End-User Guide

LOCAL

TIME | WEATHER | MEETINGS

Particular	Details
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First Release	16 May 2015
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Index

Application Overview

Prerequisites

Permission Sets

Configuration

- Local Time
- Preview
- Virtual Meetings Add-On
    - Section: Platform
    - Section: Activate Platform
    - Section: Test Connectivity
    - It's the final step in the configuration page and in this user gets a link to a video tutorial that shows how to add quick actions on Page Layouts and add Utility Bar. Section: Update Page Layouts And Utility Bar Setup

Local Time Component

- Embed Time Component in Account/Lead/Contact
    - Lightning Experience (LEX)
    - Salesforce Classic
- Tabs: Smart List (Account, Contact & Lead)
    - Section: Filters
    - Section: Matching results
- Local Time for Gmail Prerequisites for Gmail
- Local Time for Outlook Prerequisites
    - for outlook Local Time In Outlook:
- Meetings (Quick Action)
    - Prerequisites for Lightning Experience (LEX)
    - Create a Meeting with Quick Action button
- Options for Upcoming Meetings:-
    - Quick Response Plan
        - Event
    - In-Person Meetings Event
- Record Page

When an Event is of Type In-Person Meeting:

- When an Event is of Type Online Meeting:
- When an Event is General :
- Meetings (Utility Bar)
    - Prerequisites for Utility Bar

On clicking on Utility Bar
On Clicking On Plan Event From Utility Bar:-
In-Person Meetings From Utility Bar

Inquiries

Application Overview

"Local" for Salesforce is a Time and Meetings app, that

- Show the current local time for a particular Account, Contact, and Lead on the native record pages.
- Offers a List View tab called "Smart List" for Lead, Account, and Contact, that lets a Sales rep quickly identify the correct time to contact a prospect or customer.
- Integrates Salesforce calendar & events with popular **virtual** meeting platforms like Zoom, GoogleMeet. It lets a Salesforce user create a virtual meeting in Zoom or GoogleMeet from the standard Salesforce Event. This turbo-charges a Salesforce standard event to promote into a Zoom. The virtual meeting is created using all standard details available on the Salesforce Event record, like Title/Subject, Date/Time, and Attendees. This almost eliminates the need to re-enter the same detail in Virtual Meeting platforms like Zoom.

Prerequisites

- My Domain is configured/enabled on your org.
- If the Virtual Meetings Add-on is enabled from the Local Settings Tab, make sure you have a corporate Zoom Account ready with the required permissions.

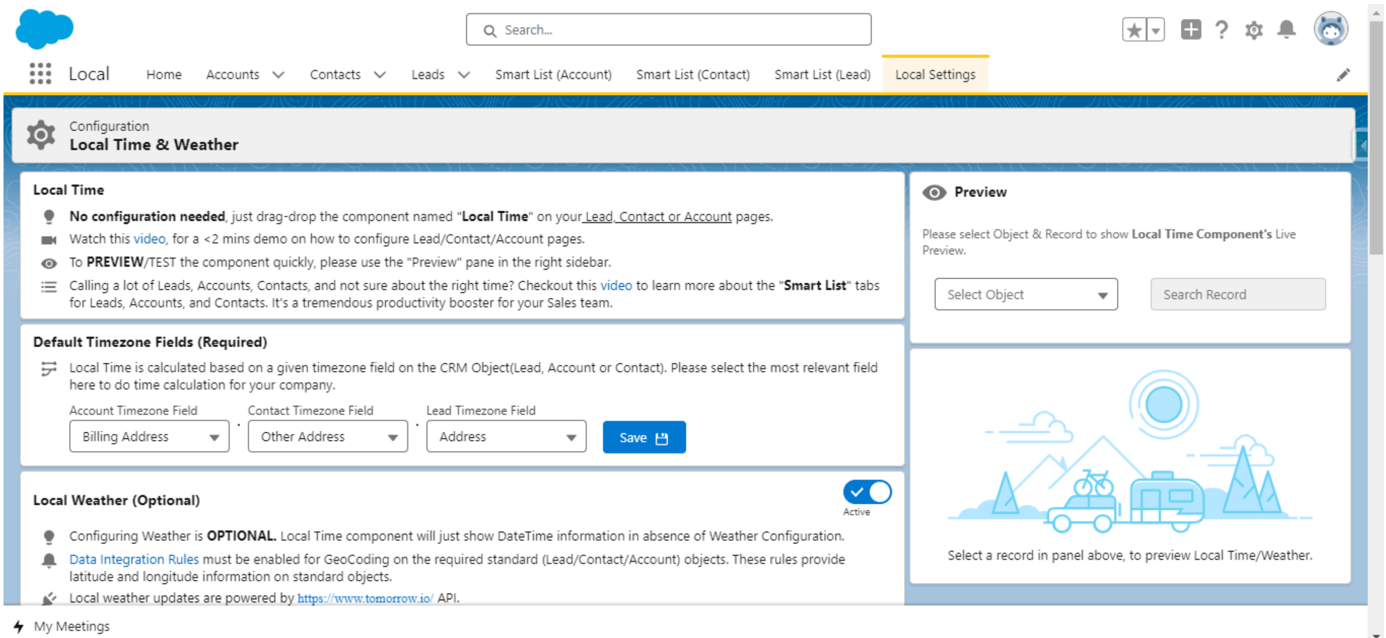
Permission Sets

Post-installation, please make sure the following permission sets are correctly assigned to respective end users.

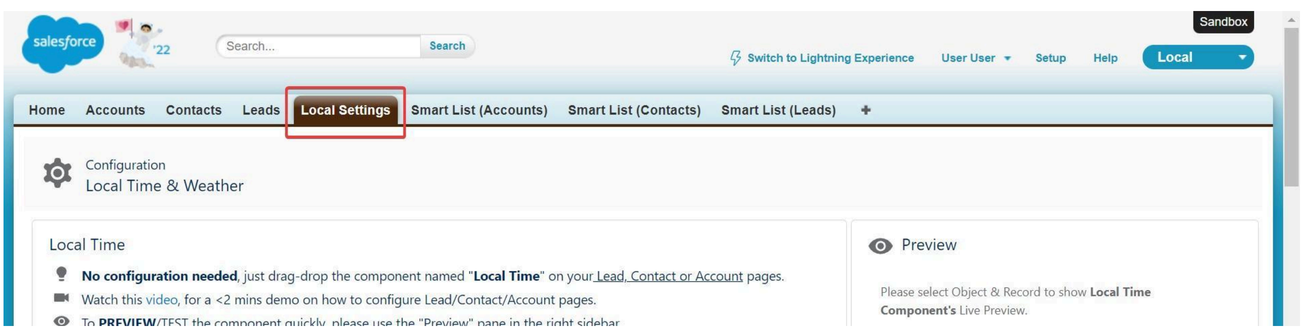
Permission Set Name	Purpose
Local App (Admin)	It's meant for admins, with required permissions to configure the app, and also use the same as an end-user. Note: *Please make sure to assign the permission to System Admin users only.*
Local App (User)	For Sales/Marketing reps or any end-user who wants to use the Smart List Tabs, and view Local Time on Lead/Contact/Account detail pages.

Configuration

Launch the “Local” app via App Launcher in Lightning Experience(LEX). Or, use Salesforce Classic’s App Menu to select the “Local” app. You will find the “Local Settings” Tab in both LEX and Classic. (Screenshots below)



Lightning Experience



Classic

Local Time

Local Time sections have all the necessary details about the local time component and configuration part for the same.

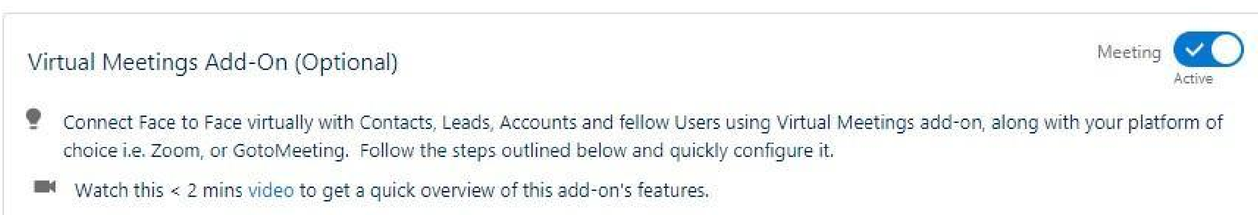
Preview

There is one more section for previewing the local time component. To get started Select the Object and Record to preview the Local Time component. Watch this short demo video to learn more about the preview section.

Virtual Meetings Add-On

Enable Virtual Meetings Add-On to integrate your Salesforce Event with Zoom, and Google Meet online meeting. (This Add-On is only visible to Admin, once admin enables the meeting platform and selects the named credentials (In **the** case of zoom and Google Meet Platform), the other salesforce users will be able to authorize themselves with the selected meeting platform.)

Note: It is user-based Authentication, Every salesforce user needs to authorize themselves with their respective meeting platform account. The meeting platform is selected by Admin from the Local Settings Tab. Admin needs to write Auth. Provider and Named Credentials while enabling the platform (For GoogleMeet and Zoom), and give access permission of named credentials to other salesforce users, so that other users can authenticate with their meeting platform account using the admin's named credentials.



The Virtual Meeting Add On section has all the necessary details about the setup meeting component and configuration of the meeting platform.

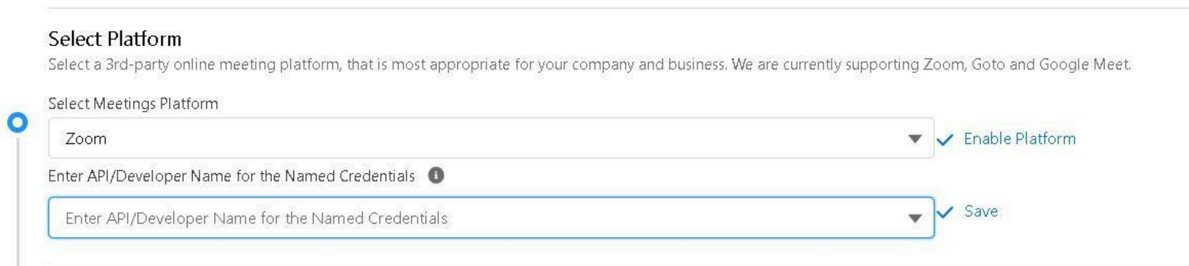
- Activate the toggle button to enable the add-on.
- Select the meeting platform to create meetings.

- Need to authorize yourself using named credentials as “per user” and authenticate. (**Note**: You need to make your own Authorization Provider and Named Credential in case of selecting GoogleMeet and Zoom Platform).
- Users can test the connection with the selected platform.
- Here is a tutorial video for the app. Please go through the [Video](#).

Section: Platform

Admin needs to select the virtual meeting platform configuration for all future event meetings. Admin can select either Zoom **or** Google Meet as their corporate meeting platform. After selecting the platform, the Admin needs to Enable the Platform. Once the Platform is enabled, then Admin needs to select the named credential for the selected platform.

