Meetabl App - How-To Guide

About

This guide is designed to support the end user through navigating the Meetabl application, outlining key features and details.
NB: This guide is tailored towards Salesforce Lightning Experience.

Table of contents

Support

Please contact us at hello@insightablapps.com for any support questions or issues.

Meeting Cadence

What is a Meeting Cadence?

A meeting cadence defines the frequency and period the customer is to be met, for example, every 8 weeks. Meeting cadences collates all meetings related to that customer, providing details on how many meetings took place, when the last completed meeting was and when the next scheduled meeting is.

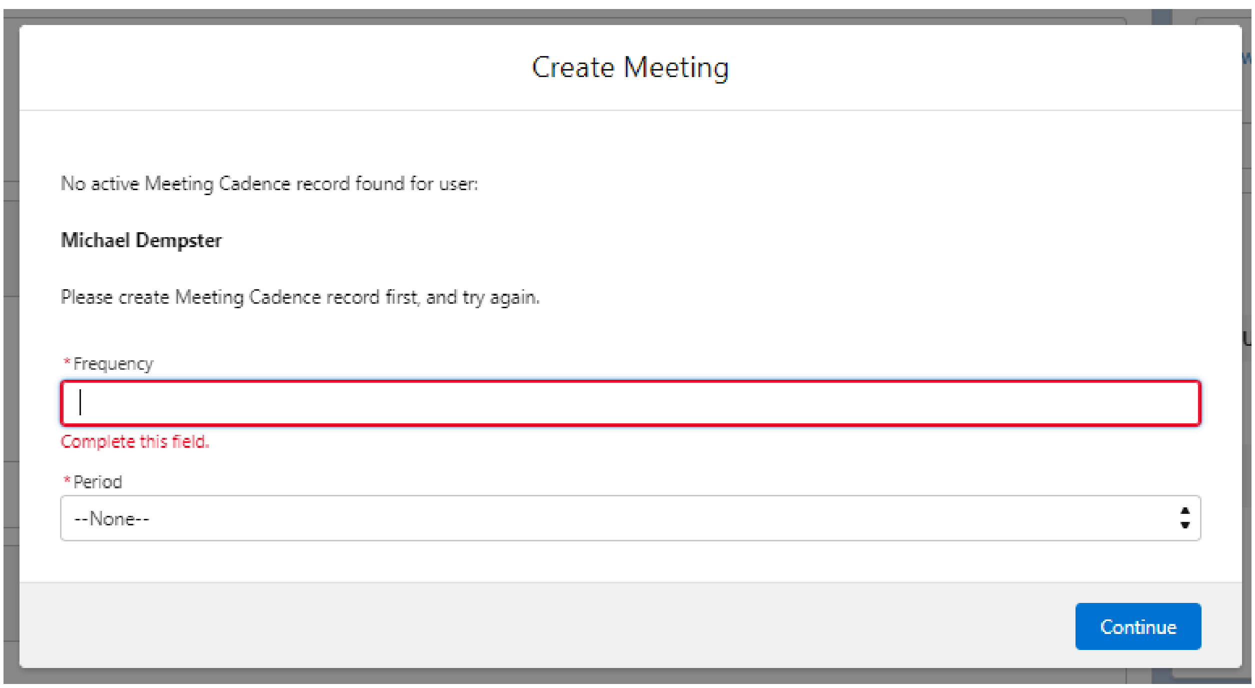
Depending on the setup of the application, meeting cadences can be :

- Associated to an account or contact record
- Owned by the user or user's business unit

How do I create a Meeting Cadence?

Meeting cadence records can be created in two different ways:

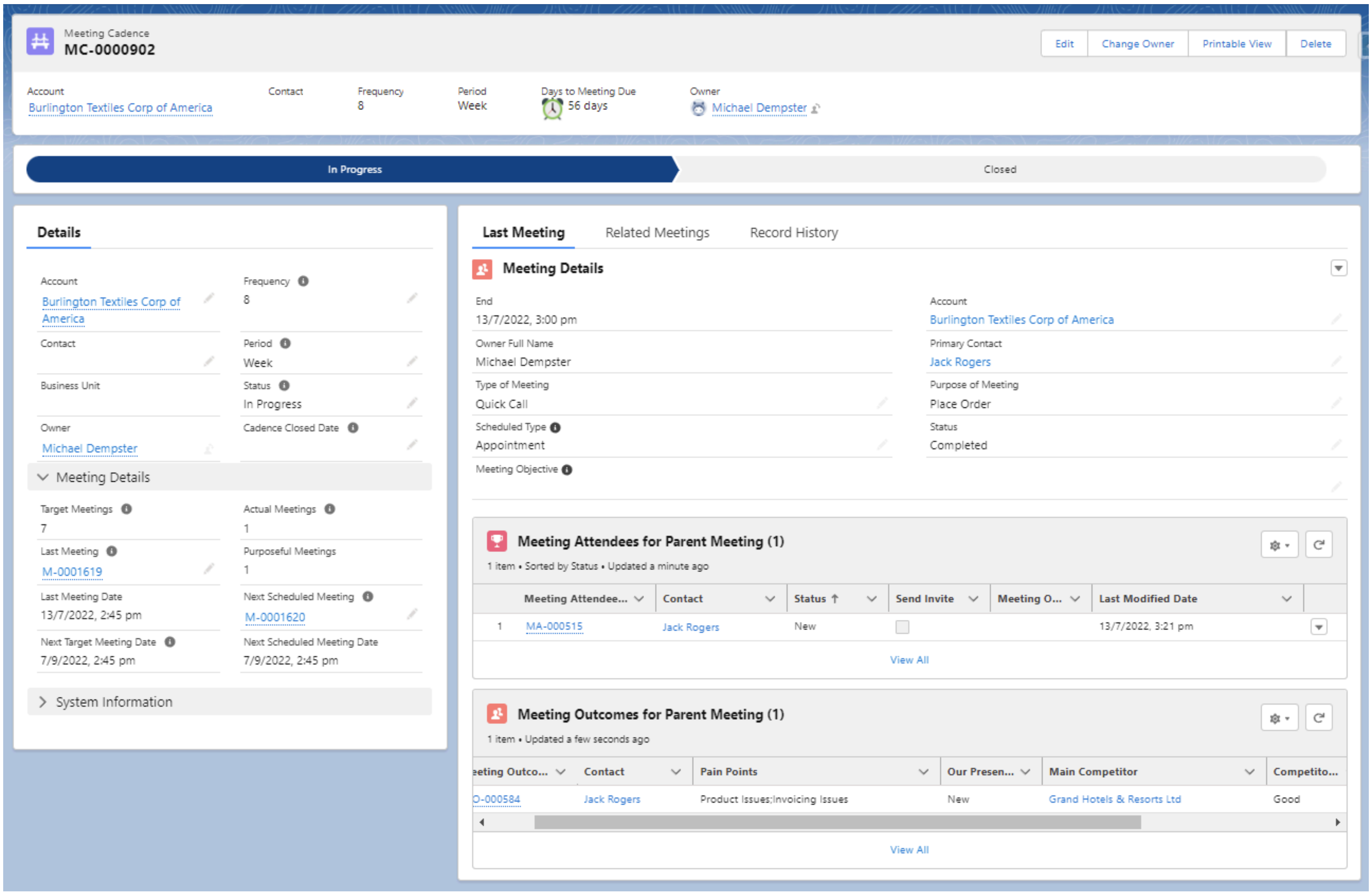
1. The first time a meeting is created, if there is no meeting cadence, the user will be prompted to create one



2. Through the use of a CSV data load template and a data loading tool. See data load template and guide documentation for more information

Meeting Cadence Page

From the meeting cadence page the user will have access to all related meeting records including direct links to the last meeting and associated meeting outcomes.

