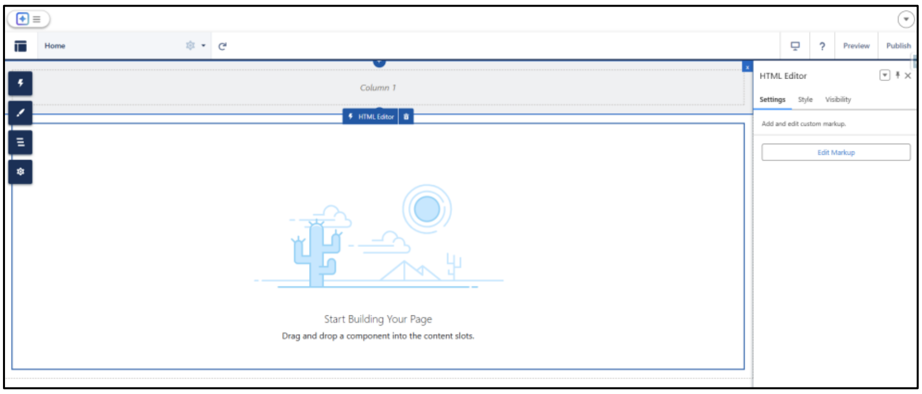
Site configuration

Once the site is created, you can adjust the settings and put the necessary components on the page.

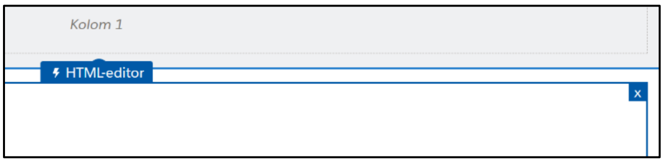
Via Samensteller you enter the management environment of the portal. You will then be taken to the environment where you can add components and settings to the site and the pages.



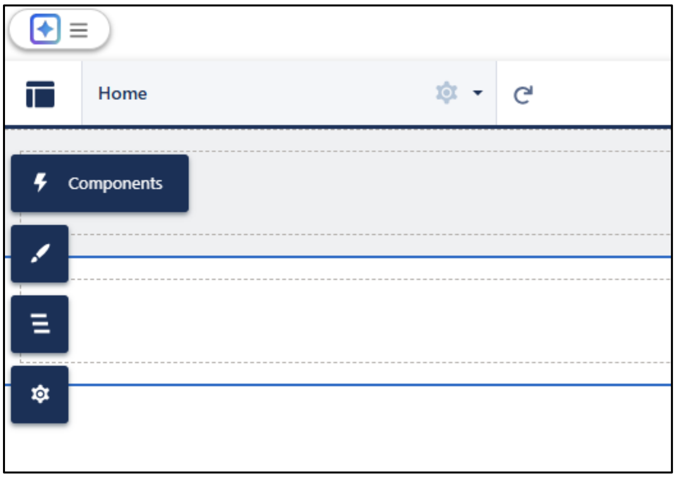
First of all, you need to remove the automatically added HTML component by clicking in the middle of the page.



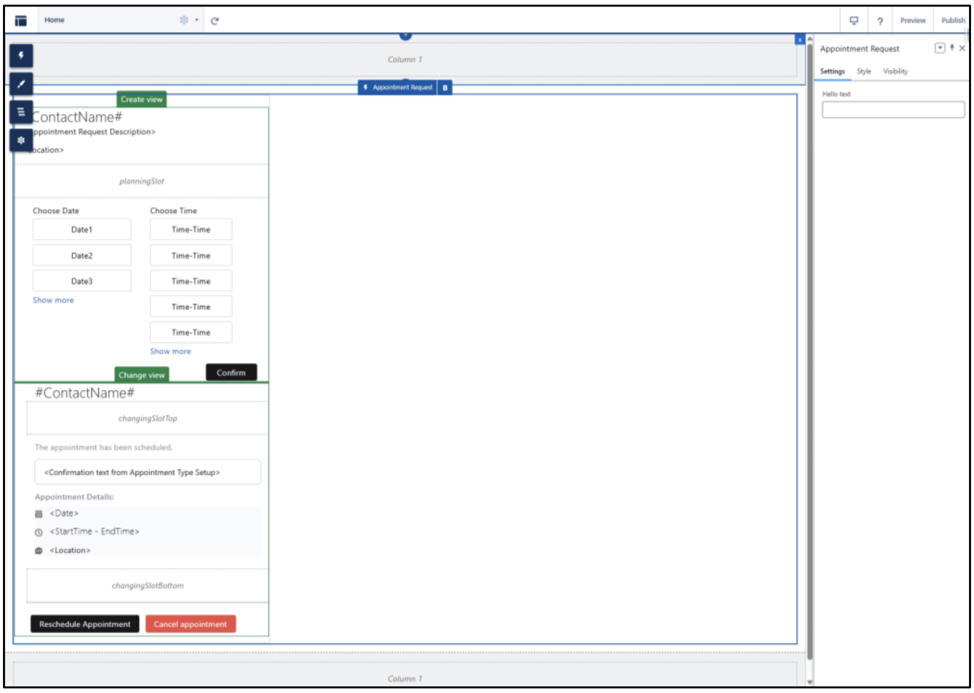
You then click away the pop-up with the cross and you remove the HTML component by clicking on the cross in the top right corner:



Now you can add a new component to the page via 'Components' in the menu:

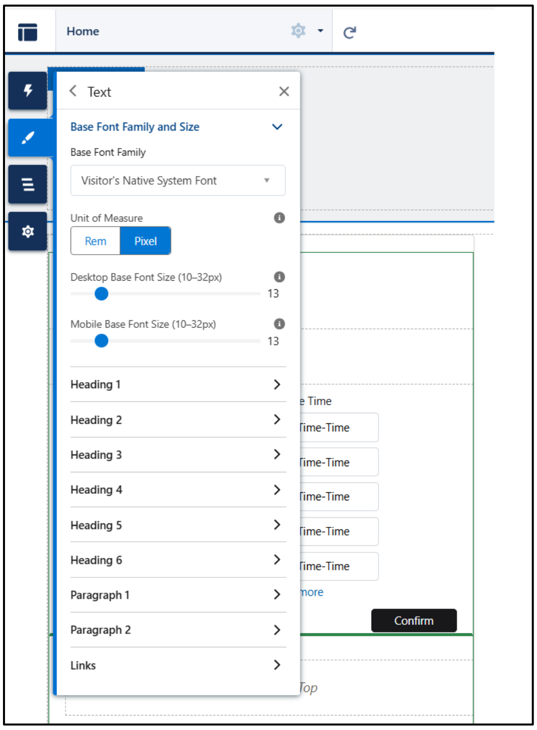


You drag the custom component Appointment Request component onto the screen:

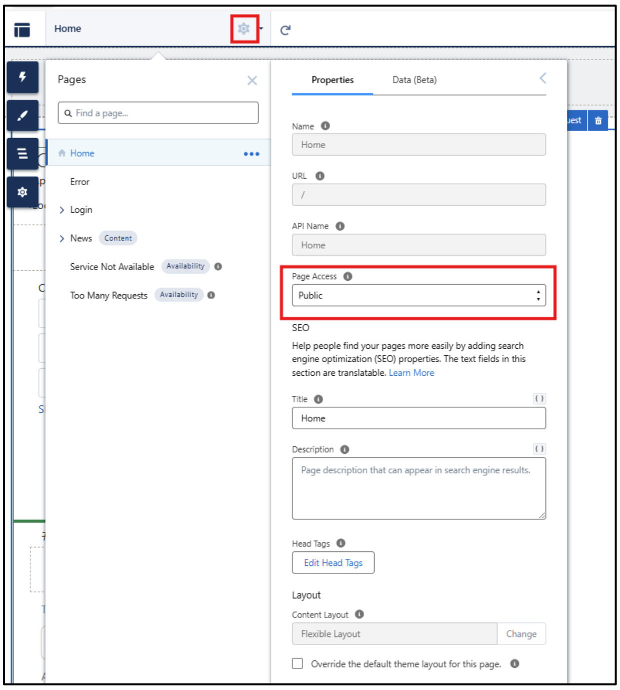


With the 'Hello text' at the top right of the properties of the component, you can set the salutation on the portal. By default, the name of the person is shown there. For example, you can also make Hello #ContactName# to address the candidate in a more targeted way. If you want to set up these pages in multiple languages as well, you can also use a custom label.

