



Using Manage Availability to Build Appointments

Contents:

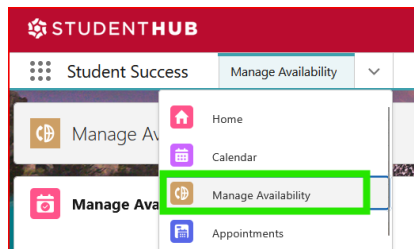
PART I: Building Appointment Availability

Part II: Cloning Availability

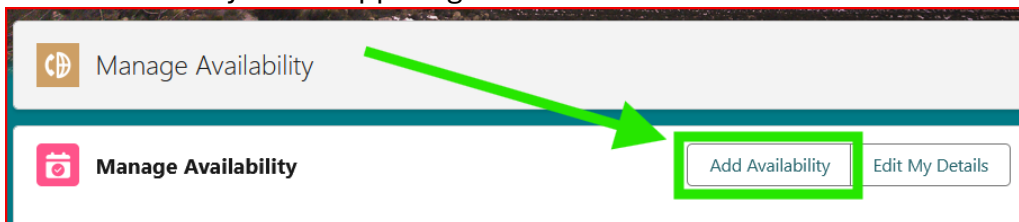
PART III: Helpful Tips

PART I: Building Appointment Availability

Step 1: Select Manage Availability from your primary tab. You may need to add it to your menu using the edit button.



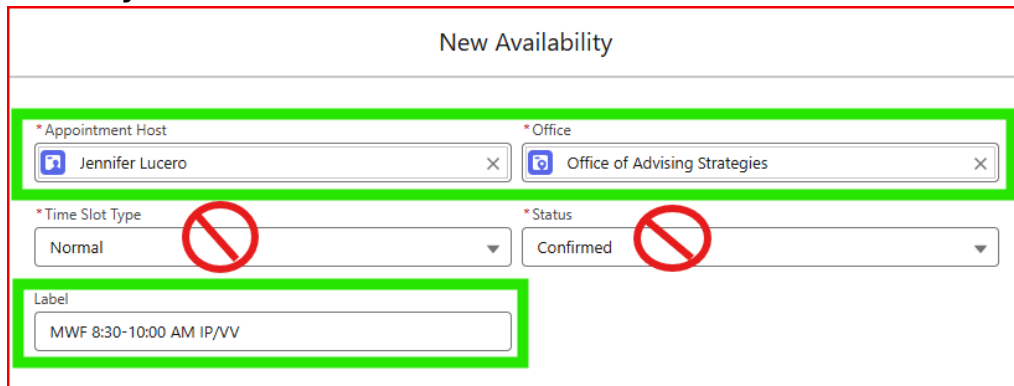
Step 2: Add Availability – this page lists the availabilities you created and details. To create a new availability, click Add Availability on the upper right:



A new pop-up page should appear that reads New Availability. All things needed to build availability are now on one page:

A screenshot of the 'New Availability' form. The form is titled 'New Availability' and contains several sections: 'Appointment Host' (with a dropdown menu), 'Office' (with a search field), 'Time Slot Type' (with a dropdown menu), 'Status' (with a dropdown menu), 'Label' (with a text field), 'Date & Time' (with start and end time fields), 'Topics & Modalities' (with dropdown menus and checkboxes for 'All Topics' and 'All Modalities'), and 'Recurrence Settings' (with a 'Type' dropdown menu). At the bottom right, there are 'Cancel' and 'Save' buttons.

