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@insightablapps.com for any support questions or issues.

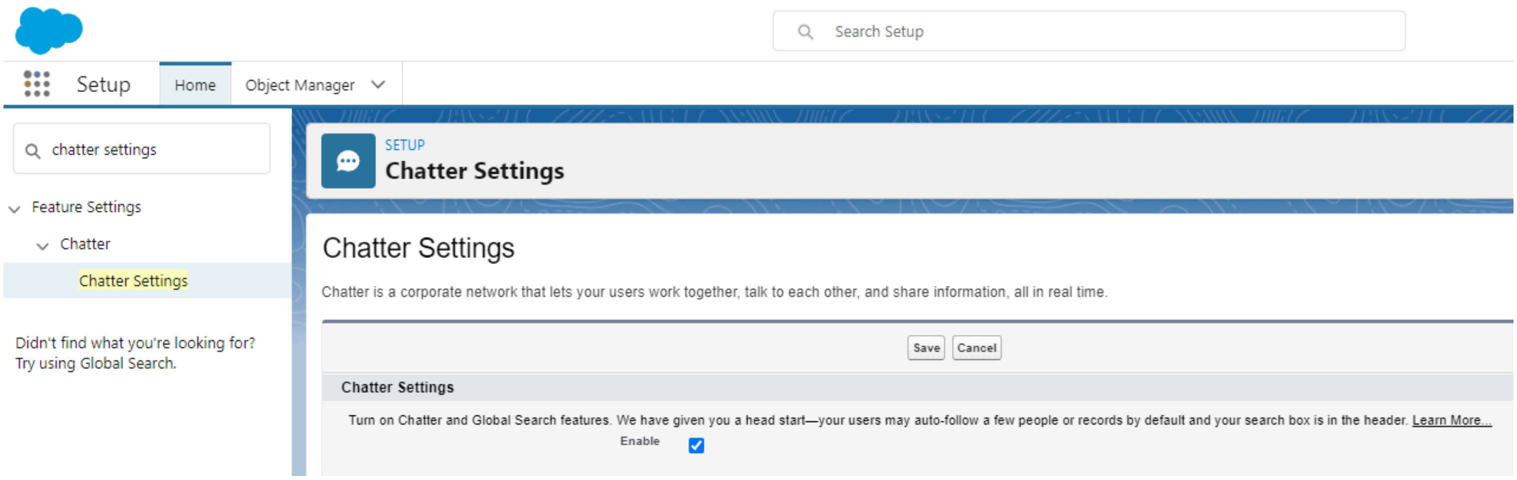
Prerequisite Steps

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.

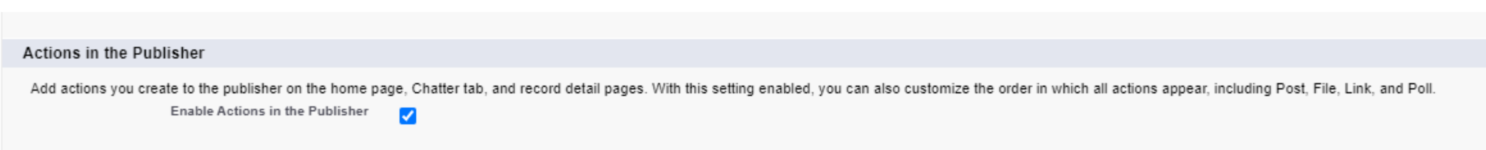
Enable Chatter & Actions in the Publisher