To optimally display these blocks on a mobile, we recommend setting the font for the mobile display to a maximum of 13 px in the Theme setting of the portal:

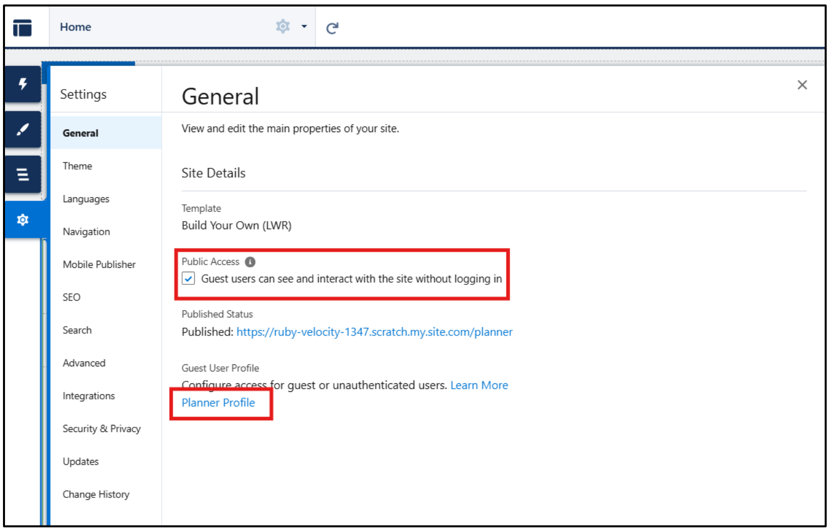


Before you can publish the site, you need to change the page properties. Click on the cog icon of the 'Home' page:



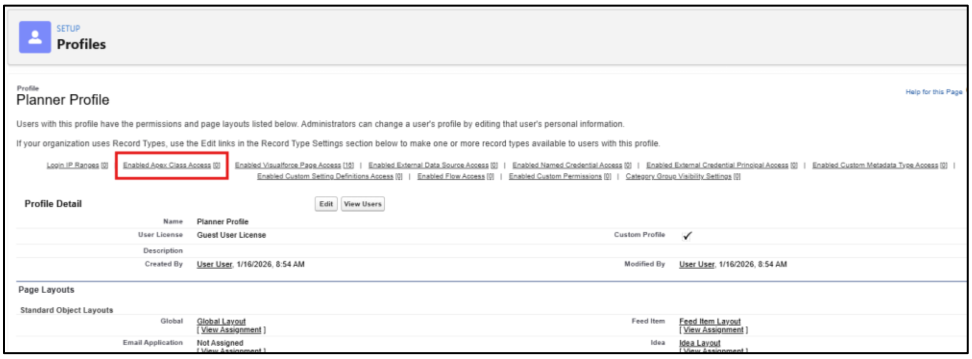
Set Page access to "Public."

Finally, you need to adjust the settings by selecting the gear icon from the menu:



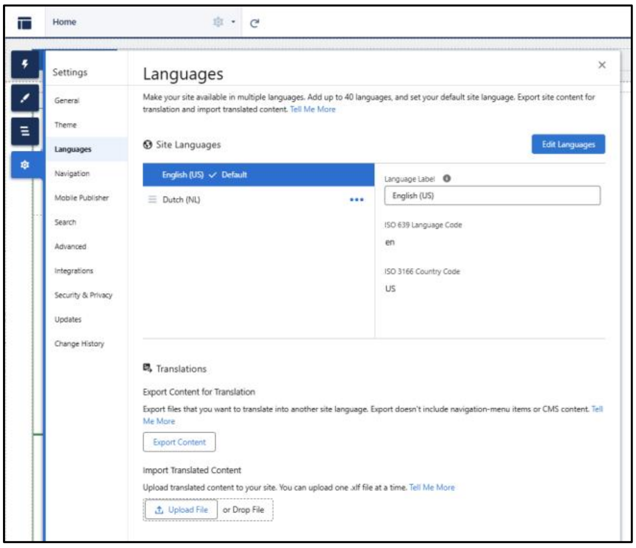
Select Guest users can see and use the site without being signed in. Then press the hyperlink Profile 'Planner' (this name is the same as the name of the site, which may differ in a customer environment).

You open the profile in another tab:

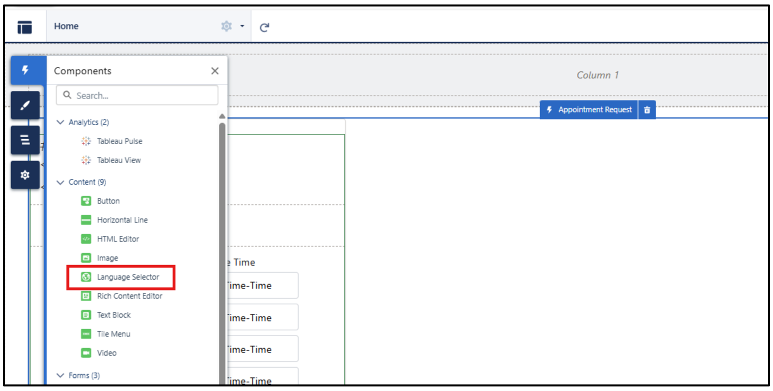


Add AppointmentPlanningPublicController to the Access to Apex Code classes. Save the profile and navigate back to the site composer.

If you want to support multiple languages on the page, add the languages by editing them:

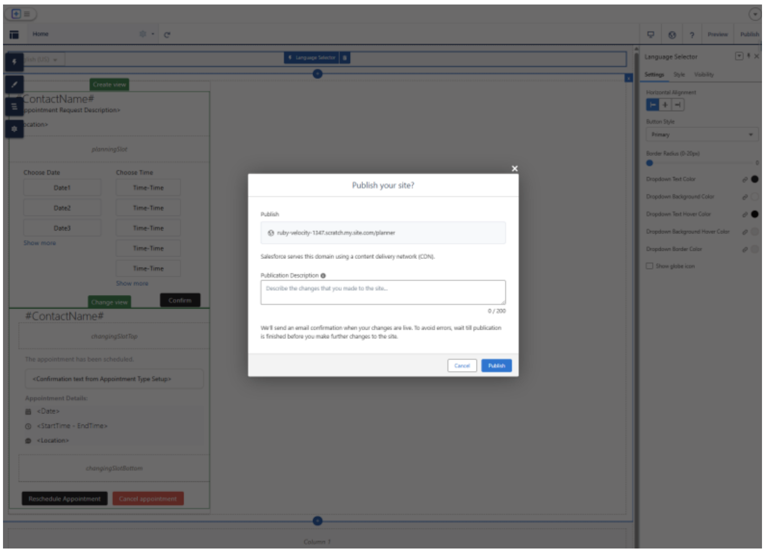


In that case, also add the Language Selector component to the Header on the page:



You can add other formatting elements such as images, (HTML) text, etc. It is recommended that you use a URL for images and make sure that the web location is added as a trusted site of CSP.

Once you're happy with the formatting, choose Publish:

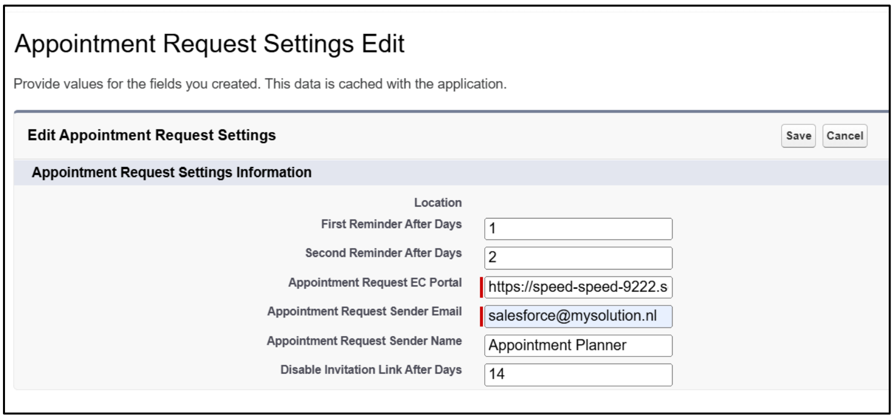


This may take a while. The user will automatically receive a message when it is ready. You can now close the environment composer.

