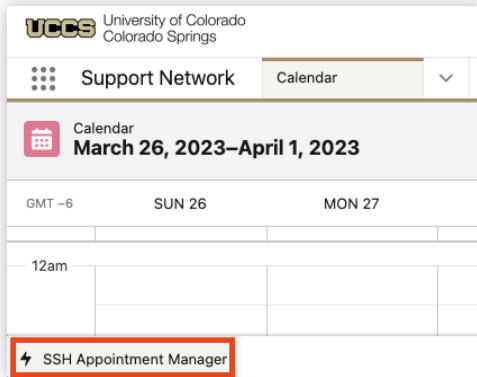




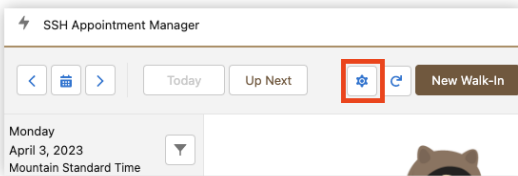
Availability | Scheduling

Creating Appointment Settings

1. Click on **SSH Appointment Manager** (at the bottom of most pages).



2. Click on the Settings  icon.



Appointment Timing Defaults

3. In the Appointment Settings section:

Edit Appointment Availability

Appointment Settings

GENERAL SETTINGS

* Appointment Buffer (minutes) ⓘ **A**

* Advance Notice (hours) ⓘ **B**

Time Zone ⓘ
Mountain Standard Time

Record Type for One-Off Availability ⓘ
Advising Time

LENGTH SETTINGS

* Default Appointment Length (minutes) ⓘ **C**

- a. Enter time required between appointments in **Appointment Buffer**.
- b. Enter required advanced notice for scheduling appointments in **Advance Notice**.
- c. Enter default length for appointments in **Default Appointment Length**.



Create Appointment Locations

1. In the Appointment Locations section click **New**.

APPOINTMENT LOCATIONS
The locations where you're available to meet with students.

New

In Person

NAME	CAMPUS	BUILDING	ROOM	ADDITIONAL DETAILS
Office				

2. Select an appointment location type from the **Type** drop-down menu.

*Type

In Person

-- Select One --

✓ In Person

Phone

Virtual

Other

3. Fill out the requisite details for the selected location type ("In Person" shown) and click **Save**:

New Appointment Location

Basics

*Type: In Person

*Name: A

Details

Campus: B

Building: C

Room: D

Additional Details: E

Cancel Save

- a. Enter a **Name** for the location type.
- b. (OPTIONAL) Enter a **Campus** location.
- c. (RECOMMENDED) Enter a **Building** for the appointment location.
- d. (RECOMMENDED) Enter a **Room** for the appointment location.
- e. (OPTIONAL) Enter any **Additional Details** students need to know about this location.

*NOTE: **Phone** appointment location type asks for phone number. **Virtual** asks for a meeting link (Zoom or Teams). These fields are both highly recommended.*



Create Recurring Availability

1. In the Recurring Availability section, under Current and Future Availability, click **New**.

Recurring Availability

Current and Future Availability
These recurrences are active and available for scheduling.

No recurring availability scheduled.

New

2. In the New Availability dialog, enter availability details and click **Save**:

New Availability

Basics

Subject **A** Type **B** Select One --

Topic **C** All Topics (By Default) Location **D** Locations (By Default)

