



# ***DateMaster Configuration Guide***



# Setup Contents

- **DateMaster Overview**
- Configuration
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  - Dates and Date Ranges
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# DateMaster enables best in class experience for working with dates in Salesforce.

Ease of referencing and updating of dates:

- Uses calendar component versus date field
- Usable for Dates and Date Ranges.
- Record and Flow Components make DateMaster usable virtually anywhere in Salesforce with any date fields

A screenshot of the Salesforce interface. The top navigation bar includes a search bar and various menu items like Accounts, Opportunities, Cases, Tasks, Files, Dashboards, Reports, Effort Capture, Client Billing Rates, and More. The main content area shows a record for "Effort Capture" with fields for Installation Start Date (11/8/2023), Installation End Date (11/16/2023), and Month Shown (2/13/2024). A "Date Custom Label" calendar component is highlighted with a pink border, showing a calendar for November 2023 with the 8th and 16th highlighted. Below the calendar are "Start Date Label" (Nov 8, 2023) and "End Date Label" (Nov 16, 2023) fields, along with "Clear Dates" and "Today" buttons. The bottom of the screen shows a "Case Team (0)" section.



# DateMaster improves experience with 3 different types of dates.

## Single Dates

Works with any date field

The screenshot shows a calendar for November 2023. The date 8 is highlighted with a green circle. Below the calendar, there is a text input field labeled "Installation Start Date" containing "Nov 8, 2023". At the bottom, there are three buttons: "Clear Dates", "Today", and "Confirm Date".

## Date Ranges

### (Start and End Select)

Allows user to select Start and End Dates

The screenshot shows a calendar for November 2023. The date 8 is highlighted with a green circle and the date 16 is highlighted with a red circle. Below the calendar, there are two text input fields: "Installation Start Date" containing "Nov 8, 2023" and "Installation End Date" containing "Nov 16, 2023". At the bottom, there are three buttons: "Clear Dates", "Today", and "Confirm Date".

## Date Ranges

### (Fixed Duration)

User Selects Start Date. End date determined by defined duration.

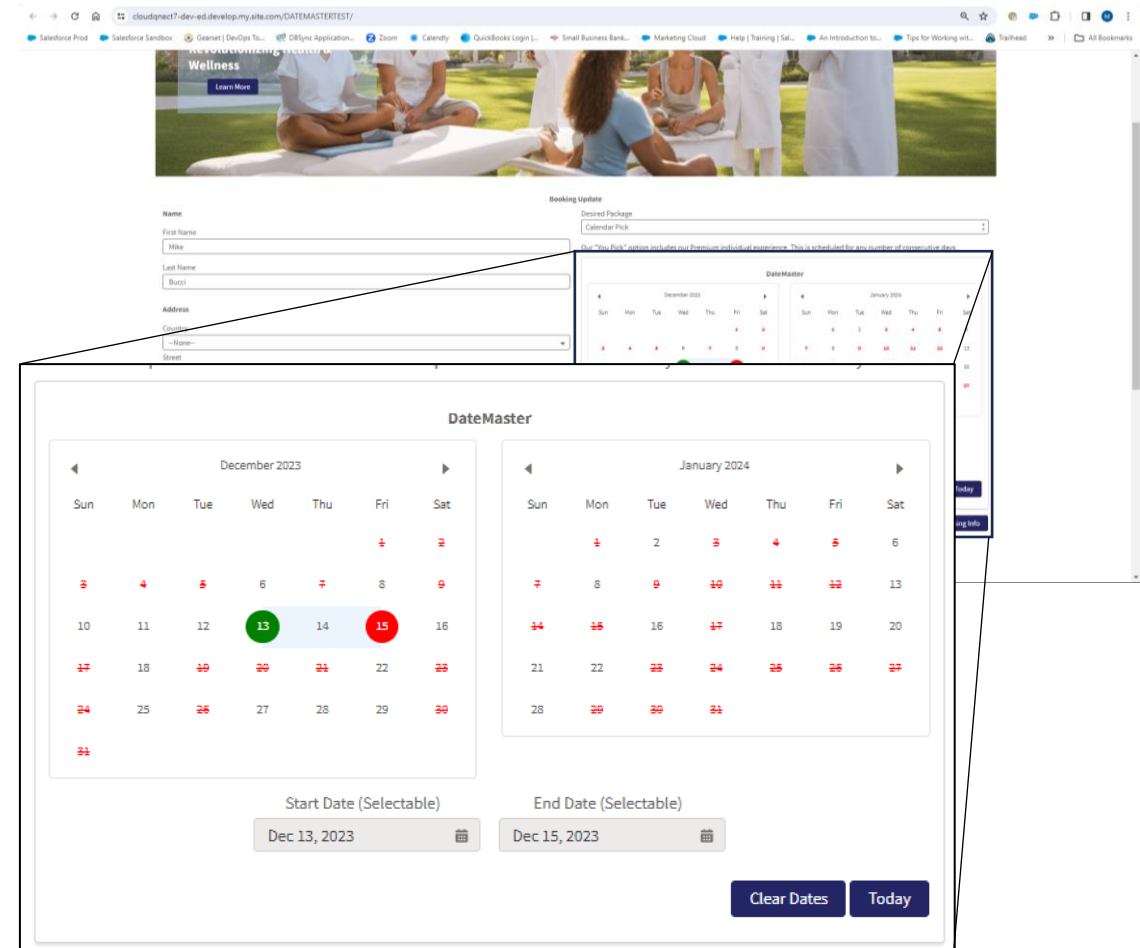
The screenshot shows a calendar for November 2023. The date 6 is highlighted with a green circle and the date 9 is highlighted with a red circle. Below the calendar, there are two text input fields: "Installation Start Date" containing "Nov 6, 2023" and "Installation End Date" containing "Nov 9, 2023". At the bottom, there are three buttons: "Clear Dates", "Today", and "Confirm Date".



# DateMaster also enables scheduling capabilities with Selectable Dates\*.

Selectable Dates enables presentation and selection of dates that are available/selectable versus those that are not so that users are not selecting dates where people, assets, etc. are not available.

For ultimate flexibility, this screen flow component can leverage any record collection of dates gathered within a flow.



\* - Selectable Dates is our premium product



# Selectable Dates are a flexibly defined within a Flow as a record collection.

The DateMaster Component enables several scenarios including:

Provided dates are selectable

The screenshot shows the DateMaster component with two calendar views for April and May 2024. The 'Installation Start Date' is set to April 22, 2024, and the 'Installation Completion' date is April 26, 2024. The date 22 is highlighted in green, and 26 is highlighted in red. A blue arrow labeled 'Inverse' points from this interface to the next one.

Provided dates are NOT selectable

The screenshot shows the DateMaster component with two calendar views for April and May 2024. The 'Installation Start Date' is set to February 15, 2024, and the 'Installation Completion' date is February 20, 2024. The date 20 is highlighted in red, indicating it is not selectable.

Available end dates are dependent upon the selected start date

The screenshot shows the DateMaster component with two calendar views for April and May 2024. The 'Installation Start Date' is set to April 22, 2024, and the 'Installation Completion' date is empty. The date 22 is highlighted in green, and the completion date field is empty, indicating that the available end dates are dependent on the selected start date.



# DateMaster offers extensive options for configuration for your specific use.

Configuration abilities include:

Core

1. Start and End Date configuration to any date fields

Presentation

2. Component Label

3. Number of months to show – determines if component displays 1 or 2 months

4. Show Weekends toggle – shows/hides Saturday and Sunday on component

5. Start and End Date Labels

6. Show Today button toggle

7. Show Start/End Date boxes toggle

8. Show Clear Dates button toggle

9. Show Confirm Date Button

Functional

10. Allow End Date Before Start Date toggle

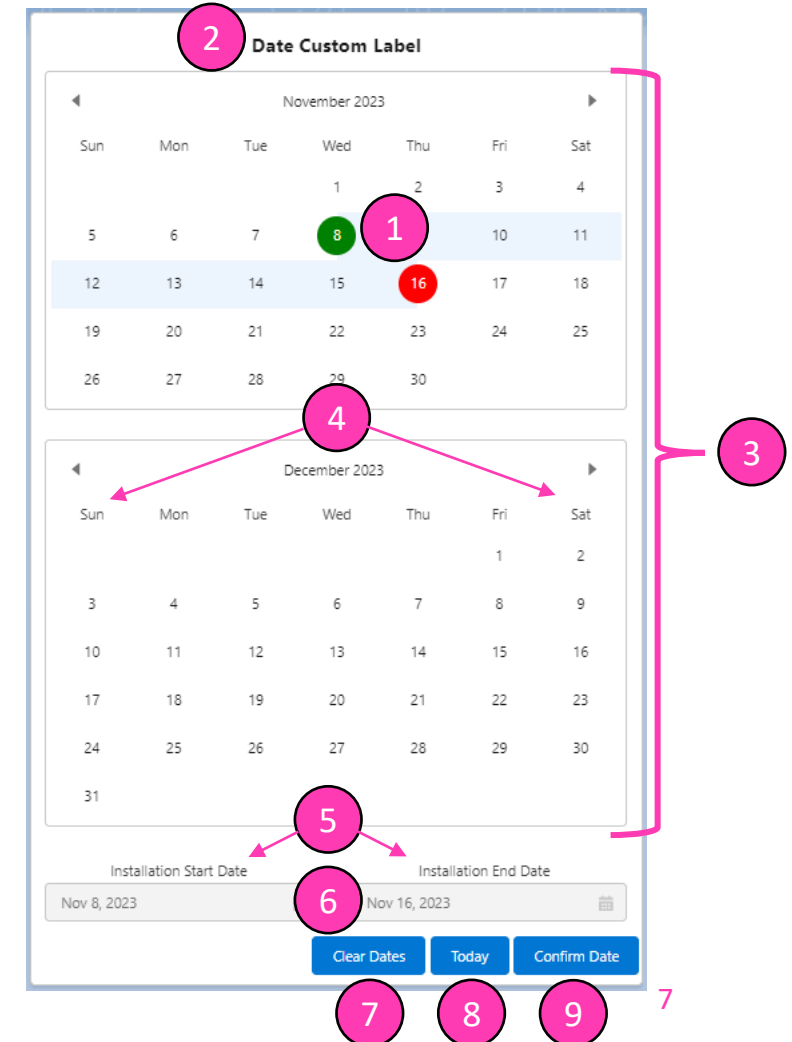
11. Display Only toggle – functional control that can place component into a “read only” mode

12. Validation to ensure appropriate date entry – functional control to ensure that needed dates are entered

13. Duration for fixed duration ranges – functional control that determines end date when start date is entered

14. Default month shown – determines what month to show when input dates are empty

15. Standard Component visibility filters





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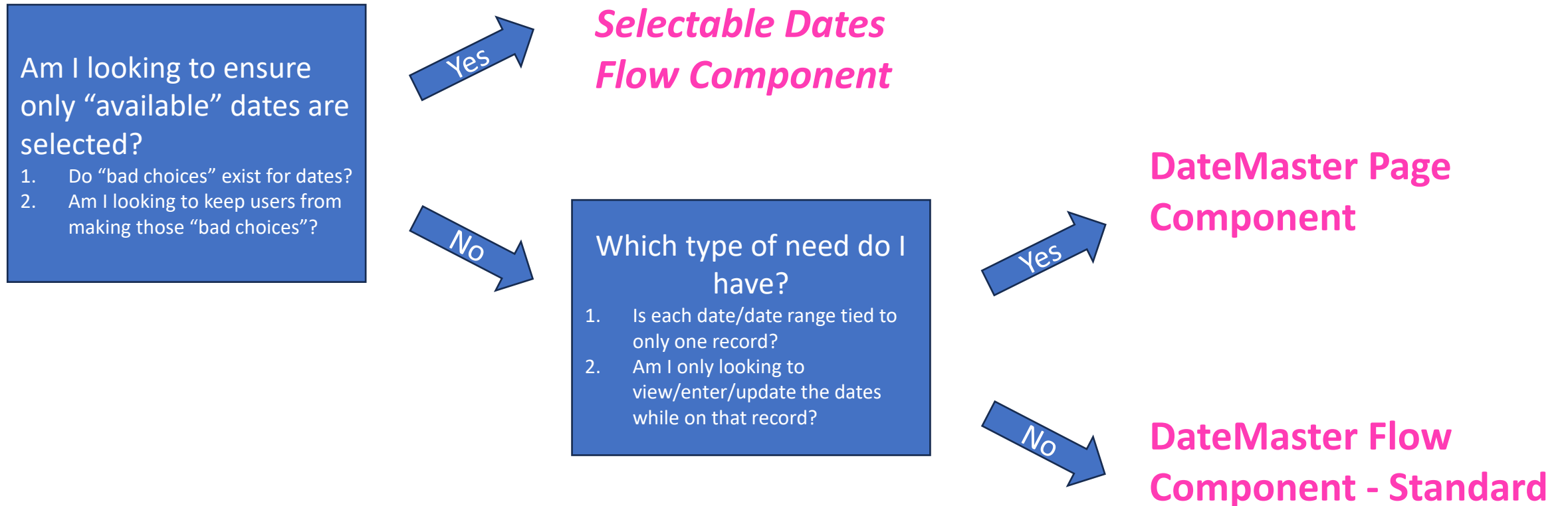
# DateMaster is available for download into your Salesforce org from the Salesforce AppExchange.

- Includes FREE trial period
- Billing after the trail will come directly from AppsZeroCode
- We recommend:
  - Testing in a sandbox or dev org before installing in your production org
  - Installing for all users (license is on an org basis so everyone can use)

The screenshot displays the Salesforce AppExchange interface for the DateMaster application. At the top, the Salesforce logo and 'AppExchange' are visible, along with navigation links for Home, Solutions by Type, Product Collections, Industry Collections, Consultants, Learn, and Latest Collections. A search bar is present below the navigation. The main content area features the DateMaster app listing, including its logo, title 'DateMaster... When Dates Really Matter', developer '4Convergence', and a 5-star rating with 8 reviews. The price is listed as \$100 USD/company/month, with a note about discounts for nonprofits and a 'Pricing Details' link. A 'Get It Now' button and a 'More' dropdown are also visible. The page is categorized under 'Horizontal Product' in the 'Industries' section, 'Customer Service', 'Agent Productivity', and 'Data Visualization' in the 'Business Need' section, and 'None' in the 'Requires' section. It is compatible with 'Sales Cloud', 'Service Cloud', and 'Experience Cloud'. A 'More Details' link is provided at the bottom of the app listing. The bottom of the page shows navigation tabs for 'Overview', 'Reviews', and 'More Details'.



**THIS IS REALLY IMPORTANT.** The goals of what you are trying to accomplish should drive your high-level configuration decisions.

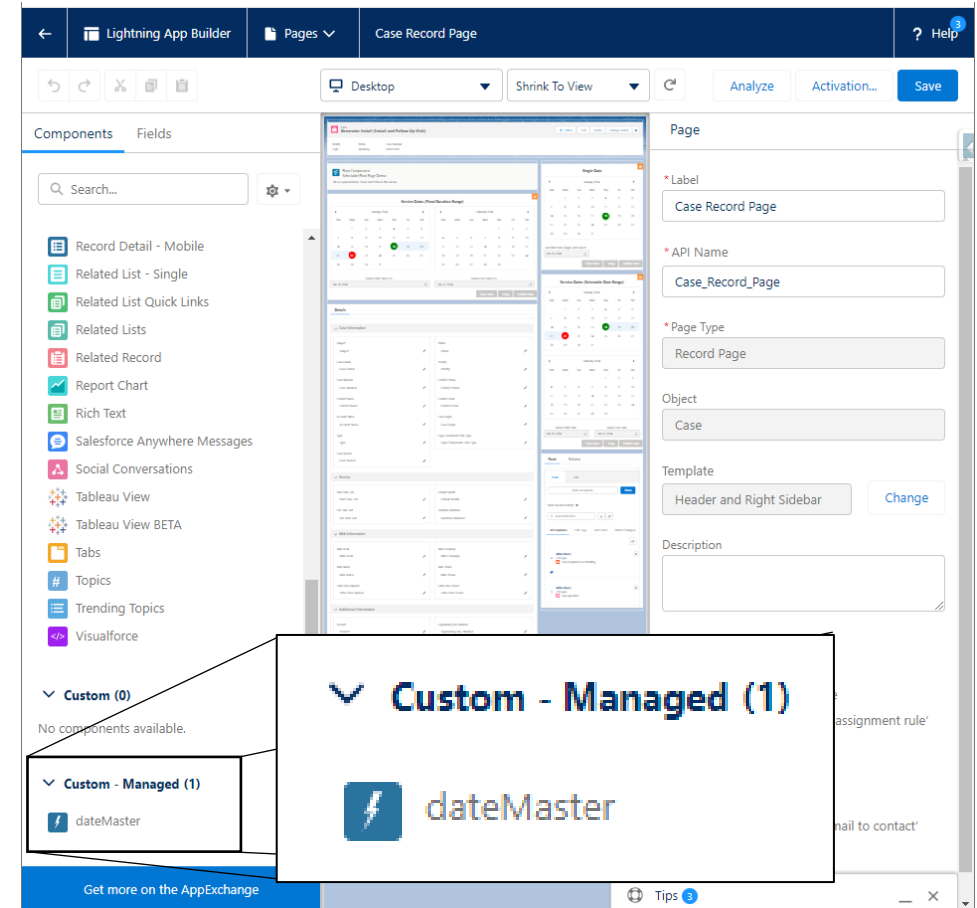




# DateMaster Page Component

This is the simplest to use component and offers great options for easily updating dates on a given record. Use this component when:

- The dates fields are within the object where you want the component presented.
- Date selection does not need to be limited

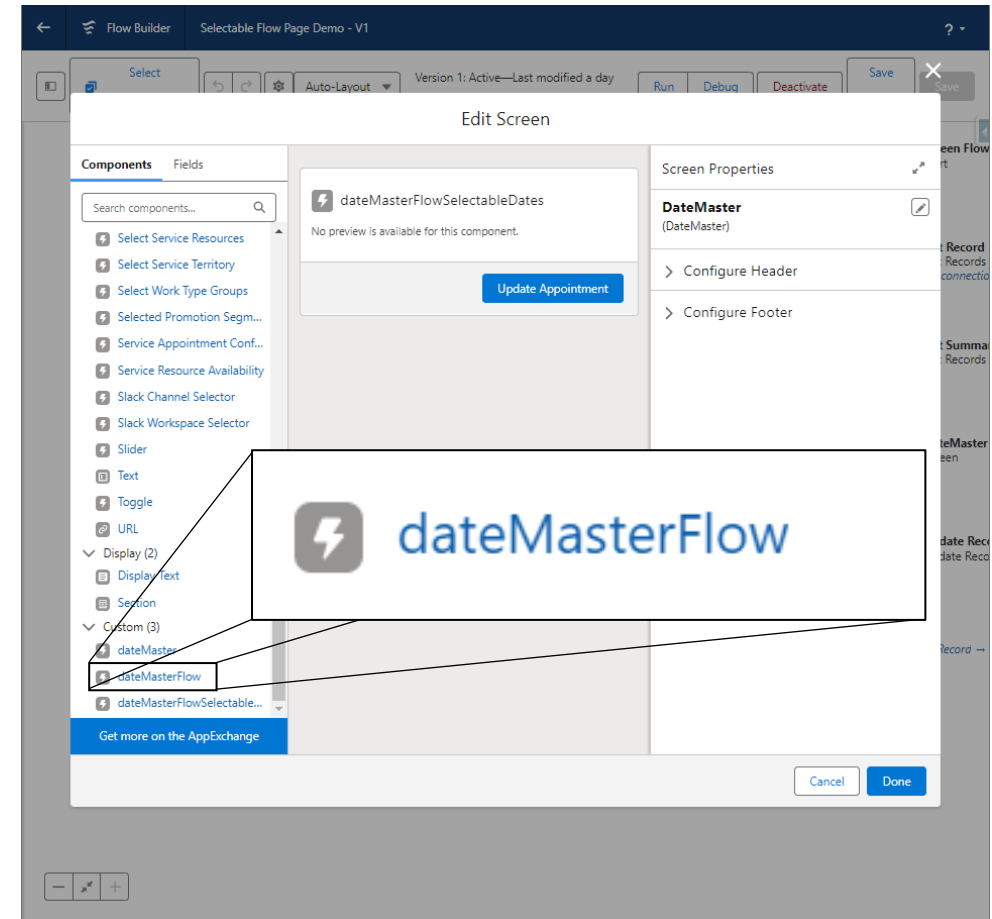




# DateMaster Flow Component - Standard

The Standard Flow Component is used on screens within Screen Flows. Found under “Custom” Components on screen flow layout page. Use this component when:

- A screen flow is needed for your solution.
- Date selection does not need to be limited.

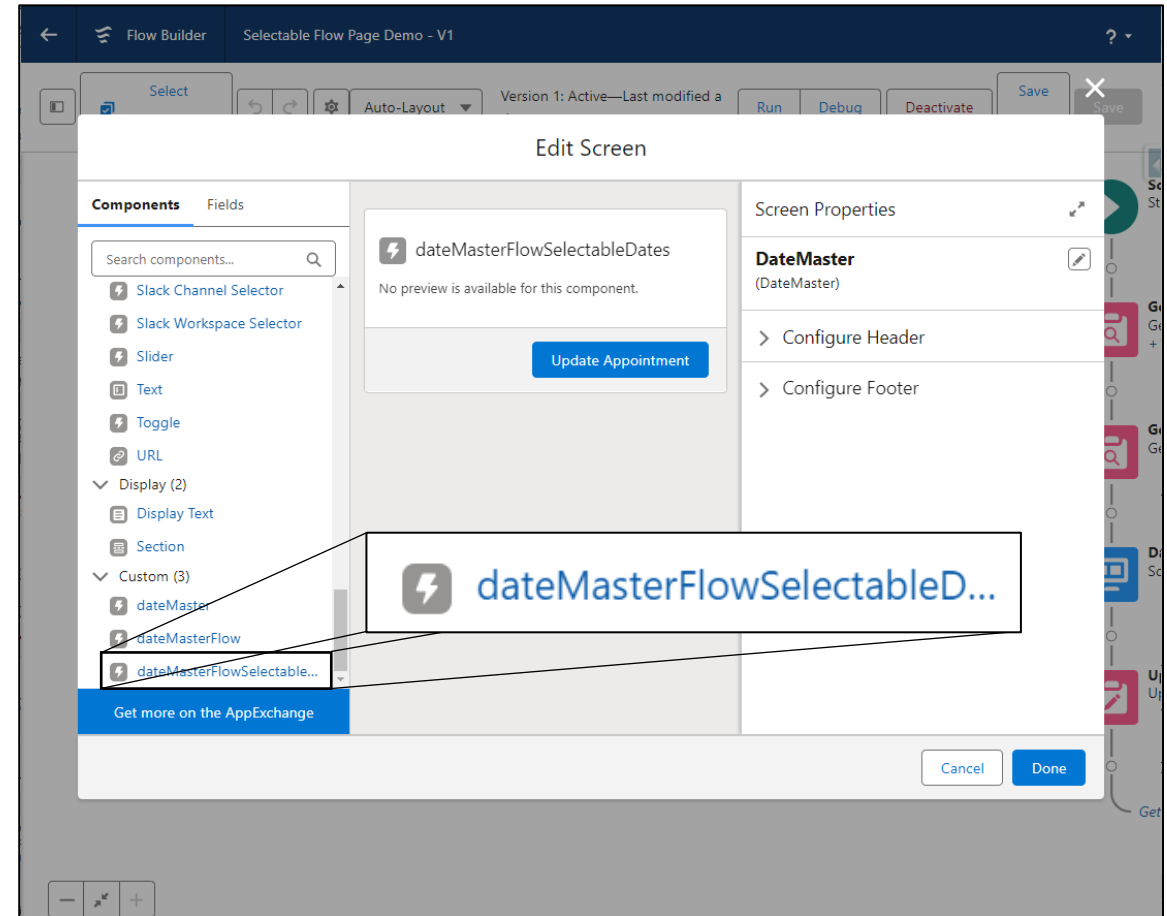




# DateMaster Premium Flow Component – Simple Scheduler/Selectable Dates

The “Selectable Dates” Flow Component is used on screens within Screen Flows. Found under “Custom” Components on screen flow layout page. Use this component when:

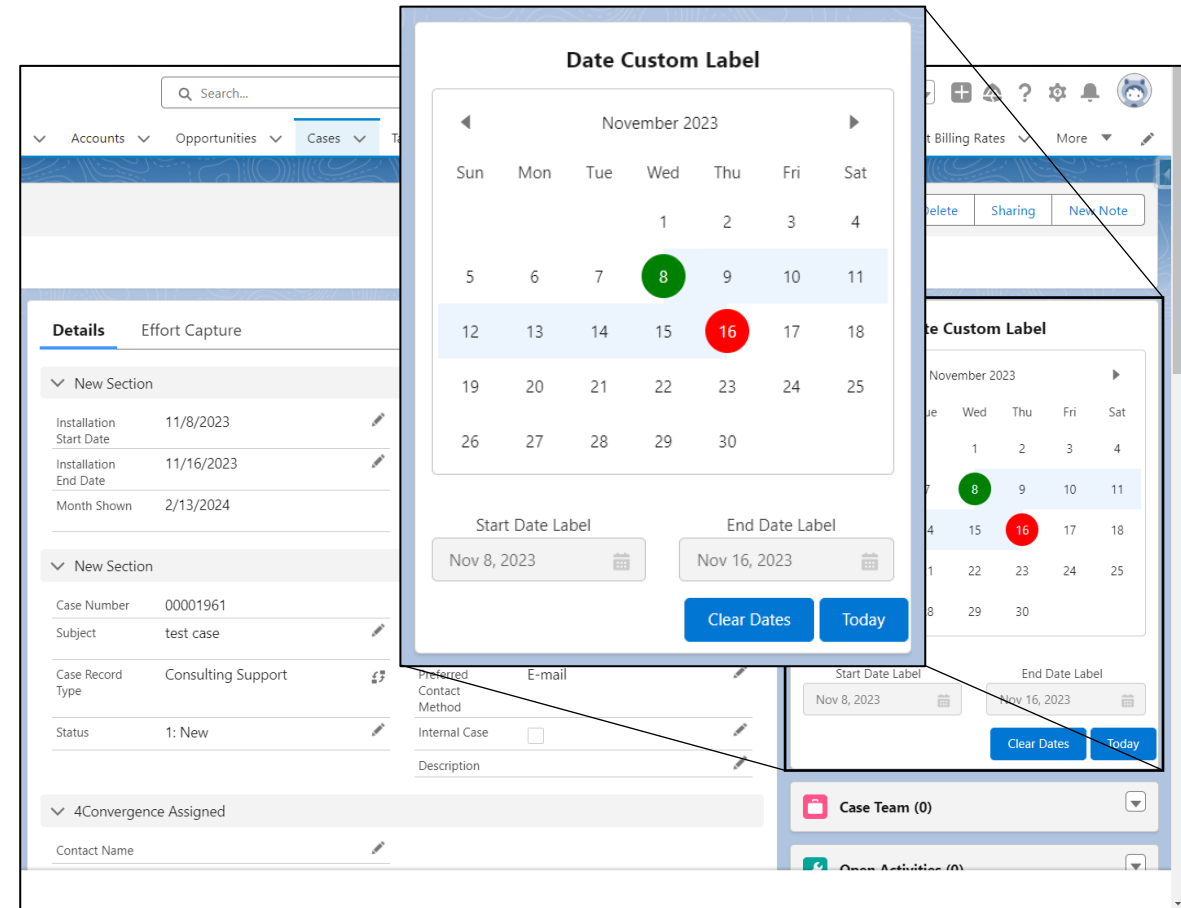
- A screen flow is needed for your solution.
- You want Date selection does not need to be limited.