Configuration steps

Custom settings

A new custom setting is available for scheduling appointments. You can find these in the Setup, Custom Settings, Appointment Request Settings:



For the First reminder after days, set the number of days after which the candidate should receive an appointment booking reminder, as long as it hasn't been made. You can also set the second reminder.

Enter the site URL in the Appointment Request EC Portal field. You can copy these from the list via Setup, Digital environments, All sites. The Appointment Request Sender Email is also mandatory to set up.
The Disable invitation link after number of days setting defaults to 14. If the candidate does not make an appointment, the appointment request will automatically be set to the status 'Expired' after 14 days.

Note: if you send an appointment request via WhatsApp, the EC Portal will not be used and no reminders will be sent.

Permissions/profiles

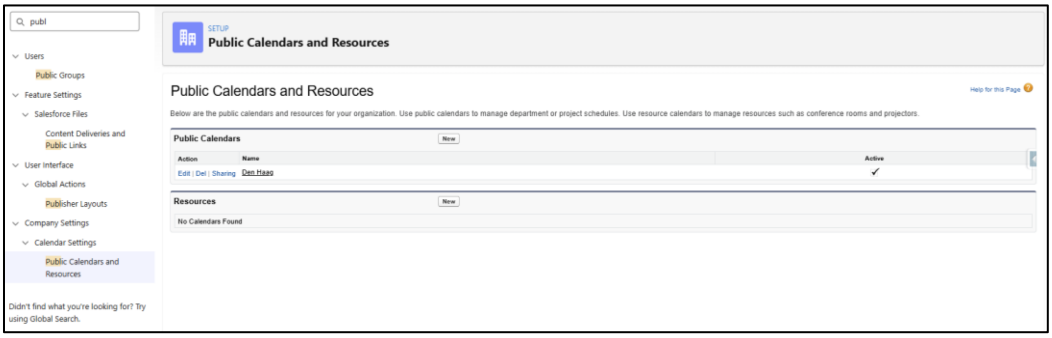
A number of new objects are available for making appointments and fields have been added to existing objects.

- Appointment type settings (msf__Appointment_Type_Setup__c): object to record the appointment parameters. Make it available as a Tab. Administrators: All fields edit access, Users: All fields read access.
- Appointment request (msf__Appointment_Request__c): object to let the candidate schedule an appointment. Make it available as a Tab. Administrators and Users should have edit access to all fields.
- Event: We have added a new record type: Appointment Reservation to record time blocks in the personal and team calendar. In addition, a number of new fields have been added. Administrators and Users should have edit access to all fields.
- Team (msf__Team__c): a new field is available here: Team calendar. Administrators should be given edit access, Users only read access.
- Vacancy (msf__Job__c): a new field is available here: Team calendar. Administrators and Users should be given edit access.

Public calendars

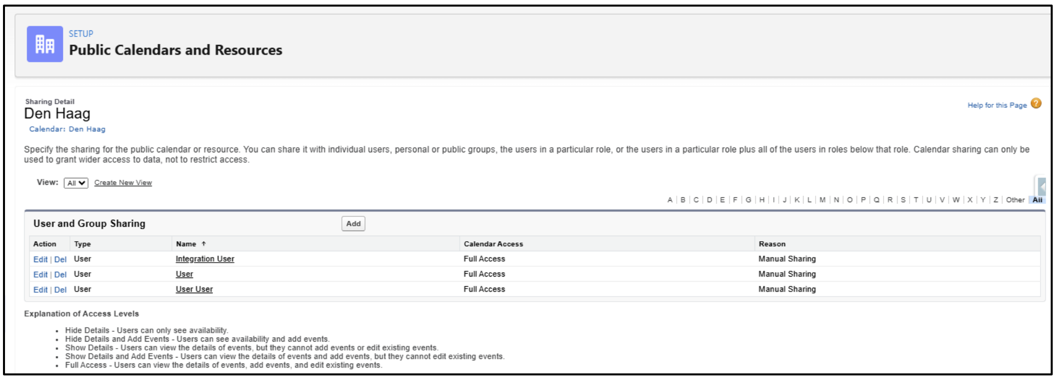
If you send the invitation via e-mail, you can also have the candidate make an appointment in a Public/Group calendar to make an appointment.

These are maintained in Salesforce through the Setup, Public Calendars, and Resources. For example, you create an agenda for a Team.



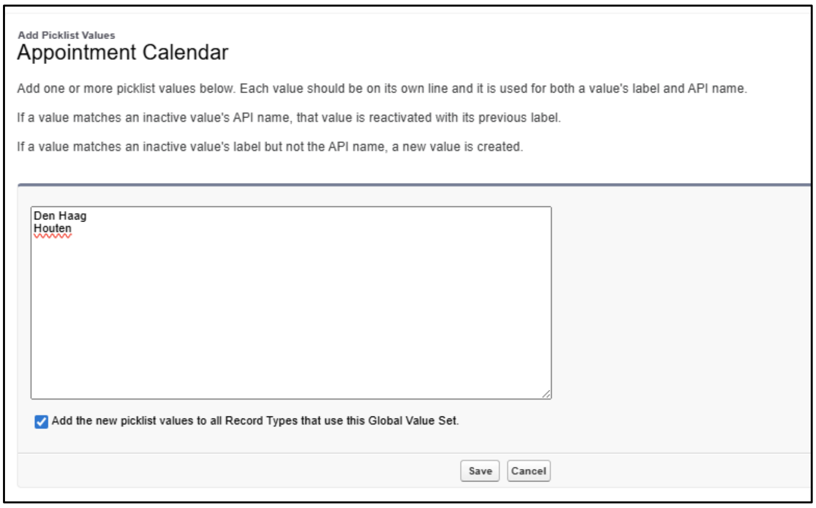
If you don't work with Teams, you can create a public calendar for "Visitors."

To show a public calendar on your own calendar overview, you need to share it:



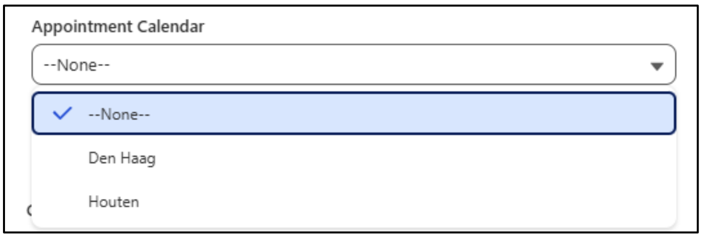
Add users and give them full access.

Next, you need to add the name of your public calendar in the global sets of Appointment Calendar drop-down list values:



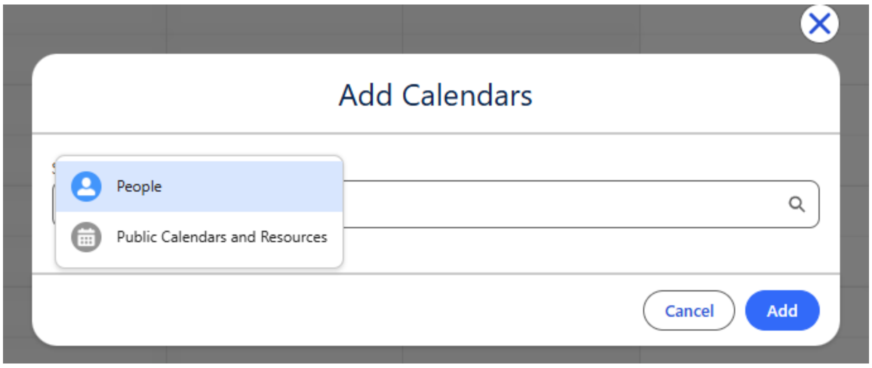
In this list value set, the value Visitors is available by default. Deactivate it if necessary.