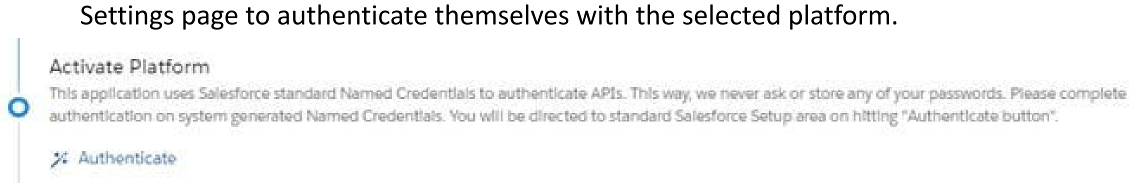
In case, the Admin hasn’t made a named credential for the selected platform, Please take help to make your own Authorization provider and Named Credentials for the selected platform from below the ‘i’ button.
[Demo for Creating Auth Provider and Named Credentials for Platform](#)



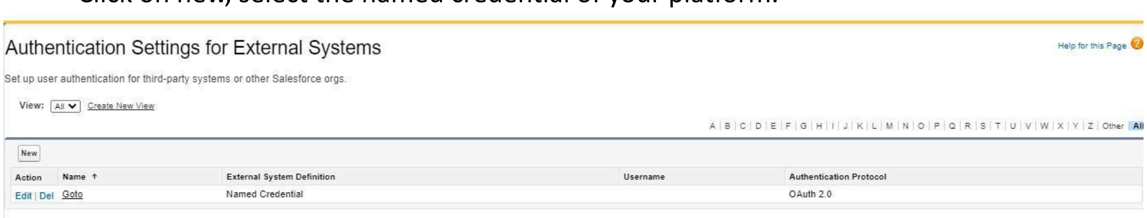
After completing the first Step, Admin and other users will be able to see the Meeting platform on the utility bar/ Quick Actions.

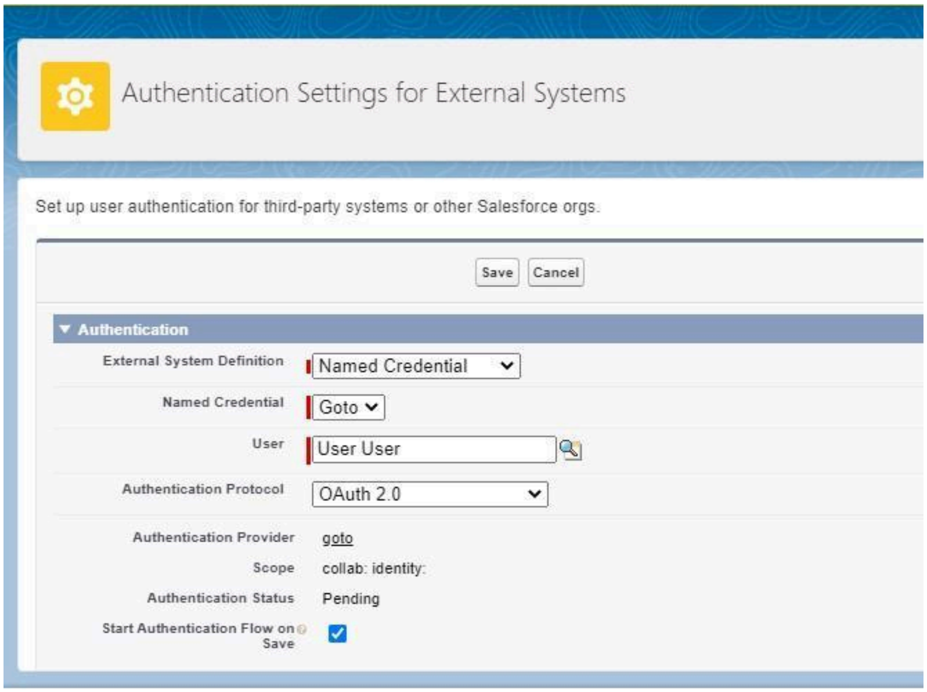
Section: Activate Platform

In this, on clicking on the Authenticate Button, Admin will be redirected to the Authentication Settings page to authenticate themselves with the selected platform.



Click on new, select the named credential of your platform.

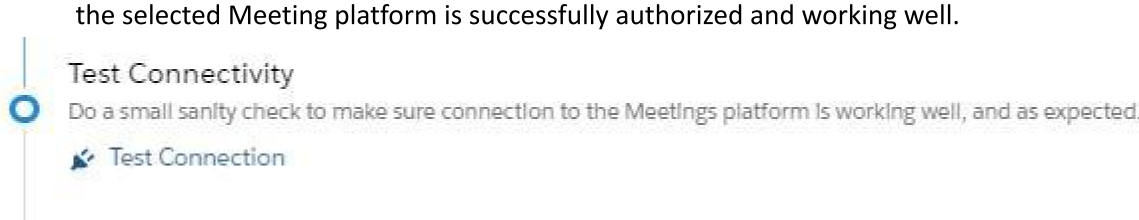




On clicking on save, you will be redirected to a page to enter your credentials for your online platform to authenticate it with Salesforce.

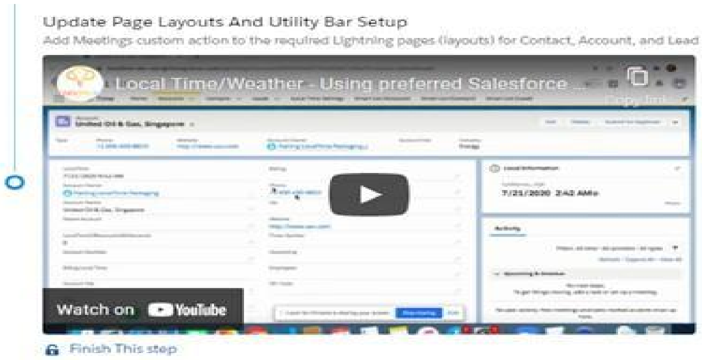
Section: Test Connectivity

In this, by clicking on the Test Connection button, the system will make sure that the connection to the selected Meeting platform is successfully authorized and working well.



Section: Test Connectivity

It's the final step in the configuration page and in this user gets a link to a video tutorial that shows how to add quick actions on Page Layouts and Utility Bar.

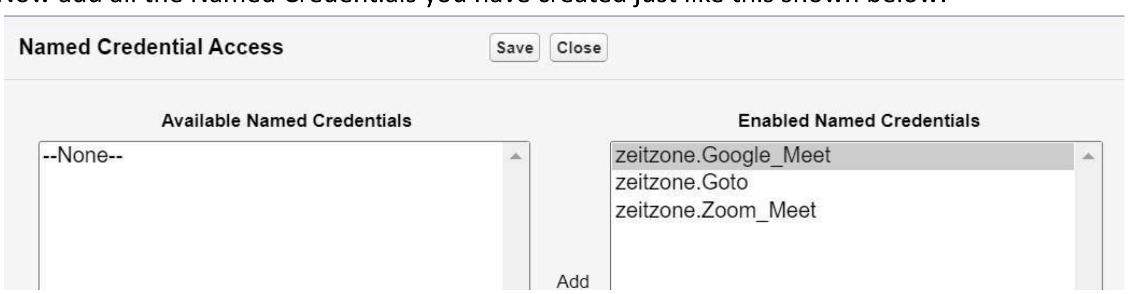


Section: Adding Named Credentials in the permission set

Now that you have created the Named Credentials for the System Administrator now it's time to give it's permission to all the Users who are going to use it. For this, you need to create a new Permission set and add the Named Credentials in it .

Please Note that this new Permission set will be in addition to the Permission Set provided in the package already.Please watch this videofor reference. Follow the steps mentioned below:

1. Go to Setup->Permission Sets->New.
2. Once you create a new Permission set , there you will find 'Named Credential Access'. Go there and edit it.
3. Now add all the Named Credentials you have created just like this shown below:

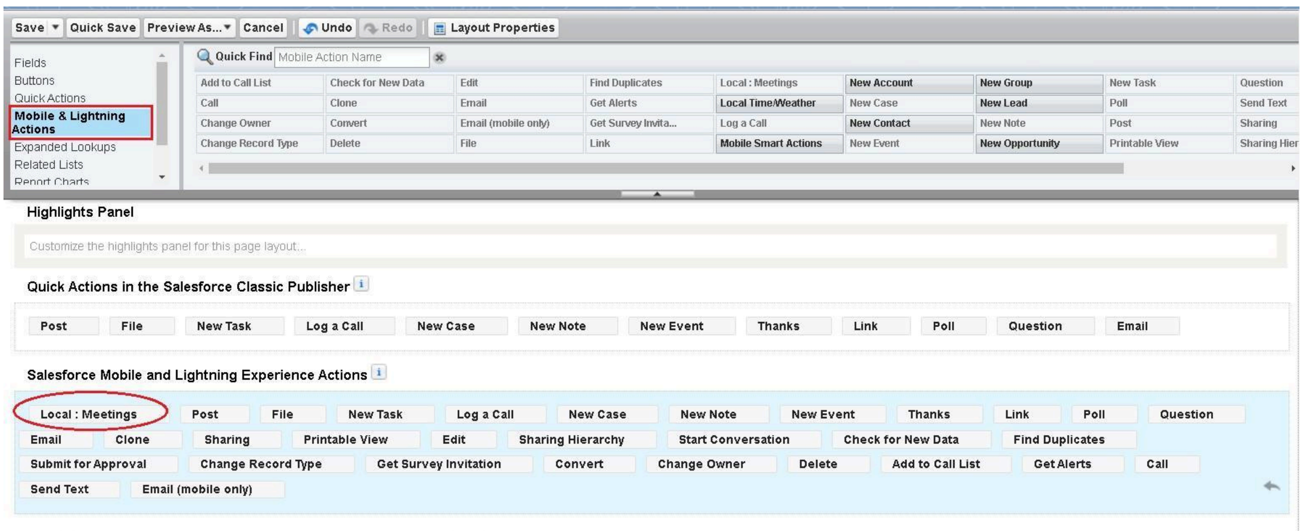


4. Now click on save and all those who are assigned to this permission set can use these Named credentials.

Section: Update Page Layouts And Utility Bar Setup

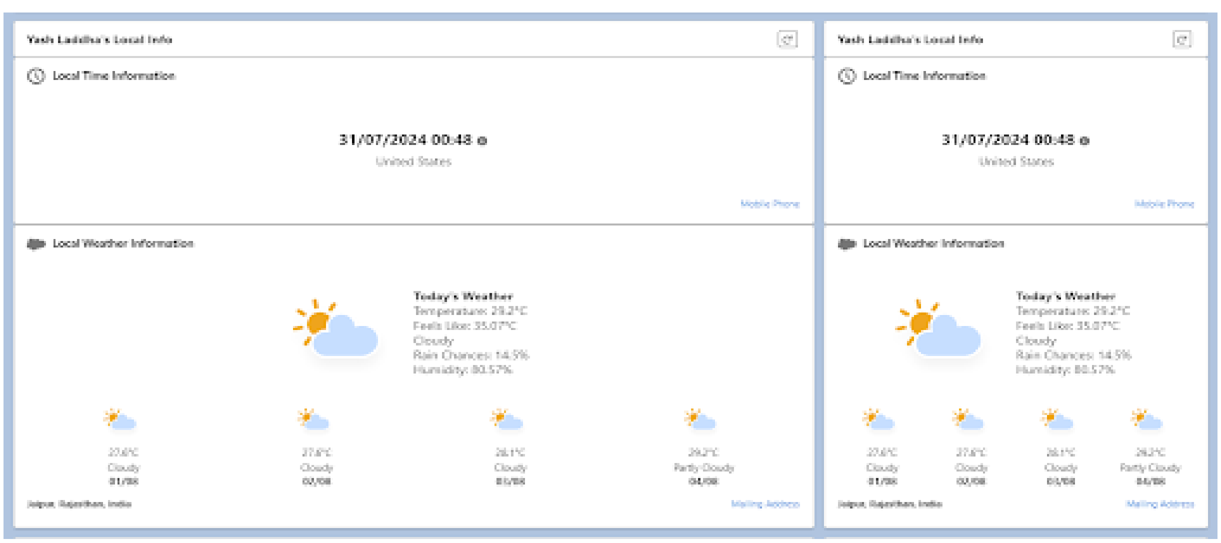
In this, the user will Update Page Layouts for Contact and Lead with Custom Action.