Step 3: New Availability

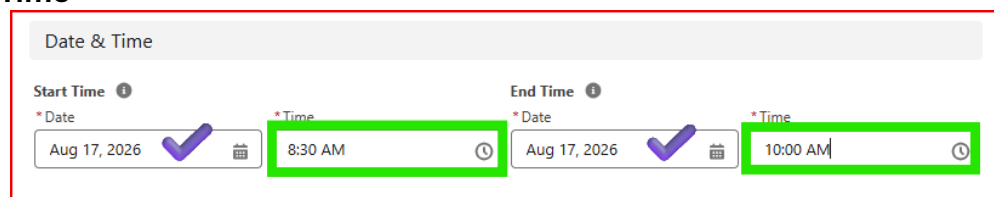


- Appointment Host – your own name should appear
- Office – if your own office does not default, search for it and it should be there. If it's not, please email shconnect@unm.edu
- Time Slot Type – DO NOT EDIT – leave on Normal
- Status – DO NOT EDIT – leave on Confirmed
- Label – these are very important. As you build more availability, it's an easy way to know some essential details about that Availability block for reference and for cloning. Some offices have created best practice guidelines for labels in their own units. For *scheduled appointment availability*, this label is only viewable by you. Build in a way that is easy for you to recognize.

Examples:

- Monday AM Appointments
- Tues WFH AM Appts
- MWF 8:30-10:30 Appts

Step 4: Date & Time



- Date – this is the first date of your availability occurrence, regardless of if it is regular (one time) or recurring. This means the Start Date and End Date must be the exact same. If the End Date is a later date, you will be building overnight availability.
- Time – this is the time range for the availability. This must be different from start to end.

Step 5: Topics & Modalities

- Topics - Only topics that you are connected to should appear in this drop-down list. You cannot click All Topics because the list includes all topic types you are connected to: appointments, drop-ins, and workshops. Select only appointment topics for appointment availability. If you are unsure which topics to use, consult with your supervisor.

- Modalities - This is where you select modalities for your availability. Select only appointment modalities for appointment availability. Choose from any combination of Virtual-Video, In Person, or Phone. **Do Not use select all.**

Step 6: Recurrence Settings

- Regular: select this if this is a one-time only Availability.
- Recurring: select this if you want to make this a recurring Availability Block. When you choose this, a new sub menu appears:

- Recurring Availability. You must select the frequency:
 - Daily (*not recommended*): this means this Availability Block will recur EVERY day including Saturday and Sunday.
 - Weekly (*recommended*): when you select this, you can pick specific days of the week you want the Availability to recur.
 - Monthly: this might be a nice option for workshops but would be unlikely to be used for appointments.
- Repeat Every: click End Date and then click the calendar that appears for the date you want this Availability block to end.

Things to Note:

- You know your own office, think about peak periods when regular schedules may change if creating recurring availability. Example: if your office switches to mostly drop-ins the week of registration, maybe have your availability recurrence end the week before so you can create a unique schedule for registration week.
- Be considerate of UNM closures as you build your availability. End availability of recurrences before long breaks (winter break, planned vacations, etc.) and then clone to restart afterwards.
- Currently, the Add exception dates feature is not enabled. Do not use it as it will negatively impact your availability and calendar features.

Take a look and make sure all your fields are accurate and then hit SAVE.

IMPORTANT NOTES:

- **Topics are tied to who can view and how they offered. Never mix Appointment topics with Drop-In or Workshop topics.** Example: putting a major topic and a drop-in topic can allow a student to schedule an appointment during your drop-in Availability. It's important to be precise.
- **It takes about 10 minutes for the availability to be visible to students after it is created.**

Check your work: your availability should now be visible on each date that you listed under the Availabilities tab and marked with a green line:

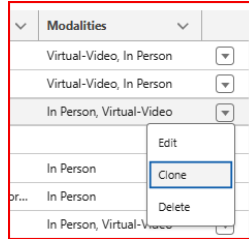
 Jennifer Luc...		8:00 AM-12:00 PM Meeting 8:30 AM-10:30... Confirmed-Recurring 1:00 PM-2:00 PM Meeting 1:30 PM-5:00 PM Meeting	10:00 AM-11:30 ... Meeting 2:00 PM-3:30 PM Meeting	8:30 AM-10:30... Confirmed-Recurring 2:00 PM-3:00 PM Meeting 3:00 PM-3:50 PM Meeting	10:30 AM-12:00 PM Meeting	8:30 AM-10:30... Confirmed-Recurring 1:30 PM-5:00 PM Meeting
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Now that one is done, building for the next Availability block is made so much easier by cloning!