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# The DateMaster Lightning Page Component supports 3 different types of dates.

Selectable Date Type	Description
Single Dates	Only a single date is selected.
Date Ranges	Where user selected both start and end date.
Date Ranges (Fixed Duration)	Where user selected the start date and the end date is automatically determined based upon a known duration. For example, duration equals 2 days, user selected March 11 and DateMaster automatically selects March 13 as the end date.



# The DateMaster Page Component has 17 fields that enable customization of essentially everything.

- 5 Core Setup Fields
- 3 Label Customization
- 3 Behavioral Customization Fields
- 6 Visualization Customization Fields

1 Component Label  
Header Label

2 Date Types  
Date Range(Fixed Duration)

3 Single/Start Date field API Name  
Start\_Date\_\_c

4 Single/Start Date Label  
Start Date Label

5 End Date field API Name  
End\_Date\_\_c

6 End Date Label  
End Date Label

7 Validation Rule settings for date entry  
Neither Start nor End Date is required

8 Duration  
3

9 Month Shown (Default)

10 Number of months to show  
1

11  Show Weekends

12  Show Today Button

13  Show Clear Date(s) Button

14  Show Confirm Date Button

15  Show Start/End Boxes

16  Display Only

17  Allow End Date before Start Date

18 Field Name (API) of Field Used (Deprecated)

1 Header Label

10 December 2023

11

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

3 4 Start Date Label 15 End Date Label 6 5

Dec 18, 2023 Dec 21, 2023

13 Clear Dates 12 Today 14 Confirm Date





# The Core Setup fields drive the high-level configuration of the page component.

## 5 Core Setup Fields:

2. **Date Types:** This is where you select the type of date that you are working with. Options are:
  - Single Date – this is where only one date is selected on DateMaster
  - Date Range (Selectable) – this is where the user selected both the start and end dates
  - Date Range (Fixed duration) – this is where the duration (# of days) of an appointment is known. The users selects the start date and DateMaster calculates and returns the end date
3. **Single/Start Date field API Name:** This is the API Name of the field that contains the start date. This field is always required.
5. **End Date field API Name:** This is the API Name of the field that contains the end date. This field is required for Date Ranges.
8. **Duration:** For Date Range (Fixed Duration), this is the number of days between the start and end dates. This can either be an integer or the API name of a field on the record. 0 means that the start and end dates are the same. Entering 1 means that the end date is the next day. Negative numbers can be used if the “Allow End Date before Start Date” box is checked.
9. **Month Shown (Default):** This field is optional and can contain either a date or the API name of a date field. Upon page load, DateMaster will show the month/months based upon the following logic:
  - If there is an entered start date, DateMaster will display that month.
  - If there is an entered end date (but no start date), DateMaster will display that month. This applies to Date ranges only.
  - If neither start date or end date is entered, DateMaster will display the Default Date.
  - If none of the start date, end date or default date is filled in, DateMaster will display the current month

The screenshot shows the configuration interface for the Date Master component. It includes the following fields and settings:

- Component Label:** Header Label
- 2 Date Types:** Date Range(Fixed Duration)
- 3 Single/Start Date field API Name:** Start\_Date\_\_c
- Single/Start Date Label:** Start Date Label
- 5 End Date field API Name:** End\_Date\_\_c
- End Date Label:** End Date Label
- Validation Rule settings for date entry:** Neither Start nor End Date is required
- 8 Duration:** 3
- 9 Month Shown (Default):** (Empty field)
- Number of months to show:** 1
- Show Weekends
- Show Today Button
- Show Clear Date(s) Button
- Show Confirm Date Button
- Show Start/End Boxes
- Display Only
- Allow End Date before Start Date



# The DateMaster Page Component has three label and three behavioral customizations.

## 3 Label Customizations

1. Header Label
4. Start Date Label – visible if “Show Start/End Boxes” is selected
6. End Date Label – visible if “Show Start/End Boxes” is selected

## 3 Behavioral Customization Fields

7. Validation Rule setting for date entry in Date Range (Selectable) Date Type. There are 3 options for this field:
  - Neither Start nor End Date is Required
  - Start Date Required/End Date not required
  - Both Start and End Date Required
16. Display Only – selecting this sets the DateMaster component to only display information and removes the ability for the user to change the selected dates
17. Allow End Date before Start Date – selecting this box enables a user to select an end date before a start date when in the Date Range (Selectable) date type.

1 Component Label  
Header Label

Date Types  
Date Range(Fixed Duration)

Single/Start Date field API Name  
Start\_Date\_c

4 Single/Start Date Label  
Start Date Label

End Date field API Name  
End\_Date\_c

6 End Date Label  
End Date Label

7 Validation Rule settings for date entry  
Neither Start nor End Date is required

Duration  
3

Month Shown (Default)

Number of months to show  
1

Show Weekends

Show Today Button

Show Clear Date(s) Button

Show Confirm Date Button

Show Start/End Boxes

16  Display Only

Allow End Date before Start Date 17

Field Name (API) of Field Used (Deprecated)

1 Header Label

December 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

4 Start Date Label  
Dec 18, 2023

End Date Label 6  
Dec 21, 2023

Clear Dates Today Confirm Date



# The DateMaster Page Component has six visualization customizations.

## 6 Visualization Customization Fields

- 10. Number of months to show – this is a selection of either 1 or 2
- 11. Show Weekends – when checked, weekends are shown. When unchecked, weekends are not shown. This impacts fixed duration ranges in that if a start date is Friday and duration = 1, end date will be Monday.
- 12. Show Today Button – this controls the visibility of the “Today” button. When pressed this button selects current date.
- 13. Show Clear Date(s) Button – this button will clear any selected values from the start and end date.
- 14. Show Confirm Date Button – when this button is present, it must be pressed to write information back to the record. This is an optional safety feature to keep users from accidentally changing information on records.
- 15. Show Start/End Boxes – this controls the visibility of the Start Date and End Date labels and boxes.

Component Label

Date Types

Single/Start Date field API Name

Single/Start Date Label

End Date field API Name

End Date Label

Validation Rule settings for date entry

Duration

Month Shown (Default)

Number of months to show

Show Weekends

Show Today Button

Show Clear Date(s) Button

Show Confirm Date Button

Show Start/End Boxes

Display Only

Allow End Date before Start Date

Field Name (API) of Field Used (Deprecated)

Header Label

December 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Start Date Label: Dec 18, 2023

