

Lunasa: Drag-and-Drop Account Appointment Scheduler



Overview

This article provides a configuration overview of the Lunasa Drag-and-Drop Calendar for Salesforce Lightning Experience. This module is intended to replicate the Salesforce Classic “Account Scheduler” module from the older classic interface. The new Drag and Drop Calendar module must first be installed from the [AppExchange listing](#).

The user interface consists of:

- Account Listviews presented in dropdown/picklist form
- Alpha search to quickly jump through long lists of Accounts
- Keyword search to locate Accounts even faster
- Admin-defined sorting criteria
- Lightning “cards” for each Account containing configured fields

The screenshot displays the Lunasa Drag-and-Drop Account Appointment Scheduler interface. The top navigation bar includes tabs for Sales, Home, Account Scheduler, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and More. The main interface is divided into a sidebar and a calendar view. The sidebar on the left shows a list of accounts with search and sort options. The calendar view on the right shows a grid for the week of February 12-18, 2023, with time slots from 6am to 8pm. Several appointments are scheduled, including 'Exec Presentation' on Mon 2/13, 'Meeting at UoA' on Tue 2/14, 'Call with David Johnson' on Tue 2/14, 'Meeting (Teams) with Leatherman' on Tue 2/14, 'On Site Training' on Wed 2/15, and 'Out of Office (x)' on Thu 2/16. Three orange arrows point from the account listviews to their respective appointments in the calendar: from Dickenson plc to 'Exec Presentation', from University of Arizona to 'Call with David Johnson', and from Burlington Textiles Corp to 'On Site Training'.

Generally users should first pick an existing Account Listview at the top left, then determine how they want the list sorted (based on configured options). Users can click, tap or touch and drag the Account cards onto a specific day and time on the calendar to the right. This will pop-up a dialog for the User to input the Event details:

The screenshot displays the Salesforce Account Scheduler interface. On the left, a list of accounts is visible, including GenePoint, Dickenson plc, University of Arizona, Burlington Textiles Corp, and Leatherman. The main area shows a calendar for February 12-18, 2023. A modal window titled "Edit Meeting (Teams) with Leatherman" is open, allowing users to edit meeting details. The modal includes fields for the subject, start and end dates and times, and a description. The start date is 02/15/2023 at 10:00 AM, and the end date is 02/15/2023 at 11:30 AM. The description field contains the placeholder text "Description text goes here". At the bottom of the modal are buttons for "Delete", "Cancel", and "Save".

Related To ID
Leatherman

Subject
Meeting (Teams) with Leatherman

Start Date Time
Date: 02/15/2023 Time (PST): 10:00 AM

End Date Time
Date: 02/15/2023 Time (PST): 11:30 AM


Description
Description text goes here

Buttons: Delete, Cancel, Save

The “Edit Account Visit” modal window will display a form similar to the native Lightning interface, with each of the configured Event fields. Each calendar event is instantly saved to the User’s [Salesforce calendar](#).

Configuration

The default Lightning Tab should appear as "Account Scheduler" (feel free to rename it and add to your Lightning apps). This can be renamed under **Setup > User Interface > Translation Workbench > Override** then select Package “Lunasa” and Setup Component “Web Tab”.



SETUP

Override

Translation Workbench

Override

To get started in the translation workbench

1. If you have items to override in more than one language, select a language.
2. Select a setup component.
3. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc. Comment) to filter for overridable terms.
4. Double click in the override column to enter new values. You can tab to jump to the next row.

Select the filter criteria:

Package

Lunasa

Language

English

Setup Component

Web Tab

Master Custom Tab Label	Custom Tab Label Override
Account Scheduler	Scheduler

1-1 of 1

<<

<

Previous

Next

>

>>

There are three primary configuration options that you can adjust:

1. **Sort Criteria** can be defined under **Setup > Custom Metadata > Account Scheduler Sort Fields**. Add one record for each Account field you would like the users to be able to sort Accounts by. The “Label” field will determine the text that displays in the picklist but it is critical to input the [full API name or Developer Name](#) of the field into “Account Scheduler Sort Field Name” as shown below:


Account Scheduler Sort Fields

[Help for this Page](#)