PART II: Cloning Availability

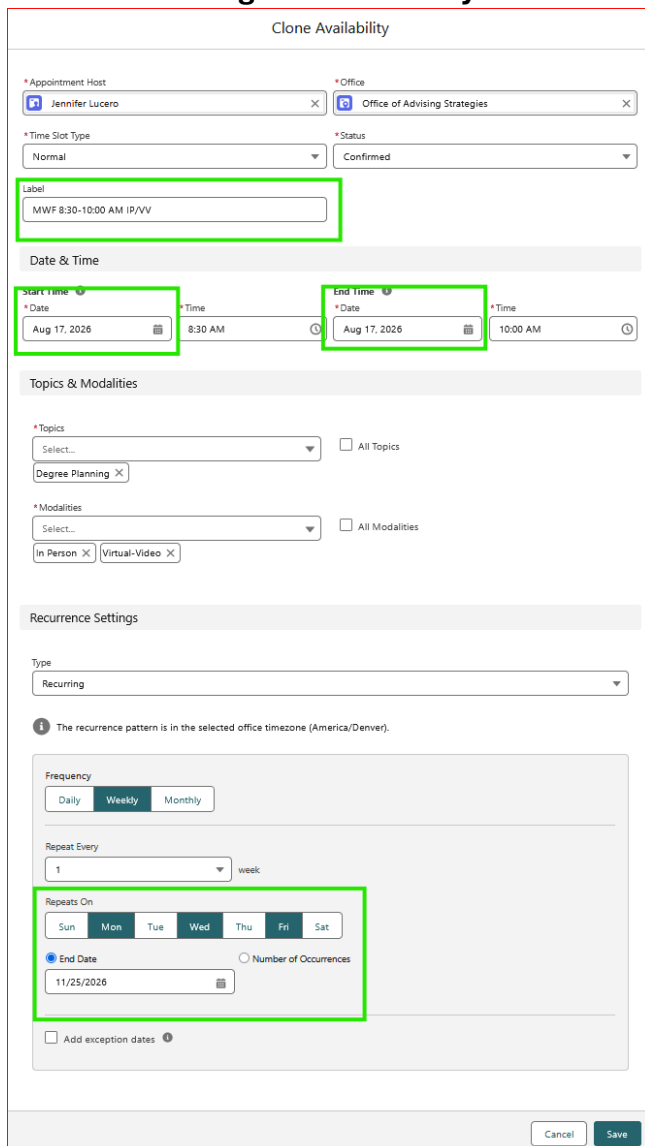
To Clone availability, please follow these steps:

- From the “My Availabilities” tab of your Manage Availability menu, click the caret on the far-right side for the Availability that you want to clone. Select Clone, and a pop-up window will appear.