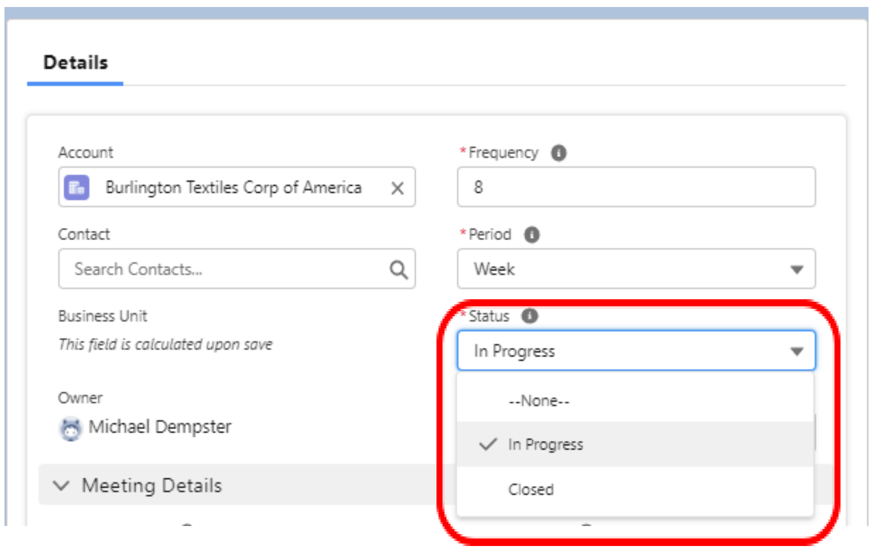


Key detail fields include:

- **Target Meetings** - Calculation of the number of meetings the user / business unit is expected to complete in a given calendar year based on the frequency and period
- **Actual Meetings** - Count of all completed meetings against the meeting cadence *(NB: If the custom metadata type "Canceled meetings Count as Completed" setting as part of the application setup is set to TRUE, they are counted here)*
- **Purposeful Meetings** - Count of all completed meetings with a meeting purpose that matches the "Purpose of the Meeting" custom metadata type as part of application setup
- **Last Meeting** - Update automatically with a link to the last completed meeting
- **Next Scheduled Meeting** - Updated automatically with a link to the next scheduled meeting. Scheduled meeting is defined by the meeting scheduled type equal to "Appointment"
- **Next Target Meeting Date** - Calculated based on the last meeting date plus the frequency and period to determine when the customer is due for their next meeting

Other Important Points

- There can only be one meeting cadence record associated with a user or business unit per account or contact
- Meeting cadences should be closed if the frequency or period is to be adjusted. To close a meeting cadence simply update the status to “Closed”. When the user creates another meeting for the same account/contact a new meeting cadence can be set



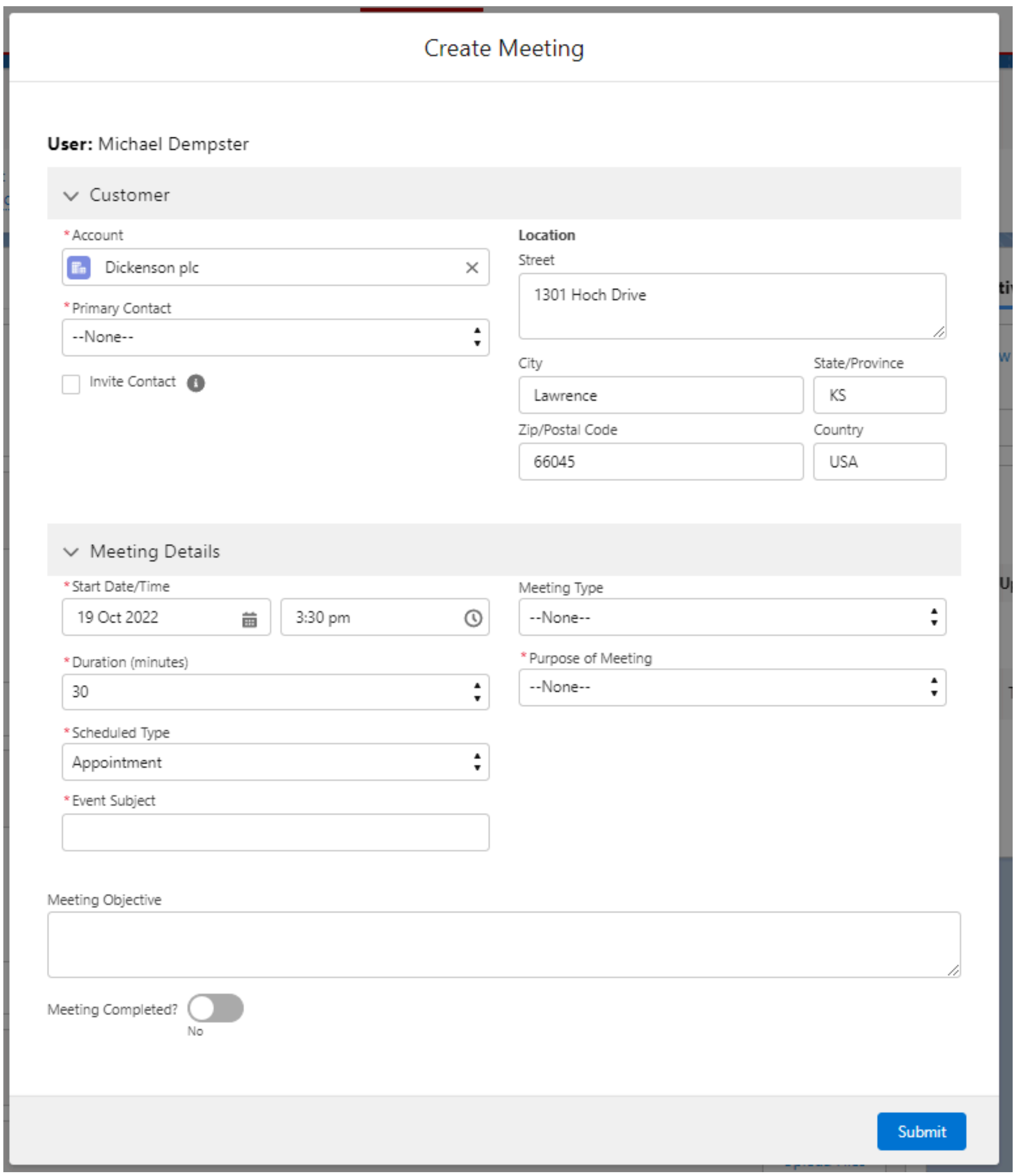
Meeting

What is a Meeting?