Users have to add 'Local: Meetings' Quick Action available in 'Mobile & Lightning Actions', under the 'Salesforce Mobile and Lightning Experience Actions' section.



For Updating the Utility Bar setup of the App. Please follow the steps mentioned [here](#).

Local Time Component



Once embedded on the record detail pages, it will show the local time. The component will read out the address/phone fields and extract the time conditions. The component is capable of handling more than one address or phone field by providing a picklist to choose the address.

One can pick a best suite address/phone field on record to view time, check this video for a quick demo.

In case no good address detail is available on the record, one can use a phone field as well, check this short demo video for details. This component is smart enough to parse the country, state code etc to figure out the closest timezone details.

Embed Time Component in Account/Lead/Contact

This section walks through the simple steps to embed the Local Time component in any of the Contact/Account/Lead detail pages.

Lightning Experience (LEX)

Here is a quick video demo of the steps. Steps are outlined below for ease of reference.

1. Go to the Lead, Contact/ Account Record Page.
2. Click on the gear icon and then click on the Edit Page.
3. From the component list, drag the “Local Time” component on the record page wherever needed.
4. It’s recommended to keep 1/3rd horizontal layout space for the component. Ideally, it’s best to keep it in the left or right sidebars.

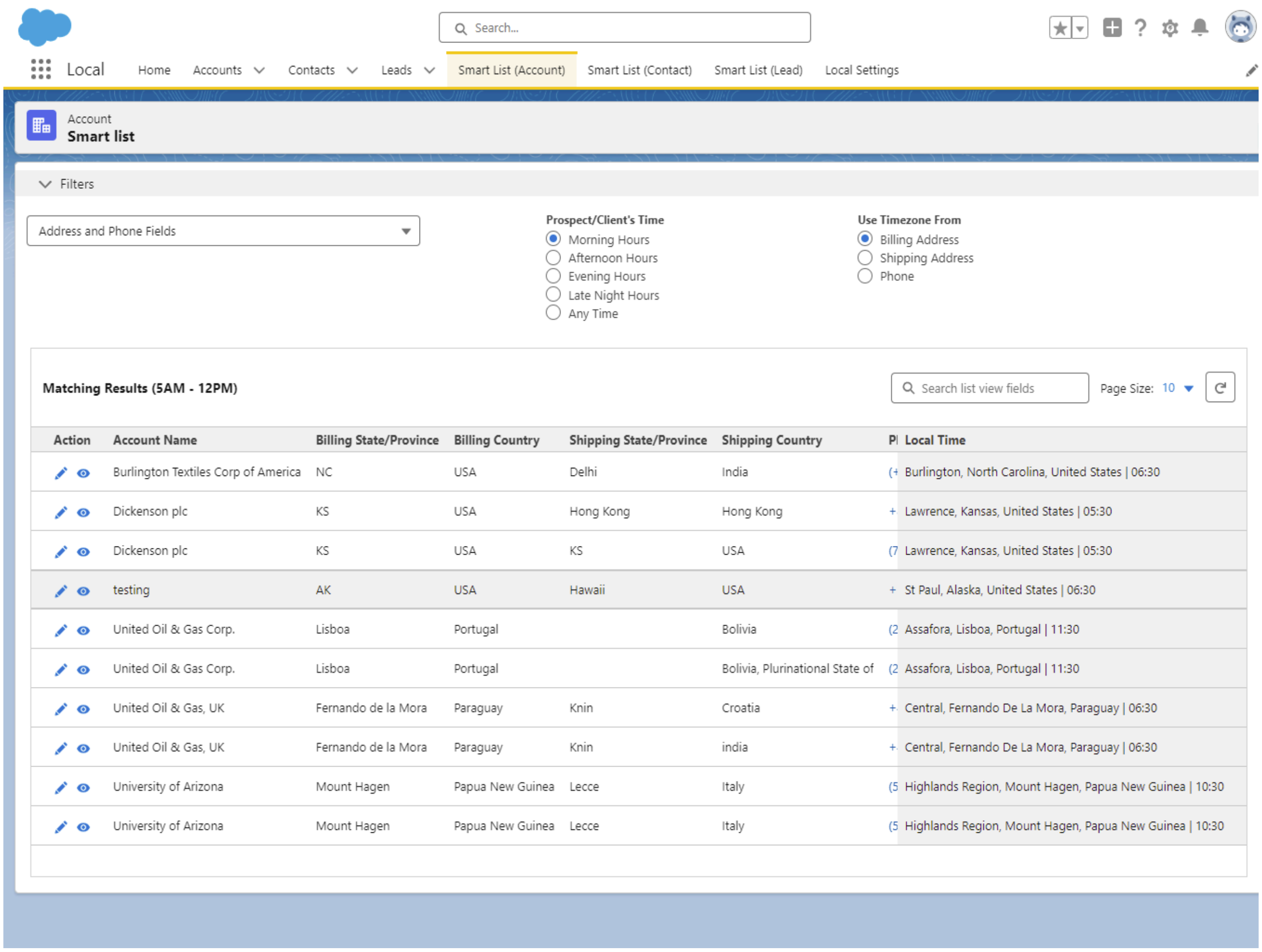
Salesforce Classic

Here is a quick video demo of the steps. The steps are outlined below for ease of reference.

1. Go to the Account, Contact/ Lead record detail page.
2. Click on the EDIT LAYOUT button, on the top right corner of the detail page.
3. Create a new section for the local time component wherever needed.
4. From the Visualforce Pages section select the localTime component and drag it into the section.
   (*Make sure you specify the height for the component at least 350 px).*
5. Click on Save.

Tabs: Smart List (Account, Contact & Lead)

Smart List is a smarter list view for Account, Contacts and Leads. It works on top of your existing List views and offers time-sensitive filters to let Sales reps decide the best time to contact the prospects/contacts/customers. This tab is available in 3 variations for Accounts, Contacts, and Leads.



Section: Filters

Watch this video for a quick overview.

1. **List View drop-down:** This dropdown shows all the List views which are available in the Org for the given Object and also fetch records on the basis of the list view, which is selected.

2. **Prospect/Client's Time**: This filters the records on the basis of the Local Time of the record and offers the following 4 choices:
    a. **Any Time**: This filter shows all the records that are available in the selected list view.

    b. **Morning Time**: This filter shows all records with local time in Morning hours.

    c. **Afternoon Time**: This filter shows all those records in which local time is of Afternoon hours.

    d. **Evening Time:** This filter shows all those records in which local time is of Evening hours.

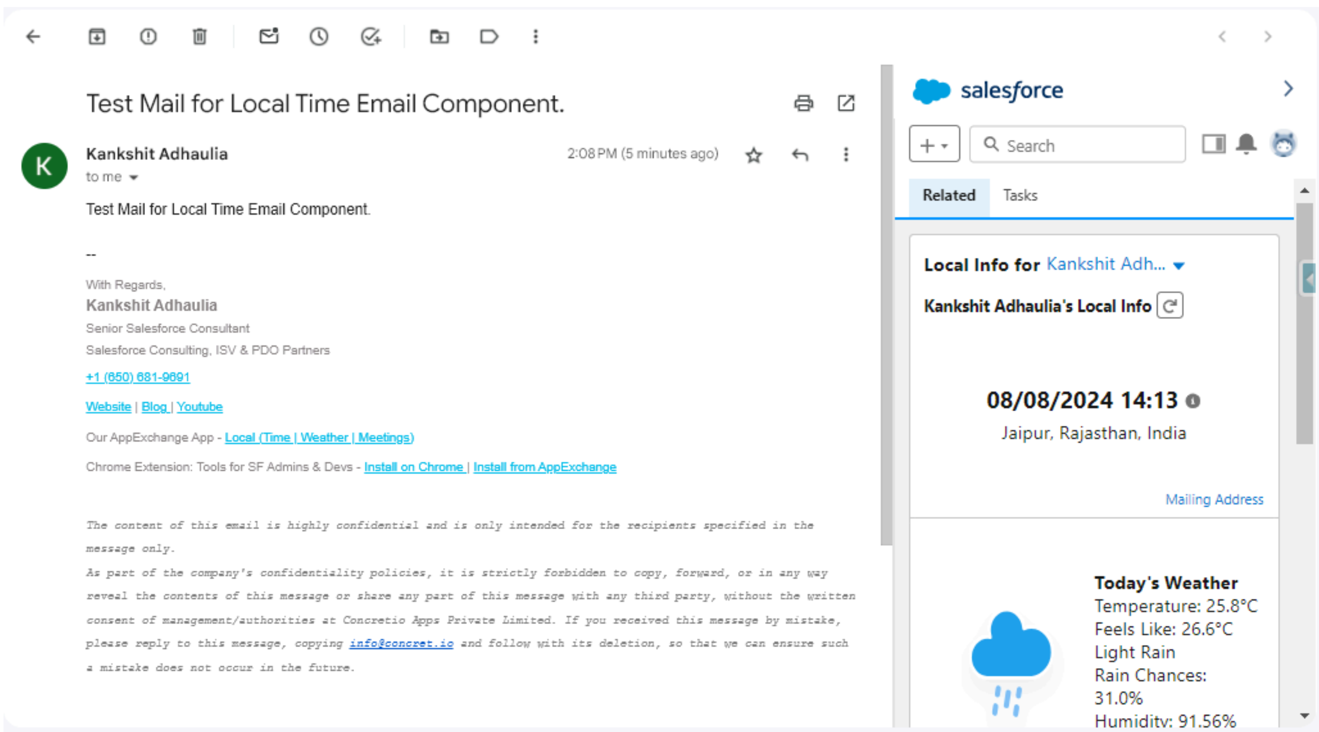
e. **Late Night Time:** This filter shows all those records in which local time is of Latenight hours.

3. **Use Timezone from:** This filter decides, out of various Phone/Address fields on Lead/Account/Contact, which one should be used to decide the best and most precise Local Time information.

Section: Matching results

This section shows the matching records based on the selected filters. Please notice the last column is frozen and it shows the local time. The advantage of the frozen last local time column comes in handy when the selected "List View" in the Filters section contains too many fields/columns.

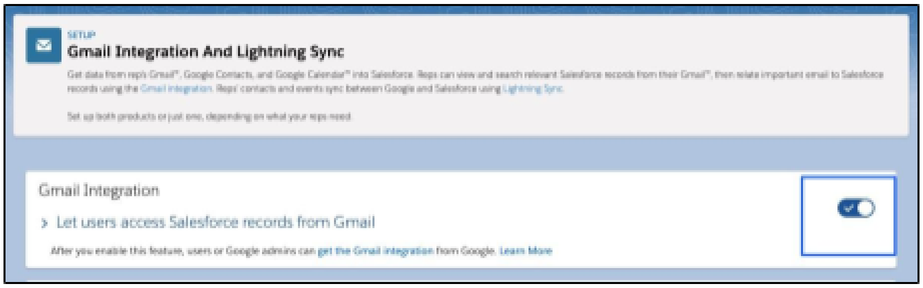
Local Time for Gmail



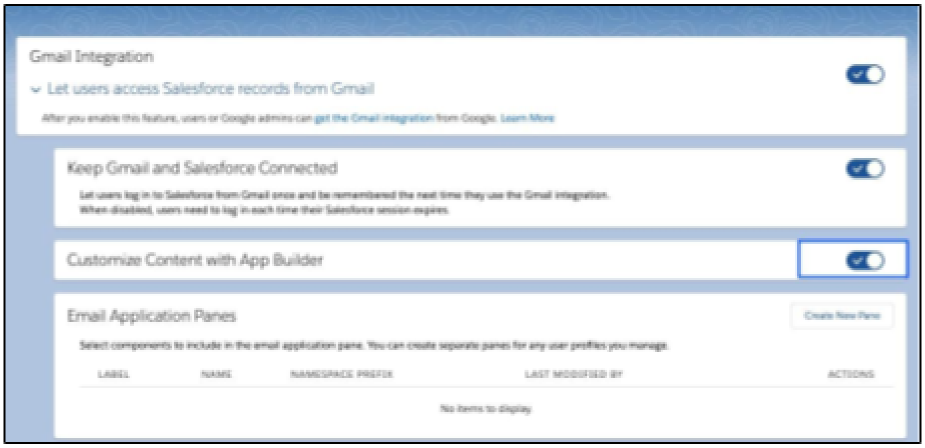
Prerequisites for Gmail

Enable the Gmail Integration in Salesforce.

