

Meetabl App - Installation Guide

About

This guide is designed to support the installation of the Meetabl App on the Salesforce platform. The following steps are critical to the successful installation of the application .

NB: All setup sets are in Lightning Experience.

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Support

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

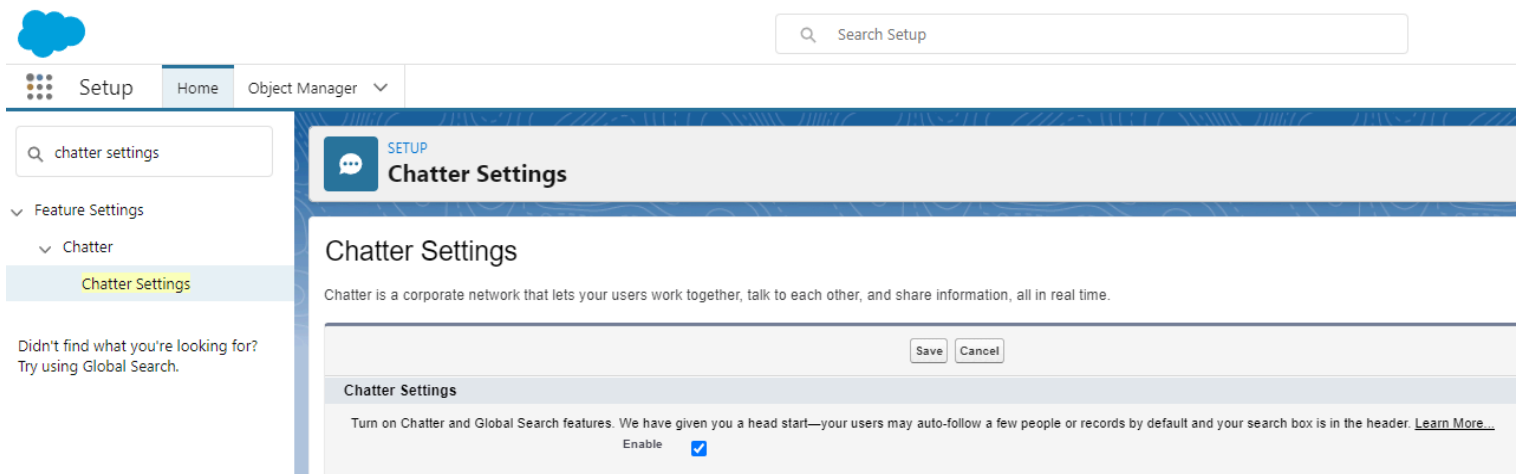
Prerequisite Steps

The following steps are required to be completed before installation into Salesforce as there are components within the application which are reliant on these Salesforce features. Without enabling these features, the application will not install.

Enable Chatter & Actions in the Publisher

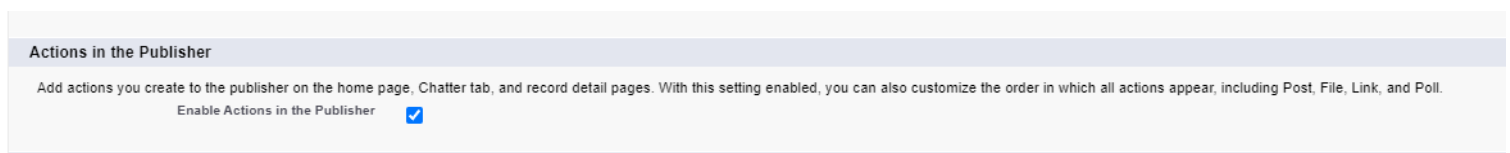
Chatter is a standard Salesforce feature that allows for record based conversation between Salesforce users. Chatter is used primarily on the meeting object to allow for messages to be sent about the meeting to other Salesforce users. To enable chatter:

1. Setup > Chatter Settings
2. Enable Chatter Settings



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'chatter settings' entered. Under 'Feature Settings', 'Chatter' is expanded, and 'Chatter Settings' is highlighted. The main content area is titled 'Chatter Settings' and includes a description: 'Chatter is a corporate network that lets your users work together, talk to each other, and share information, all in real time.' Below this is a 'Save' and 'Cancel' button pair. A section titled 'Chatter Settings' contains the text: 'Turn on Chatter and Global Search features. We have given you a head start—your users may auto-follow a few people or records by default and your search box is in the header. [Learn More...](#)' and a checkbox labeled 'Enable' which is checked.

3. Enable Actions in the Publisher

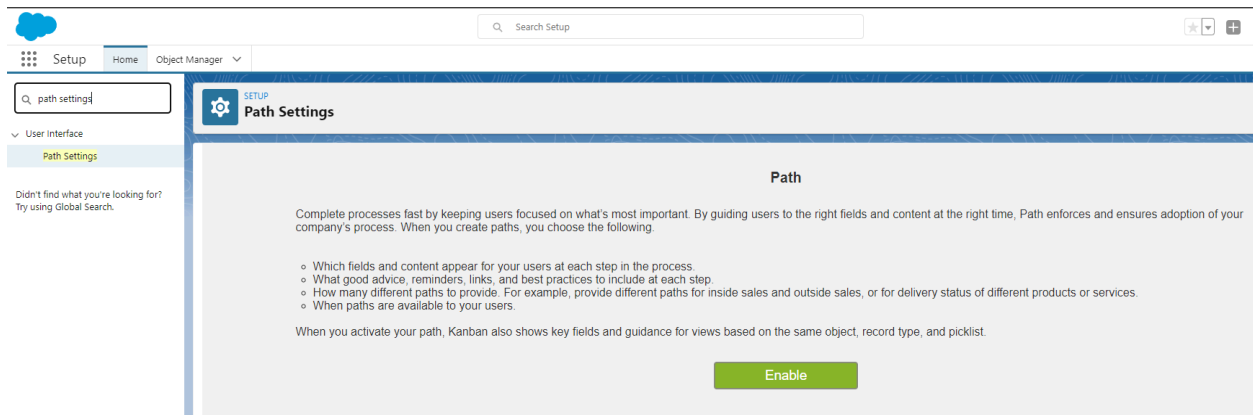


The screenshot shows the 'Actions in the Publisher' section of the Salesforce Setup interface. It includes the text: 'Add actions you create to the publisher on the home page, Chatter tab, and record detail pages. With this setting enabled, you can also customize the order in which all actions appear, including Post, File, Link, and Poll.' Below this is a checkbox labeled 'Enable Actions in the Publisher' which is checked.

Enable Path

Path is a standard Salesforce component that visually guides users through a process on a record. Path is used in the application on the meeting, meeting attendee, and meeting cadence objects. To enable path:

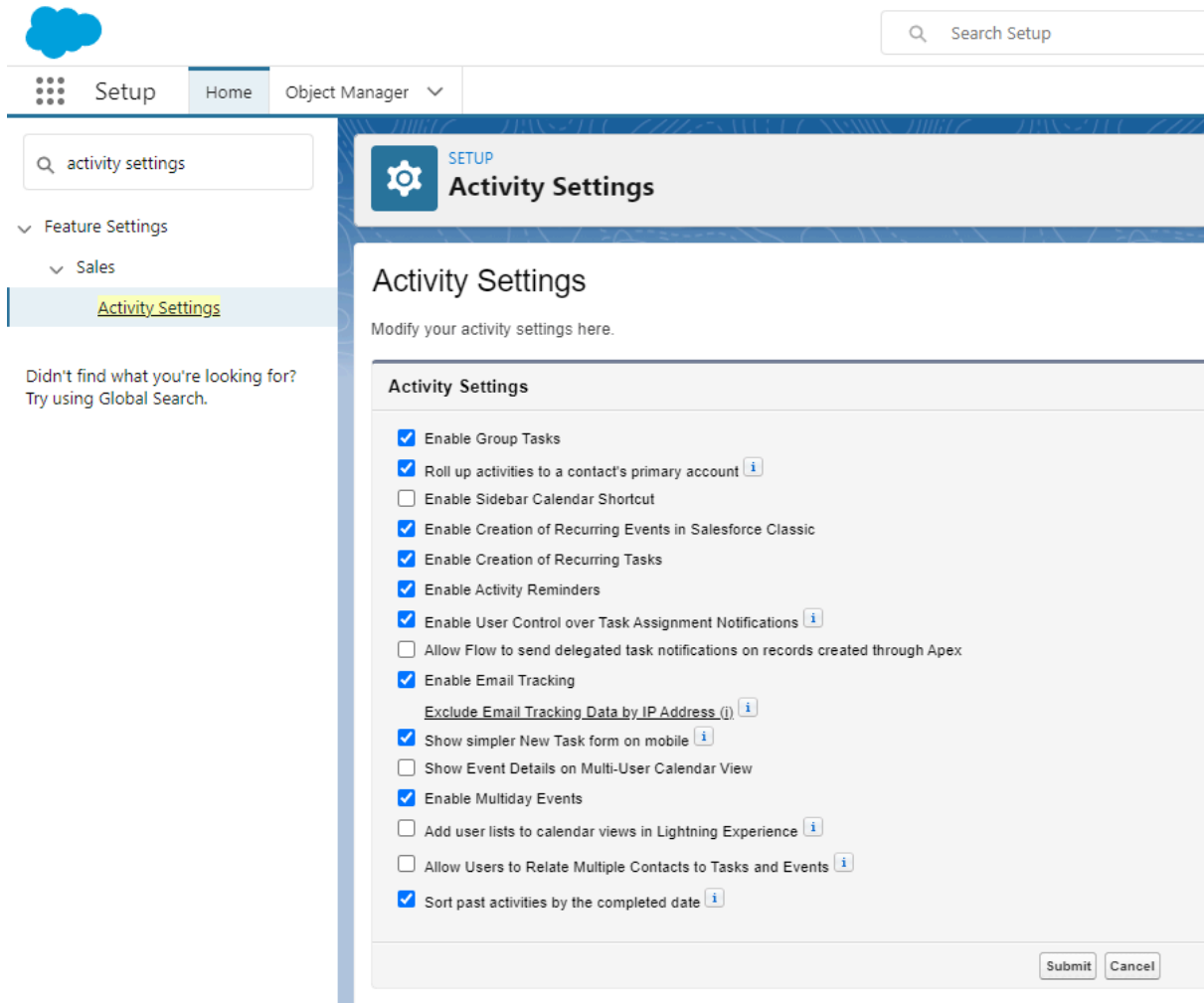
1. Setup > Path Settings
2. Enable “Path”



Enable Shared Activities

Shared activities allow for multiple contacts to be attributed to a single event record as well as manage the invitations to those contacts. To enable shared Activities:

1. Setup > Activity Settings
2. Enable "Allow users to Relate Multiple Contacts to Tasks and Events"



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with "activity settings" and a list of categories: Feature Settings, Sales, and Activity Settings (highlighted). The main content area is titled "Activity Settings" with a sub-header "Modify your activity settings here." Below this is a list of settings, each with a checkbox and an information icon (i). The settings are:

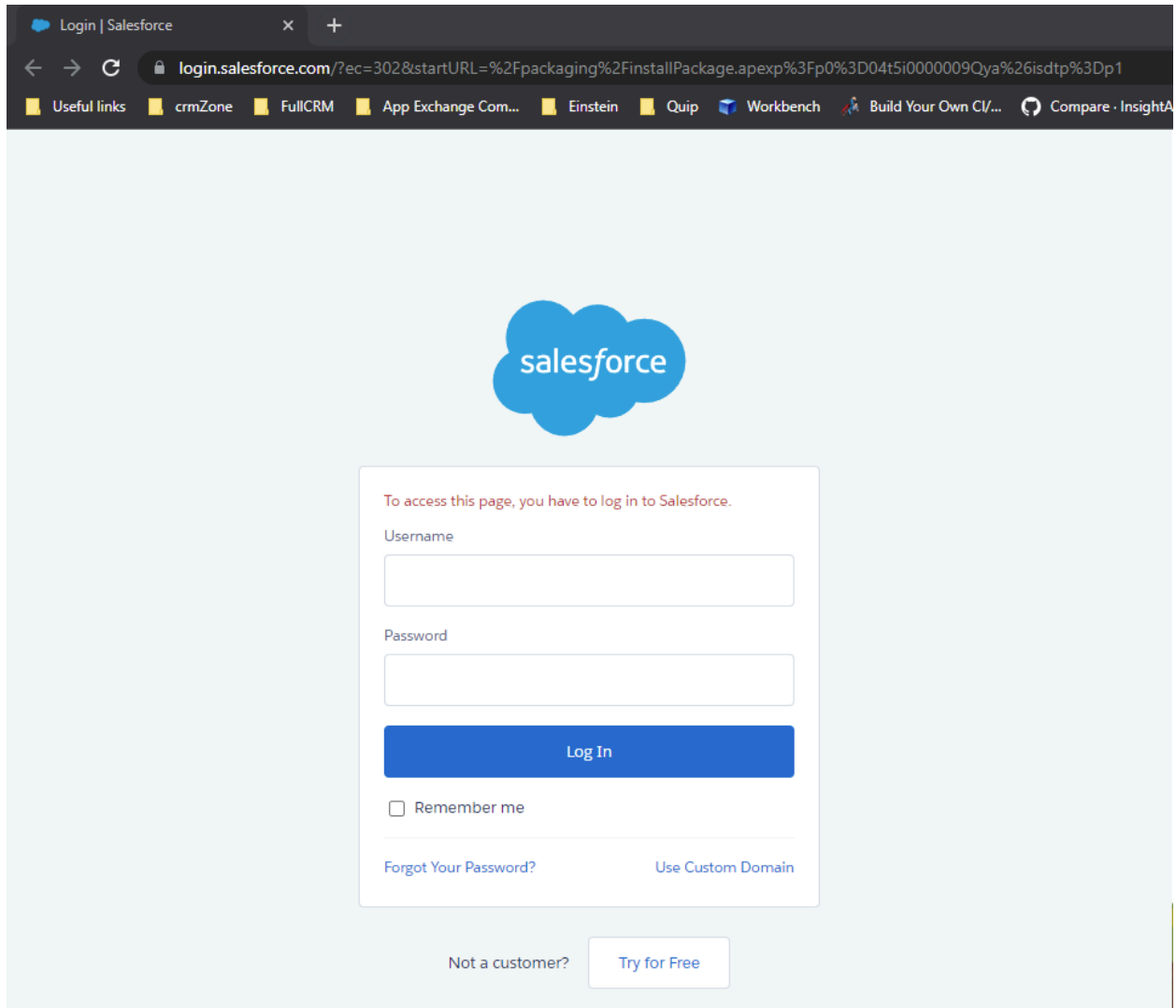
- ☒ Enable Group Tasks
- ☒ Roll up activities to a contact's primary account (i)
- ☐ Enable Sidebar Calendar Shortcut
- ☒ Enable Creation of Recurring Events in Salesforce Classic
- ☒ Enable Creation of Recurring Tasks
- ☒ Enable Activity Reminders
- ☒ Enable User Control over Task Assignment Notifications (i)
- ☐ Allow Flow to send delegated task notifications on records created through Apex
- ☒ Enable Email Tracking
- Exclude Email Tracking Data by IP Address (i) (i)
- ☒ Show simpler New Task form on mobile (i)
- ☐ Show Event Details on Multi-User Calendar View
- ☒ Enable Multiday Events
- ☐ Add user lists to calendar views in Lightning Experience (i)
- ☐ Allow Users to Relate Multiple Contacts to Tasks and Events (i)
- ☒ Sort past activities by the completed date (i)

At the bottom right of the settings list are "Submit" and "Cancel" buttons.

Installation Steps

On installation it will ask you to log into Salesforce with your Salesforce credentials.

NB: If you are installing into a sandbox, replace the “login” part of the URL with “test” and then login with your sandbox credentials.