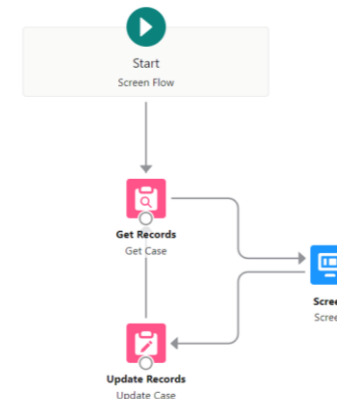
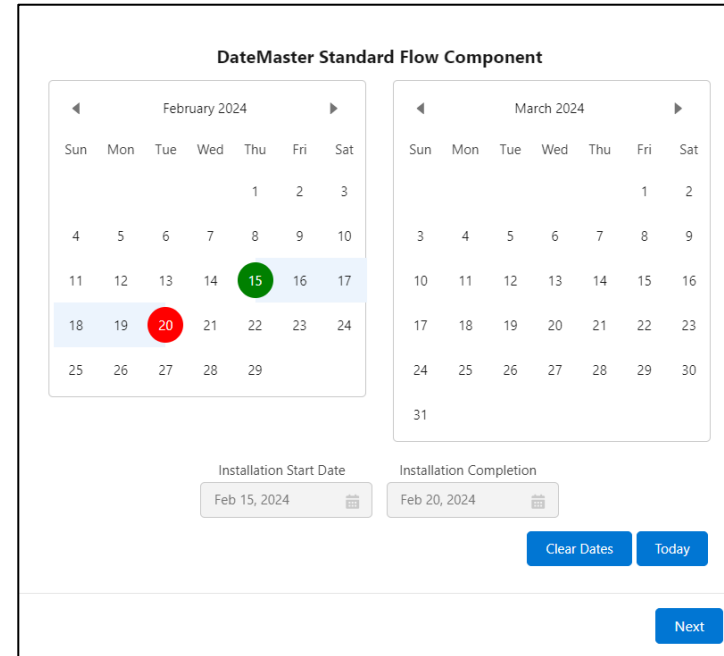
End Date Label: Dec 21, 2023

Buttons: Clear Dates, Today, Confirm Date



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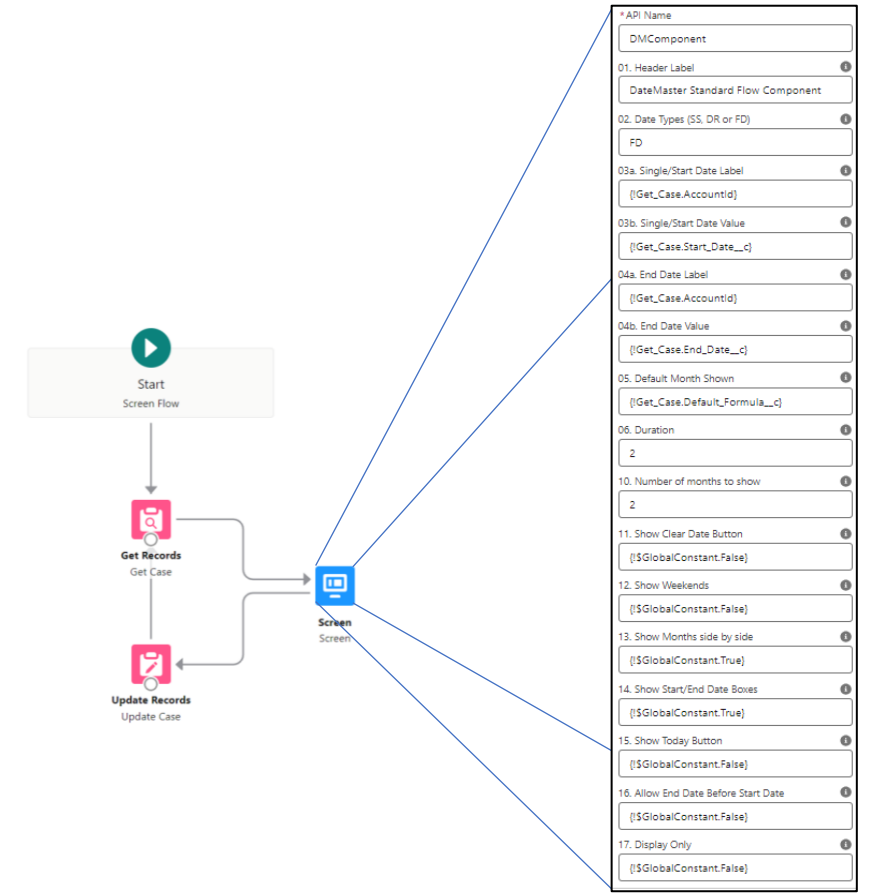


* API Name	
DMComponent	
01. Header Label	!
DateMaster Standard Flow Component	
02. Date Types (SS, DR or FD)	!
FD	
03a. Single/Start Date Label	!
{!Get_Case.AccountId}	
03b. Single/Start Date Value	!
{!Get_Case.Start_Date__c}	
04a. End Date Label	!
{!Get_Case.AccountId}	
04b. End Date Value	!
{!Get_Case.End_Date__c}	
05. Default Month Shown	!
{!Get_Case.Default_Formula__c}	
06. Duration	!
2	
10. Number of months to show	!
2	
11. Show Clear Date Button	!
{!\$GlobalConstant.False}	
12. Show Weekends	!
{!\$GlobalConstant.False}	
13. Show Months side by side	!
{!\$GlobalConstant.True}	
14. Show Start/End Date Boxes	!
{!\$GlobalConstant.True}	
15. Show Today Button	!
{!\$GlobalConstant.False}	
16. Allow End Date Before Start Date	!
{!\$GlobalConstant.False}	
17. Display Only	!
{!\$GlobalConstant.False}	



# The DateMaster Flow Component combines the power of flows with the configurability of DateMaster.

- Current Start and End Dates can be retrieved from any objects or derived as flow variables
- Selected Start and End Dates can be used to update or create any dates across any objects from flow
- Multiple configuration fields are flow variables
- Increased layout controls

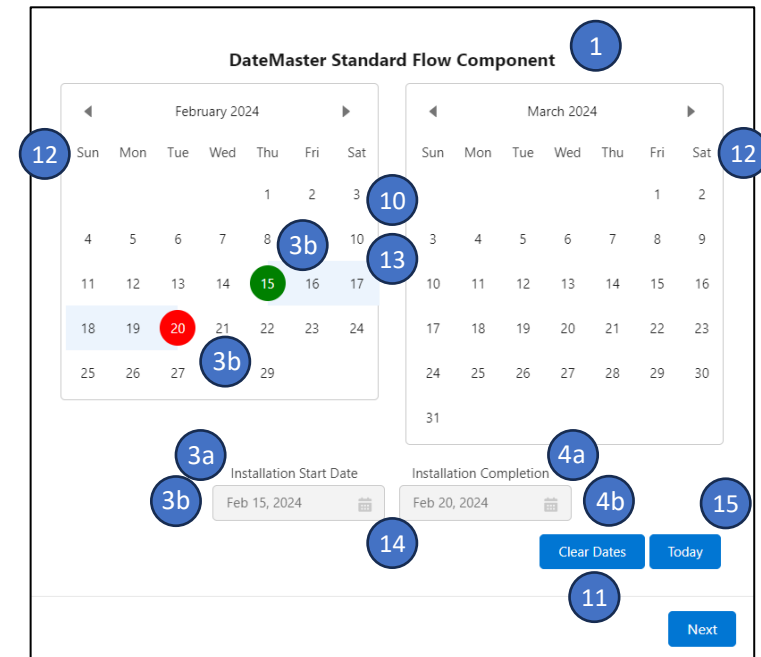




# The DateMaster Flow Component (Standard) has 17 fields for extensive configuration.

- 6 Core Setup Fields
- 3 Label Customization
- 2 Behavioral Customization Fields
- 7 Visualization Customization Fields

0	*API Name	DMComponent
1	01. Header Label	DateMaster Standard Flow Component
2	02. Date Types (SS, DR or FD)	FD
3a	03a. Single/Start Date Label	{!Get_Case.AccountId}
3b	03b. Single/Start Date Value	{!Get_Case.Start_Date__c}
4a	04a. End Date Label	{!Get_Case.AccountId}
4b	04b. End Date Value	{!Get_Case.End_Date__c}
5	05. Default Month Shown	{!Get_Case.Default_Formula__c}
6	06. Duration	2
10	10. Number of months to show	2
11	11. Show Clear Date Button	{!\$GlobalConstant.False}
12	12. Show Weekends	{!\$GlobalConstant.False}
13	13. Show Months side by side	{!\$GlobalConstant.True}
14	14. Show Start/End Date Boxes	{!\$GlobalConstant.True}
15	15. Show Today Button	{!\$GlobalConstant.False}
16	16. Allow End Date Before Start Date	{!\$GlobalConstant.False}
17	17. Display Only	{!\$GlobalConstant.False}





# The DateMaster Flow Component has six fields for core setup.

1. API Name – Salesforce Standard field for all screen components
3. Date Types: This is where you select the type of date that you are working with. Options are:
  - Single Date – only one date is displayed/selected by user
  - Date Range (Selectable) – this is where user will select both start and end dates
  - Date Range (Fixed duration) – this is where the duration (# of days) of an appointment is known. The users selects the start date and DateMaster calculates and returns the end date
5. Single/Start Date Value: this can be either a retrieved date (from Get statement) a flow variable/date formula or a fixed date.
7. End Date Value: this can be either a retrieved date (from Get statement) a flow variable/date formula or a fixed date.
8. Month Shown (Default): this can be either a retrieved date (from Get statement) a flow variable/date formula or a fixed date. Upon component load, DateMaster will show the month/months based upon the following logic:
  - If there is an entered start date, DateMaster will display that month.
  - If there is an entered end date (but no start date), DateMaster will display that month. This applies to Date ranges only.
  - If neither start date or end date is entered, DateMaster will display the Default Date.
  - If none of the start date, end date or default date is filled in, DateMaster will display the current month
9. Duration: this can be either a retrieved date (from Get statement) a flow variable/date formula or a fixed date.