In the Team object, the 'Calendar appointments' field is available. Put it on the page layout and fill in the correct calendar for the team:



The field is also available on the Job Advertisement. This allows you to create an appointment request fully automatically via a flow, in the calendar of the linked Team.

In addition, you also need to add the public agenda(s) to the calendar overview:

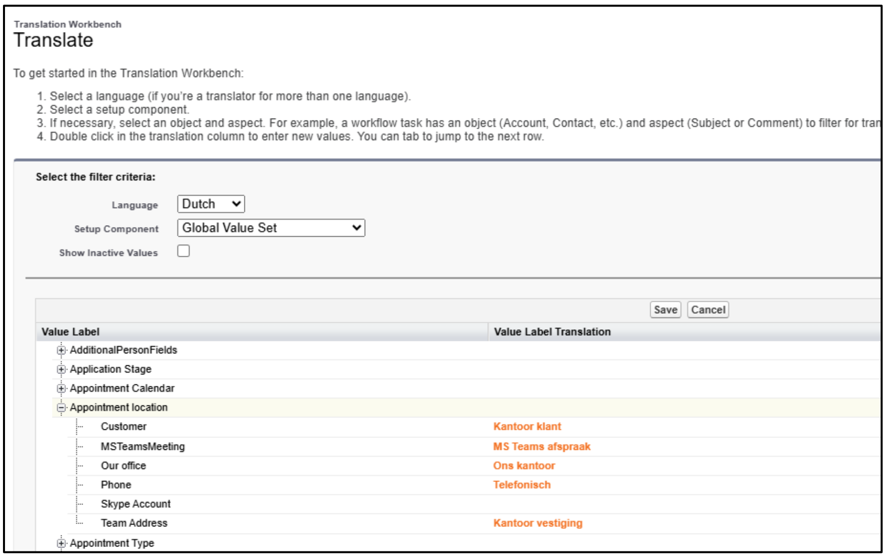


Then choose Public Agendas.

Combo list values

The Appointment request object contains a number of global drop-down lists that are used to create the appointment. Make sure that the value of the drop-down list fields in the Activity object matches these lists. This concerns 'Appointment type' and 'Appointment location'. You also need to translate the latter:

Go to the setup, Translate. Choose English and the Global value set:



Each value can be translated accordingly.

Email templates

For the Appointment type setting, define new Lightning email templates. When creating the object, choose Appointment request. You can then add all fields of this object. This object is also used to confirm the appointment made. So don't use the 'Event' fields that are normally used for confirmation.

To send the candidate a request, include the reserved tag #APPOINTMENT_PORTAL_LINK# in your template. This tag is used in most automated emails so that the candidate can change the appointment.

In addition, the standard tags such as #Label#.<<fieldname>> also work. It is also possible to use the [language code] tag in the template description to create a language-specific variant. Then make sure that the template names are identical to each other.

<u>Invitation:</u>
Subject: {{{msf__Appointment_Request__c.msf__Subject__c}}}Link: #APPOINTMENT_PORTAL_LINK#

<u>Confirmation/reminder:</u>

Subject: {{{msf__Appointment_Request__c.msf__Subject__c}}}Link: #APPOINTMENT_PORTAL_LINK#

Location: {{{msf__Appointment_Request__c.msf__Location_Description__c}}}
Appointment Date: {{{msf__Appointment_Request__c.msf__Appointment_Date__c}}}
Start Time: {{{msf__Appointment_Request__c.msf__Appointment_Start_Time__c}}}
End Time: {{{msf__Appointment_Request__c.msf__Appointment_End_Time__c}}}
Change Appointment? Link: #APPOINTMENT_PORTAL_LINK#

Note: you should not include a {{{Sender.Name}}} tag in the confirmation email because the appointment and the corresponding email are sent by the configured portal user.

<u>Cancellation</u>

Subject: {{{msf__Appointment_Request__c.msf__Subject__c}}}

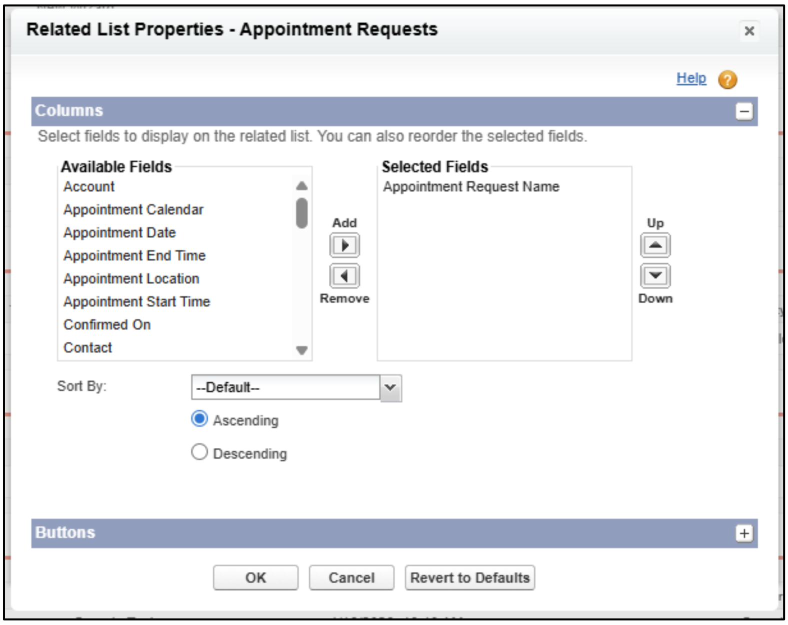
SMS templates

Lightning e-mail templates are also used for the SMS templates, to be able to set up a language variant as well. Make sure you limit the number of characters. Sending SMS requires an additional subscription to Club Message and cannot be used in combination with WhatsApp.

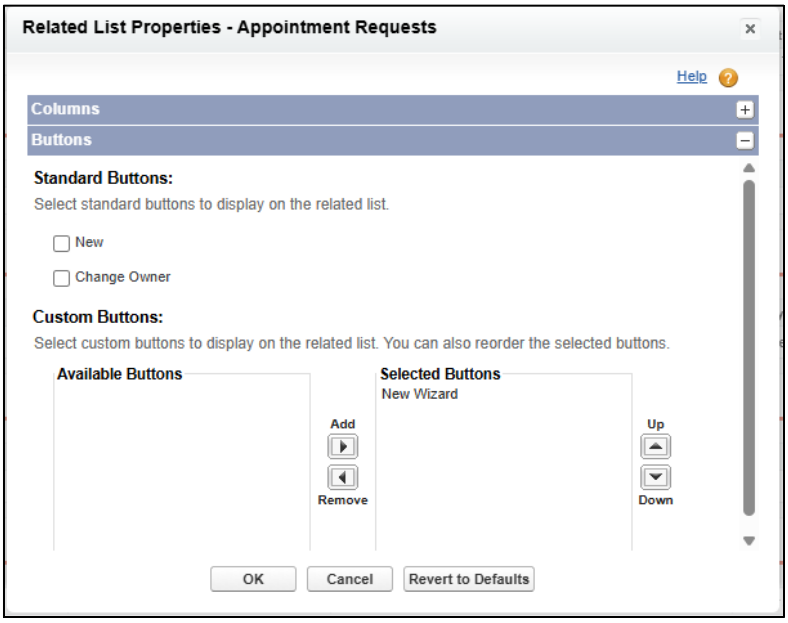
Object management

Object Application and object Ticket

In the Application object, you need to add the related list Appointment request to the page layout. After adding this related list, choose properties:



Add the visible columns and press the plus sign next to the buttons:



Deselect the 'New' and 'Change Owner' options, add 'New Wizard' as an available button.

You can call the wizard from the application or from a ticket. If you also want to use appointment requests in the ticket object, repeat the steps above for that object.