The screenshot shows a web browser window with the Salesforce login page. The browser's address bar displays the URL: `login.salesforce.com/?ec=302&startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t5i0000009Qya%26isdtp%3Dp1`. The page features the Salesforce logo at the top center. Below the logo, a message states: "To access this page, you have to log in to Salesforce." The login form includes fields for "Username" and "Password", a "Log In" button, a "Remember me" checkbox, and links for "Forgot Your Password?" and "Use Custom Domain". At the bottom, there is a "Not a customer?" link and a "Try for Free" button.

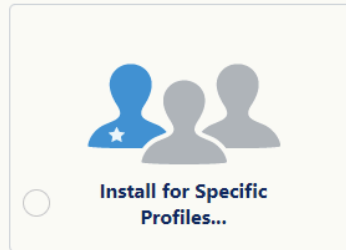
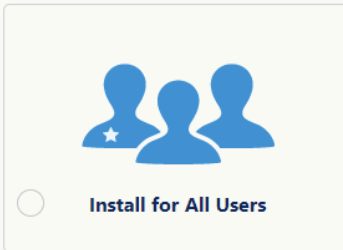
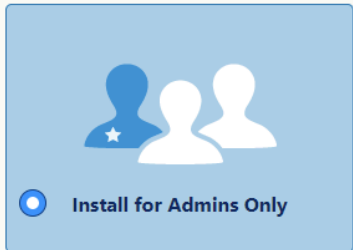
Once logged in the following screen will appear. Ensure you select “Install for Admins Only”, in a later step permission sets will be applied to provide access to other non-admin users.

Finally, press the Install button. If there are any errors on installation please get in contact and provide any error information.



Install MEETabl

By INSIGHTabl Apps



You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. ⓘ

☐

I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

App Name

MEETabl

Publisher

INSIGHTabl Apps

Version Name

MEETabl

Version Number

1.0

Description

MEETabl is designed to provide an organization with a configurable application for scheduling and recording meetings with customers

Additional Details

[View Components](#)

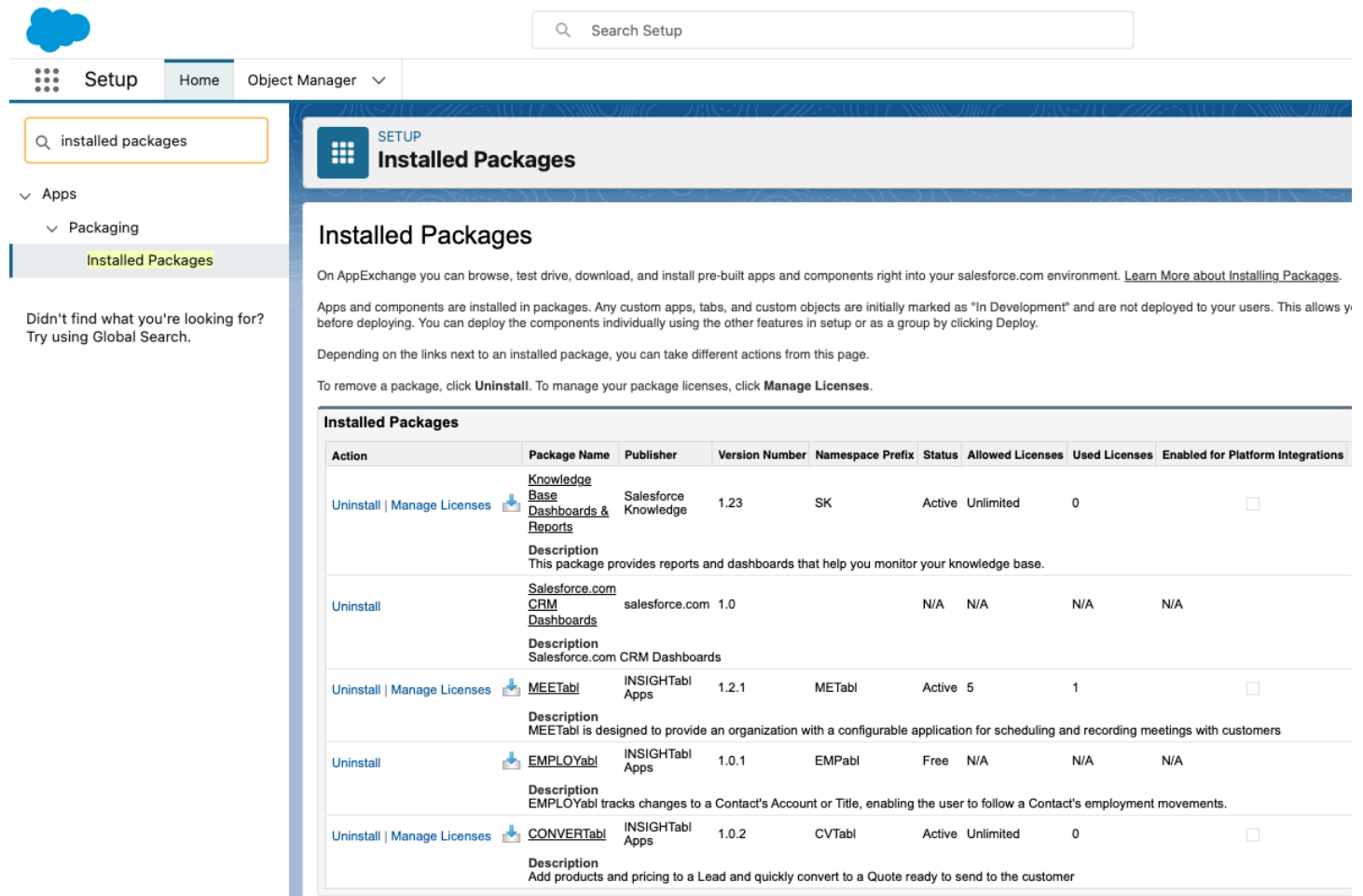
Post Installation Steps

Assign Meetabl Licenses

Meetabl is licensed on a per user basis. A Meetabl license is required to be attributed to a user who will be using the application. If more licenses are required please get in contact with us.

To assign a Meetabl license:

1. Setup > Installed Packages
2. Select "Manage Licenses" next to the Meetabl application



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "installed packages" and a list of navigation items: Apps, Packaging, and Installed Packages (highlighted). The main content area is titled "Installed Packages" and includes a search bar. Below the title, there is a table of installed packages.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations
Uninstall Manage Licenses	Knowledge Base Dashboards & Reports	Salesforce Knowledge	1.23	SK	Active	Unlimited	0	
Uninstall	Salesforce.com CRM Dashboards	salesforce.com	1.0		N/A	N/A	N/A	N/A
Uninstall Manage Licenses	MEETabl	INSIGHTabl Apps	1.2.1	MEETabl	Active	5	1	
Uninstall	EMPLOYabl	INSIGHTabl Apps	1.0.1	EMPabl	Free	N/A	N/A	N/A
Uninstall Manage Licenses	CONVERTabl	INSIGHTabl Apps	1.0.2	CVTabl	Active	Unlimited	0	

3. Select “Add Users” and select the users that you want to assign the licenses too.

Package Details
MEETabl
[Back to Previous Page](#)

Enable for Platform Integrations

Package Name	MEETabl	Publisher	INSIGHTabl Apps
Status	Active	Allowed Licenses	5
Expiration Date	23/6/2023	Used Licenses	1
Enabled for Platform Integrations	☐		

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S

Licensed Users

Add Users

Remove Multiple Users

Action	Full Name ↑	Role	Active	Profile
Remove	Dempster, Michael	SVP Customer Experience	☒	System Administrator

NB: The number of “Allowed Licenses” represents how many can be assigned. You can use this process to add or remove licenses when required.