A meeting represents a particular date and time in which the user will meet with the customer. Often it is a scheduled face-to-face appointment with a location but can also be considered virtual or a drop-in. A meeting is linked to a meeting cadence and specifies why the meeting is taking place and what the objective is.

How do I create a Meeting?

A meeting is created from either the account or contact record depending on the parent record selected as part of the application setup. A button is placed on the chosen page layout and is accessible only to use with the MEETabl App - User Permission set. To create a meeting simple select the “Create Meeting” button:

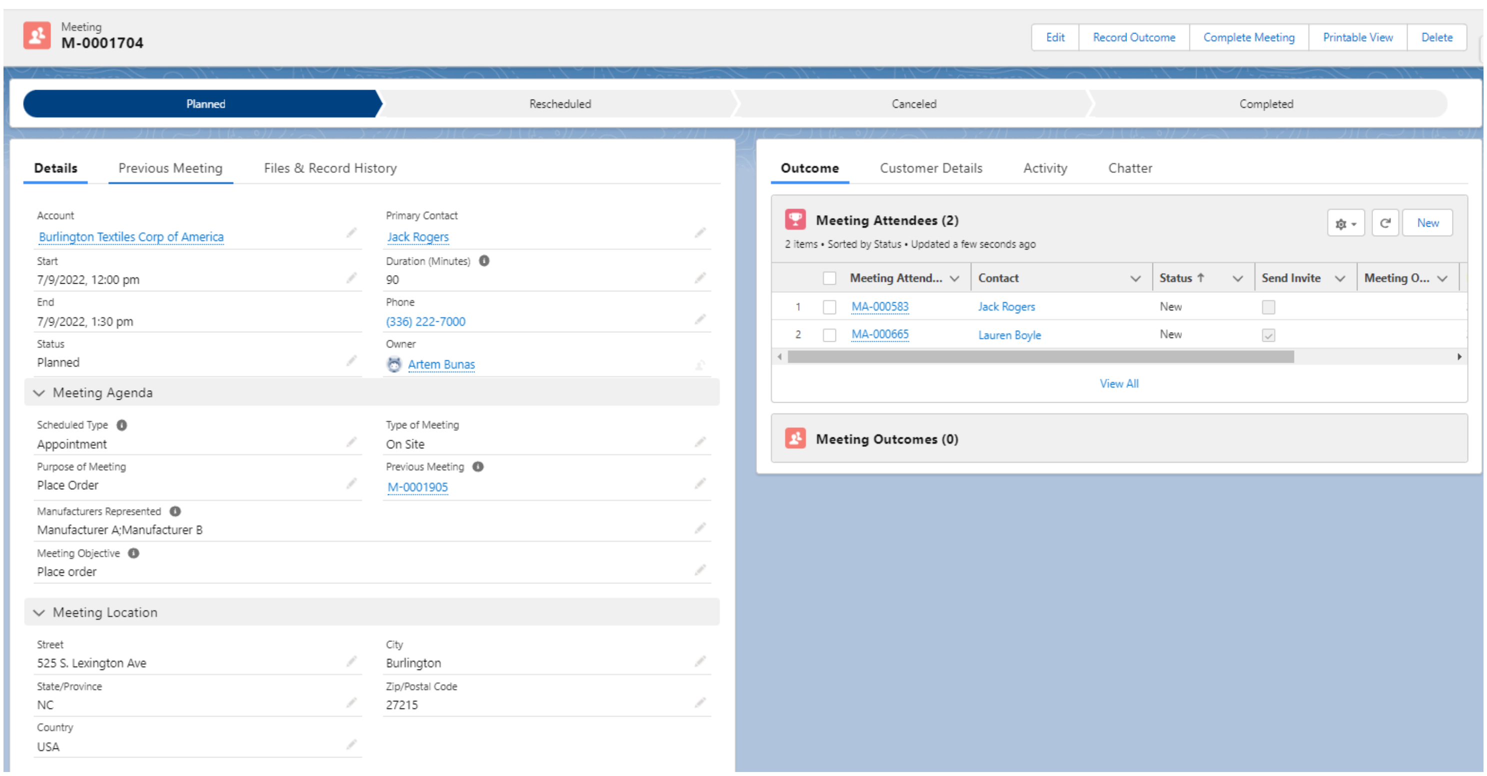


- Selecting “Invite Contact” will send the selected primary contact an invite to the meeting. See Meeting Attendees for how the contact will receive the invite
- Depending on whether manufacturers were set up on the user record will dictate whether the user sees the Manufacturers Represented field on Meeting creation or not
- Selecting “Meeting Completed?” will allow the user to create and complete the meeting in one process
- The Event Subject is used to populate the meeting record created within Outlook or Google calendar which the customer will see in their calendar

Meeting Page

The meeting page will capture the details entered during creation and provide access to relevant account and contact information for easy visibility and updates. It will also provide access to:

- Meeting Attendees - Those that attend the meeting
- Meeting Outcomes - One or more outcomes of the meeting
- Previous Meeting held with this customer. Updated automatically from the meeting cadence
- Ability to record outcomes and complete the meeting via a button
- Status to track the overall progress of the meeting



Other Important Points

- Keep an eye out for fields with an symbol. Mousing over or clicking this symbol will give the user more information

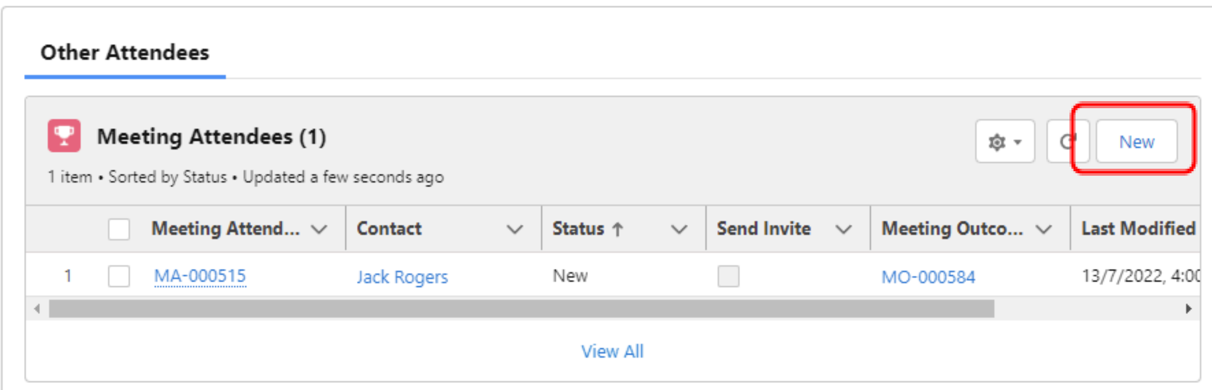
Meeting Attendees

What is a Meeting Attendee?