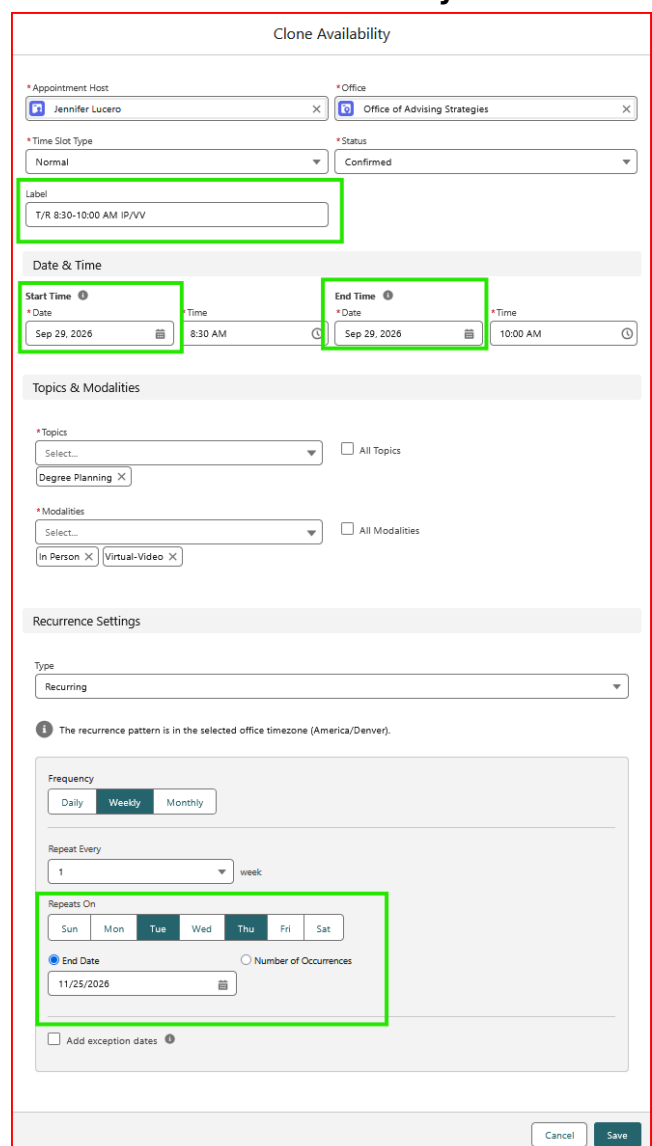


- When you Clone, it copies all the details of your original Availability, and you only need to edit what you want to adjust for the next Availability. Example: the original Availability was MWF but now you want it to be TR with the same times, topics, etc. Using Clone, you only need to change a few details such as Label and Repeats On which is much easier than having to do everything again:

Original Availability:

A screenshot of the 'Clone Availability' form. The form is titled 'Clone Availability'. It contains several sections: 'Appointment Host' (Jennifer Lucero), 'Office' (Office of Advising Strategies), 'Time Slot Type' (Normal), 'Status' (Confirmed), 'Label' (MWF 8:30-10:00 AM IP/VV), 'Date & Time' (Start Time: Aug 17, 2026, 8:30 AM; End Time: Aug 17, 2026, 10:00 AM), 'Topics & Modalities' (Topics: Degree Planning; Modalities: In Person, Virtual-Video), 'Recurrence Settings' (Type: Recurring; Frequency: Weekly; Repeat Every: 1 week; Repeats On: Sun, Mon, Tue, Wed, Thu, Fri, Sat; End Date: 11/25/2026). The 'Label' and 'Date & Time' sections are highlighted with green boxes.

Cloned Availability:

A screenshot of the 'Clone Availability' form. The form is titled 'Clone Availability'. It contains several sections: 'Appointment Host' (Jennifer Lucero), 'Office' (Office of Advising Strategies), 'Time Slot Type' (Normal), 'Status' (Confirmed), 'Label' (T/R 8:30-10:00 AM IP/VV), 'Date & Time' (Start Time: Sep 29, 2026, 8:30 AM; End Time: Sep 29, 2026, 10:00 AM), 'Topics & Modalities' (Topics: Degree Planning; Modalities: In Person, Virtual-Video), 'Recurrence Settings' (Type: Recurring; Frequency: Weekly; Repeat Every: 1 week; Repeats On: Sun, Mon, Tue, Wed, Thu, Fri, Sat; End Date: 11/25/2026). The 'Label' and 'Date & Time' sections are highlighted with green boxes.

- Click Save and the new Availability will appear on the table along with the original.