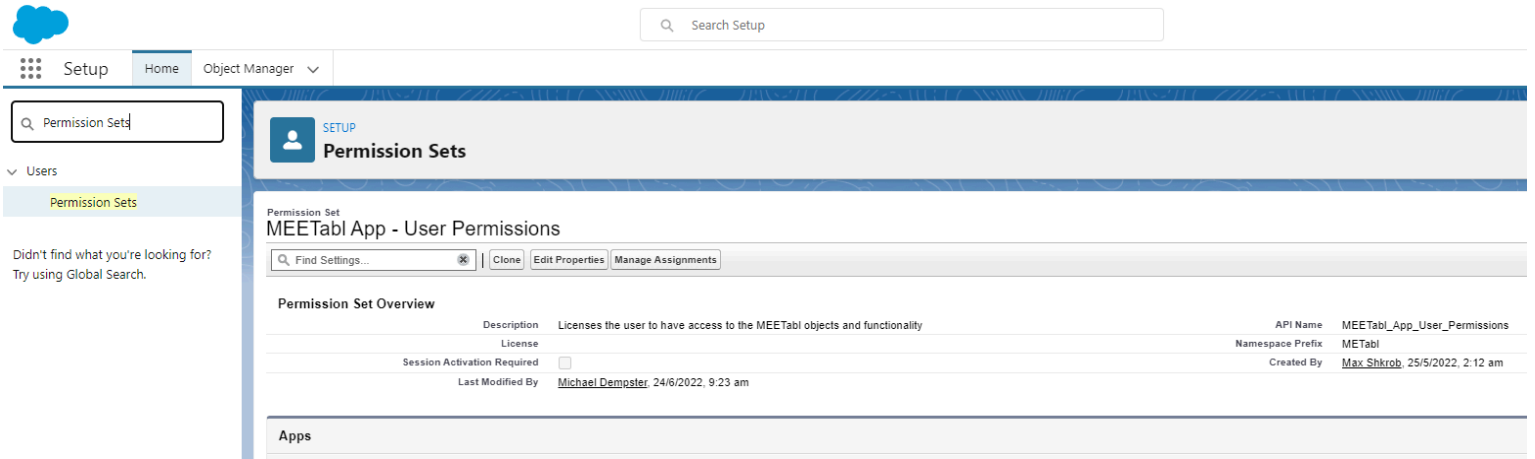
Assign Permission Sets

Permission sets have been created to provide access to objects, fields, components and automation related to the Meetable application. There are two permission sets:

1. MEETabl App - User Permission
 - This permission is to be assigned to any user who will need access to Meetable functionality or access to relevant object and fields for reporting purposes
 - The permission provides object and field level access to the Meetable data model.
2. MEETabl App - Admin Permission
 - This permission provides the same access as the user permission above as well as access to the MEETabl configuration page used to setup the application
 - Only a Salesforce user with administrative access will be able to use this permission set as it requires access to the setup of Salesforce

To assign a permission set:

1. Setup > Permission Sets
2. Select the Permission Set and press “Manage Assignments”

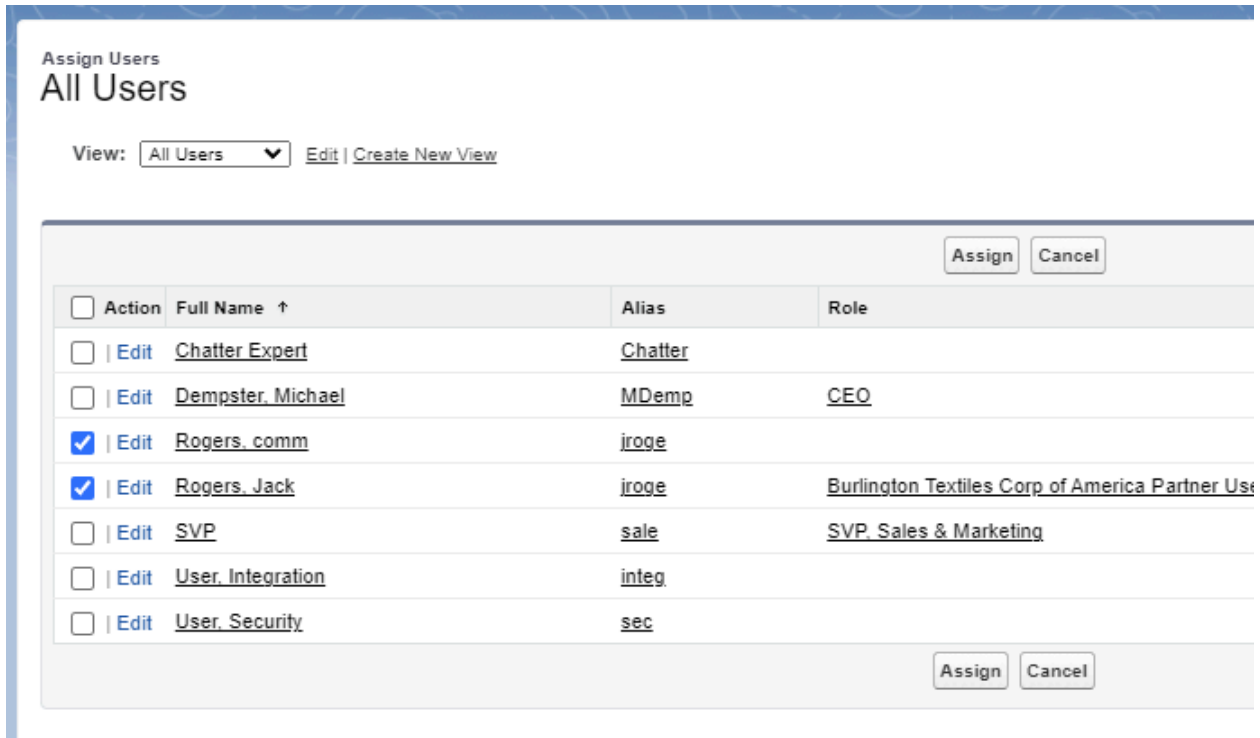


The screenshot shows the Meetabl Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains 'Search Setup'. On the left sidebar, 'Permission Sets' is selected under the 'Users' section. The main content area is titled 'Permission Sets' and shows the 'MEEtabl App - User Permissions' configuration. It includes a 'Find Settings...' search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. Below this is a 'Permission Set Overview' section with a table of details:

Permission Set Overview		API Name	MEEtabl_App_User_Permissions
Description	Licenses the user to have access to the MEEtabl objects and functionality	Namespace Prefix	MEEtabl
License		Created By	Max Shkrob, 25/5/2022, 2:12 am
Session Activation Required	☐		
Last Modified By	Michael Dempster, 24/6/2022, 9:23 am		

Below the overview is an 'Apps' section.

3. Select “Add Assignment” and then select the users who will be provided access to the application. Set no expiration and then assign



The screenshot shows the 'Assign Users' interface. The title is 'Assign Users' and 'All Users' is selected. Below the title is a 'View:' dropdown set to 'All Users' and links for 'Edit' and 'Create New View'. A table lists users with checkboxes for selection. The table has columns for 'Action', 'Full Name', 'Alias', and 'Role'. At the bottom right are 'Assign' and 'Cancel' buttons.

☐	Action	Full Name ↑	Alias	Role
☐	Edit	Chatter Expert	Chatter	
☐	Edit	Dempster, Michael	MDemp	CEO
☒	Edit	Rogers, comm	iroge	
☒	Edit	Rogers, Jack	iroge	Burlington Textiles Corp of America Partner User
☐	Edit	SVP	sale	SVP, Sales & Marketing
☐	Edit	User, Integration	integ	
☐	Edit	User, Security	sec	

Assign “Run Flows” System Permission

There are a number of Salesforce flows used in Meetabl that require the running user to have the system permission “Run Flows”. This can be set on a user level or at a profile / permission set level. Please see the following article for more details and setup guide:

To enable “Run Flows” for a user, create a permission set by navigating to:

1. Setup > Permission Sets

2. Create a New Permission Set and call it "Run Flows Permission".
3. Session Activation is not required, nor is attributing it to a license type
4. Upon save, click on the "App Permissions" > Edit
5. Select "Run Flows" checkbox under the "Flow and Flow Orchestration section" and then save

▼ Flow and Flow Orchestration

Permission Name	Enabled	Description
Manage Flow	☐ ⓘ	Create and edit Flows.
Manage Orchestration Runs and Work Items	☐	Cancel and debug orchestration runs and reassign orchestration work items.
Run Flows	☒	In this org, run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.
View Flow Usage and Flow Event Data	☐ ⓘ	Unsupported. Use the View Setup and Configuration permission to let users access flow usage data and flow standard platform event data.