The image shows a configuration form for the DateMaster component. It contains 17 numbered fields with callouts 0 through 6. Field 0 is the API Name (DMComponent). Field 1 is the Header Label (DateMaster Standard Flow Component). Field 2 is Date Types (FD). Field 3 is Single/Start Date Label ([!Get\_Case.AccountId]). Field 3b is Single/Start Date Value ([!Get\_Case.Start\_Date\_\_c]). Field 4a is End Date Label ([!Get\_Case.AccountId]). Field 4b is End Date Value ([!Get\_Case.End\_Date\_\_c]). Field 5 is Default Month Shown ([!Get\_Case.Default\_Formula\_\_c]). Field 6 is Duration (2). Fields 10 through 17 are various options like 'Show Clear Date Button', 'Show Weekends', 'Show Months side by side', etc., with values like [!GlobalConstant.False] or [!GlobalConstant.True].

The image shows the user interface of the DateMaster Standard Flow Component. It features two side-by-side calendars for February 2024 and March 2024. The February calendar has a red circle on the 20th and a green circle on the 15th. Below the calendars, there are two date pickers: 'Installation Start Date' (Feb 15, 2024) and 'Installation Completion' (Feb 20, 2024). Both date pickers have callouts 3b and 4b. At the bottom, there are buttons for 'Clear Dates', 'Today', and 'Next'.



# The DateMaster Flow Component has three label and two behavioral customizations.

## 3 Label Customizations

- 1. Header Label
- 3a. Start Date Label
- 4a. End Date Label

## 2 Behavioral Customization Fields

- 16. Allow End Date before Start Date – selecting this box enables a user to select an end date before a start date when in the Date Range (Selectable) date type.
- 17. Display Only – selecting this sets the DateMaster component to only display information and removes the ability for the user to change the selected dates

\* API Name  
DMComponent

1 01. Header Label  
DateMaster Standard Flow Component

3a 02. Date Types (SS, DR or FD)  
FD

4a 03a. Single/Start Date Label  
[!Get\_Case.AccountId]

03b. Single/Start Date Value  
[!Get\_Case.Start\_Date\_\_c]

4a 04a. End Date Label  
[!Get\_Case.AccountId]

04b. End Date Value  
[!Get\_Case.End\_Date\_\_c]

05. Default Month Shown  
[!Get\_Case.Default\_Formula\_\_c]

06. Duration  
2

10. Number of months to show  
2

11. Show Clear Date Button  
[!GlobalConstant.False]

12. Show Weekends  
[!GlobalConstant.False]

13. Show Months side by side  
[!GlobalConstant.True]

14. Show Start/End Date Boxes  
[!GlobalConstant.True]

15. Show Today Button  
[!GlobalConstant.False]

16 16. Allow End Date Before Start Date  
[!GlobalConstant.False]

17 17. Display Only  
[!GlobalConstant.False]

DateMaster Standard Flow Component 1

February 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
						31

3a Installation Start Date  
Feb 15, 2024

4a Installation Completion  
Feb 20, 2024

Clear Dates Today

Next



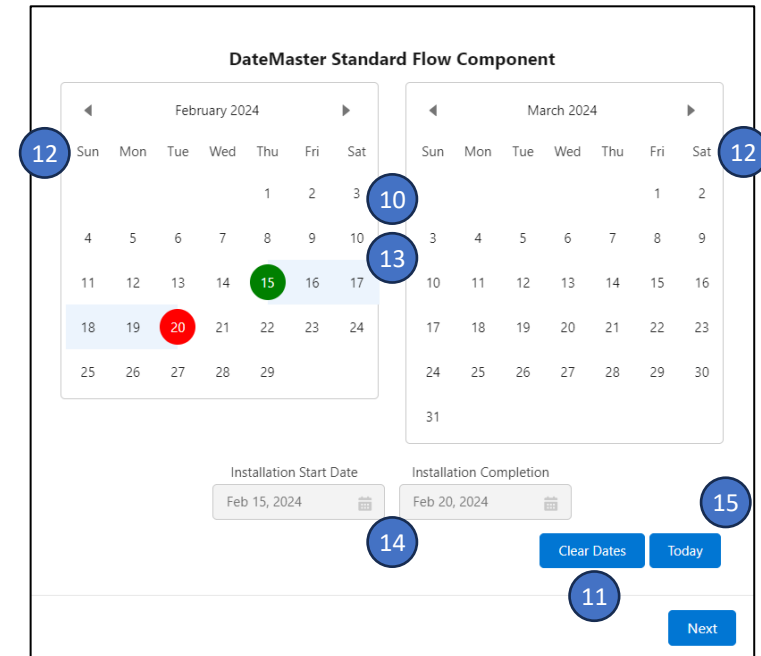


# The DateMaster Flow Component has six fields for visualization customization.

## 6 Visualization Customization Fields

- 10. Number of months to show – this is a selection of either 1 or 2 or any flow field that contains a number.
- 11. Show Clear Date(s) Button – this button will clear any selected values from the start and end date.
- 12. Show Weekends – when checked, weekends are shown. When unchecked, weekends are not shown. This impacts fixed duration ranges in that if a start date is Friday and duration = 1, end date will be Monday.
- 13. Show Months side by side – this controls whether 2 months are stacked or presented side-by-side
- 14. Show Start/End Boxes – this controls the visibility of the Start Date and End Date labels and boxes.
- 15. Show Today Button – this controls the visibility of the “Today” button. When pressed this button selects current date.

* API Name	DMComponent
01. Header Label	DateMaster Standard Flow Component
02. Date Types (SS, DR or FD)	FD
03a. Single/Start Date Label	{!Get_Case.AccountId}
03b. Single/Start Date Value	{!Get_Case.Start_Date__c}
04a. End Date Label	{!Get_Case.AccountId}
04b. End Date Value	{!Get_Case.End_Date__c}
05. Default Month Shown	{!Get_Case.Default_Formula__c}
06. Duration	2
10. Number of months to show	2
11. Show Clear Date Button	{!GlobalConstant.False}
12. Show Weekends	{!GlobalConstant.False}
13. Show Months side by side	{!GlobalConstant.True}
14. Show Start/End Date Boxes	{!GlobalConstant.True}
15. Show Today Button	{!GlobalConstant.False}
16. Allow End Date Before Start Date	{!GlobalConstant.False}
17. Display Only	{!GlobalConstant.False}





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January 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

API Name

DMComponent

01. Header Label  **!**  
DateMaster Standard Flow Component

02. Date Types (SS, DR or FD)  **!**  
FD

03a. Single/Start Date Label  **!**  
{!Get\_Case.AccountId}

03b. Single/Start Date Value  **!**  
{!Get\_Case.Start\_Date\_c}

04a. End Date Label  **!**  
{!Get\_Case.AccountId}

04b. End Date Value  **!**  
{!Get\_Case.End\_Date\_c}

05. Default Month Shown  **!**  
{!Get\_Case.Default\_Formula\_c}

06. Duration  **!**  
2

10. Number of months to show  **!**  
2

11. Show Clear Date Button  **!**  
{!\$GlobalConstant.False}

12. Show Weekends  **!**  
{!\$GlobalConstant.False}

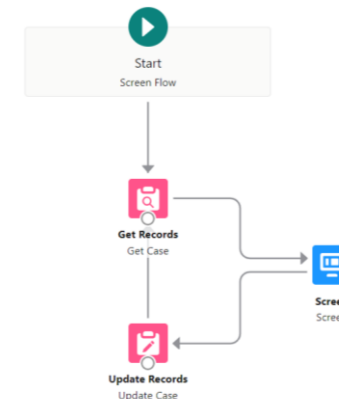
13. Show Months side by side  **!**  
{!\$GlobalConstant.True}

14. Show Start/End Date Boxes  **!**  
{!\$GlobalConstant.True}

15. Show Today Button  **!**  
{!\$GlobalConstant.False}

16. Allow End Date Before Start Date  **!**  
{!\$GlobalConstant.False}

17. Display Only  **!**  
{!\$GlobalConstant.False}





Simple Scheduling/Selectable Dates is enabled by using a record collection within the screen flow.

### Flow Record Collection

Selectable Date/Start Date	End Date(s)
2024-04-01	2024-04-01,2024-04-01
2024-04-02	2024-04-02
2024-04-05	2024-04-05, 2024-04-06, 2024-04-07
2024-04-06	2024-04-06,2024-04-07



- Record collection is simply a list of dates being passed into DateMaster
- Can be only Single/Start Dates or date pairs (Start and End Dates)

Configure DateMaster to meet your business needs



# The DateMaster Flow Component (Premium) with Simple Scheduling/Selectable Dates has 22 fields for extensive configuration.