Object Person

The Appointment Request can also be shown as a related list to the candidate. The wizard will not work, but you can create an appointment request directly from the candidate or contact person, filling in the fields of the Appointment Request yourself.

Object Event

The Event object has a record type added for an appointment reservation. Associate the Appointment Reservation page layout with this record type.

For this type of appointment, you also need to adjust the page. To do this, you need to use the default record layout for this record type instead of the AppointmentPageAuraWrapper. To do this, clone the page layout of the Event record via Setup, Lightning App Composer. Rename them and assign them to the Appointment reservation record type and the relevant profiles.

Scheduled Apex Classes

To remind attendees to create the appointment, that an appointment is scheduled and to automatically cancel an appointment request, you need to schedule APEX classes.

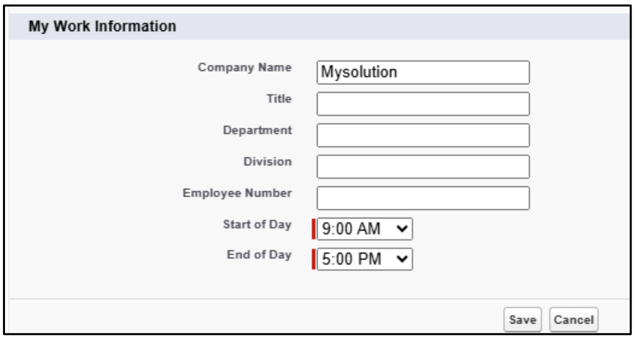
Go to Setup, Apex Classes and choose Apex plans. Create two Apex schedules that run daily.

1. The AppointmentReminderScheduler ensures:
    a. Reminding the participant to schedule an appointment. For this, the days as set in the custom settings are used. A maximum of 2 reminders will be sent.
    b. Letting the invitation expire if it does not respond to the request to make an appointment. This will use the number of days as set in the custom settings.
2. The AppointmentLastDayReminderScheduler sends a reminder for the appointment that takes place the next day.

Functional design

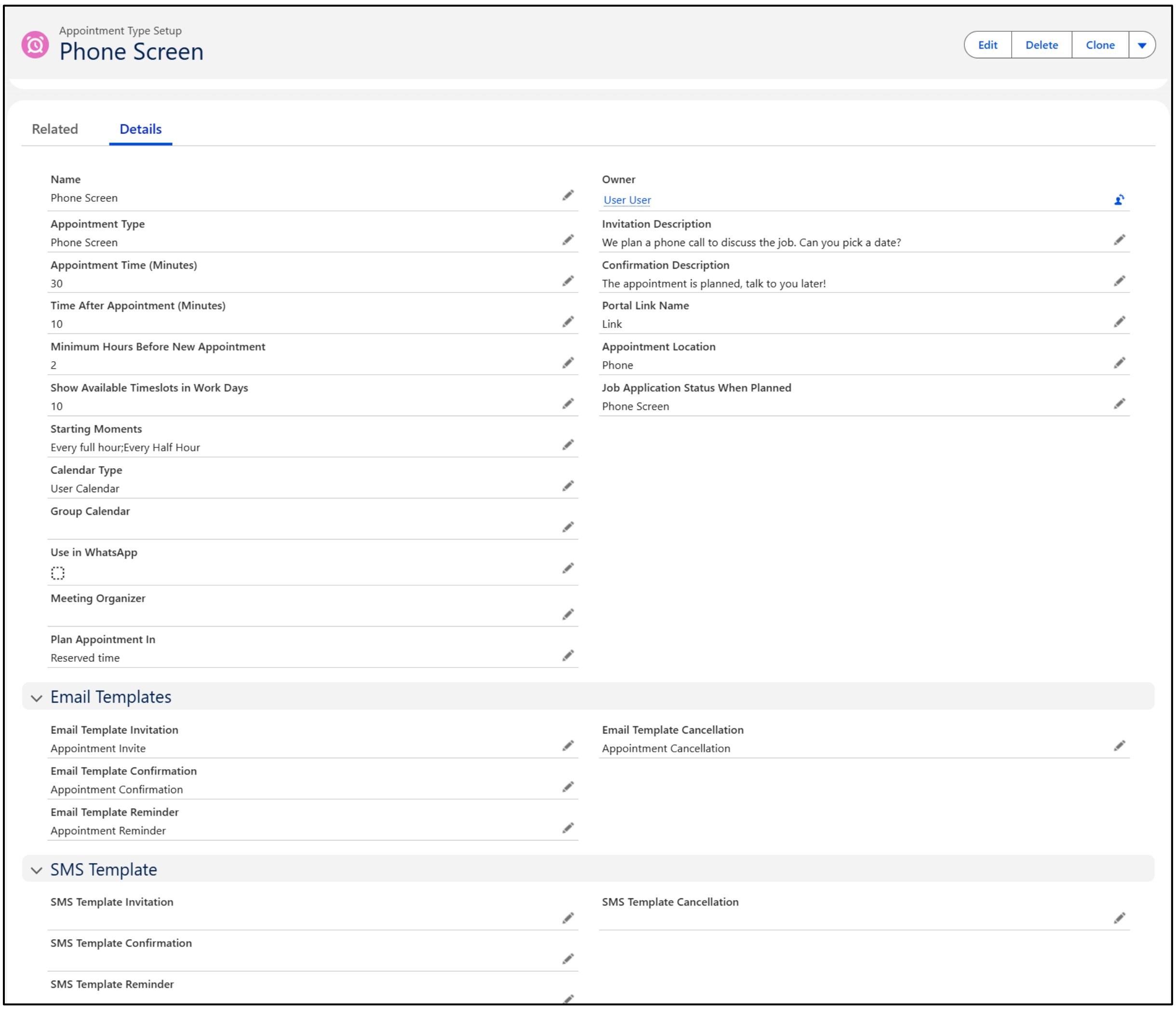
Available time

Appointments based on available time are made in the personal calendar. This involves looking at the start and end time of the user's working day. To do this, go to the user settings and enter the correct time:



Appointment type settings

Via App starter, Appointment type settings you record the basic elements for the appointment:



This is a template that is used for a certain type of meeting. You can only set one Event Type setting for each event type.

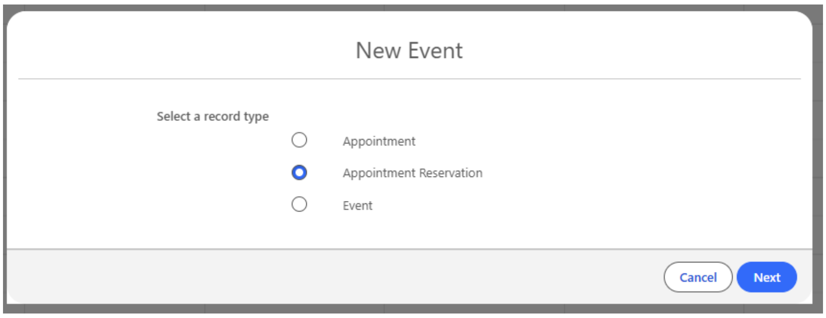
- Appointment type: Choose from the global set of choice values to indicate what type of conversation it is. Note: if you expand this list, you must also add the values to the Appointment type drop-down list in the 'Activity' object.
- Appointment time (minutes): Time reserved for the appointment
- Time after appointment (minutes): time that is put in the agenda after each scheduled appointment to possibly work out a conversation report. Can be set to 0.
- Minimum hours for new appointment: Indicates the time from which an available time slot can be selected from the calendar. If this is set to 0 hours, any available time slot will be shown.
- Show available time slots in days: Indicates how many days in the future the participant can search for an available time slot.
- Starting times: Multiple choice of Every 10 minutes, Every fifteen minutes, Every half hour and Every hour. This determines the start time of each appointment, based on its availability in the calendar.
- Calendar type: Decide what kind of calendar the appointment will be created on. Choice of personal calendar or group calendar/team calendar.
- Group calendar: depending on the chosen value at Calendar type, you can link the group calendar here.
- Meeting organizer: Depending on the Calendar type value you choose, you can link the person here.
- Schedule an appointment: choice of available time or reserved time. When the group calendar is used, you can only select reserved time.
- Invitation description: description that is shown in the portal to explain the meeting to the participant. You can also use a custom Label to translate the text.
- Confirmation description: description that is shown on the portal when the appointment is made.
- Portal link name: The title of the hyperlink to the appointment page on the portal. If you leave it blank, the full URL will be included in the email.
- Meeting location: choice of Our office, Client, Team, MSTeamsMeeting, Skype or Phone. These values must match the location selection field in the event object. Based on the choices Our office, Client and Team, the address is automatically put in the Location description field. If you leave it empty, you can still choose it yourself when making an appointment request.
- Application status if scheduled: If the appointment request is linked to an application, the application will receive this status as soon as the appointment is made. The link is made automatically when you create the appointment request via the wizard. If you send an invitation via WhatsApp, it will not be linked to the application.
- Email Templates: specify the different templates for an initial invitation, an appointment creation reminder, the confirmation and the cancellation of the appointment. The link to the appointment on the portal remains active even after the appointment has been made, allowing the participant to cancel or reschedule the appointment via the portal. Once the appointment has been cancelled by the recruiter or the candidate himself, it can no longer be used.
- SMS Templates: for the same messages you can also send an SMS if you have a subscription for this. If you fill in both templates, the participant will receive both an SMS and an email.