6. Follow the [Assign Permission Step](#) above to assign the permission set to all Meetable users

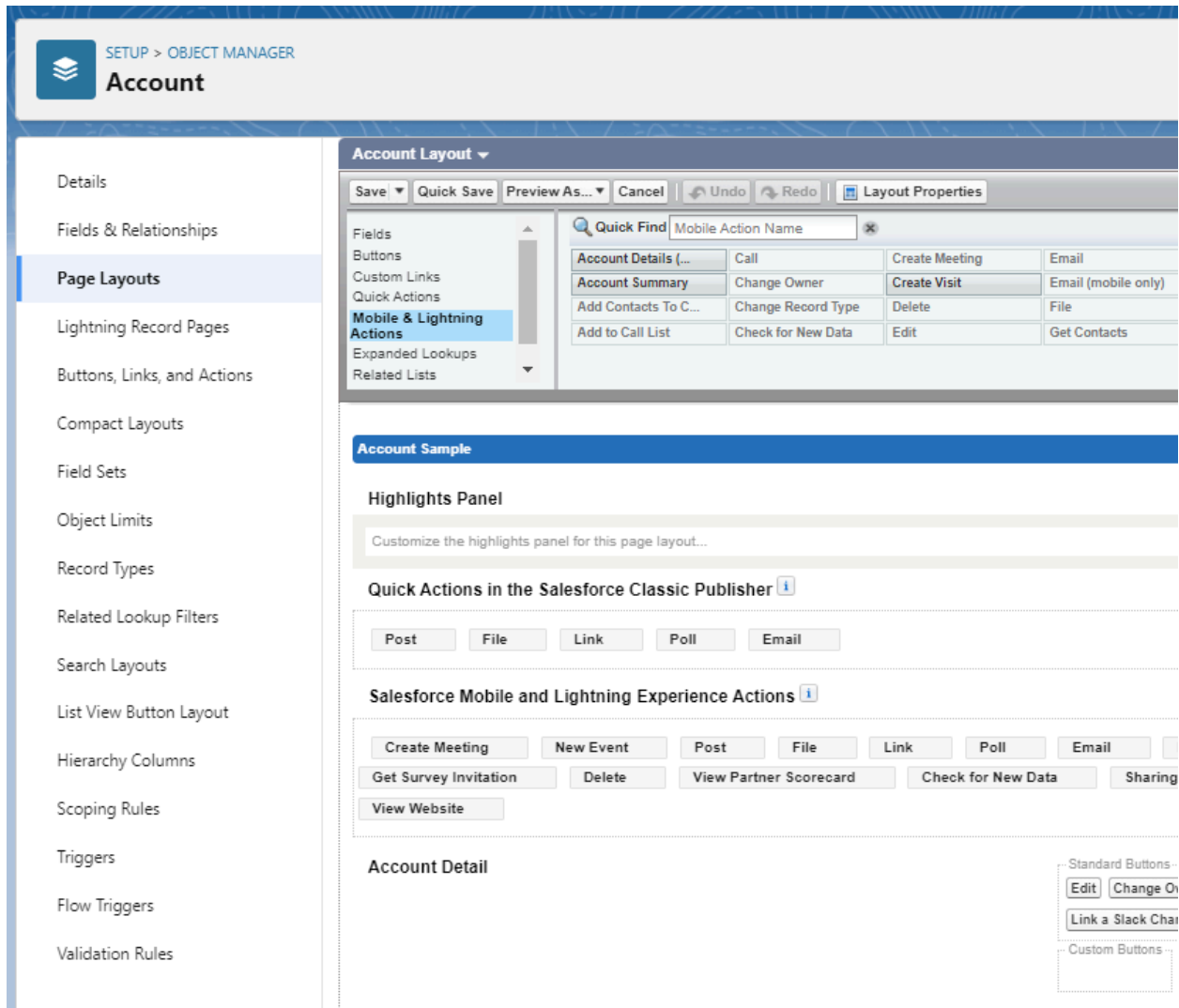
Please see the following article for more details:

https://help.salesforce.com/s/articleView?language=en_US&id=sf.wcc_setup_add_run_flows_perms.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5

Account / Contact Create Meeting Action

To create a meeting, the “Create Meeting” button is required to be added to the account or contact page depending on how the application has been configured.

1. Navigate to Setup > Object Manager > Account or Contact > Page Layouts & edit
2. Select “Mobile & Lightning Actions” in the top section
3. Drag down “Create Meeting” button to the “Salesforce mobile and Lightning Experience Actions” section
4. Press save.



The screenshot shows the Salesforce Account Page Layout editor. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

The main content area is titled "Account Layout" and includes a "Quick Find" search bar. Below the search bar is a table of actions:

Account Details (...)	Call	Create Meeting	Email
Account Summary	Change Owner	Create Visit	Email (mobile only)
Add Contacts To C...	Change Record Type	Delete	File
Add to Call List	Check for New Data	Edit	Get Contacts

Below the table, there are sections for "Account Sample", "Highlights Panel", "Quick Actions in the Salesforce Classic Publisher", "Salesforce Mobile and Lightning Experience Actions", and "Account Detail". The "Salesforce Mobile and Lightning Experience Actions" section contains a row of buttons: Create Meeting, New Event, Post, File, Link, Poll, Email, and a plus icon. Below this row are buttons for Get Survey Invitation, Delete, View Partner Scorecard, Check for New Data, and Sharing. The "Account Detail" section shows a "Standard Buttons" section with Edit and Change On buttons, and a "Custom Buttons" section with a Link a Slack Char button.

Page Layout Assignment

The Meeting Report object has two record types - Weekly & Territory. The correct page layout is required to be assigned to each layout. Ensure the:

- Territory Report Record Page Layout is assigned to the Territory record type
- Weekly Report Record Page Layout is assigned to the Weekly record type

Profiles	Record Types			(1-3 of 3)
	Master	Territory	Weekly	
Analytics Cloud Integration User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Analytics Cloud Security User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Chatter External User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Chatter Free User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Chatter Moderator User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Company Communities User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Contract Manager	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
CPQ Integration User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Cross Org Data Proxy User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Force.com - App Subscription User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Force.com - Free User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	
Gold Partner User	Territory Report Record Page Layout	Territory Report Record Page Layout	Weekly Report Record Page Layout	

Page Layout Adjustments

There are several related lists linked to account / contact that are required to be added to the page for visibility of related:

- Meeting Cadences
- Meetings
- Meeting Outcomes (Main Competitor)
- Meeting Attendees

Navigate to the org's Account / Contact page layout and include the following related lists:

- Account
 - Meeting Cadence (if Account is to be the master of meetings)
 - Meeting
 - Meeting Outcome (Main Competitor)
- Contact
 - Meeting Cadence (if Contact is to be the master of meetings)
 - Meeting
 - Meeting Attendee

Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties

Quick Find

Related List Name

Campaigns

Contact Point Add...

Contacts

Data Integration ...

Invoices

Meeting Outcomes

Opportunities

Product Requests

Return Orders

Cases

Contact Point Emails

Content Deliveries

Entitlements

Maintenance Plans

Meetings

Orders

Provided Assets

Service Contracts

Communication Sub...

Contact Point Phones

Contracts

Files

Meeting Attendees

Notes & Attachments

Partners

Related Content

Serviced Assets

Community Members

Contact Roles

Credit Memos

Groups

Meeting Cadences

Open Activities

Product Request L...