Manage Availability									
My Availabilities All Availabilities									
3 Items · Filtered by timeframe									
Filter Records									
Availability Numb...	Appointment Host	Label	Start Time	End Time	Recurrence Pattern	Exception Dates	Topics	Modalities	
SFT-25199	Jennifer Lucero	MWF 8:30-10:00 AM IP...	8/17/2026, 8:30 AM	8/17/2026, 10:00 AM	Weekly		Degree Planning	In Person, Virtual-Video	
SFT-25200	Jennifer Lucero	T/R 8:30-10:00 AM IP/VV	9/29/2026, 8:30 AM	9/29/2026, 10:00 AM	Weekly		Degree Planning	In Person, Virtual-Video	

PART III: Helpful Tips:

Clone v. Edit:

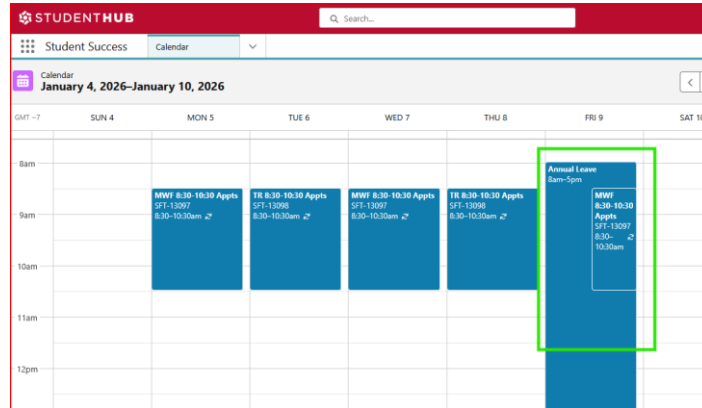
What to do if you create an Availability, save it, but afterwards realize that it has errors? For reasons we are still trying to resolve, Salesforce doesn't handle edits well. You are best served by Cloning the Availability that needs adjustment and deleting the original. To do that, follow these steps:

1. Write down the SFT # of your original availability so you don't forget which is the original one that you will need to delete later.
2. Clone the Availability and make all necessary adjustments.
3. Delete the old availability. This will NOT delete any appointments already scheduled and creating the cloned Availability will allow the necessary adjustments to be made and remain visible on your Calendar side.

Calendar v. Availability:

- On your Student Hub and/or Outlook calendar, the Availability blocks you see are 'mirrors' of your actual Availability. Anything related to your Availability should be done exclusively in the Availabilities tab. If you edit or delete the mirrors on the Calendar, it will not impact the actual Availability. It just removes it from your view for reference.
- If you opt to edit an Availability rather than Clone and delete the old one, there is a strong possibility that the mirror will be erased from your Calendar view. Your availability could still be active, and students will still be able to schedule. It's imperative that you always consult your Availabilities page, not your calendar, to see what is active. The schedule view on Availabilities presents it in a calendar format for easy reference.
- To block a specific day of your Availability so no one will be able to schedule, you cannot just delete a single day for Availability as the block is an entire unit. You will need to create an event in your Outlook calendar (if you have your Outlook synced) or do the following:
 - Click an open space on your Student Hub Calendar, and an Event will appear.
 - You only need to make selections that are marked with a red asterisk *****
 - Assigned To – make sure it has your name
 - Subject – select from the drop-down menu
 - Start and End – this is very much like Availability building, the dates must match and the start and end times should reflect what you want blocked.
 - Show Time As – this should already be set to Busy which is what prevents your availability from being viewable

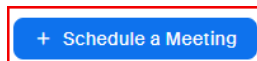
- Hit save – this Event block should appear on your calendar alongside the Availability block. That means it is working and will block off that time slot.



How to create a Zoom link with no fixed date or time:

In your Zoom account, there is way to build a recurring link that is not tied to a specific start/end date. This is a great option for your Virtual Video appointments so that the link can be included in Student Hub:

1. Click Schedule a Meeting:



2. Name your Topic:

3. Skip past When, Duration and Time Zone to click Recurring Meeting. This generates a new menu. Go to Recurrence and click the drop-down menu to select No Fixed Time:

4. When you click No Fixed Time, you will see that the other fields are removed:

Please make sure to utilize and customize your Waiting Room so that students don't jump into each other's meetings.

Tip: if you don't think your Zoom link is appearing on the student side, contact your manager/supervisor to ensure they have it added to your Team Member role in Student Hub or email shconnect@unm.edu and we can help!