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



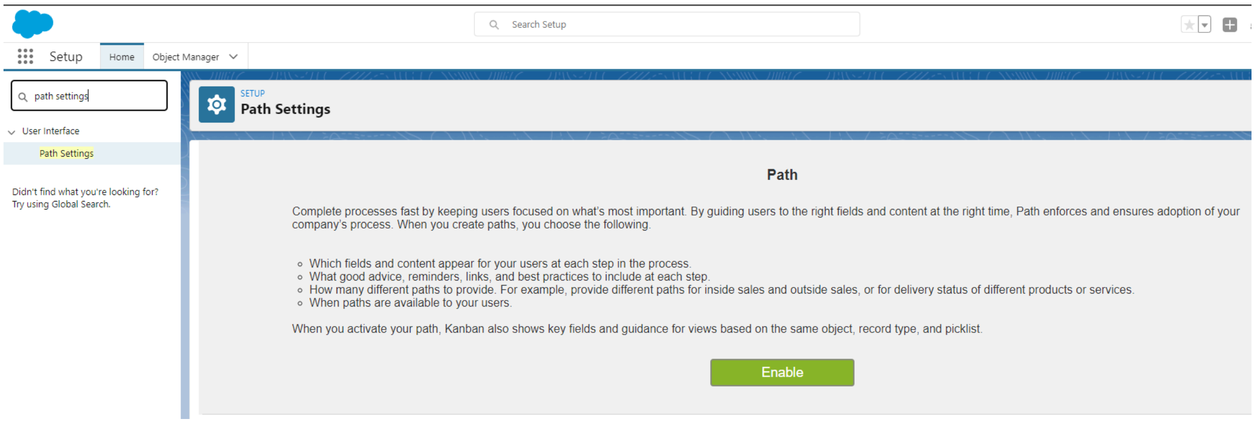
3. Enable Actions in the Publisher



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:

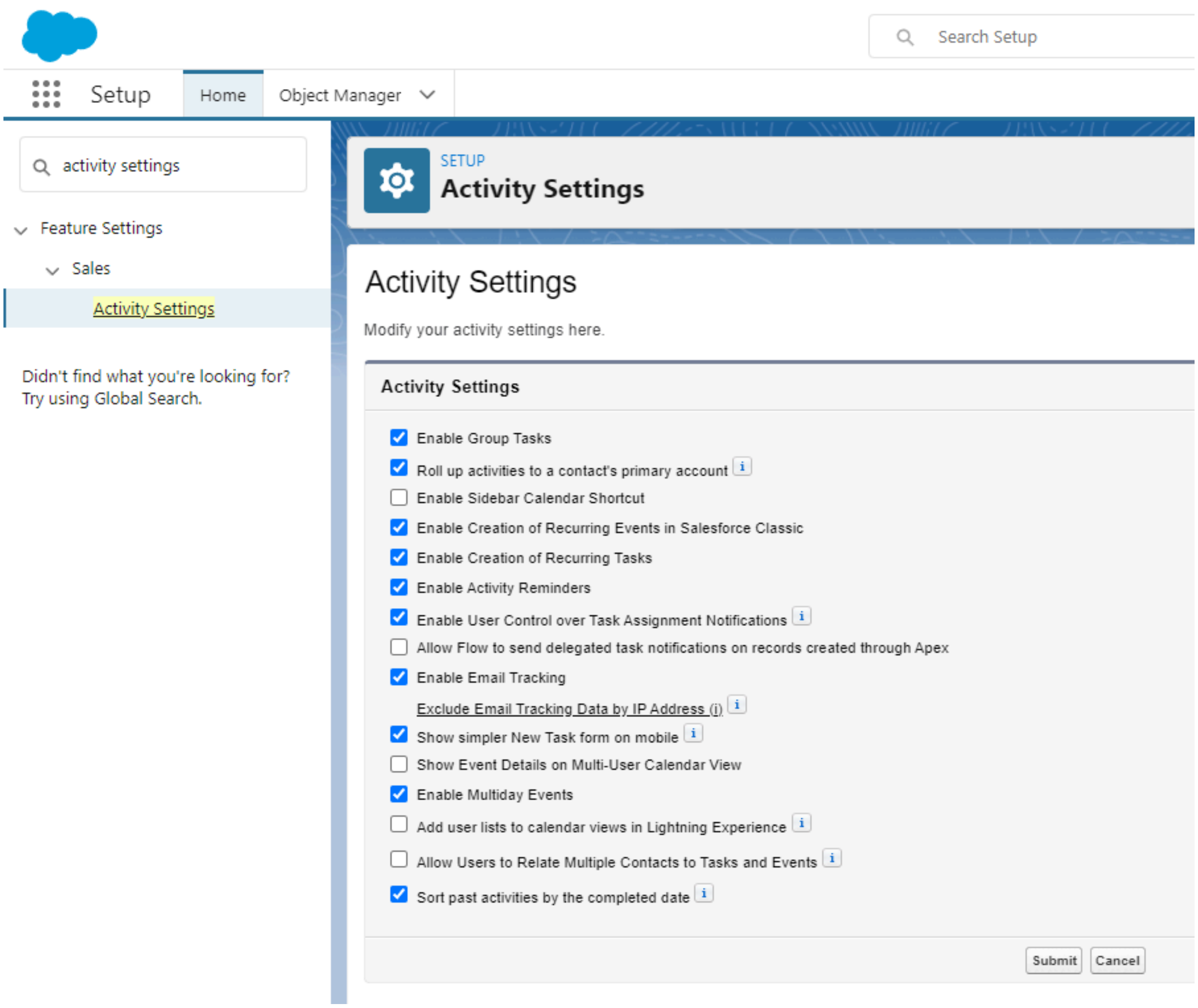
1. Setup > Path Settings
2. Enable "Path"