A meeting attendee is a contact record related to the meeting. A meeting can have one or multiple meeting attendees.

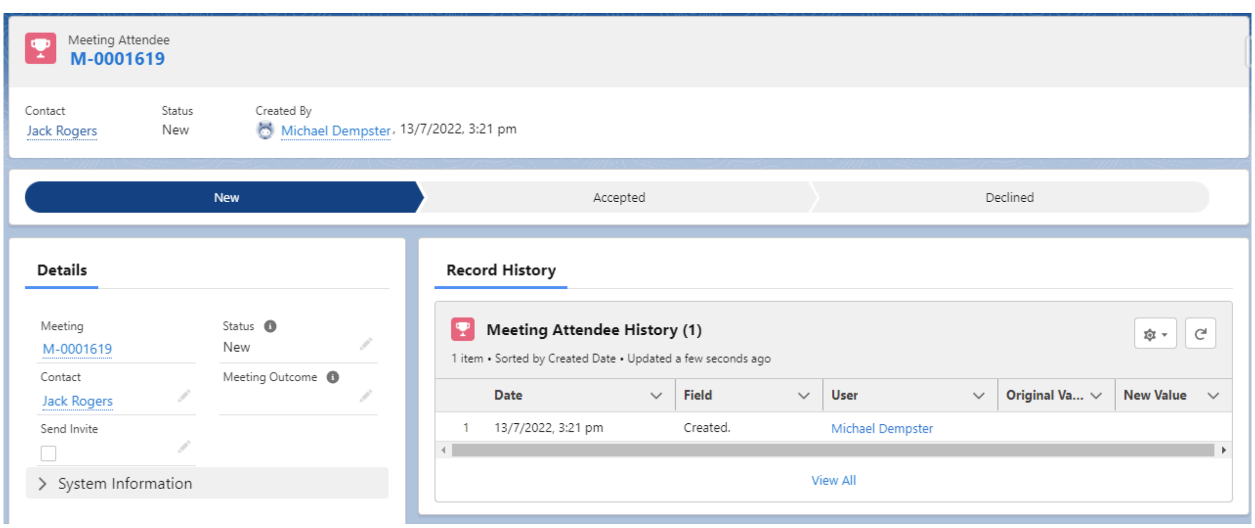
How do I create a Meeting Attendee?

The primary contact of a meeting will always be added as a meeting attendee. To add additional attendees simply select “New” from the meeting attendee related list on the meeting page:



Meeting Attendee Page

The meeting attendee page will keep track of the attendees invitation status and provide the user with a reference to their associated meeting outcome ([see Meeting Outcome section below for more information](#))

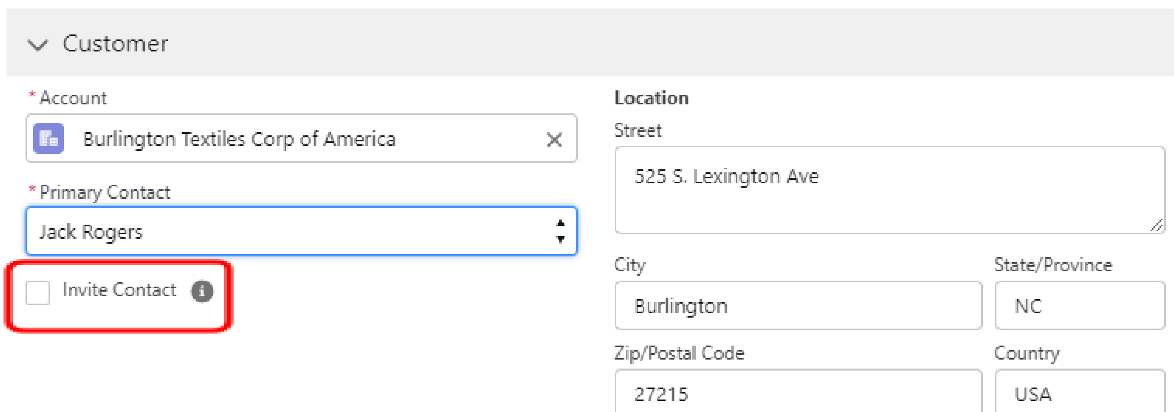


Key detail fields include:

- **Send Invite** - If selected, the meeting attendee will receive an email meeting invitation (see Event section below for more information)
- **Status** - Automatically updated based on the synced invitation status from the related event. Newly added attendees will have a status of “New” and based on their invitation will be updated to either “Accepted” or “Declined”
- **Meeting Outcome** - Attribute a meeting attendee to a recorded meeting outcome to establish a connection between the person who attended the meeting and what they said

Other Important Points

- When creating a meeting the user will have an option to send an invite to the primary contact at time of creation. If selected, they will receive an email invitation. If not selected, they will only be added as a meeting attendee



- Editing a meeting attendee's “Send Invite” option after it is created will not send the attendee a meeting invitation. Remove the meeting attendee record and re-add it
- If the meeting attendee responds to the invitation as “maybe” or “tentative” it will not be recorded in Salesforce. The status will remain as “New”.

Meeting Outcomes

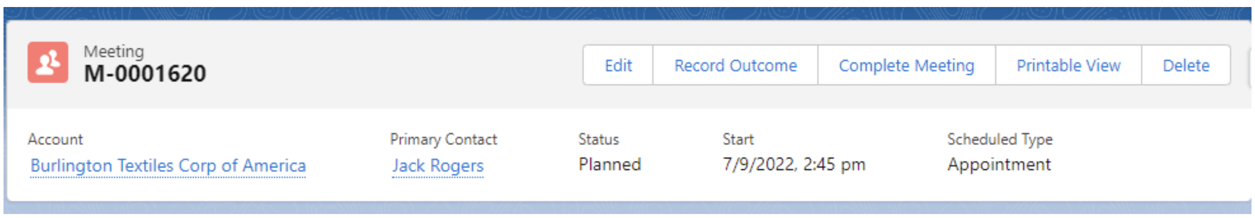
What is a Meeting Outcome?

A meeting outcome represents what was said at the meeting and the overall outcome. A user can create one or many meeting outcomes against the meeting depending on the application configuration.