- 7 Core Setup Fields
- 4 Record Collection Fields
- 3 Label Customization
- 2 Behavioral Customization Fields
- 6 Visualization Customization Fields

The configuration form contains the following fields:

- 0: \*API Name (Selectable\_Dates)
- 00: \*Summary Table Object API Name (Summary Data)
- 1: 01. Header Label (Installation Schedule)
- 2: 02. Date Types (SS, DR or FD) (DR)
- 3a: 03a. Single/Start Date Label (Installation Start Date)
- 3b: 03b. Single/Start Date Value ({!Get\_Case.Start\_Date\_c})
- 4a: 04a. End Date Label (Installation Completion)
- 4b: 04b. End Date Value ({!Get\_Case.End\_Date\_c})
- 5: 05. Default Month Shown ({!Get\_Case.Default\_Date\_c})
- 6: 06. Duration (4)
- 10: 10. Number of months to show (2)
- 11: 11. Show Clear Date Button ({!\$Global.Constant.True})
- 12: 12. Show Weekends ({!\$Global.Constant.True})
- 13: 13. Show Months side by side ({!\$Global.Constant.True})
- 14: 14. Show Start/End Date Boxes ({!\$Global.Constant.True})
- 15: 15. Show Today Button ({!\$Global.Constant.True})
- 16: 16. Allow End Date Before Start Date ({!\$Global.Constant.False})
- 17: 17. Display Only ({!\$Global.Constant.False})
- 20: 20. Selectable Date Options (SEL, NOT, EDD) (EDD)
- 21: 21. Selectable Dates Collection ({!Get\_Summary\_Dates})
- 22: 22. Start Date field on Record Collection Object (Text\_Start\_Date\_c)
- 23: 23. End Date field on Record Collection Object (End\_Dates\_Text\_c)

The flow component displays two side-by-side calendars for February 2024 and March 2024. Below the calendars are two date input fields: "Installation Start Date" (Feb 15, 2024) and "Installation Completion" (Feb 20, 2024). At the bottom right, there are buttons for "Clear Dates", "Today", and "Next".



# The DateMaster Premium Flow Component has seven fields for core setup.

- 0. API Name – Salesforce Standard field for all screen components
- 00. Summary Table Object API Name – this is a required field and you must select the same object that is used in your record collection.
- 02. Date Types: This is where you select the type of date that you are working with. Options are:
  - Single Date – only one date is displayed/selected by user
  - Date Range (Selectable) – this is where user will select both start and end dates
  - Date Range (Fixed duration) – this is where the duration (# of days) of an appointment is known. The users selects the start date and DateMaster calculates and returns the end date
- 03b. Single/Start Date Value: this can be either a retrieved date (from Get statement) a flow variable/date formula or a fixed date.
- 04b. End Date Value: this can be either a retrieved date (from Get statement) a flow variable/date formula or a fixed date.
- 05. Default Month Shown: this can be either a retrieved date (from Get statement) a flow variable/date formula or a fixed date. Upon component load, DateMaster will show the month/months based upon the following logic:
  - If there is an entered start date, DateMaster will display that month.
  - If there is an entered end date (but no start date), DateMaster will display that month. This applies to Date ranges only.
  - If neither start date or end date is entered, DateMaster will display the Default Date.
  - If none of the start date, end date or default date is filled in, DateMaster will display the current month
- 06. Duration: this can be either a retrieved date (from Get statement) a flow variable/date formula or a fixed date.

The image shows a configuration screen for the DateMaster Premium Flow Component. It consists of two main panels. The left panel is a summary view with numbered callouts (0, 00, 2, 3b, 4b, 5, 6) pointing to specific fields. The right panel is a detailed configuration view with numbered callouts (0, 00, 2, 3b, 4b, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23) pointing to each individual field.

**Left Panel (Summary View):**

- 0: API Name (Selectable\_Dates)
- 00: Summary Table Object API Name (Summary Data)
- 2: Date Types (DR)
- 3b: Single/Start Date Value ((!Get\_Case.Start\_Date\_\_c))
- 4b: End Date Value ((!Get\_Case.End\_Date\_\_c))
- 5: Default Month Shown ((!Get\_Case.Default\_Date\_\_c))
- 6: Duration (4)

**Right Panel (Detailed Configuration View):**

- 0: API Name (Selectable\_Dates)
- 00: Summary Table Object API Name (Summary Data)
- 01: Header Label (Installation Schedule)
- 02: Date Types (SS, DR or FD) (DR)
- 03a: Single/Start Date Label (Installation Start Date)
- 03b: Single/Start Date Value ((!Get\_Case.Start\_Date\_\_c))
- 04a: End Date Label (Installation Completion)
- 04b: End Date Value ((!Get\_Case.End\_Date\_\_c))
- 05: Default Month Shown ((!Get\_Case.Default\_Date\_\_c))
- 06: Duration (4)
- 07: Number of months to show (2)
- 08: Show Clear Date Button (!\$Global.Constant.True)
- 09: Show Weekends (!\$Global.Constant.True)
- 10: Show Months side by side (!\$Global.Constant.True)
- 11: Show Start/End Date Boxes (!\$Global.Constant.True)
- 12: Show Today Button (!\$Global.Constant.True)
- 13: Allow End Date Before Start Date (!\$Global.Constant.False)
- 14: Display Only (!\$Global.Constant.False)
- 15: Selectable Date Options (SEL, NOT, EDD) (EDD)
- 16: Selectable Dates Collection (!Get\_Summary\_Dates)
- 17: Start Date field on Record Collection Object (Text\_Start\_Date\_\_c)
- 18: End Date field on Record Collection Object (End\_Dates\_Text\_\_c)



# The DateMaster Premium Flow Component has an additional four fields for setup.

## 20. Selectable Date Options (SEL, NOT, EDD)

- SEL – Dates within the record collection are presented as selectable. Any dates not in the record collection will not be selectable
- NOT – Dates within the record collection are presented as NOT selectable. Any dates not in the record collection will be selectable
- EDD – this is where available end dates are dependent upon the selected start date.

21. Selectable Dates Collection – select the record collection that contains the dates to be used

22. Start Date field on Record Collection Object – this is the API name of the start date field in the Record Collection Object. This must be a TEXT field

23. End Date field on Record Collection Object – this is the API name of the end date field in the Record Collection Object. This must be a TEXT field

20. Selectable Date Options (SEL, NOT, EDD)  
EDD

21. Selectable Dates Collection  
{!Get\_Summary\_Dates}

22. Start Date field on Record Collection Object  
Text\_Start\_Date\_\_c

23. End Date field on Record Collection Object  
End\_Dates\_Text\_\_c

\*API Name  
Selectable\_Dates

\*Summary Table Object API Name  
Summary Data

01. Header Label  
Installation Schedule

02. Date Types (SS, DR or FD)  
DR

03a. Single/Start Date Label  
Installation Start Date

03b. Single/Start Date Value  
{!Get\_Case.Start\_Date\_\_c}

04a. End Date Label  
Installation Completion

04b. End Date Value  
{!Get\_Case.End\_Date\_\_c}

05. Default Month Shown  
{!Get\_Case.Default\_Date\_\_c}

06. Duration  
4

10. Number of months to show

11. Show Clear Date Button  
{!\$Global.Constant.True}

12. Show Weekends  
{!\$Global.Constant.True}

13. Show Months show by side  
{!\$Global.Constant.True}

14. Show Start/End Date Boxes  
{!\$Global.Constant.True}

15. Show Today Button  
{!\$Global.Constant.True}

16. Allow End Date Before Start Date  
{!\$Global.Constant.False}

17. Display Only  
{!\$Global.Constant.False}

20. Selectable Date Options (SEL, NOT, EDD)  
EDD

21. Selectable Dates Collection  
{!Get\_Summary\_Dates}

22. Start Date field on Record Collection Object  
Text\_Start\_Date\_\_c

23. End Date field on Record Collection Object  
End\_Dates\_Text\_\_c



Fields “2. Date Type” and “20. Selectable Dates Option” work in conjunction to drive desired functionality.

Selectable Date Type	Description	2. Date Type	20. Selectable Date Option	Record Collection Field(s) Used
Single Dates	Only a single date is selected.	SS	SEL or NOT	Start Date Only
Date Ranges (Start and End Selectable)	The same dates are available for both start and end.	DR	SEL or NOT	Start Date Only
Date Ranges (Fixed Duration)	User selects start date then end date is automatically selected based upon defined duration	FD	SEL or NOT	Start Date Only
End Date Dependent Upon Start Date	User Selects Start Date. End dates available are based upon selected start date.	DR	EDD	Start Date and End Date(s)



# The second Selectable Dates configuration field is a record collection that list the dates.

The Selectable Date Collection field is a record collection. This record collection has records for each date with that date in a text format of YYYY-MM-DD (Value returned by TEXT(date)).