Date and Time

* Start Date **E** Apr 3, 2023 * End Date **F**

* Start Time **G** * End Time **H**

Recurrence

* REPEAT EVERY 1 weeks * REPEAT ON Mon Tue Wed Thu Fri Sat Sun

Cancel **Save**

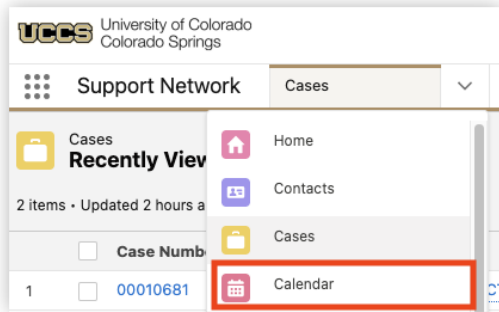
- a. Enter a unique **Subject** for this recurring availability segment (may be visible to students).
- b. Choose a recurring availability **Type** (Individual, Walk-In, Group).
- c. (OPTIONAL) Choose a specific **Topic** for this recurring availability.
- d. (OPTIONAL) Choose a **Location** for this recurring availability.
- e. Choose a **Start Date** for this segment of recurring availability.
- f. Choose an **End Date** for this segment of recurring availability.
- g. Choose a **Start Time** for each recurrence of this availability.
- h. Choose an **End Time** for each recurrence of this availability.
- i. Choose how often and the days on which this availability recurs.

*NOTE: **Topic** and **Location** both default to "all" (e.g., In-Person, Phone, and Virtual).*

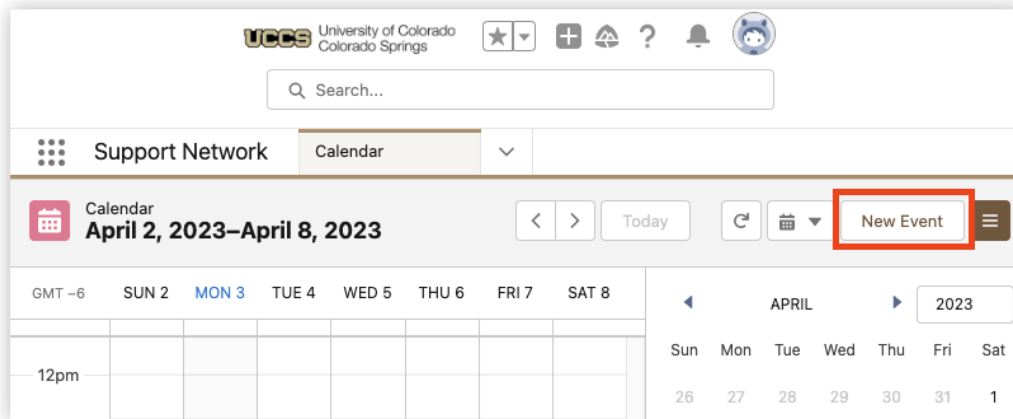


Create One-Time Availability

1. Click the drop-down menu in the tab toolbar and click **Calendar**.



2. Click **New Event**.



3. Select **Advising Time** and click **Next**.

New Event

Advising Event
"I'm booked with a student at this time." An appointment that has been scheduled for one student or a group, or a walk-in appointment. This record type is used along with the Appointment object to track appointment Events.

Advising Time
"I'm available for appointments at this time." A block of time that a support staff member has designated as available for meeting with students. Support staff can define three types of availability: scheduled, walk-in, or group appointments.

Standard
"I'm not available to meet with students at this time." Any other type of scheduled Event when a staff member is not available for appointments because of other meetings, personal appointments, and so on.



4. Enter details for the new Advising Time event and click **Save**:

New Event: Advising Time

Calendar Details

Assigned To: Brandon Poulliot

Related To: Search Accounts...

Subject: **A**

Name: Search Contacts...

All-Day Event:

Private:

Your private event details are also visible to your Salesforce admin and users with the View All Data permission. For more information, contact your Salesforce admin.