- Setup> Gmail Integration > Enable the Gmail Integration.



- Gmail Integration > Enable customized content with the app builder.



- Create a new Email Application Pane (If no default pane is available) and add the **Local Time For Email** component to it. ● watch out for more info.

- Gmail to Salesforce:
  - We have to add the Gmail Chrome extension.
  - Watch out this for more info

Note: It works in Chrome with G-Suite corporate email accounts only.

Local Time for Outlook

Prerequisites for outlook

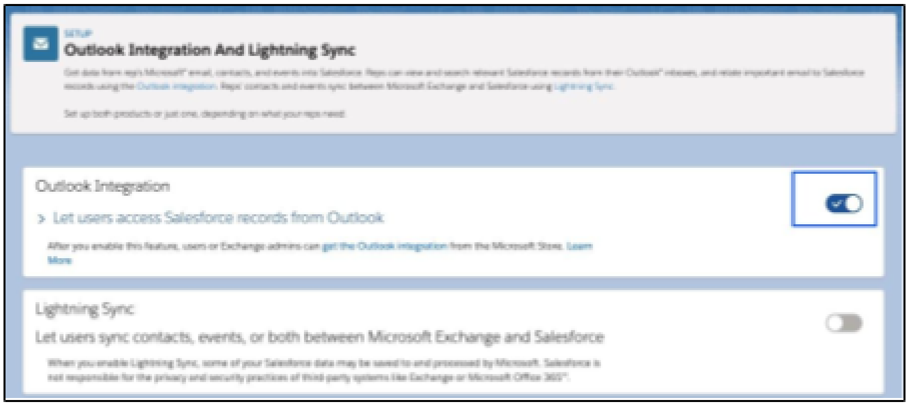
Make sure you have all the required CSP-trusted sites (watch out for more info).

- https://*.live.com
- https://*.office.com
- https://*.office365.com
- https://*.outlook.com

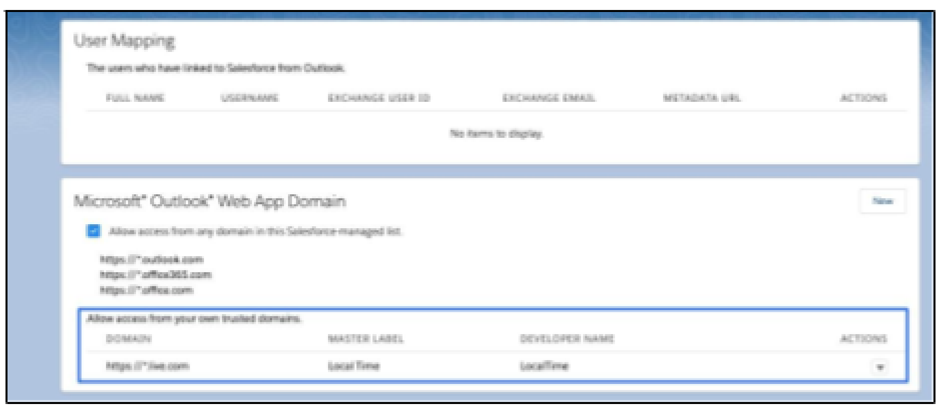
Note: The above list of generic Microsoft domains is for reference, if you use "Microsoft 365" with your custom domains, please configure a correct URL in the above settings, as per your domain configuration with Outlook.

Enable the Outlook Integration and Sync:

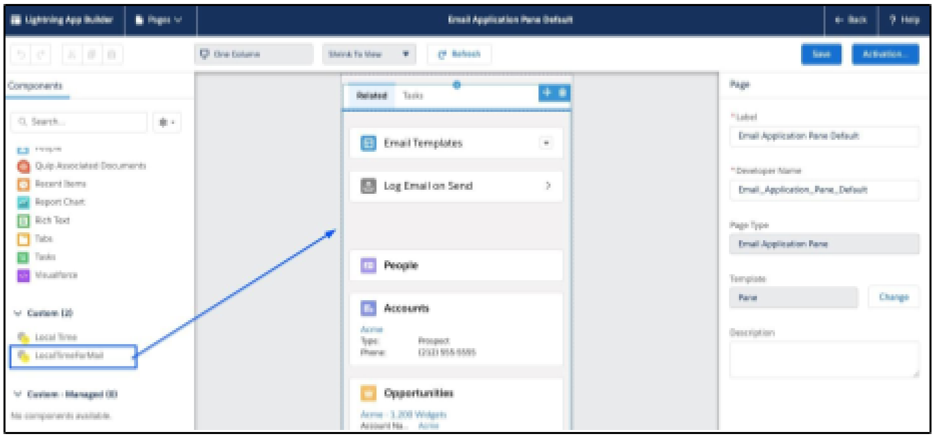
- Setup > Outlook Integration and Sync > Enable Outlook Integration.



- In the Outlook Integration section > Microsoft Outlook web App Domain > Add the required domain of ('https://*.live.com') also if not added.
  - **Note:** make sure to specify the correct domain as well if you are using any other domain too.
  - Watch out this.

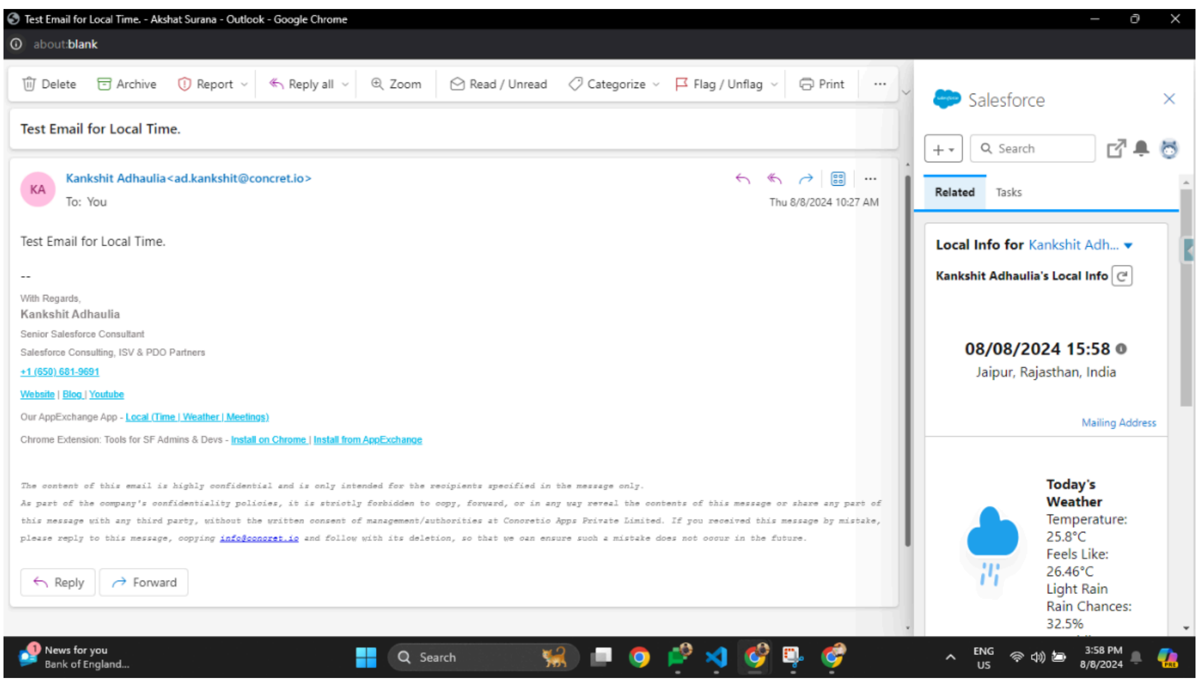


- Configure LocalTime Component for Outlook:
  0 In the Outlook Integration section > Email Pane > Add the default email pane and add the component into it and save it.
  - Watch out this.



- Outlook to Salesforce:
    - [Check it out for configuring salesforce in outlook.](#)

Local Time In Outlook:



Once embedded on the email application panes, it will show the local time, if there is any Contact/Lead with the same Email addresses as mentioned in the Outlook/Gmail mail. This component has a drop-down at the top for switching the Peoples (according to the Email addresses in the mail and only shows those which have matching contact/lead in the salesforce).

Meetings (Quick Action)

This section walks you through the simple steps to embed the “Local: Meetings” button as a quick action on the Lead/Contact record page.

Prerequisites for Lightning Experience (LEX)

Here is a quick video demo of the steps. The steps are outlined below for ease of reference.

1. Select the Lead/Contact record.
2. Click on the gear icon and then click on “Edit Object”.
3. Select the Page Layout option from the left menu bar of the Lead/Contact Object.
4. Click on the dropdown option and select “Edit”.
5. From Mobile & Lightning Actions drag the "Local: Meetings" button to the Salesforce Mobile and Lightning Experience Actions section.
6. Click on Save.

Create a Meeting with a Quick Action button

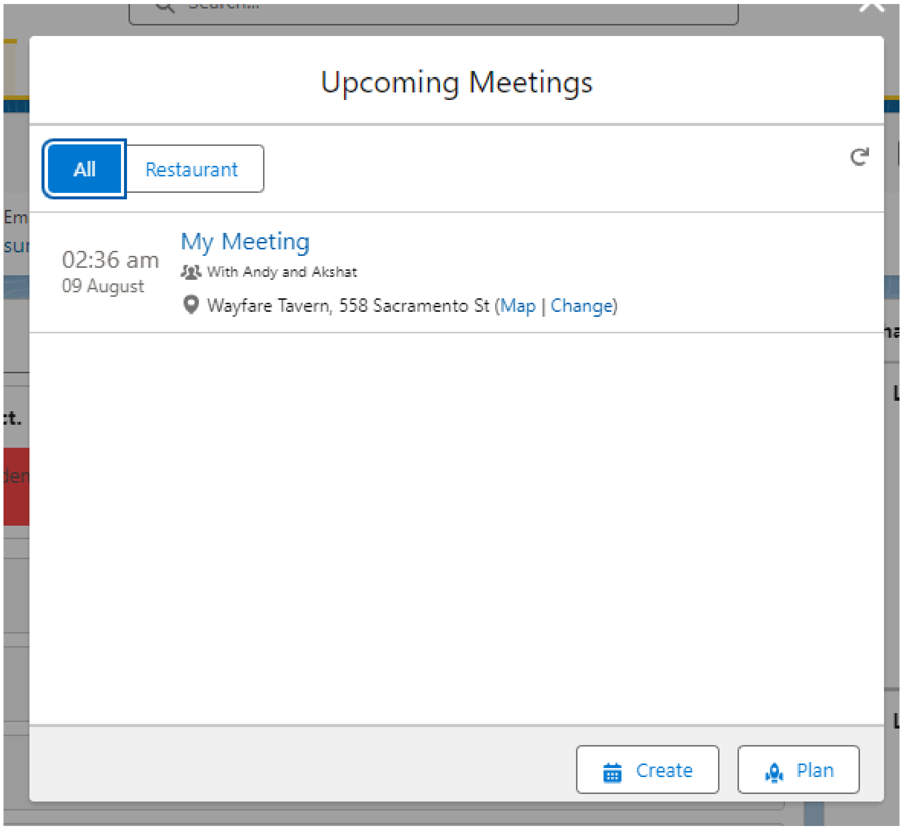
Here is a quick video demo of the steps. The steps are outlined below for ease of reference.