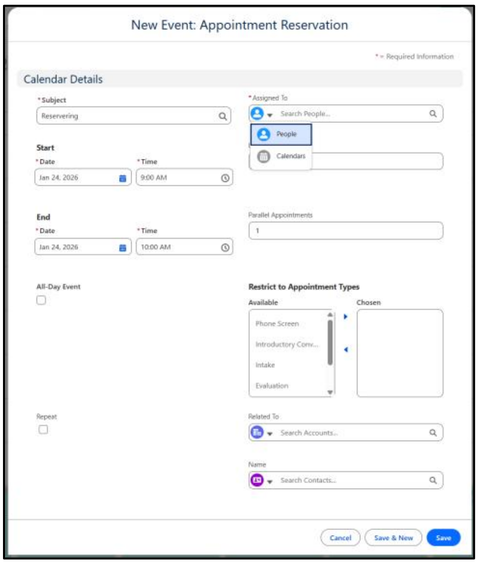
Note: To use an MS Teams meeting, you need to have the calendar synchronization active for the users for whom the appointment is made. It is not possible to set up an MS Teams meeting for a group agenda.

Planning based on a reserved time block

If reserved time is used in a personal calendar or in a group calendar, you need to create time blocks with the new type of Appointment reservation.

Go to the calendar of the person and/or the team and make a reservation:





If you reserve the time in a group calendar, choose the relevant calendar under Assigned to.

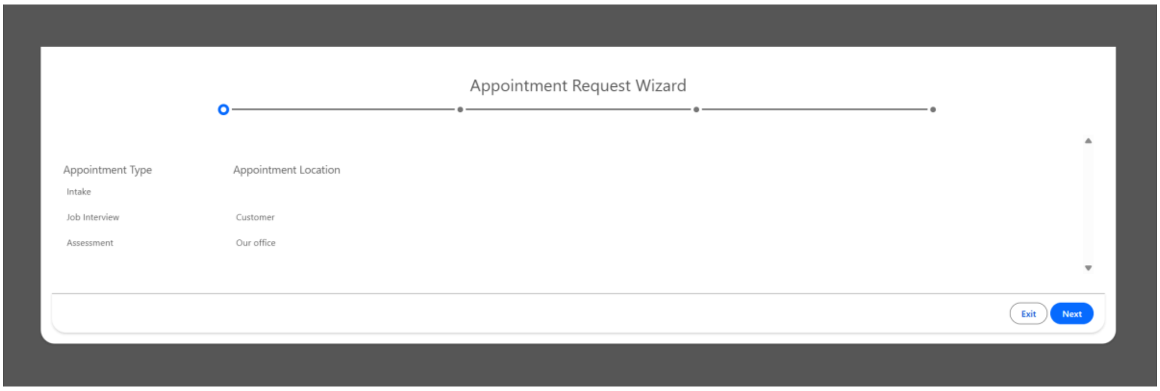
With parallel appointments, you can specify how many appointments can be scheduled at the same time in a certain time block. When you select an Event Type, the availability will be determined to see if the reserved time for that event type has been set.

Appointment request

An appointment request is a new concept that allows you to indicate from which calendar the candidate can select an available time slot based on the appointment type settings. For this purpose, a wizard has been created that you can start on the application from the related list:

Start the wizard and go through a few steps. If parameters are defined in the appointment type setting, they cannot be changed in the wizard.

Step 1:



First, choose an appointment type from the list of set types.

Step 2:

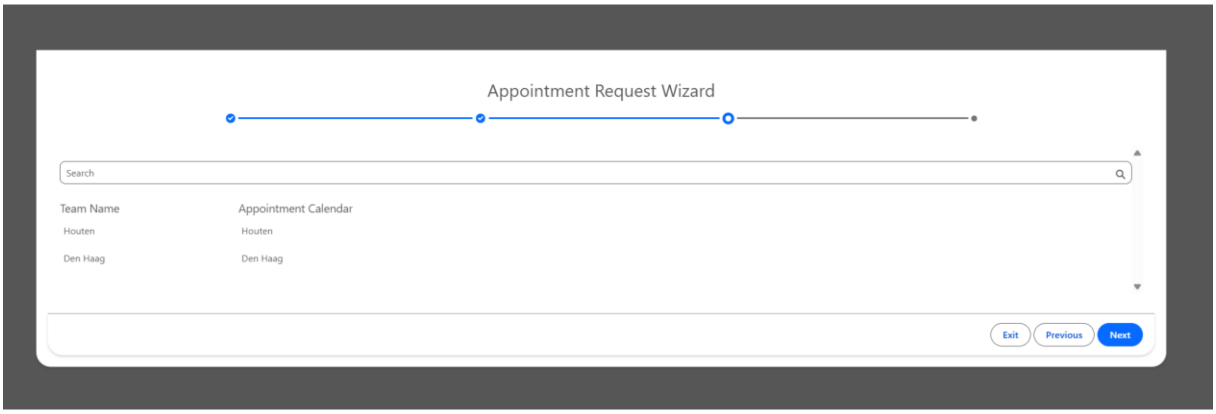
In the second step, you choose who the appointment will be made with: Myself, a Colleague or a Team.

Step 3:

The choices in step 3 depend on the choice in step 2. If you choose A colleague, you will get a follow-up choice which colleague or which public calendar:

Note: If you also work with the calendar synchronization, you can only create an appointment for a colleague if you also have rights within Outlook to create an appointment on behalf of the colleague in that calendar. If you have not activated calendar synchronization, this limitation does not apply.