Start **B**

Date: Apr 3, 2023 Time: 7:00 PM

End **C**

Date: Apr 3, 2023 Time: 8:00 PM

Other Information

Location:

Show Time As: Busy

Cancel Save & New **Save**

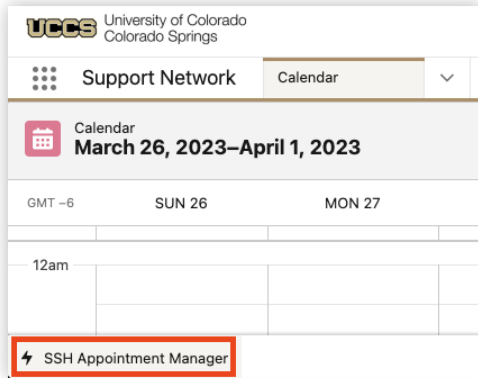
- A. Enter a **Subject** for any appointments generated through this availability.
- B. Enter a **Start Date** and **Start Time** for this availability.
- C. Enter an **End Date** and **End Time** for this availability.

NOTE: Location may be manually entered, but does not use pre-defined locations.

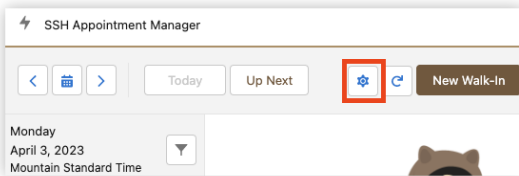


Removing Recurring Availability

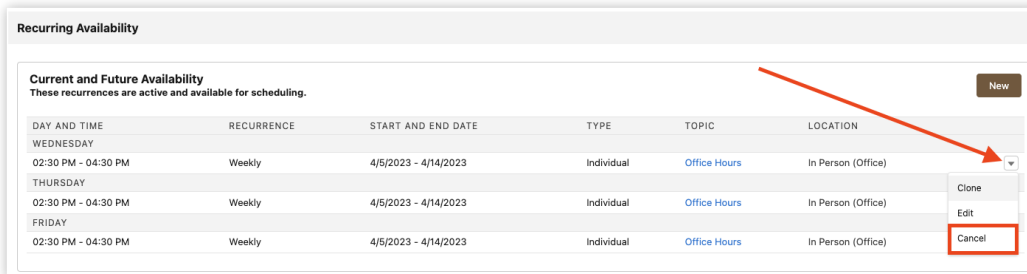
1. Click on **SSH Appointment Manager** (at the bottom of most pages).



2. Click on the Settings  icon.



3. Click on the drop-down next to the availability you wish to cancel and click **Cancel**.

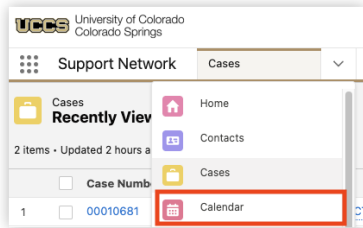




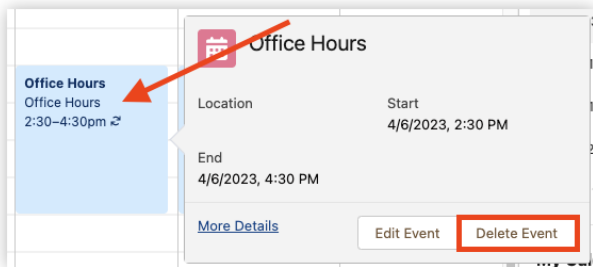
Removing Single Availability Occurrence

Option 1: Calendar

1. Click the drop-down menu in the tab toolbar and click **Calendar**.

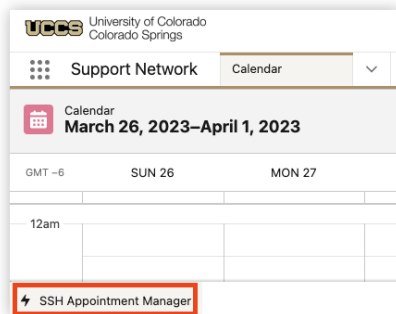


2. Place mouse cursor over the availability to be removed and click **Delete Event**.



Option 2: SSH Appointment Manager

1. Click on **SSH Appointment Manager** (at the bottom of most pages).



2. Find the date, click the drop-down menu next to the availability block and click **Delete Availability**.