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:

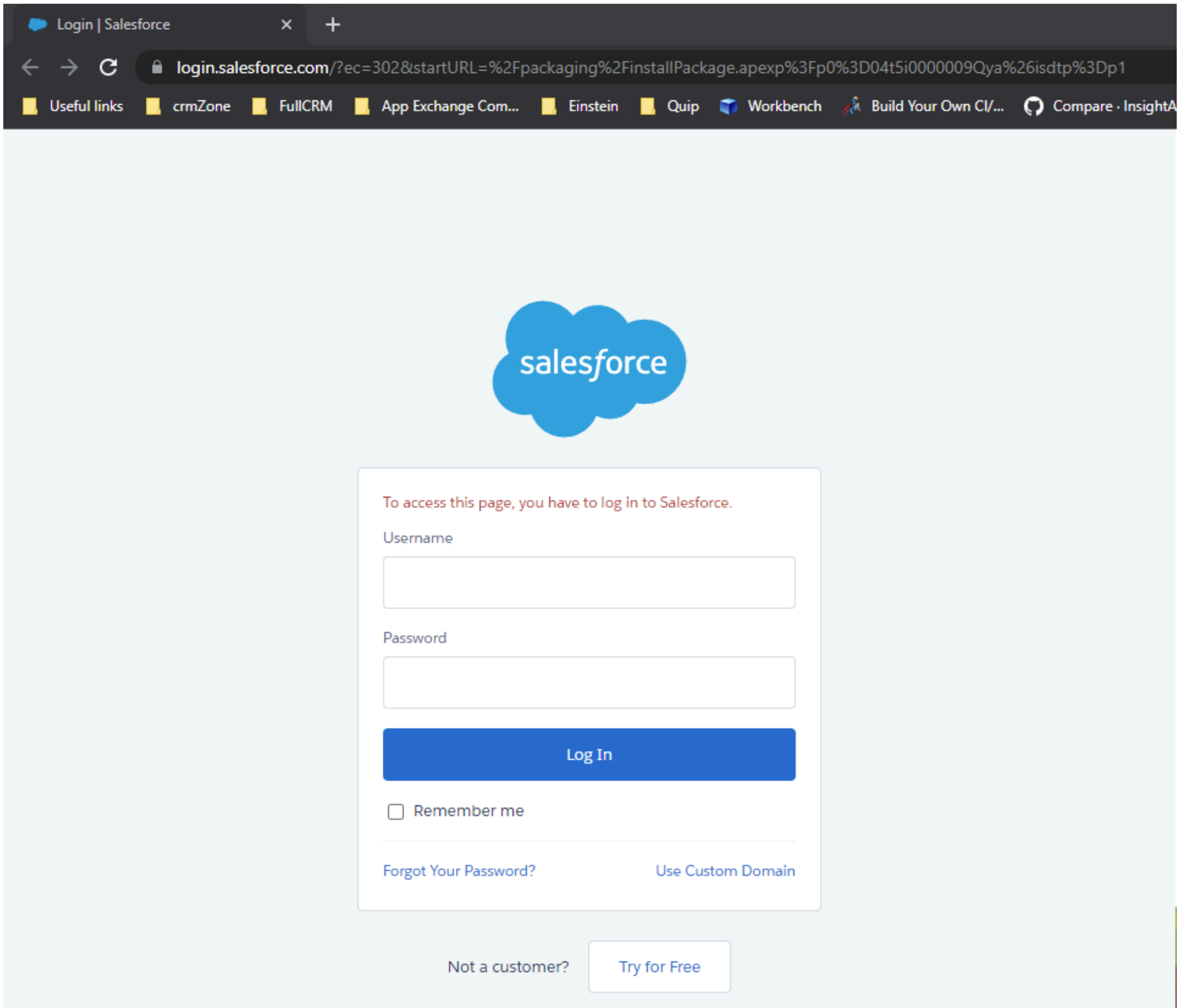
1. Setup > Activity Settings
2. Enable “Allow users to Relate Multiple Contacts to Tasks and Events”