Local Time - Embedding Component on Salesforce Lead/Contact Layouts (Lightning Experience)

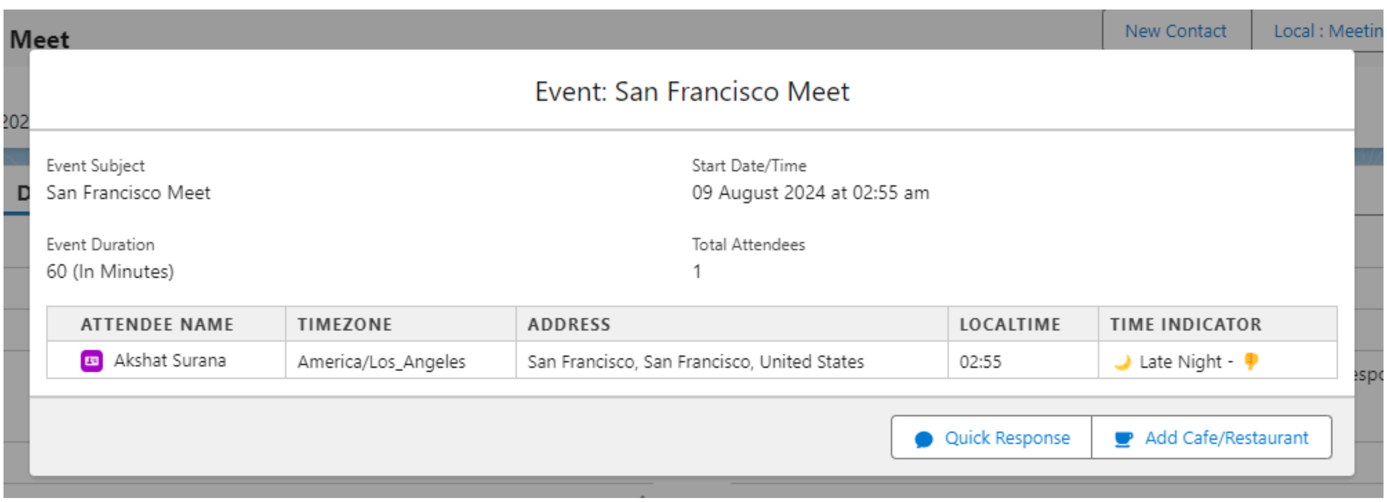
When a user clicks on the “Local: Meetings” button from the Lead/Contact record page, it will display a modal to show all upcoming **Online** and **In-Person** meetings of the Lead/Contact and have an option to Create an Event or Plan an Event.

We have the Filters in Upcoming Meetings page, for filtering the All Events, In-Person Events, and Platform Specific Online Meetings.

1. **Create Event Button:** This opens the standard record form for creating an event.
2. **Plan Event Button:** It opens the record form to create an event with an extra option to add attendees on the basis of their preferred time zones.



In-person Events have the options to Edit Location and Add Quick Response. It sends the meeting updates to all Meeting Attendees.



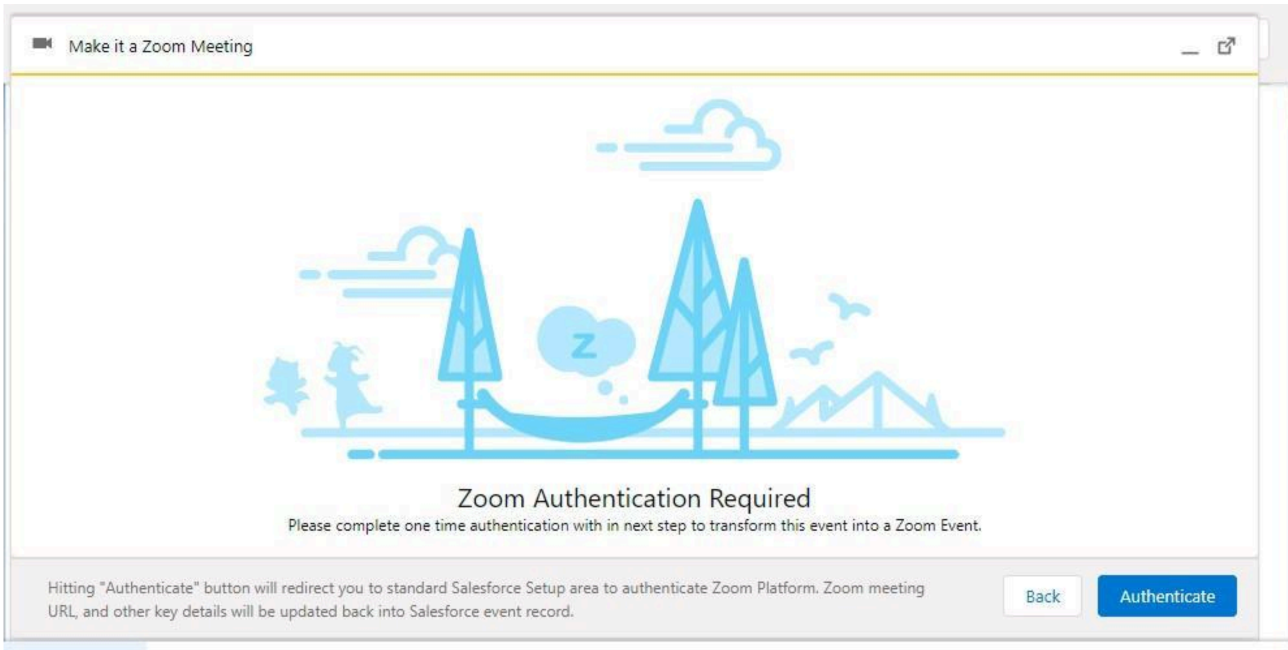
A general Event has the option to create Online Meetings (On the Meeting Platform which is selected by Admin), In-Person Meetings (To the nearest cafe/restaurant), and to send Quick Response.

Options for Upcoming Meetings:-

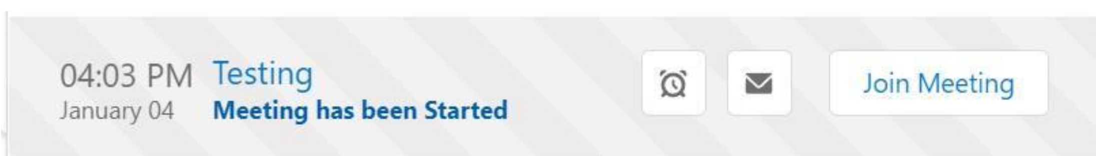
Make It a Zoom/ GoogleMeet:

It will create a meeting on the respective platform and update meeting details in the event record.

Note : If the user is not authorized to the selected meeting platform, the user will get the below screen to authenticate with the selected platform. On Clicking the Authenticate Button, the user will be redirected to the standard Salesforce Setup page to Authenticate.



All the events that are online meetings, i.e., created on any of the above-mentioned platforms have the feature of playing a buzzer sound when the meeting is going to start. This feature helps users to get reminded about the meeting when they are on some different tabs in the browser doing some different thing. At that time the event tile look like this:



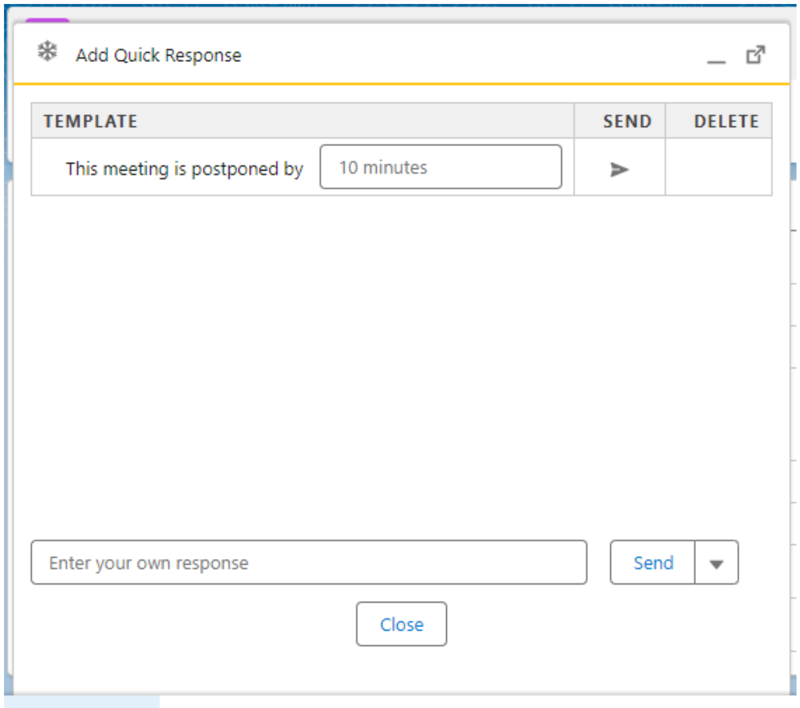
Users can click on the clock button to turn it off otherwise it automatically turns off after 5 beeps.

Add Quick Response: It will open a new modal for users to send a predefined template as a quick response to meeting attendees. Users can also create their own responses to send. This quick response will be sent as an email to the attendees.

Add Cafe/Restaurant: It will open a new modal for users to create the In-Person Meeting and choose its Location and update the meeting Details in the event record.

Quick Response

In the quick response modal, users can send a predefined template or users can create their response to send to the attendees of the meeting. Demo for Quick Response

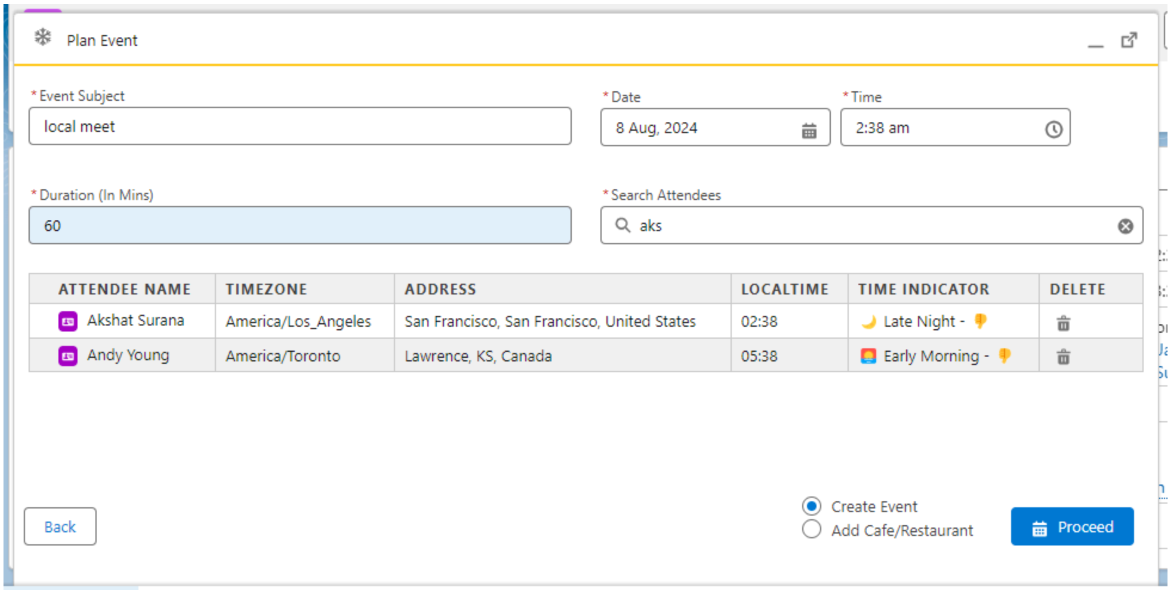


Plan Event

After clicking on the “Plan Event” button, the form displays the below-mentioned fields to be filled up by the user. Demo for Create/Plan Event

1. **Event Subject:** Subject of the planned event.
2. **Date:** Date of the planned event.
3. **Duration:** Duration of the planned event.
4. **Search Attendee:** User can find the attendees from Contact/Lead/User records. To do so, one can type the initials and hit enter which will display all the similar records.