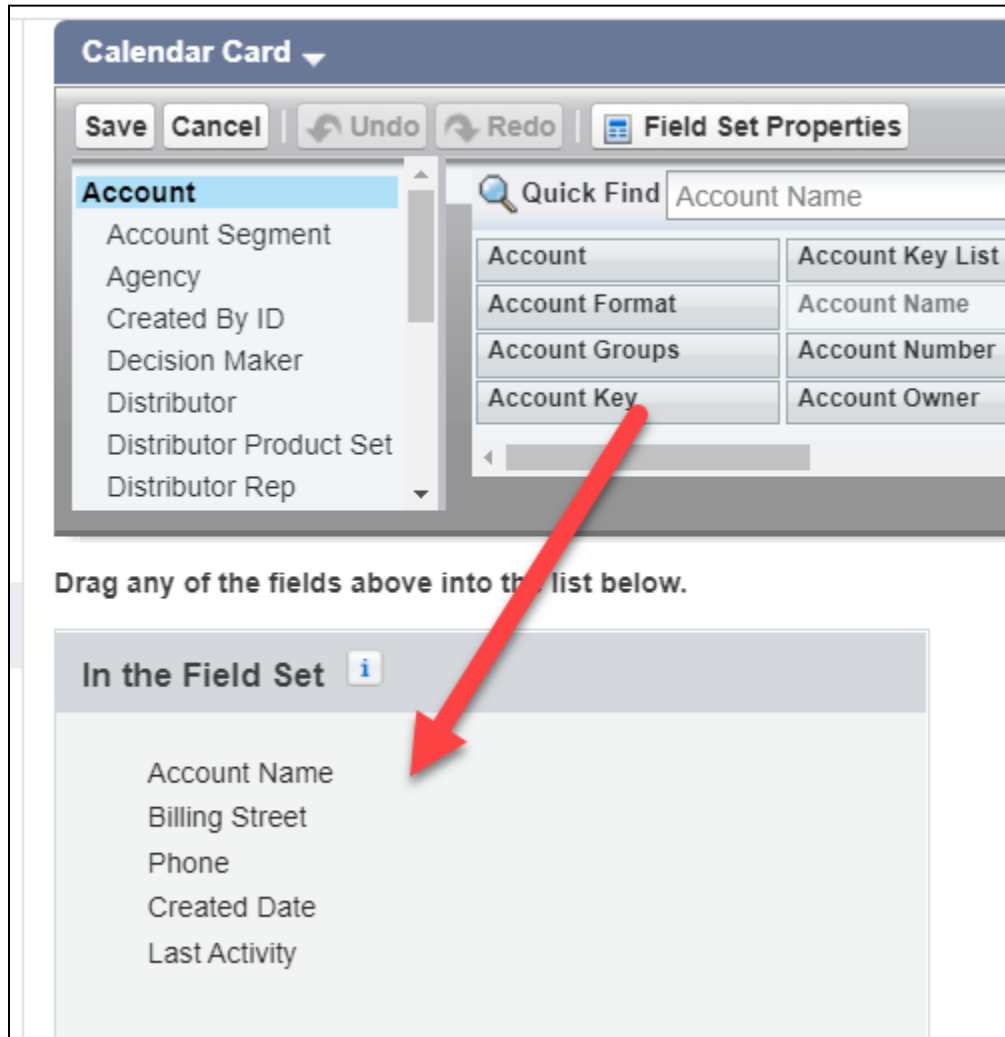
View: All

Create New View

New

Action	Label ↑	Account Scheduler Sort Field Name	Namespace Prefix
Edit	 Account Name	Account_Name	oscal
Edit Del	Days Since Last Visit	Last_Account_Call	

2. **Card Fields** are determined by a [Field Set](#) on the Account object called “Calendar Card” or `oscal__CalendarCard`. Drag whichever fields you would like to display in the Cards into this FieldSet. This can be found from **Setup > Object Manager > Account > Field Sets**. We suggest limiting this to 5 fields.



3. **Event Fields** are also determined from a similar fieldset called “Create Event” or `oscal__CreateEvent`. These appear in the Event Edit modal, where as **Card Fields** appear in the left menu of the scheduler interface.

Additional Application Settings

Administrators may also customize the following three settings under **Setup > Custom Code > Custom Settings > Lunasa Settings**.

Custom Setting

Lunasa Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you can add values to display depending on whether a specific user is running the app, a specific profile, or just a general user

Edit Delete

▼ Default Organization Level Value

Location Beam EU

Earliest Time 08:00

Hide Weekends ☐

Latest Time 24:00

Single Column Mode ☒

View: All [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W

New

Setup Owner ↑

Location

No records to display.

- Set Earliest Time and Latest Time so you don't see midnight until midnight each day
- Hide Weekends
- Change the modal/new event input form to use only a single column vs two:

Sales Rep Home Accounts Contacts Account Scheduler Calendar Account Calls Reports More

GV Admin List View 25 - 31 Jan 2021 week month today

Mon 25-1 Tue 26-1 Wed 27-1 Thu 28-1 Fri 29-1 Sat 30-1 Sun 31-1

Other All

Search

Sort by Account

Billing S... G
Billing Z... 10
Billing ... Be
Visit re...
Visit re...

"0941
Billing S... O
Billing Z... 93
Billing ... Re
Visit re...
Visit re...

"25ho
Billing S... O
Billing Z... 20
Billing ... H
Visit re...
Visit re...

"25ho
Billing S... Budapester Str. 40
Billing Z... 10787
Billing ... Berlin

Edit Sales Call

Related To ID
""Ja Zum Feiern & Geniessen""
Gervinusstr. 17
Berlin, Berlin 10629
DE

Subject
Sales Call

Start Date Time
Date 29-01-2021 Time (CET) 11:00

End Date Time
Date 29-01-2021 Time (CET) 12:00

☐ All-Day Event

Description

Cancel Save