Resource Preferences

Service Resources

Related Lists

Meetings

New

Change Owner

Meeting ID	Primary Contact	Start	Duration (Minutes)	Scheduled Type	Purpose of Meeting	Status	Meeting Location	Owner Full Name
Sample Text	Sarah Sample	27/10/2022, 10:45 am	Sample Text	Sample Text	Sample Text	Sample Text	Sample Text	Sample Text

Meeting Cadences

New

Change Owner

Meeting Cadence ID	Contact	Frequency	Period	Status	Target Meetings	Actual Meetings	Days to Meeting Due
Sample Text	Sarah Sample	99	Sample Text	Sample Text	51,178	25,188	Sample Text

Meeting Attendees

New

Change Owner

Meeting Attendee ID	Meeting	Contact	Status	Meeting Outcome
Sample Text	GEN-2004-001234	Sarah Sample	Sample Text	GEN-2004-001234

Ensure the following:

1. New and Change Owner buttons are removed from the related list using the “spanner” icon
2. The correct fields are displaying as per the businesses requirements

Event Page Layout

Adjust the org's event page layout to add two custom fields for added visibility of the related meeting and attendees. The custom fields to add are:

- Attendees
- Meeting__c

User Page Layout

Adjust the org's user page layout to add custom fields to be set per user record. Not all fields are required, some are specific to how you want to use the application. The custom fields to add are:

- **Required**
 - Meetings_to_Complete_per_Week__c
 - Territory_Coverage_weeks__c
- **Optional**
 - Manufacturers_Represented__c
 - Business_Unit__c

Compact & Search Layouts

Ensure to adjust all compact and search layouts related to Meetabl objects to suit the business needs.

Examples of this are:

- Remove Business Unit field if meetings are primarily seen by the user
- Remove Manufacturer Represented field if not applicable
- Remove Contact lookup field if meetings are mastered by account

Update User Records

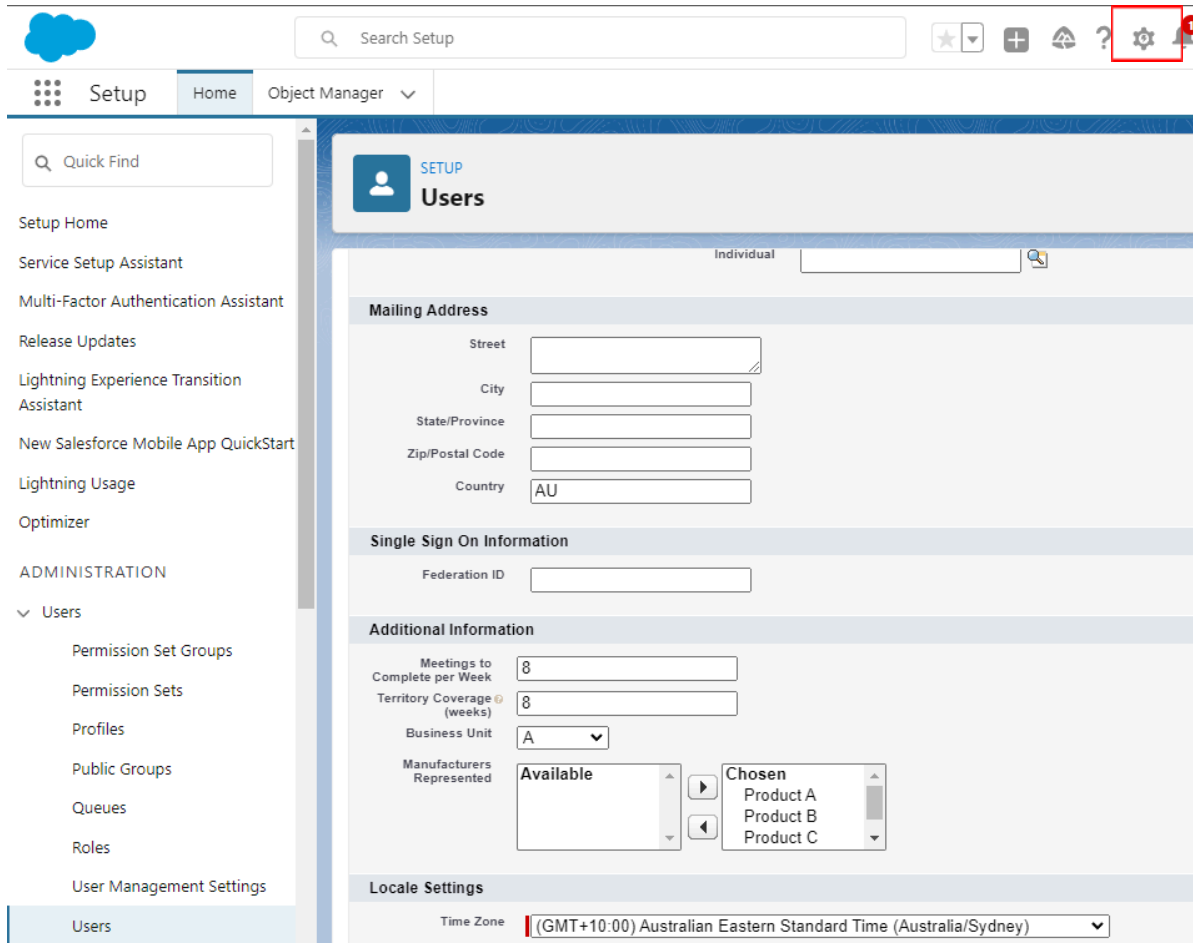
Each user who will be assigned a MEETabl permission set license requires a number of fields populated on their user record. These include:

- **Required**
 - Meetings to Complete per Week - The number of meetings the user is expected to complete per week
 - Territory Coverage (weeks) - The number of weeks it takes the user to meet all their customers in their territory
- **Optional**
 - Manufacturers Represented - The manufacturers the user represents in a meeting
 - Business Unit - The business unit the user belongs to

The above fields should be added to your User object page layout first with the **Required** fields marked as required.

To update a user record navigate to setup > Users > Users. Edit the chosen user and adjust the relevant fields. When changes are made, press save.

Alternatively users can be updated on mass using our data load template. Please contact us for more information.



The screenshot displays the 'Setup Users' interface. The top navigation bar includes a 'Setup' tab and a search bar. The left sidebar lists various setup options, with 'Users' selected under the 'ADMINISTRATION' section. The main content area is titled 'SETUP Users' and contains the following sections:

- Mailing Address:** Fields for Street, City, State/Province, Zip/Postal Code, and Country (set to AU).
- Single Sign On Information:** Field for Federation ID.
- Additional Information:** Fields for Meetings to Complete per Week (set to 8), Territory Coverage (set to 8 weeks), Business Unit (set to A), and Manufacturers Represented (a list with Product A, Product B, and Product C).
- Locale Settings:** Field for Time Zone (set to (GMT+10:00) Australian Eastern Standard Time (Australia/Sydney)).

Report & Dashboard Folders

Update MEETabl report and dashboard folders to provide users access to the packages report and dashboards. To do so:

1. Navigate to the Report or Dashboard tab
2. Select All Folders
3. Click the dropdown arrow next to the MEETabl Reports / Dashboard folder
4. Click Share

Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Public Groups

Names

All

Access

View

All Internal Users

Who Can Access

FullCRM Users

Manage

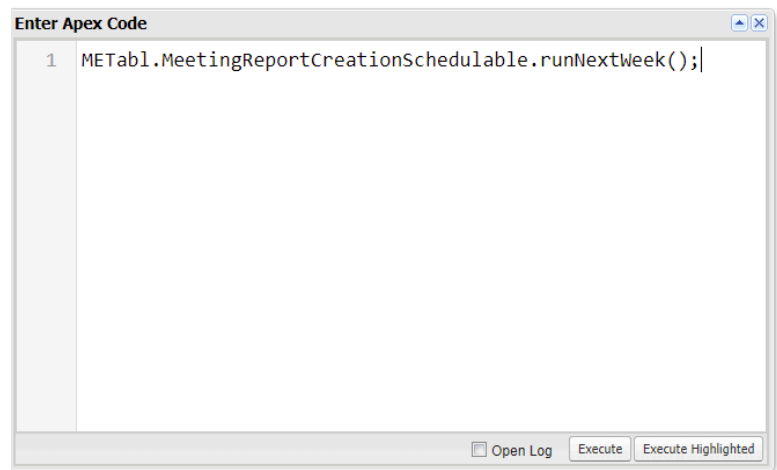
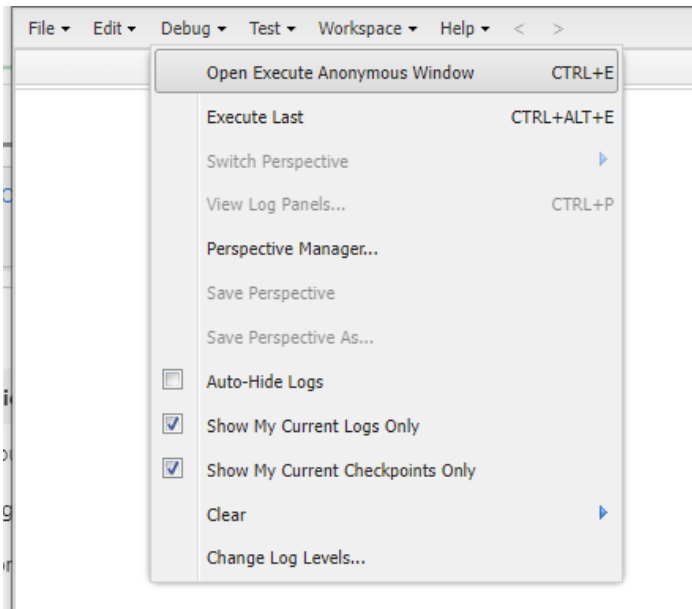
Done