If you have chosen a Team in step 2, you will see all teams where an appointment calendar has also been entered:



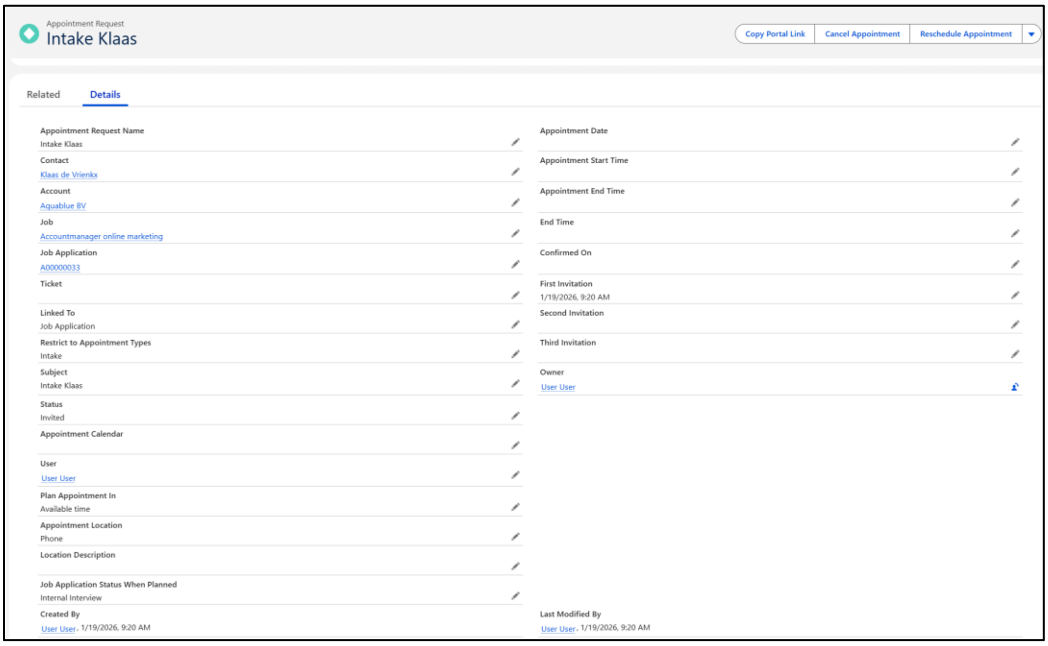
Step 4:

In the last step, you specify the subject and choose a location if it is not preset in the Event type setting. If you choose a predefined location based on Office, Customer or Team/branch, the location description will automatically be filled with the correct address.

At 'Schedule an appointment in' you can choose from the following options:

1. Time available in personal calendar.
2. Based on reserved time. These are time blocks in a personal calendar or in a group calendar. If the appointment is made for a team, reserved time is the only option available.

After the wizard has been completed, the appointment request has been created:

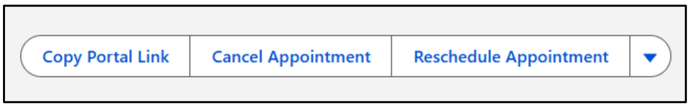


Once the appointment request has been created, the participant will receive an email and/or SMS based on the settings from the Appointment Request Setting.

The status of the appointment request is as follows:

- Invite: the request has been created
- Invited: the participant has received an invitation via e-mail and/or SMS
- Confirmed: the participant has an appointment scheduled and it has also been confirmed
- Scheduled: if no confirmation email or SMS has been set, the appointment will be set to 'Scheduled' immediately after creation.
- Cancelled by the candidate: the participant has cancelled a scheduled appointment.
- Cancelled Internal: the scheduled appointment has been cancelled by the recruiter.
- Expired: if the candidate has not responded to the request to make an appointment.

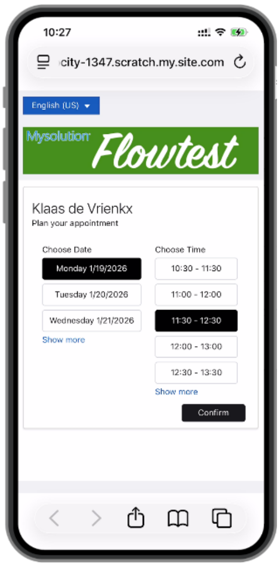
The date of the first invitation, second reminder and third reminder is kept. Once the appointment is scheduled, these fields will be reset and the date of the confirmation will be filled.



On the appointment request, a button is available to copy the Portal link to, for example, send it again to the participant via e-mail or to view the appointment yourself.

If the recruiter reschedules the appointment, the participant will receive another invitation via e-mail or SMS. If it is cancelled, an e-mail/SMS will follow based on the set cancellation template. The Portal link will then no longer be usable and the status will be converted to 'Cancelled Internal'.

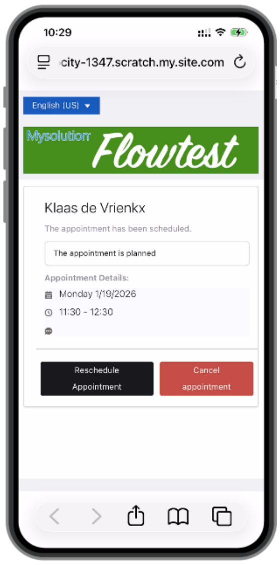
Scheduling an appointment by participant



The participant clicks on the link from the e-mail or SMS to schedule the appointment. Of course, this can also be done on a mobile phone. This will look like the image on the right.

Depending on the configuration, a number of time slots are shown here on different days in the future.

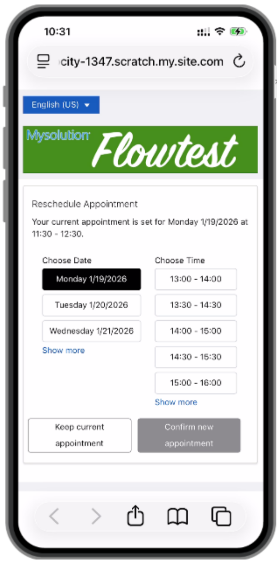
The participant chooses a time slot and presses the 'Confirm' button. If in the meantime the chosen time slot has been booked by another participant, a notification will follow and the participant can choose a new time slot.

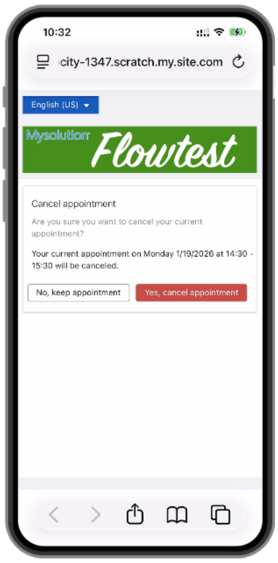


Once the appointment has been created, the participant will receive an email and/or SMS based on the settings from the Appointment Request Setting. The final appointment is linked to the appointment request.

The candidate can also return to the appointment via the same link in the email and also has the option to reschedule or cancel the appointment.

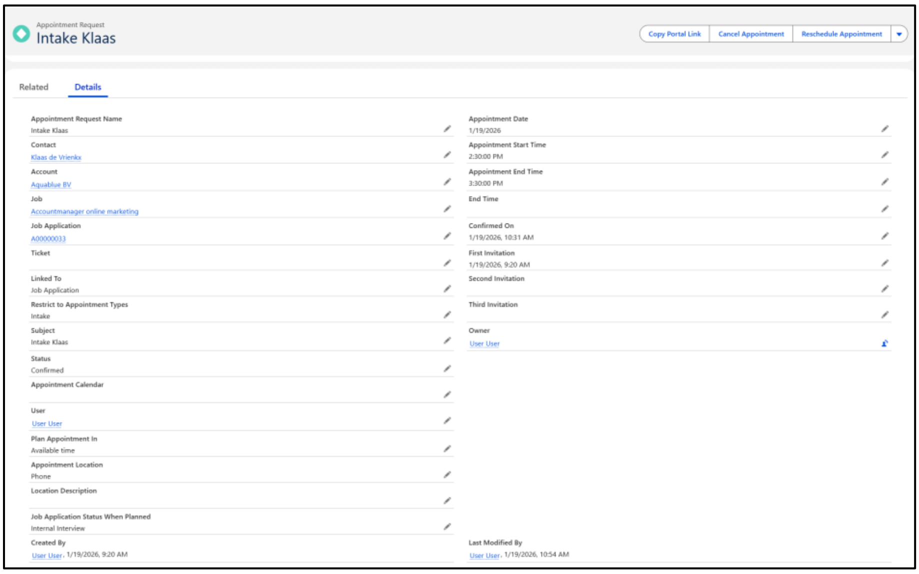
If the invitation has expired, this will also be shown with a notification on the portal.