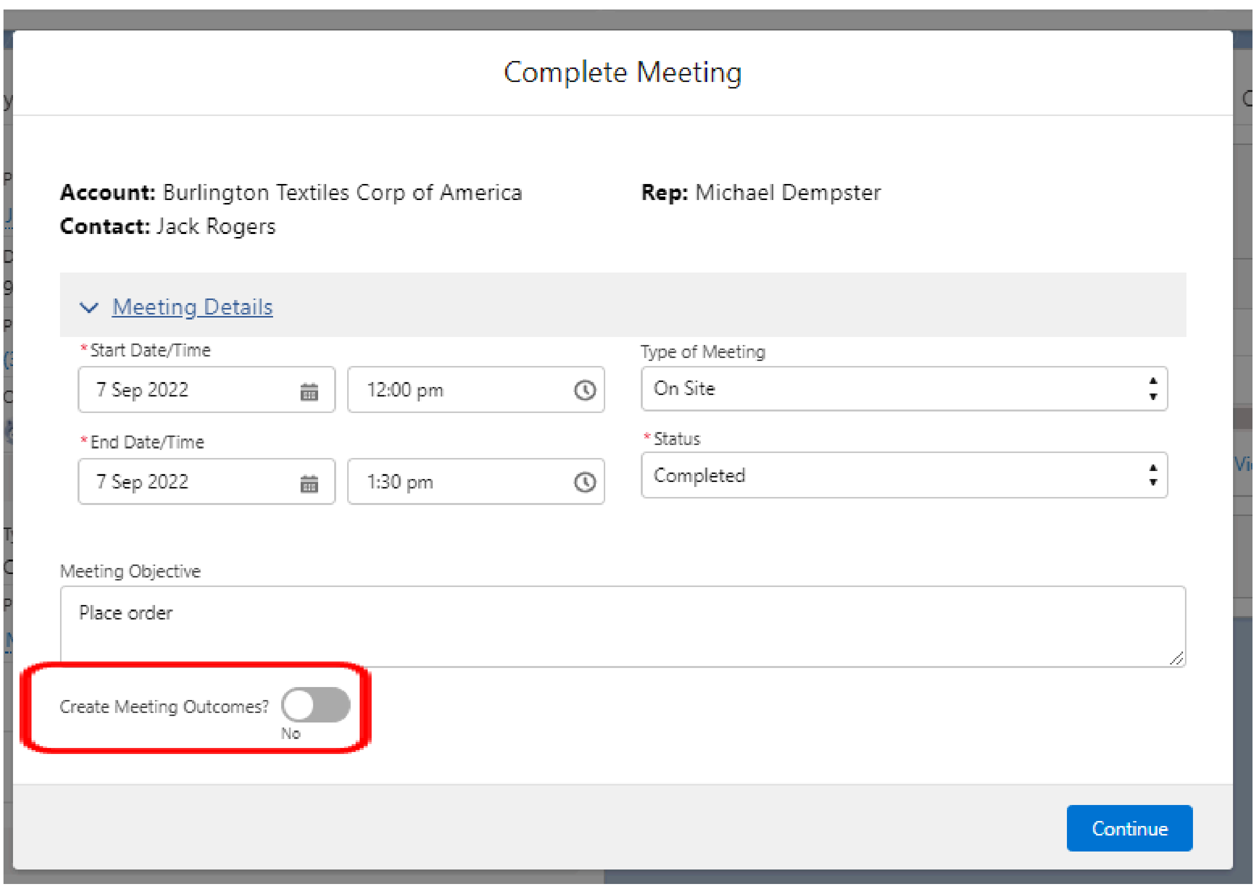
How do I create a Meeting Outcome?

Meeting outcomes can be created from two places:

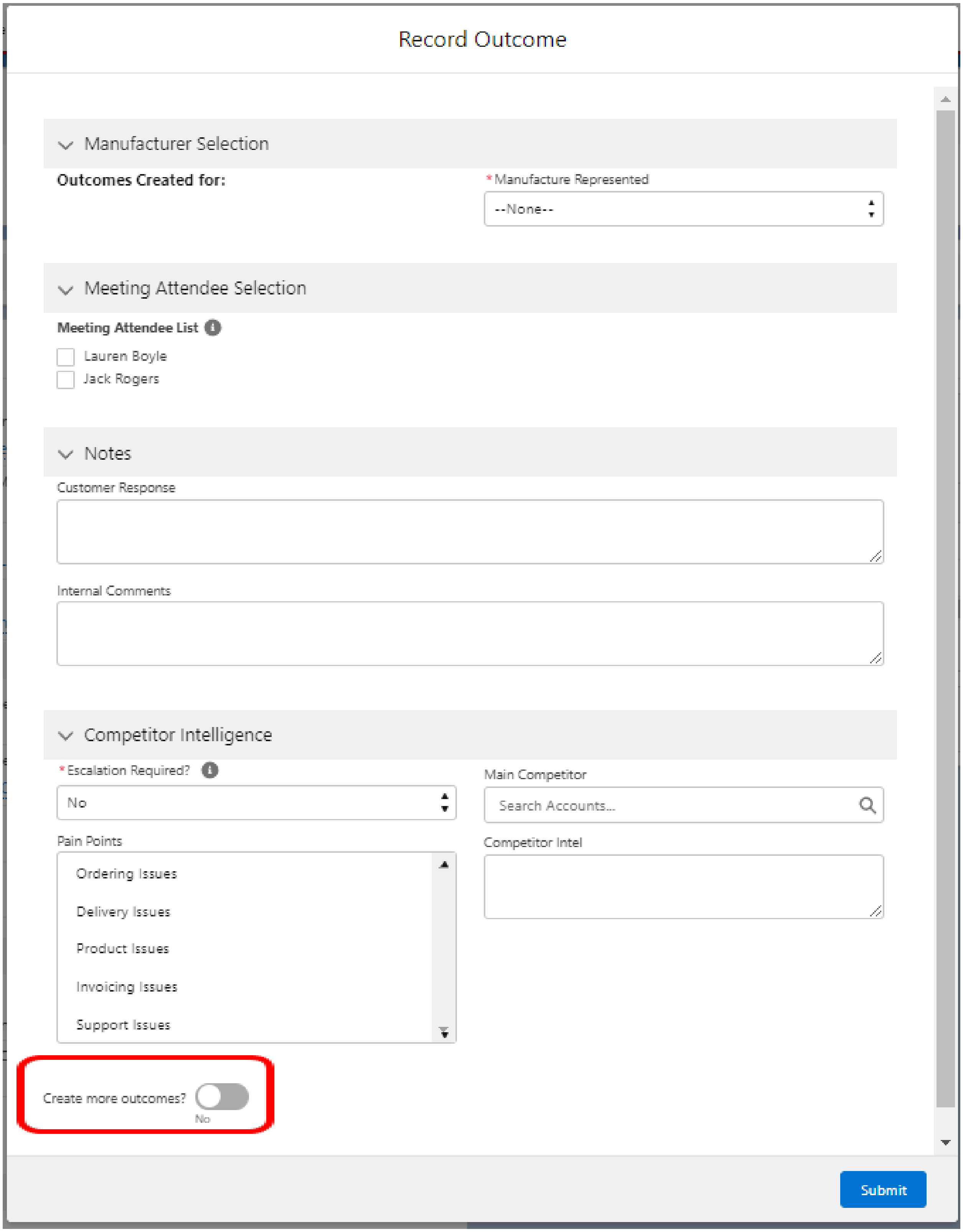
1. On the meeting page through the “Record Outcome” button