If you have selected “End Date Dependent Upon Start Date” then each record in the collection must have a second TEXT field that contains the acceptable End Dates for each Start Date. The acceptable End Dates should be in a comma separated date text format. (Ex: YYYY-MM-DD,YYYY-MM-DD,...)

TEXT field required for all Selectable Dates



TEXT field Required for EDD (End Date Dependent upon Start Date)



Record Number	Selectable Date/Start Date	End Date(s)
1	2024-04-01	2024-04-01,2024-04-01
2	2024-04-02	2024-04-02
3	2024-04-05	2024-04-05, 2024-04-06, 2024-04-07
4	2024-04-06	2024-04-06,2024-04-07
5	2024-04-07	2024-04-07
6	2024-04-09	2024-04-09
7	2024-04-13	2024-04-13





# The DateMaster Premium Flow Component has three label and two behavioral customizations.

## 3 Label Customizations

- 2. Header Label
- 4. Start Date Label
- 6. End Date Label

## 2 Behavioral Customization Fields

- 16. Allow End Date before Start Date – selecting this box enables a user to select an end date before a start date when in the Date Range (Selectable) date type.
- 17. Display Only – selecting this sets the DateMaster component to only display information and removes the ability for the user to change the selected dates

The configuration panel includes the following fields:

- 1. \*API Name: Selectable\_Dates
- \*Summary Table Object API Name: Summary Data
- 01. Header Label: Installation Schedule
- 02. Date Types (SS, DR or FD): DR
- 03a. Single/Start Date Label: Installation Start Date
- 03b. Single/Start Date Value: {{Get\_Case.Start\_Date\_\_c}}
- 04a. End Date Label: Installation Completion
- 04b. End Date Value: {{Get\_Case.End\_Date\_\_c}}
- 05. Default Month Shown: {{Get\_Case.Default\_Date\_\_c}}
- 06. Duration: 4
- 10. Number of months to show: 2
- 11. Show Clear Date Button: {{Global.Constant.True}}
- 12. Show Weekends: {{Global.Constant.True}}
- 13. Show Months side by side: {{Global.Constant.True}}
- 14. Show Start/End Date Boxes: {{Global.Constant.True}}
- 15. Show Today Button: {{Global.Constant.True}}
- 16. Allow End Date Before Start Date: {{Global.Constant.False}}
- 17. Display Only: {{Global.Constant.False}}
- 20. Selectable Date Options (SEL, NOT, EDD): EDD
- 21. Selectable Dates Collection: {{Get\_Summary\_Dates}}
- 22. Start Date field on Record Collection Object: Text\_Start\_Date\_\_c
- 23. End Date field on Record Collection Object: End\_Dates\_Text\_\_c

The flow component shows two side-by-side calendars for February 2024 and March 2024. The date Feb 20, 2024 is highlighted in red. Below the calendars, there are two date input fields: "Installation Start Date" (Feb 15, 2024) and "Installation Completion" (Feb 20, 2024). Buttons for "Clear Dates", "Today", and "Next" are visible.



# The DateMaster Premium Flow Component has six fields for visualization customization.

## 6 Visualization Customization Fields

- Number of months to show – this is a selection of either 1 or 2 or any flow field that contains a number.
- Show Clear Date(s) Button – this button will clear any selected values from the start and end date.
- Show Weekends – when checked, weekends are shown. When unchecked, weekends are not shown. This impacts fixed duration ranges in that if a start date is Friday and duration = 1, end date will be Monday.
- Show Months side by side – this controls whether 2 months are stacked or presented side-by-side
- Show Start/End Boxes – this controls the visibility of the Start Date and End Date labels and boxes.
- Show Today Button – this controls the visibility of the “Today” button. When pressed this button selects current date.

The configuration panel includes the following fields:

- \* API Name: Selectable\_Dates
- \* Summary Table Object API Name: Summary Data
- 01. Header Label: Installation Schedule
- 02. Date Types (SS, DR or FD): DR
- 03a. Single/Start Date Label: Installation Start Date
- 03b. Single/Start Date Value: {{Get\_Case.Start\_Date\_c}}
- 04a. End Date Label: Installation Completion
- 04b. End Date Value: {{Get\_Case.End\_Date\_c}}
- 05. Default Month Shown: {{Get\_Case.Default\_Date\_c}}
- 06. Duration: 4
- 10. Number of months to show: 2
- 11. Show Clear Date Button: {{Global.Constant.True}}
- 12. Show Weekends: {{Global.Constant.True}}
- 13. Show Months side by side: {{Global.Constant.True}}
- 14. Show Start/End Date Boxes: {{Global.Constant.True}}
- 15. Show Today Button: {{Global.Constant.True}}
- 16. Allow End Date Before Start Date: {{Global.Constant.False}}
- 17. Display Only: {{Global.Constant.False}}
- 20. Selectable Date Options (SEL, NOT, EDD): EDD
- 21. Selectable Dates Collection: {{Get\_Summary\_Dates}}
- 22. Start Date field on Record Collection Object: Text\_Start\_Date\_c
- 23. End Date field on Record Collection Object: End\_Dates\_Text\_c

The component displays two side-by-side calendars for February 2024 and March 2024. The February calendar shows dates 1 through 29, with date 20 highlighted in red. The March calendar shows dates 1 through 31. Below the calendars are two date input boxes: "Installation Start Date" (Feb 15, 2024) and "Installation Completion" (Feb 20, 2024). At the bottom right, there are buttons for "Clear Dates", "Today", and "Next".



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- DateMaster Overview
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    - Flow Component - Standard
  - **Selectable Dates**
    - Flow Component - Premium
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    - Summary Tables
- Frequently Asked Questions



# Improving performance for Selectable Dates

Gathering and/or summarizing the data to determine Selectable Dates within your Flow may result in long wait times for the Flow to be presented.

There are several actions that can be taken to improve the speed of the flow where DateMaster is being used. These include:

- Smart Queries
- Good Flow Design
- Summary Tables



Being “smart” about the data that you bring in for selectable dates is the first step to improving performance.

Some things to think through:

- “Meaningful” Date Range
  - Requested by customers – if customers typically look for availability within days or weeks, don’t bring in months or years of data.
  - Where constraints occur – use selectable dates in the same timeframe where your organization typically “runs out” of resources
  - Future only – if you are scheduling for the future, don’t pull in historic dates
- Other scope to consider narrowing by:
  - Location/Geography
  - Types of services



Your flow design can meaningfully impact the speed of getting the correct information into DateMaster.

Some things to consider in flow design:

- Scope/number of records being brought into the flow
- Standard Flow Constraints: SOQL Queries, DML Statements, etc.
- Loops
  - Try to minimize the number of elements in any loop
  - Avoid nested loops or minimize them

Summary Tables are the best way to minimize the “effort” required at run time to get the correct data into your flow.



- Summary tables gather and update required information as that information changes versus gathering and updating at run time for the component.
- Examples of where summary tables are recommended:
  - Very large source data sets (ex. a car rental company with multiple types of cars across many locations)
  - Where multiple resources/objects are used to determine dates to be used in DateMaster (ex. Delivery and install of equipment. Delivery person, delivery vehicle, installers and equipment must all be available)
  - End Date Dependent (EDD) since determining these dates often requires a nested loop



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# What are Summary Tables and why do I need them?

## Why are Summary Tables used?

Summary Tables enable improved performance when looking to understand large amounts of data.

## What is a Summary Table?

A summary table simply “summarizes” a large amount of data into a smaller, more digestible table which is defined for your specific purpose.



# What are Summary Tables and why do I need them?

## What does this mean for DateMaster Selectable Dates?

An example... if you are renting equipment, you may have a very large number of orders for multiple pieces of the same type of equipment to rent at multiple business locations. Querying all of these orders each time you want to see if a type of equipment is available at a specific location would result in waiting time for the component to load.

So, you create a Summary Table that shows equipment availability each day at each location and query that table each time someone is looking to rent. You would also likely update this table each time a piece of equipment is rented.



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# FAQ's on DateMaster

What does DateMaster do?

How do I get DateMaster?

How much does DateMaster cost?

Do you offer discounts for non-profits? **Yes, we offer a 40% discount for non-profits. You will need a coupon to apply at checkout. You can request that coupon at: <https://appszero.com/contact/>**



# FAQ's on Selectable Dates

Do I need Selectable Dates? Selectable Dates are highly recommended when you have organization constraints that would limit the number of times a date can be selected.

How do I add Selectable Dates if I have already purchased DateMaster without Selectable Dates? That's easy, contact us here (<https://appszero.com/contact/>) and we will process an incremental payment for the additional purchase then activate Selectable Dates for you

How hard is it to use Selectable Dates? Selectable dates adds only two fields to the configuration. If you take some time to understand those fields, you should be up and running quickly.