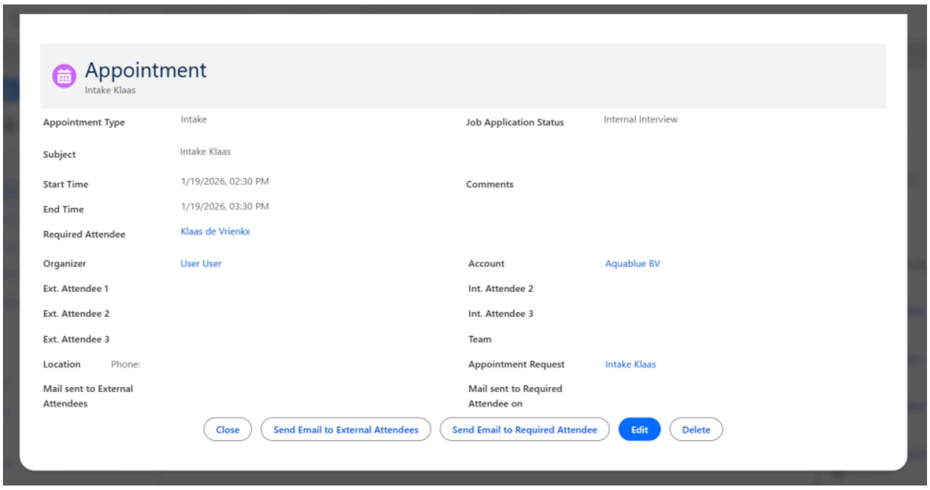
If the candidate chooses to reschedule the appointment, the left screen will be displayed. This will confirm the new time or the existing appointment can be kept.

The Cancel button shows the right screen, with the confirmation to actually cancel the appointment.

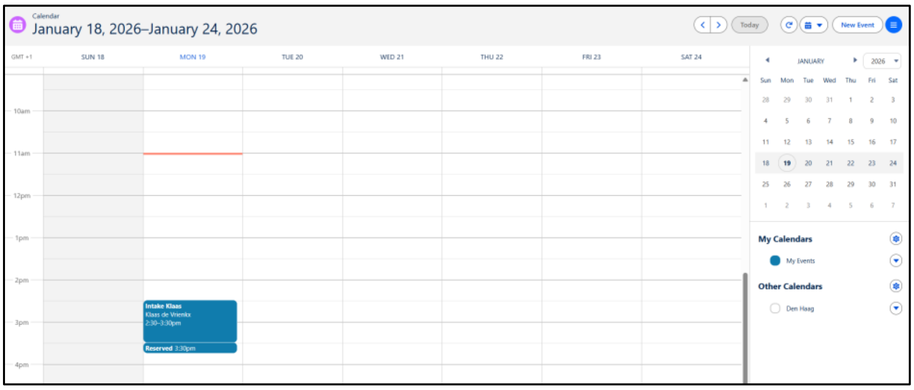


Email and SMS communication goes through the appointment request, you cannot delete a linked appointment without canceling the appointment request.

In the event you will see the linked event request:

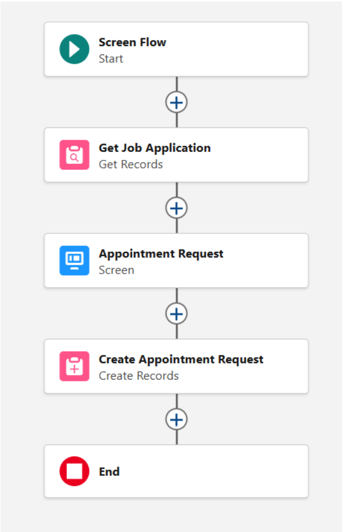


In the calendar used, an appointment is then 'Reserved' to work out a report, for example. You set this in the Appointment type setting:

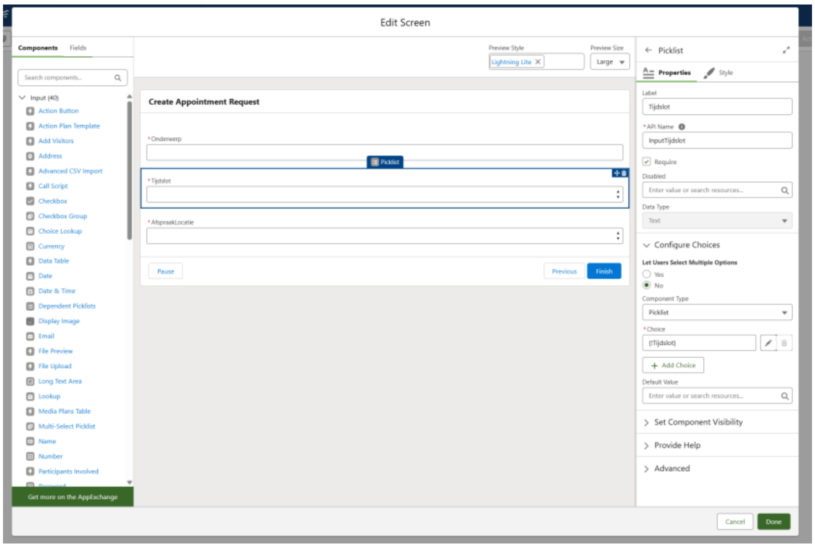


Sending an appointment request via a flow

Via the Application step setting you can set up a screen flow to send the candidate an appointment request. The flow for making an appointment in the recruiter's available time can look like this:

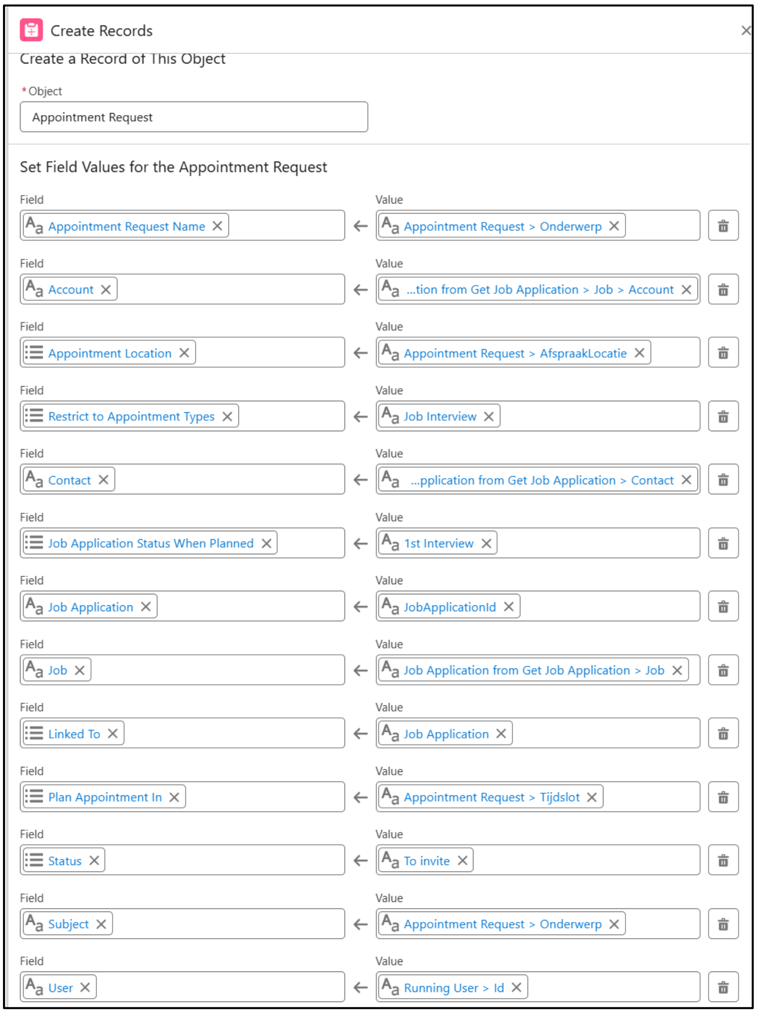


First, you retrieve all the data from the application. Then you ask a number of fields in a screen flow:



The choice of a time slot and the location is done by creating Keuzelijstkeuzenset variables from those fields.

In the last step, you create the appointment request record. Below is an example of which fields are relevant for creating a record:



The rule of thumb is that you have to fill in all fields that are also automatically added to the appointment request via the wizard.

In conclusion

With the steps described, you can set up the appointment scheduling module and you can start fully automating the application process. Need help? Please contact your Customer Success Manager or the Support Department.