2. When completing a meeting, the user has the option to record outcomes



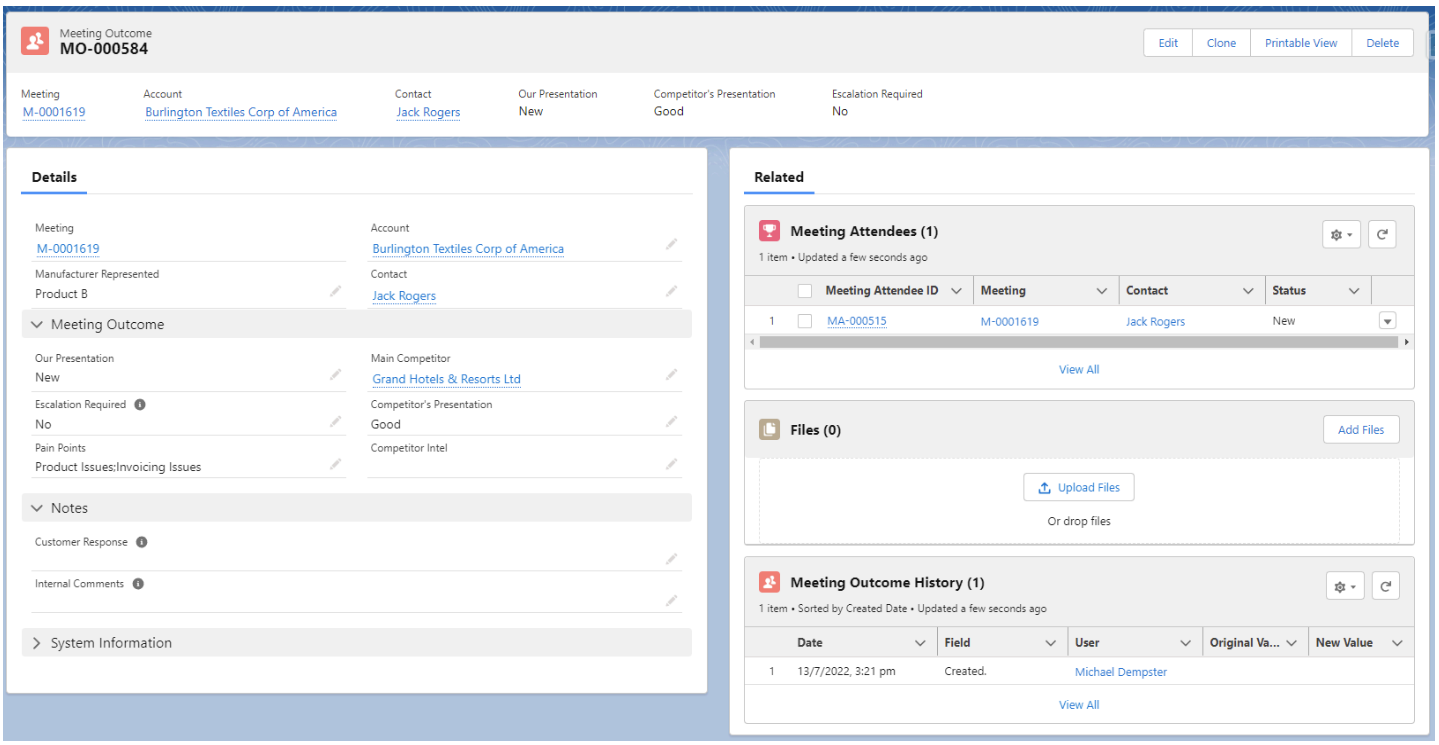
When selecting to create a meeting outcome the user will be presented with the following screen:



- Meeting outcomes can be attributed to one or multiple meeting attendees by selecting the relevant meeting attendees checkboxes. The list will go blank when all meeting attendees have one meeting outcome attributed to them
- The option to “Create more outcomes?” will be available based on configuration setup. If the ability to create multiple meeting outcomes is turned off, this option will not be displayed and creating more than one meeting outcome will prompt the user to edit the existing meeting outcome record.

Meeting Outcome Page

The meeting outcome page provides the relevant detail entered when creating a meeting outcome. It also provides a list of the associated meeting attendees and ability to upload files.



Other Important Points

- Fields available when creating a meeting outcome are configurable. Existing picklists can be amended or new fields added. The following flow would need to be adjusted to reflect the new fields added or removed: Meeting Outcome | Screen Flow | Create Meeting Outcome flow

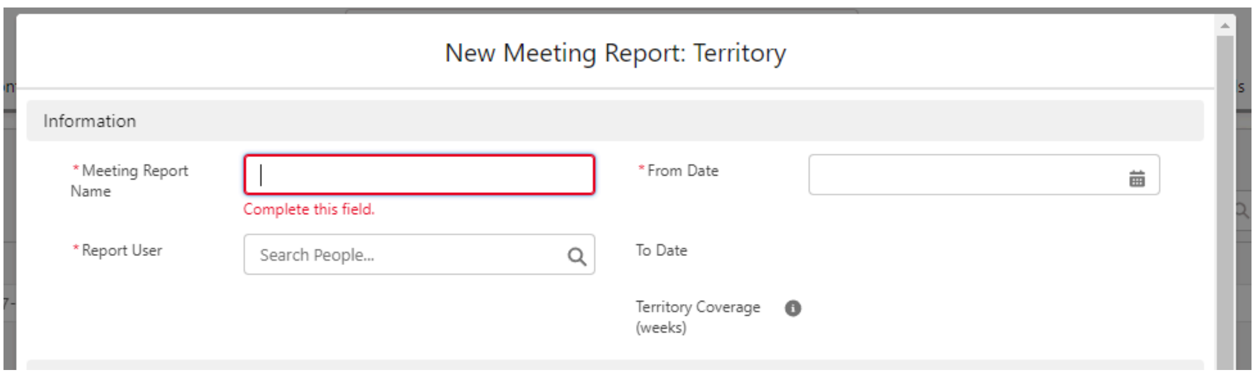
Meeting Reports

What is a Meeting Report?

A meeting report is a custom object which summarizes meeting record data for a single user over a weekly or territory coverage period of time.

How do I create a Meeting Report?