Installation Steps

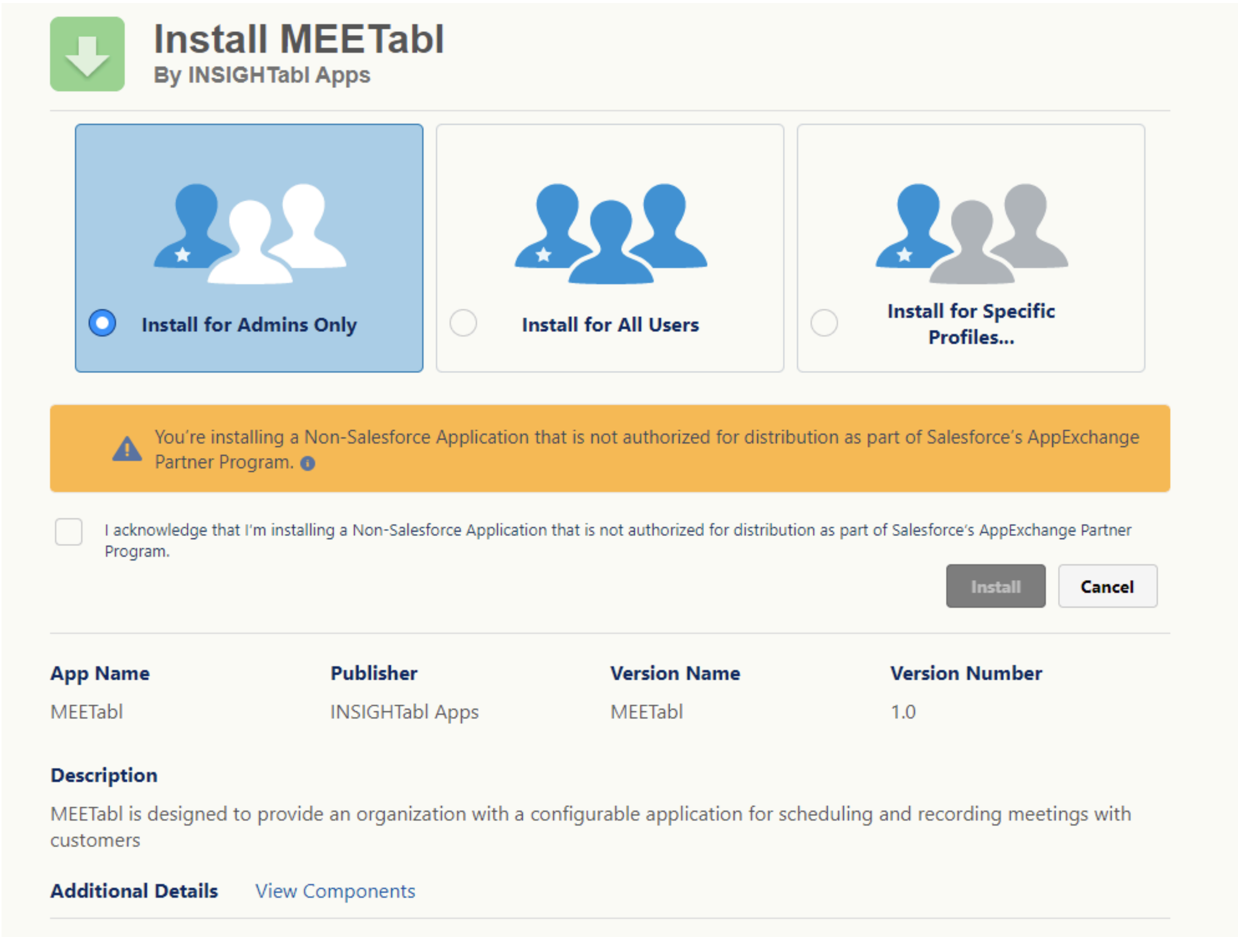
On installation it will ask you to log into Salesforce with your Salesforce credentials.