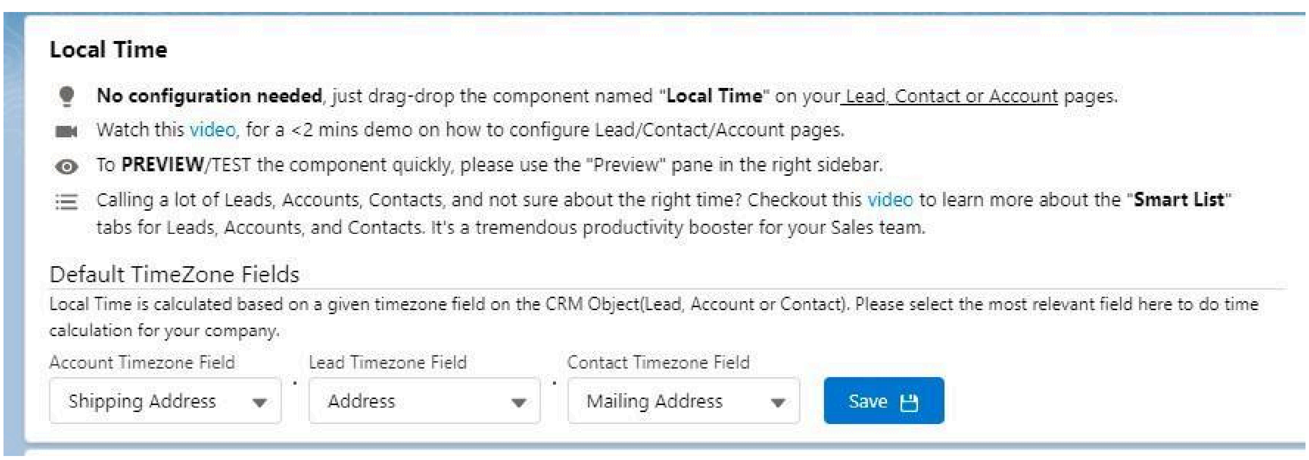
Note-: Table will be displayed below with all the selected attendees with their local time zones respective to the event start time, Time Indicator is to represent the good/bad Time for your clients for that event and an option to delete Attendee as well.



In Plan Event, Users have the option to create an Event with In-person Meeting/Platform specific Online Meeting.

On Clicking on **Create Event**, an event will be created with the details entered by the User. On Clicking on **Add Zoom/GoogleMeet Meeting**, a specific online event will be created with Join Url and Meeting Id.
On Clicking of **Add Cafe/Restaurant**, a user will redirect to create an offline event, after that specific In-person event created with Location and Location Id.

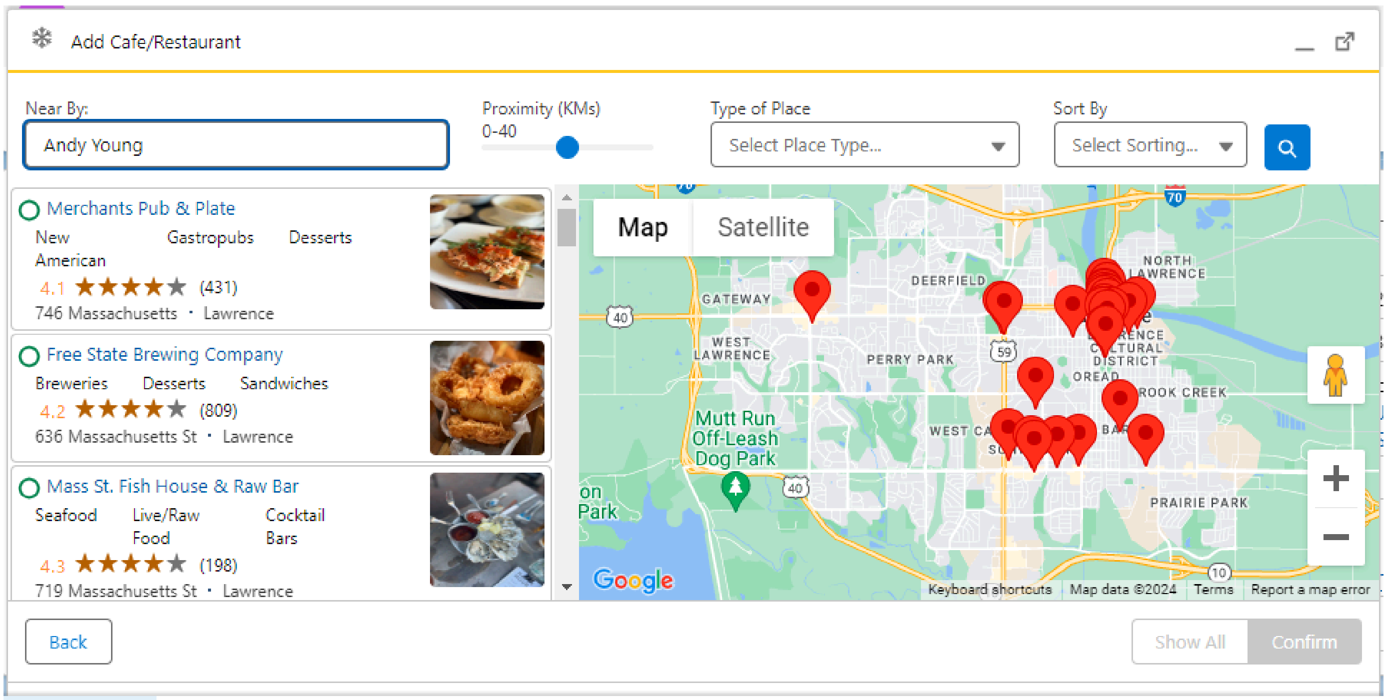
Note-: If the default address field is not selected by the Admin, the Search Attendees would show an error message. (To resolve that, Ask your Admin to set the Default fields for Account/Contact/Lead records in the Local Settings Tab, so from the default field, Local App will show the Attendees TimeZone)



In-Person Meetings

In-Person Meetings lets Sales/Marketing teams plan an in-person meeting with prospects/customers, in just a few clicks, at a location of their choice, which could be near a customer or them. The following screenshot gives a quick glimpse of the user experience:

[Demo for Offline Meeting]



1. **Back**- On clicking on Back Button, the User will be redirected to the Plan Event, can do the changes like changing the Event subject, time, and duration or add/remove attendees.
2. **Show All** - On Clicking on Show All, all places locations will be displayed on the Map.
3. **Confirm**- On Clicking on the Confirm Button, An In-Person Meeting will be created with the selected Place.

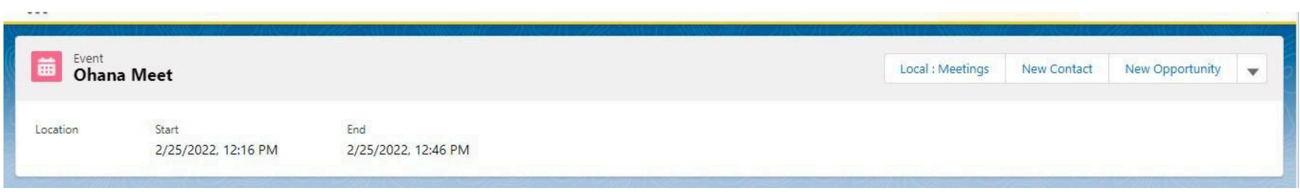
Event Record Page

Users can also view the Event Details from the Event Record page, and perform an Event in Online Meetings/ In-Person meetings. To add the 'Local: Meetings' Quick Action on the event record page. [Demo]

Follow these steps to add a Local: Meetings Quick Action on the event Record Page.

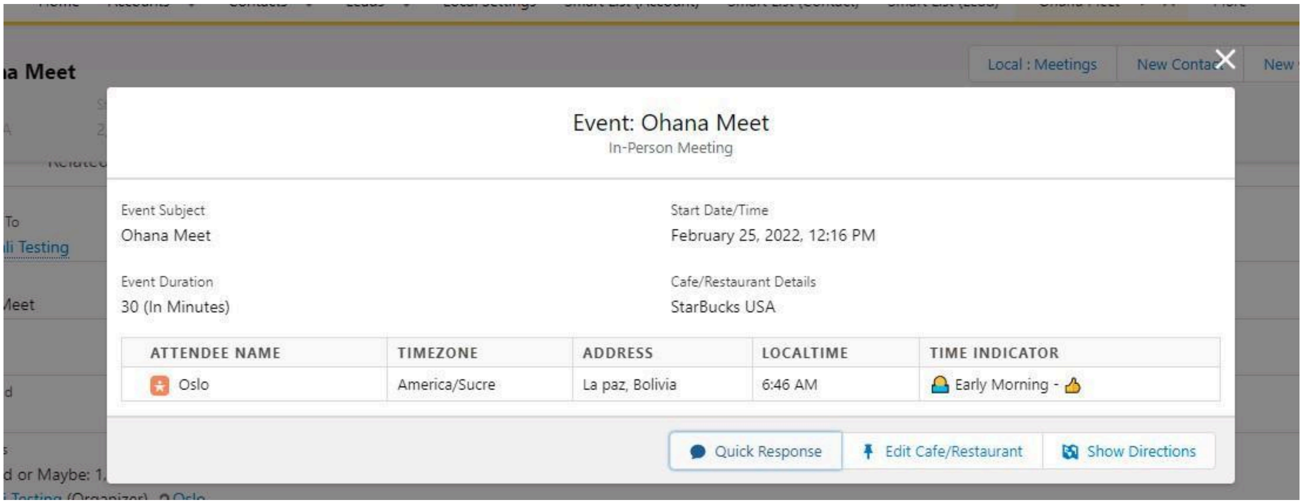
1. Select the Event record.
2. Click on the gear icon and then click on "Edit Object".
3. Select the Page Layout option from the left menu bar of the Event Object.
4. Click on the dropdown option and select "Edit".
5. From Mobile & Lightning Actions drag the "Local: Meetings" button to the Salesforce Mobile and Lightning Experience Actions section.
6. And add the 'Attendees' field in the field section.
7. Click on Save.

When the User clicks on **Local: Meetings** on the Event Record page, Event Details will be shown according to the Type of Event.



When an Event is of Type In-Person Meeting:

In-Person Meeting Event Details will be displayed like Event Subject, Event Duration, Start DateTime, Duration, Cafe/Restaurant Location, and Event Attendees as shown in the below screenshot.