5. Select Share With = Public Groups
6. Select Names = All Internal Users
7. Press Share and then Done

Weekly Meeting Report Batch Job Schedule

Weekly Meeting Reports are generated automatically for the user. The first weekly report is created after the first meeting is created in the system. Subsequent weekly reports are created each Sunday based on an apex batch job. To schedule the job:

1. Setup > Developer Console > Debug > Open Execute Anonymous
2. Copy paste in the following script and select "Execute"
`METabl.MeetingReportCreationSchedulable.runNextWeek();`



Event Status Sync

Events are created automatically when a Meeting record is created with associated meeting attendee records if defined as part of configuration. These meeting attendee records are then added to the related event as Salesforce attendees.

Through the use of Einstein Activity Capture, Salesforce events are synchronized with Outlook/Google calendars including those meeting attendees who have been invited. This apex class updates the related meeting attendee records with their invitation status (Accepted or Declined). To schedule the job:

3. Setup > Developer Console > Open Execute Anonymous
4. Copy paste in the following script and select run `METabl.EventStatusSyncSchedulable.run();`

The job will run every 5 minutes to retrieve an update.

Einstein Activity Capture

Einstein Activity Capture is a standard Salesforce function available in all Salesforce orgs. This feature allows for the synchronization of email, event and email records between Salesforce and Outlook/Google. This feature is used in Meetabl to synchronize meetings created in Salesforce with the Outlook/Google calendar and keep track of changes to the event and its attendees.

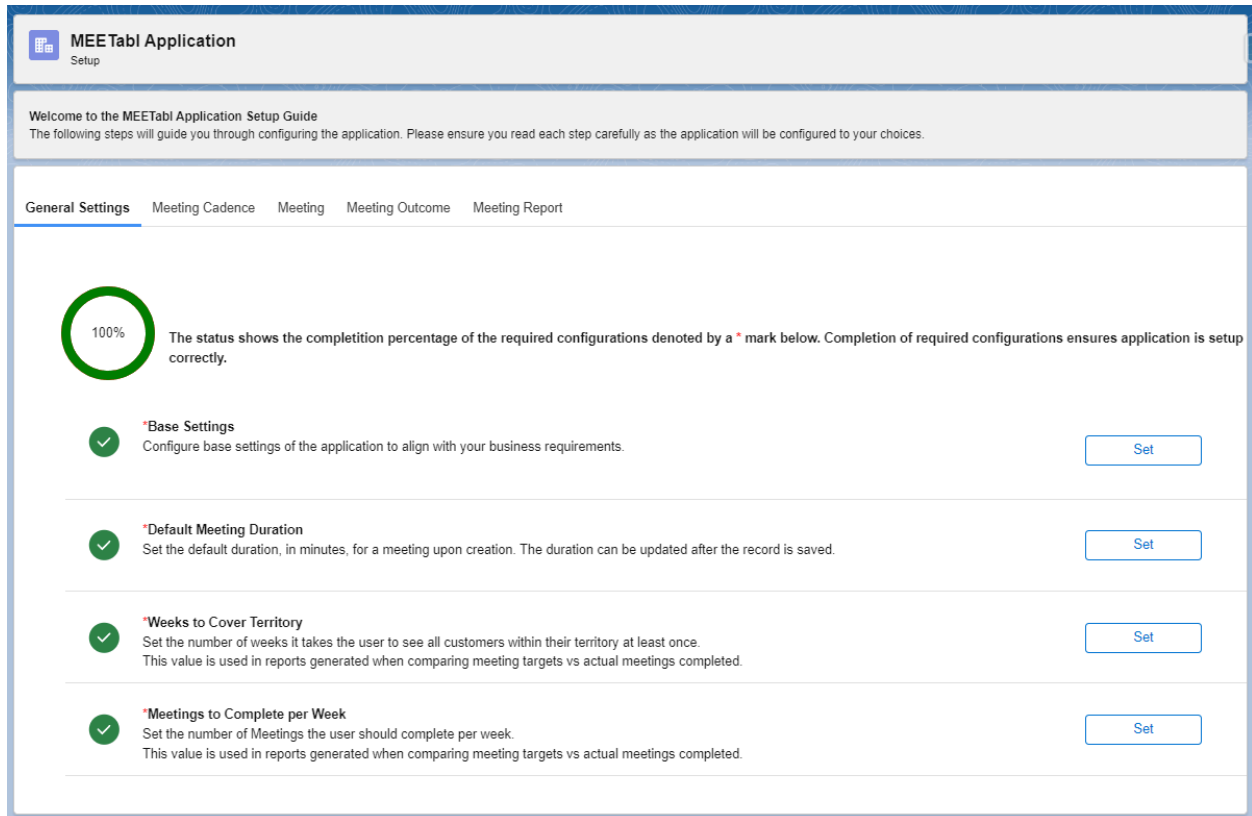
Follow this Salesforce article to setup Einstein Activity Capture:

https://help.salesforce.com/s/articleView?id=einstein_sales_aac.htm&language=en_US

Meetabl Configuration

The configuration page is created to enable the setup user (administrator) to easily configure the application, defining the mandatory settings and adding default values. The configuration page will be broken into separate tabs on the navigation bar providing a tab per object with links to settings, objects, fields and layouts and a main tab for general settings of the package.

The configuration is crucial to the functionality of the application. A visual indicator showcases the progress of the mandatory settings configuration completeness.



MEE Tabl Application
Setup

Welcome to the MEE Tabl Application Setup Guide
The following steps will guide you through configuring the application. Please ensure you read each step carefully as the application will be configured to your choices.

General Settings | Meeting Cadence | Meeting | Meeting Outcome | Meeting Report

100% The status shows the completion percentage of the required configurations denoted by a * mark below. Completion of required configurations ensures application is setup correctly.