There are two types of meeting reports. Weekly or Territory. Weekly reports are generated automatically based on a scheduled apex class setup as part of installation. Territory reports are created manually by the user, requiring entering the report user, from date and report name *(NB: The report name will be overwritten with a predefined naming convention)*

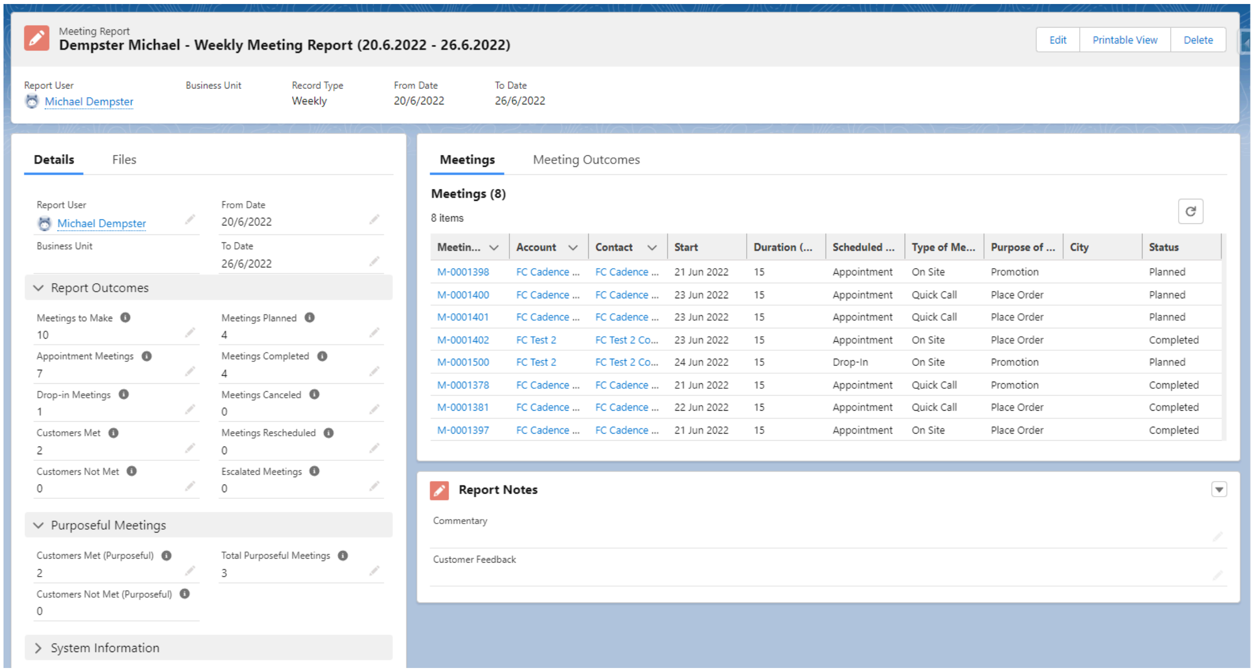


- The “To Date” will be automatically calculated based on the entered “From Date” and the number of weeks it takes the Report User to cover their territory (defined on the Salesforce user record)
- Multiple territory reports can be created for a single user

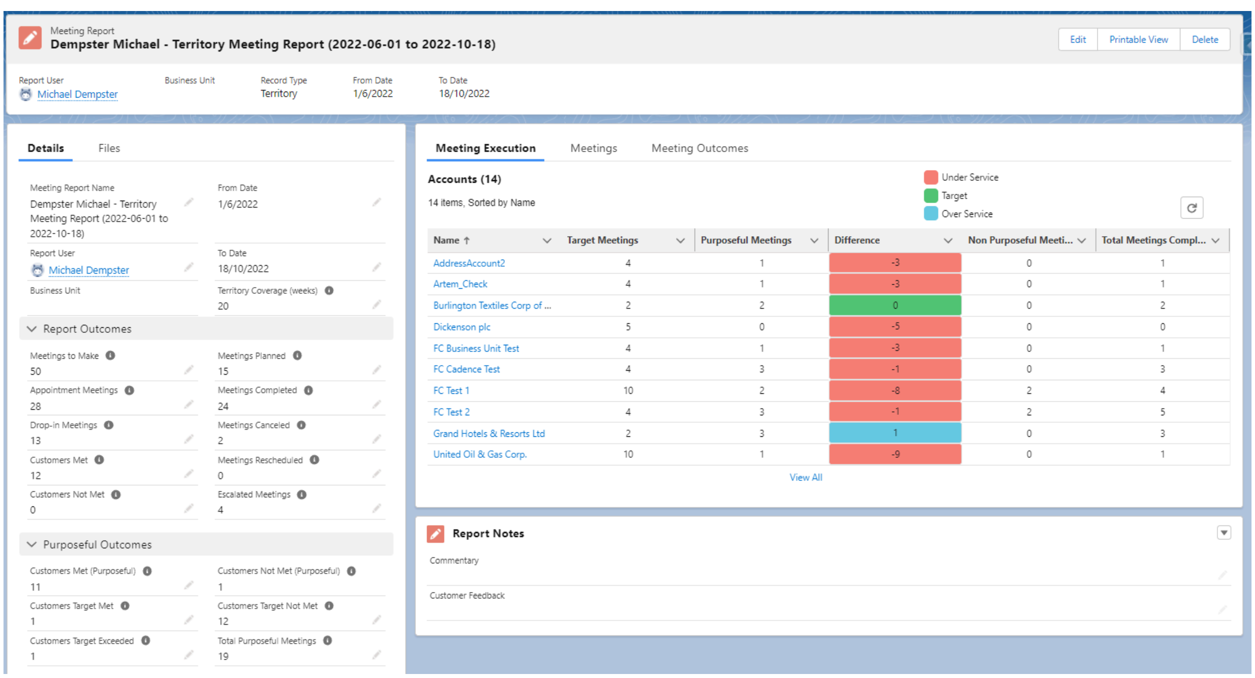
Meeting Report Page

The meeting report page differs depending on the type of report being viewed.