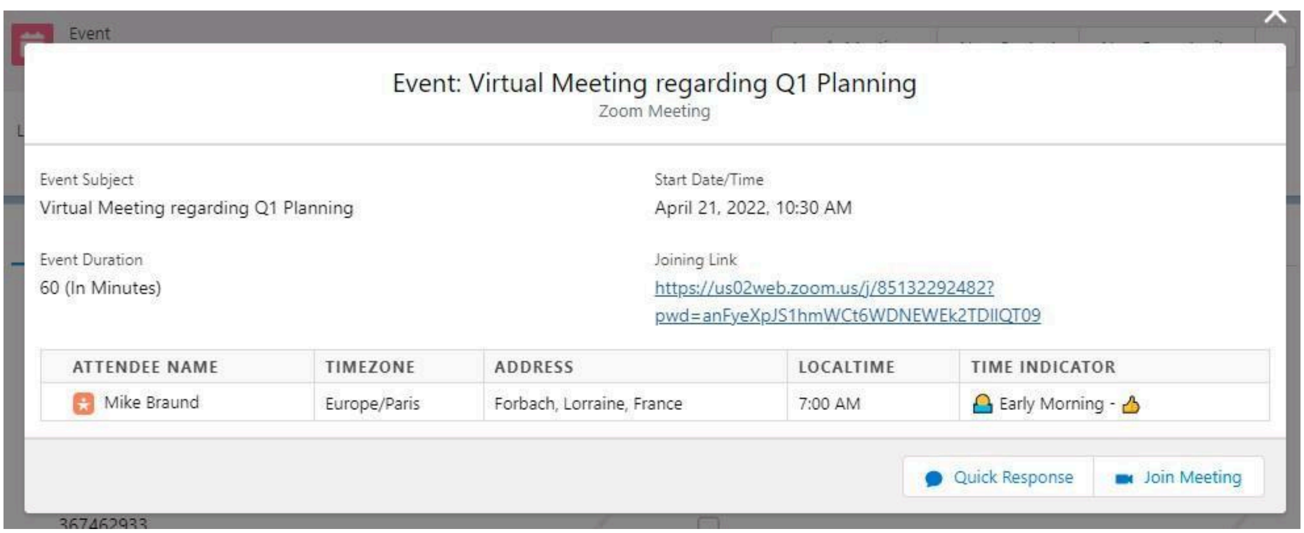


It will have the option to Change the In-Person Event Location, or Showing Directions to Event Locations, and send Meeting Updates to Attendees through Quick Responses.

When an Event is of Type Online Meeting:

Online Event Details will be displayed like Event Subject, Event Duration, Start DateTime, Joining Link, and Event Attendees as shown in the below screenshot. [Demo for Online Meeting]

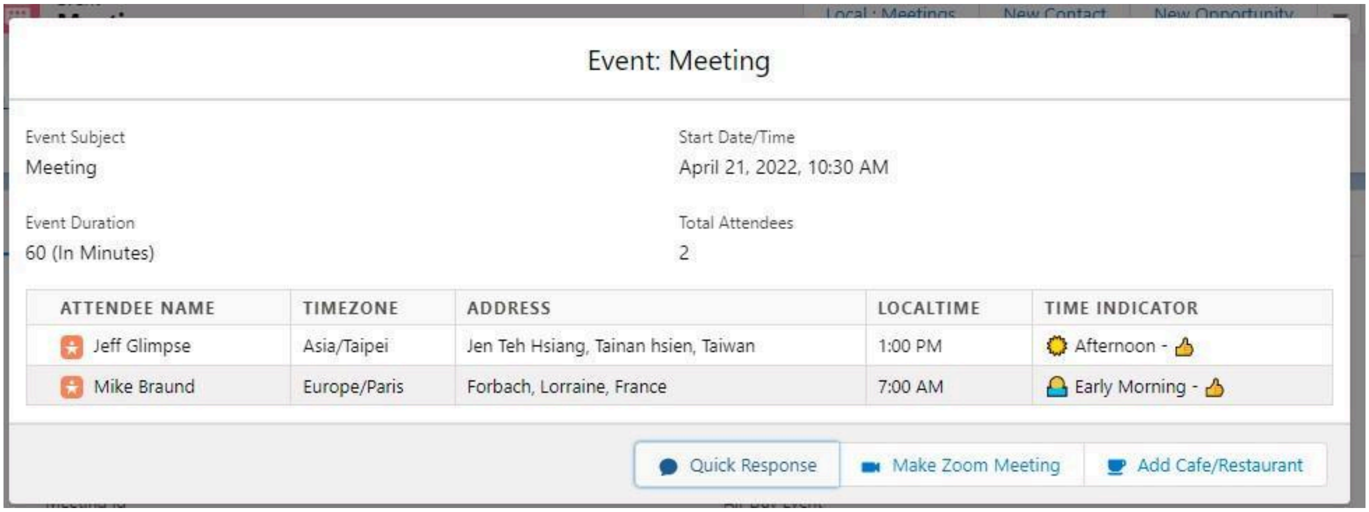
At the Header, It will show the selected Platform(Zoom/Google Meet) chosen by the User.



It will have the option to send the Updates of Meetings like Meeting Delays through Quick Responses and can Join Meet through the Join Meeting button.

When an Event is General :

Event Details will be displayed like Event Subject, Event Duration, Start DateTime, Duration, Total Attendees, and Event Attendees as shown in the below screenshot.



It will have the option to send Updates of Events to Event Attendees, Converting the Event to an Online Or In-Person Meeting. **Demo**

Meetings (Utility Bar)

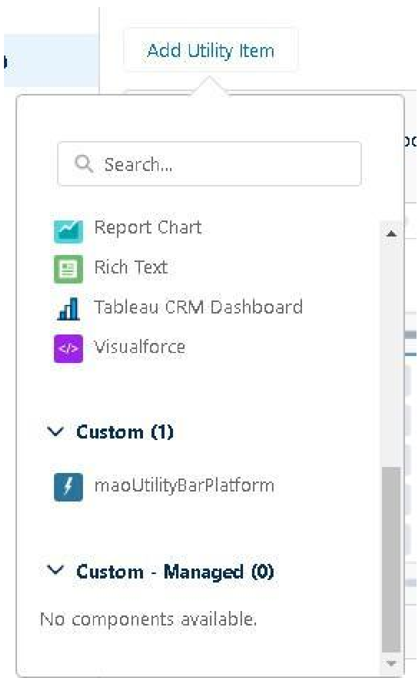
Prerequisites for Utility Bar

Steps are outlined below to enable the Utility Bar. (Quick Demo Video of Steps)

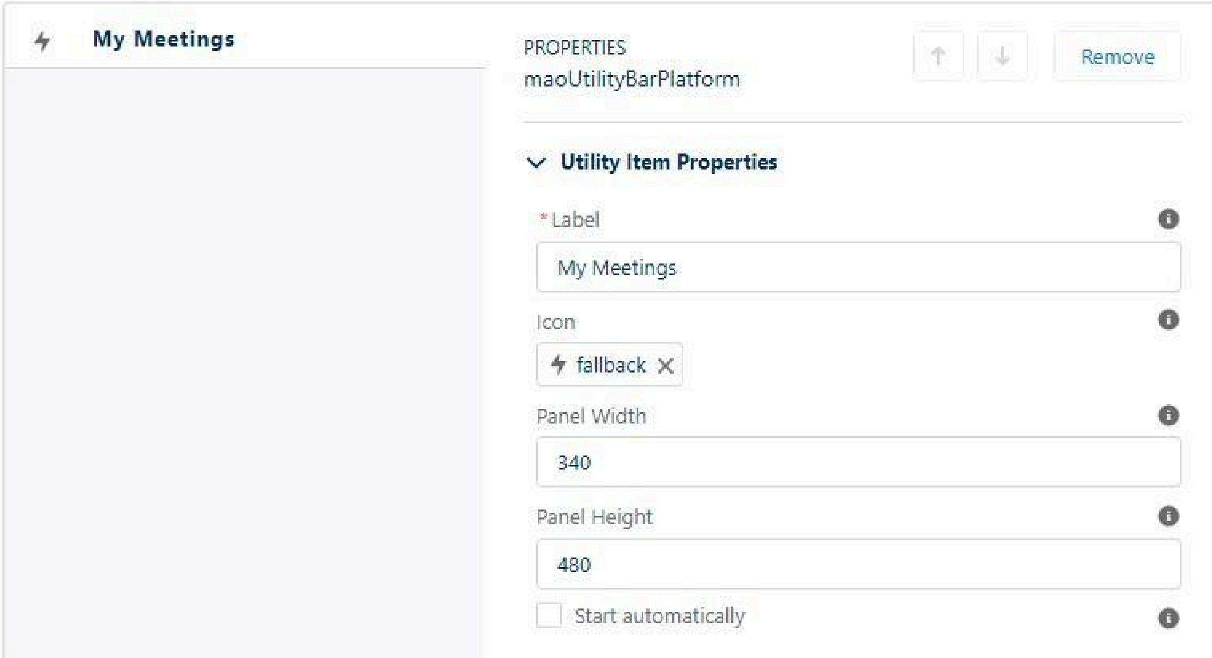
1. Click on the gear icon and then click on “Setup”.
2. Type “App Manager” in the Quick Find box and Click on App Manager.
3. From the list of “Lightning Experience App Manager”, click on the Button Menu of “Local Time” Lightning App Type and click on Edit.

4. On the Lightning App Builder page click on “Utility Items (Desktop Only)”.

5. Click on Add Utility Item, and scroll down to the “Custom” option, from here click on “maoUtilityBarPlatform”.



6. Type “My Meetings” in Label and select the “Start automatically” option and then click “Save”.



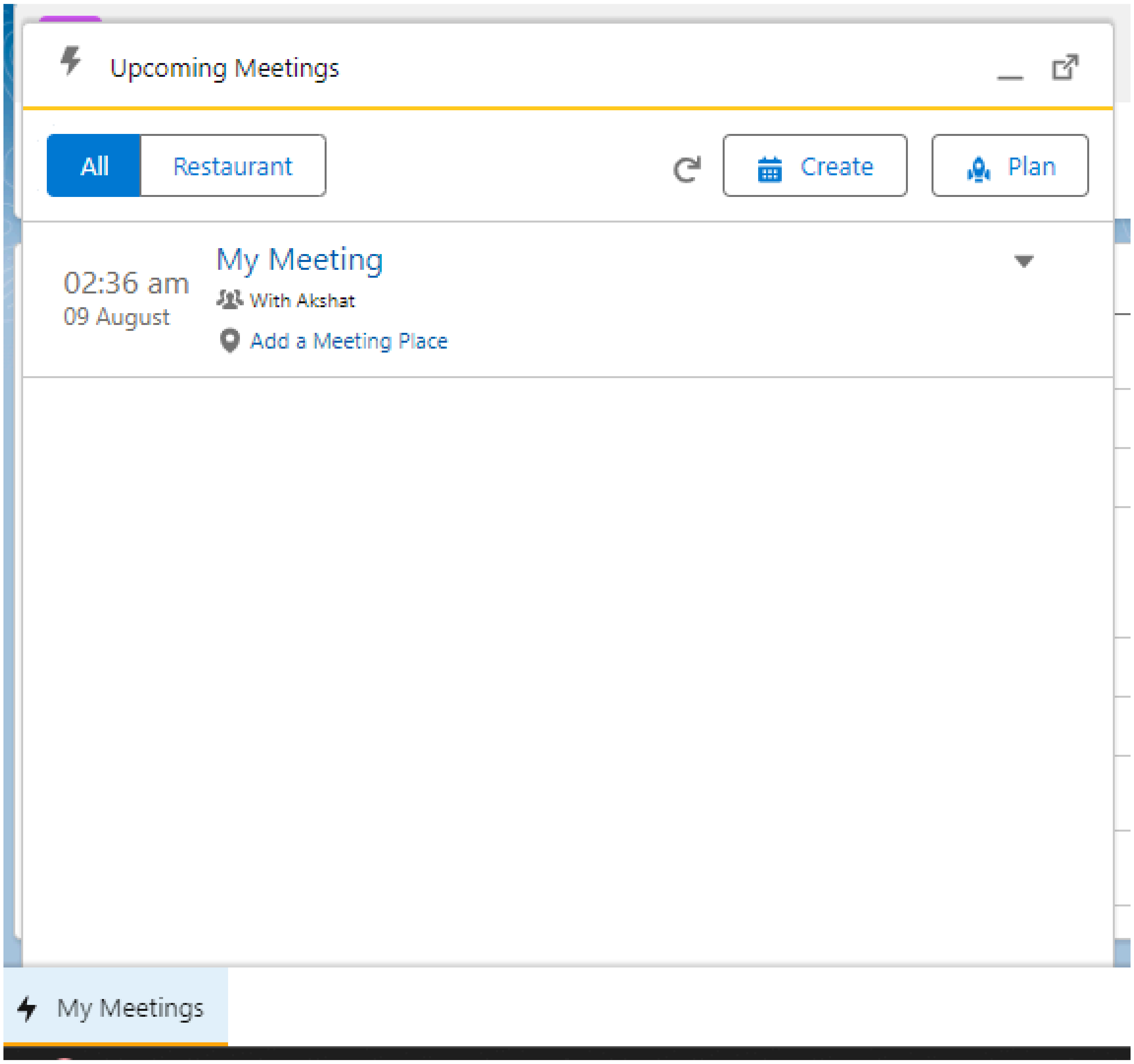
Now the “My Meeting” Utility bar would be available at the “bottom-left” throughout the Local Time App.