- *Base Settings**
Configure base settings of the application to align with your business requirements. [Set](#)
- *Default Meeting Duration**
Set the default duration, in minutes, for a meeting upon creation. The duration can be updated after the record is saved. [Set](#)
- *Weeks to Cover Territory**
Set the number of weeks it takes the user to see all customers within their territory at least once. This value is used in reports generated when comparing meeting targets vs actual meetings completed. [Set](#)
- *Meetings to Complete per Week**
Set the number of Meetings the user should complete per week. This value is used in reports generated when comparing meeting targets vs actual meetings completed. [Set](#)

General Settings:

- **Base Settings**
 - **Meeting Master Record - Account / Contact**
 - Select if meetings are to be mastered by account or Contact (i.e. is the user see meet with the account/business or the contact/person)
 - Setting this option will ensure validation of account or contact as being required when creating a meeting
 - **Meeting Allocation**
 - Define if the meeting is to be allocated against the user or the user's business unit
 - When a meeting cadence / meeting is created, it will determine if the record is created against the user, or against the business unit

- *NB: There can be one meeting cadence for a single business unit that multiple users use for their meetings because they belong to the same business unit*
- **Canceled Meetings Count as Completed**
 - Checkbox that if selected, meetings with a status of “Canceled” are counted as completed meetings while calculating:
 - Actual Meetings on meeting cadence
 - Customers Met on meeting report
 - Customers Not Met on meeting report
 - Customer Meetings Fulfilled on meeting report
 - Meeting Execution LWC actuals on meeting report
- **Create Events**
 - Define if Salesforce event records are to be created automatically from meeting creation
 - Event records are used to synchronize with Outlook/Google calendar via Einstein Activity Capture to track date/time changes and meeting attendee invitation status
- **Create Multiple Outcomes**
 - Define if multiple outcomes are to be created against a meeting or not
 - If set to FALSE, only one meeting outcome can be created per meeting
- **Purpose of the Meeting values considered**
 - Define the meeting purposes which are considered when counting whether a customer has been successfully met
 - Define the corresponding values separate by a semicolon based on values from the Purpose_of_Meeting__c field on the Meeting__c object
 - This feature allows for certain types of meetings (e.g. sample drop-off) to not be considered when reporting on actual meetings completed and whether a customer was met enough times in a period
- **Default Meeting Duration**
 - Defines the default meeting duration used on meeting creation
 - The duration can be manually overridden on creation
- **Weeks to Cover Territory**
 - Defines the default number of weeks it takes a user to cover their territory
 - Default value goes onto all new user records
 - Change in the default value will update all user records
- **Meetings to Complete per Week**
 - Defines the default number of meetings a user should complete in a week
 - Default value goes onto all new user records
 - Change in the default value will update all user records

Object Specific Tabs:

[General Settings](#) **[Meeting](#)** [Meeting Outcome](#) [Meeting Cadence](#) [Meeting Report](#)

The object is used to schedule, track and report on the Meetings conducted to Accounts / Contacts.

Too see the object details, please, click the button

To see and configure the page layouts of the object, click the button

To see and configure the fileds of the object, please, click the button

[Details](#)
[Fields](#)
[Layouts](#)

- Nagitate through the following buttons to access each object:
 - Details - Quick access to Setup > Object Manager > “chosen object”
 - Fields - Quick access to Setup > Object Manager > Fields & Relationships for that specific object to make amendments
 - Layouts - Quick access to Setup > Object Manager > Page layouts to adjust field position or remove fields from the layout

Meeting Report Field Sets

Under the meeting report tab there are an additional two options to access field sets that determine the columns displayed in visual components on the Meeting Report.

[General Settings](#) [Meeting Cadence](#) [Meeting](#) [Meeting Outcome](#) **[Meeting Report](#)**

The object provides summary information about the user and the meetings completed across a weekly and t...

Click the button to access the object details

Click the button to access the object's page layouts

Click the button to access the object's fields & relationships

Select the fields to be shown on the Meeting List custom component on the Meeting Report page

Select the fields to be shown on the Meeting Outcome custom component on the Meeting Report page.

[Details](#)
[Layouts](#)
[Fields](#)
[Set](#)
[Set](#)

- Meeting List custom component

Meetings List Help for this

Save Cancel Undo Redo Field Set Properties

Meeting

Quick Find Meeting Name *

Account	Created Date	Last Activity Date	Last Viewed Date	Meeting ID
City	Deleted	Last Modified By	Manufacturers Rep...	Meeting L
Country	Duration (Minutes)	Last Modified Date	Manufacturers Rep...	Meeting O
Created By	End	Last Referenced Date	Meeting Cadence	Owner

Drag any of the fields above into one of the lists below.

Available for the Field Set

Drag and drop the fields you want administrators to have available to add to the Field Set.

In the Field Set

Meeting ID
Account
Primary Contact
Start
Duration (Minutes)
Scheduled Type
Type of Meeting
Purpose of Meeting
City
Status

Meeting Report
Dempster Michael - Weekly Meeting Report (20.6.2022 - 26.6.2022)

Edit Printable View Delete

Record Type: Weekly From Date: 20/6/2022 To Date: 26/6/2022 Report User: Michael Dempster Business Unit: Department A

Details Files

Report User: Michael Dempster From Date: 20/6/2022 To Date: 26/6/2022 Business Unit: Department A

Report Outcomes

Scheduled Meetings	Meetings to Make
7	5
Drop-in Meetings	Meetings Completed
1	4
Customers Met	Meetings Canceled
2	0
Customers Not Met	Meetings Rescheduled
0	0
	Escalated Meetings
	0

Meetings Meeting Outcomes

Meetings (8)

8 Items

Meeti...	Acco...	Contact	Start	Duration ...	Schedule...	Type of ...	Purpose o...	City	Status
M-0001398	FC Cadenc...	FC Cadenc...	21 Jun 2022	15	Appointm...	On Site	Promotion		Planned
M-0001400	FC Cadenc...	FC Cadenc...	23 Jun 2022	15	Appointm...	Quick Call	Place Order		Planned
M-0001401	FC Cadenc...	FC Cadenc...	23 Jun 2022	15	Appointm...	Quick Call	Place Order		Planned
M-0001402	FC Test 2	FC Test 2 C...	23 Jun 2022	15	Appointm...	On Site	Place Order		Completed
M-0001500	FC Test 2	FC Test 2 C...	24 Jun 2022	15	Drop-In	On Site	Promotion		Planned
M-0001378	FC Cadenc...	FC Cadenc...	21 Jun 2022	15	Appointm...	Quick Call	Promotion		Completed
M-0001381	FC Cadenc...	FC Cadenc...	22 Jun 2022	15	Appointm...	Quick Call	Place Order		Completed
M-0001397	FC Cadenc...	FC Cadenc...	21 Jun 2022	15	Appointm...	On Site	Place Order		Completed

- Meeting Outcome List custom component

Meetings Outcomes List [Help for this Page](#)

Save Cancel Undo Redo Field Set Properties

Meeting Outcome

Quick Find Meeting Outcome Name *

Account	Created By	Last Activity Date	Manufacturer	Our Presentation
Competitor's Pres...	Created Date	Last Modified By	Manufacturer Repr...	Pain Points
Competitor Intel	Deleted	Last Modified Date	Meeting	Record ID
Contact	Escalation Required	Main Competitor	Meeting Outcome ID	System Modstan

Drag any of the fields above into one of the lists below.

Available for the Field Set

Drag and drop the fields you want administrators to have available to add to the Field Set.

In the Field Set

- Meeting Outcome ID
- Account
- Contact
- Escalation Required
- Main Competitor

Meeting Report
Dempster Michael - Weekly Meeting Report (20.6.2022 - 26.6.2022)

Edit Printable View Delete

Record Type: Weekly From Date: 20/6/2022 To Date: 26/6/2022 Report User: Michael Dempster Business Unit: Department A

Details Files

Report User: Michael Dempster From Date: 20/6/2022 Business Unit: Department A To Date: 26/6/2022

Report Outcomes

Scheduled Meetings	Meetings to Make
7	5
Drop-in Meetings	Meetings Completed
1	4
Customers Met	Meetings Canceled
2	0
Customers Not Met	Meetings Rescheduled
0	0
	Escalated Meetings
	0

Meetings Meeting Outcomes

Meeting Outcomes (4)

4 items

Meeting Outcome Id	Account	Contact	Escalation Required	Main Competitor
MO-000481	FC Cadence Test	FC Cadence Contact Test		
MO-000482	FC Cadence Test	FC Cadence Contact Test		
MO-000483	FC Cadence Test	FC Cadence Contact Test		
MO-000484	FC Cadence Test	FC Cadence Contact Test	No	

There are additional field sets accessible under the following objects which provide quick access to relevant records on the Meeting and Meeting Cadence page.

- Account:
 - Meeting Account Summary - Account fields displayed on the Meeting Lightning page under the Customer Details tab
- Contact:
 - Contact Account Summary - Contact fields displayed on the Meeting Lightning page under the Customer Details tab
- Meeting:
 - Previous Meeting Summary - Meeting fields displayed on the Meeting and Meeting Cadence Lightning pages under the Previous Meeting tab