Weekly Report



Territory Report



Key detail fields include:

- **Meetings to Make** - Calculated based on the "Meetings to complete per Week" multiplied by the "Territory Coverage (weeks)" values on the user record
- **Appointment Meetings** - Number of Meetings with a Schedule Type = Appointment that have a start date within the From and To date range of the meeting report
- **Drop-in Meetings** - Number of unique completed Meetings with a Schedule Type = "Drop In" that have a start date within the From and To date range of the meeting report
- **Meetings Planned** - Number of Meetings with a Status = "Planned" that have a start date within the From and To date range of the meeting report
- **Meetings Completed** - Number of Meetings with a Status = "Completed" that have a start date within the From and To date range of the meeting report
- **Meetings Canceled** - Number of Meetings with a Status = "Canceled" that have a start date within the From and To date range of the meeting report
- **Meetings Rescheduled** - Number of Meetings with a Status = "Rescheduled" that have a start date within the From and To date range of the meeting report
- **Customers Met** - Number of unique customers with a single completed Meeting that have a start date within the From and To date range of the meeting report
- **Customers Not Met** - Number of unique customers without a completed Meeting but were meant to be seen based on the related Meeting Cadence during the report period.
- **Escalated Meetings** - Number of unique Meetings with a status "Completed" which has a Meeting Outcome with the escalated flag set to TRUE during the report period
- **Customers Met Purposeful** - Number of unique customers with a completed meeting with a purposeful meaning that matches against configurations for that report period
- **Customers Not Met Purposeful** - Number of unique customers without a completed meeting with a purposeful meaning that matches against configurations for that report period
- **Customers Target Met** - Number of unique customers where the target number of meetings was met for that report period. Only applies to territory reports
- **Customers Target Not Met** - Number of unique customers where the target number of meetings was not met for that report period. Only applies to territory reports
- **Customers Target Exceeded** - Number of unique customers where the target number of meetings was exceeded for that report period. Only applies to territory reports
- **Total Purposeful Meetings** - Total number of completed meetings with a purposeful reason that matches against configurations for that report period

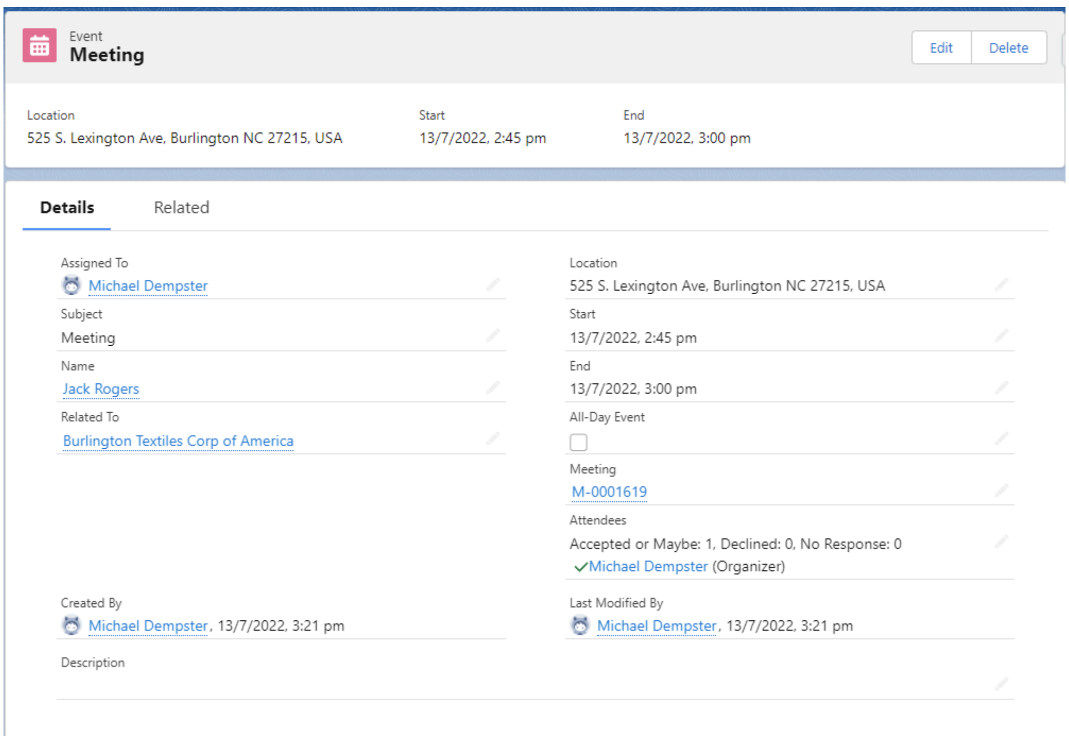
Other Important Points

- The meeting execution component only displays on the territory report. It showcases accounts or contacts with a meeting cadence owned by the report user
- If the meeting cadence is owned by the business unit, the meeting execution component does not summarize the business units meeting results only the individual report user. This is current a roadmap item scheduled for a future release

Events

Salesforce events are created for every meeting. Meeting attendees that have "Send Invite" checked are added to the event as attendees. Through the use of Salesforce Einstein Activity Capture, events can be synchronized with Outlook or Gmail calendars, creating a mirrored calendar event. The attendees of the calendar event are then invited to the meeting,

When an attendee responds to the invitation, either accepting or declining, the status is synchronized back to the Salesforce event, and then updated onto the corresponding meeting attendee record.



Other Important Points

- Change to the event start date or end date in either Salesforce or Outlook/Google will update the linked meeting
- Change to the meeting start date or duration will update the associated event and synchronize with Outlook/Google event
- The invitation email sent to the attendee is sent from Outlook or Gmail, not Salesforce
- If the attendee selects maybe or tentative to the invitation, the status is not synchronized back to Salesforce. The status will remain as "New". This is a Salesforce limitation.

User

Depending on how the application is set up, there are certain fields for the user that will need to be populated in order for the application to function correctly.

Mandatory fields:

- **Meetings to Complete per Week** - Number of meetings the user is expected to complete in a given week. This is visible in meeting report records as well as other reports and dashboards.
- **Territory Coverage (weeks)** - The number of weeks it takes the user to see all their customers in their territory at least once. This is visible in meeting report records as well as other reports and dashboards.

Mandatory fields based on configuration are:

- **Business Unit** - Select the business unit the user belongs to if the MEETabl General Settings custom metadata type is configured for meetings to be allocated to business units *(NB: An admin can alter the values in the picklist via the Business_Unit picklist value set. Click here for more information)*

Optional fields:

- **Manufacturers Refreshed** - Select manufacturers at the user representatives in a meeting. The values chosen here will default to a Meeting, allowing the user to select which manufacturers they are representing in the meeting. *(NB: An admin can alter the values in the picklist via the Manufacturer picklist value set. Click here for more information)*

Other Important Points

- If MEETabl General Settings custom metadata type is configured for meetings to be allowed to Business Units, the user must have a Business Unit set before the record can be saved
- Manufacturers Represented must be selected on the user record for the list to appear when creating meeting and meeting outcome records
- Territory coverage (weeks) and Meetings to Complete per Week fields are defaulted based on the custom metadata setup for each corresponding field. If the custom metadata is updated, all user records will be updated accordingly

Reports & Dashboards

A series of standard Salesforce reports and dashboards are included in the package. They cover the following user groups and timeframes:

- User Groups
  - User (reports filtered by MY)
  - Manager (reports filtered by All Users)
  - Business Unit (reports filtered by All Users but grouped by Business Unit)
- Timeframes
  - Today
  - This Week
  - This Month
  - This Financial Year

Reports and dashboards are located inside the MEEtabl Reports or MEETabl Dashboards folder.

There are 3 meeting field filters applied to each dashboard that can be customized if required. They are:

1. Status
2. Purpose of Meeting
3. Scheduled Type