Note - You can add any name for your utility bar, we would prefer to use ‘My Meetings’ as it will show all your upcoming meetings.

On clicking on the Utility Bar

When a user clicks on the “Meetings”, it will display a modal to show all upcoming **Online** and **In-Person, and Normal** Events and have an option to Create an Event or Plan an Event. We have the Filters in Upcoming Meetings page, for filtering All Events, In-Person Events, and Platform Specific Online Meetings.
[Demo on Accessing Utility Bar]

1. **Create Event Button:** This opens the standard record form for creating an event.
2. **Plan Event Button:** It opens the record form to create an event with an extra option to add attendees on the basis of their preferred time zones.

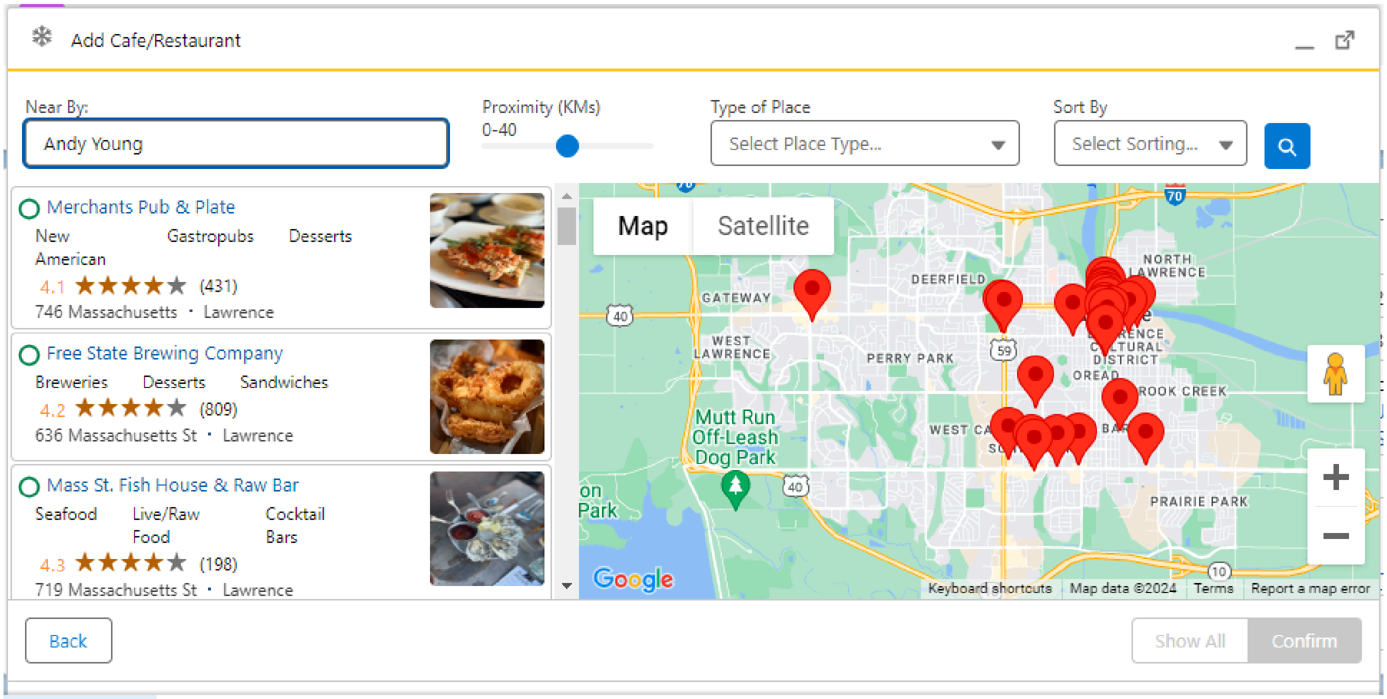


On Clicking On Plan Event From Utility Bar:-

After clicking on the “Plan Event” button, the form displays the below-mentioned fields to be filled up by the user.

5. **Event Subject:** Subject of the planned event.
6. **Date:** Date of the planned event.
7. **Duration:** Duration of the planned event.
8. **Search Attendee:** User can find the attendees from Contact/Lead/User records. To do so, one can type the initials three letters which will display all the similar records.

Note-: Table will be displayed below with all the selected attendees with their local time zones respective to the event start time, Time Indicator is to represent the good/bad Time for your clients for that event and an option to delete Attendee as well.



In Plan Event, Users have the option to create an Event with In-person Meeting/Platform specific Online Meeting.

On Clicking on **Create Event**, an event will be created with the details entered by the User.

Demo: We showed how to create an event through Plan Event In this video-[Create Event Demo]

On Clicking on **Add Zoom/GoogleMeet Meeting**, a specific online event will be created with Join Url and Meeting Id.

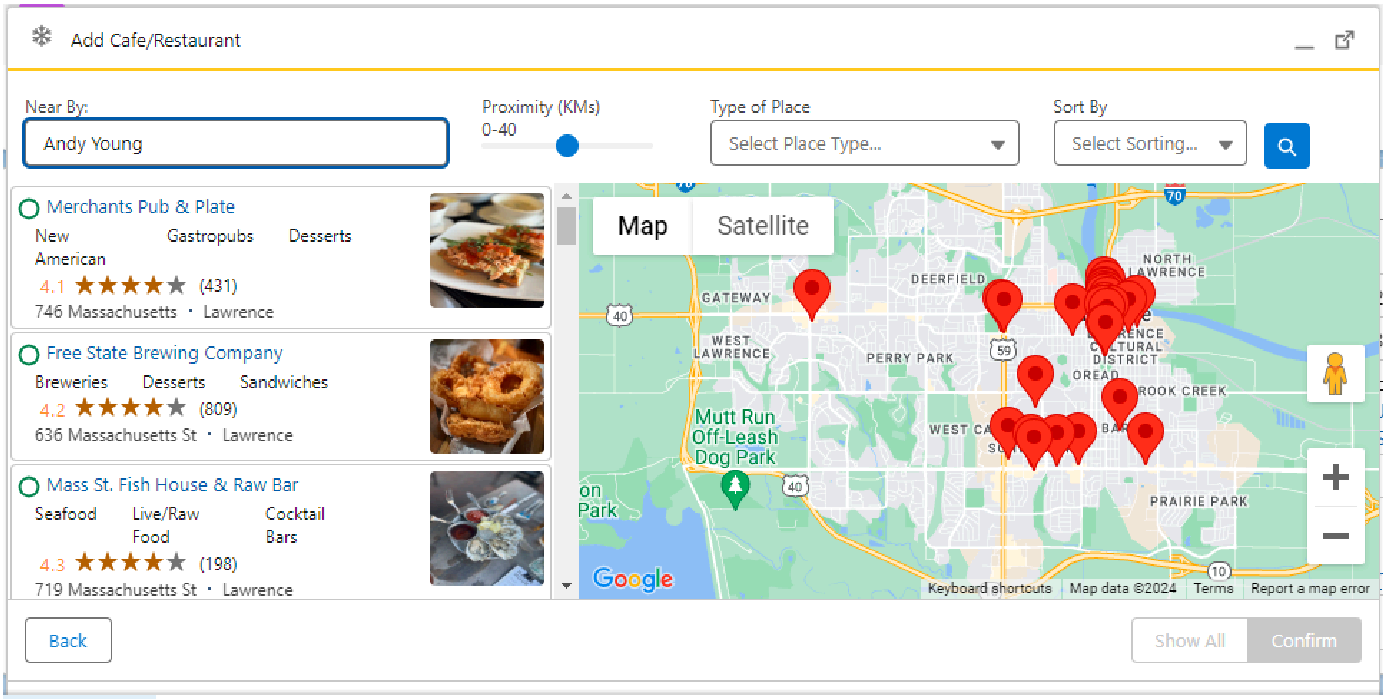
Demo: We showed how to create Zoom Meeting through Plan Event In this video-[Online Meeting Demo]

On Clicking on **Add Cafe/Restaurant**, a user will be redirected to create an offline event, after that specific In-person event created with Location and Location ID.

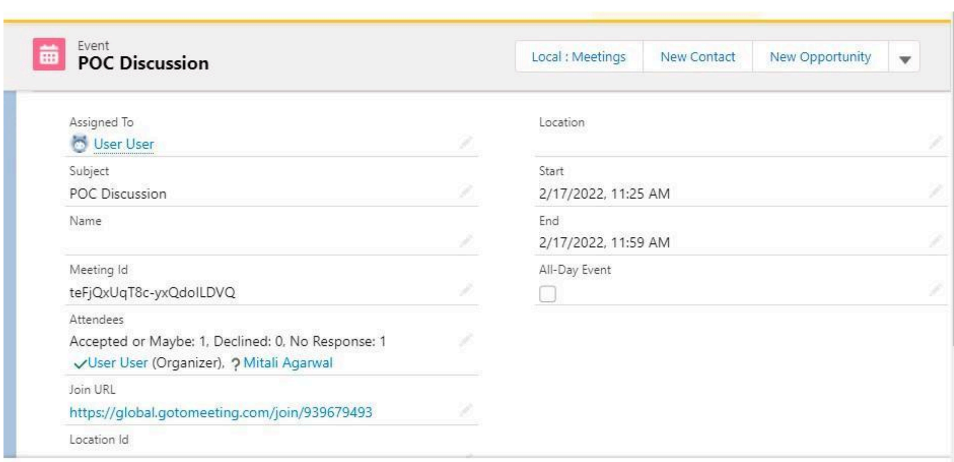
Demo: We showed how to create an In-Person Meeting through Plan Event In this video-[In-Person Meeting Demo]

In-Person Meetings From Utility Bar

In-Person Meetings lets Sales/Marketing teams plan an in-person meeting with prospects/customers, in just a few clicks, at a location of their choice, which could be near a customer or them. The following screenshot gives a quick glimpse of the user experience:



1. **Back**- On clicking on Back Button, User will be redirected to the Plan Event.
2. **Show All** - On Clicking on Show All, all places location will be displayed on the Map.
3. **Confirm**- On Clicking on Confirm Button, An In-Person Meeting will be created with the selected Place. **Note**: Users need to Add JoinUrl, Meeting, StartUrl, Location Id to see the meeting details from the Event Page Layout to show on the Event Record Page. Follow this video for the same: https://www.loom.com/share/1b5e2d2f64d04f49b491bf9005cd5f35



Inquiries

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