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



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
Install for Admins Only
Install for All Users
Install for Specific Profiles...
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

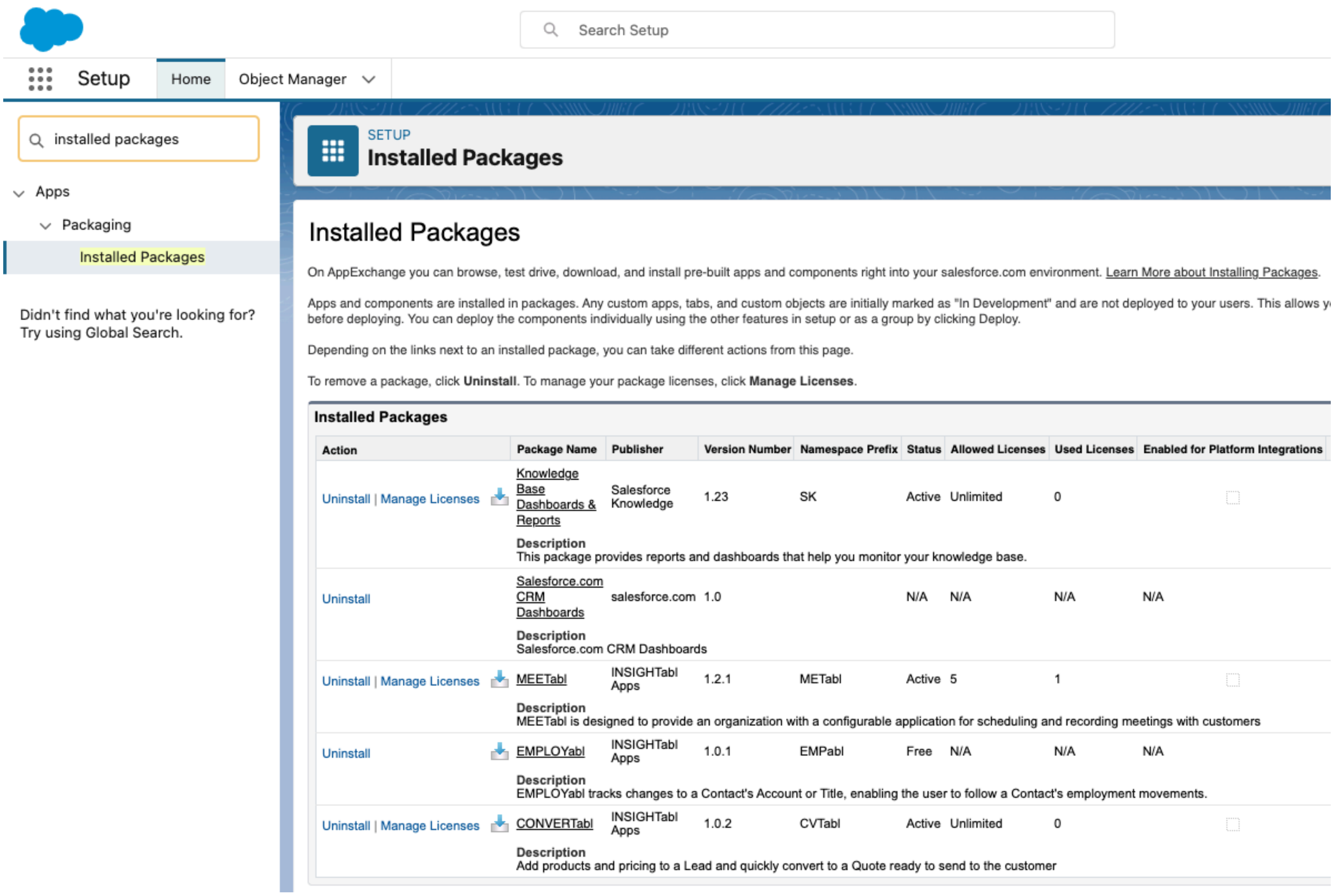
Post Installation Steps

Assign Meetabl Licenses

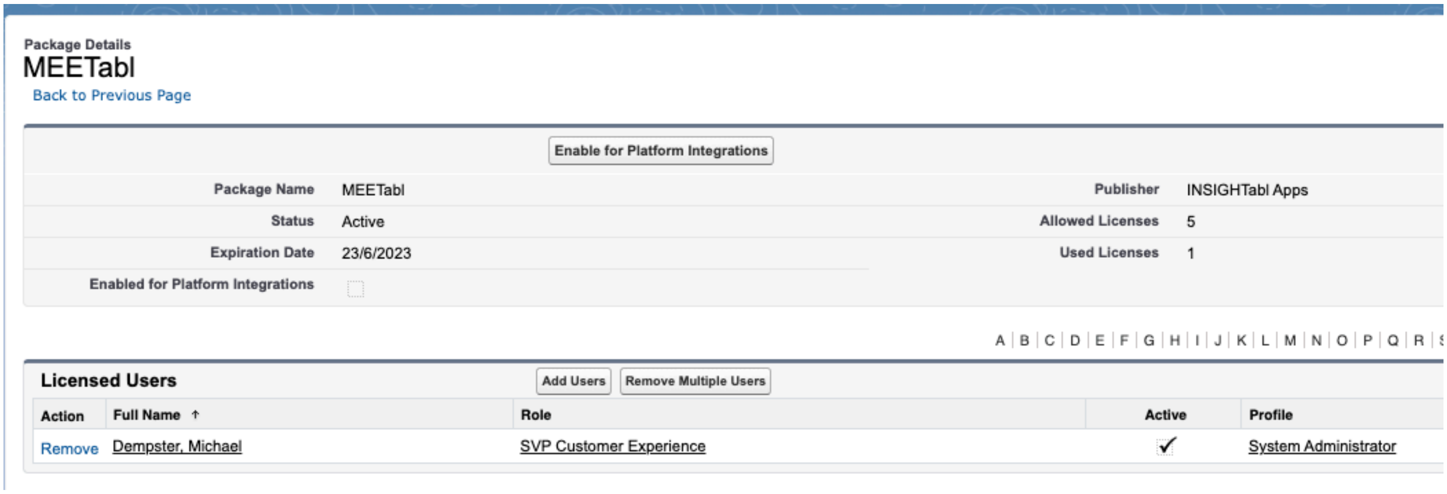
Meetabl is licensed on a per user basis. A Meetabl license is required to be attributed to a user who will be using the application. If more licenses are required please get in contact with us.

To assign a Meetabl license:

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



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



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

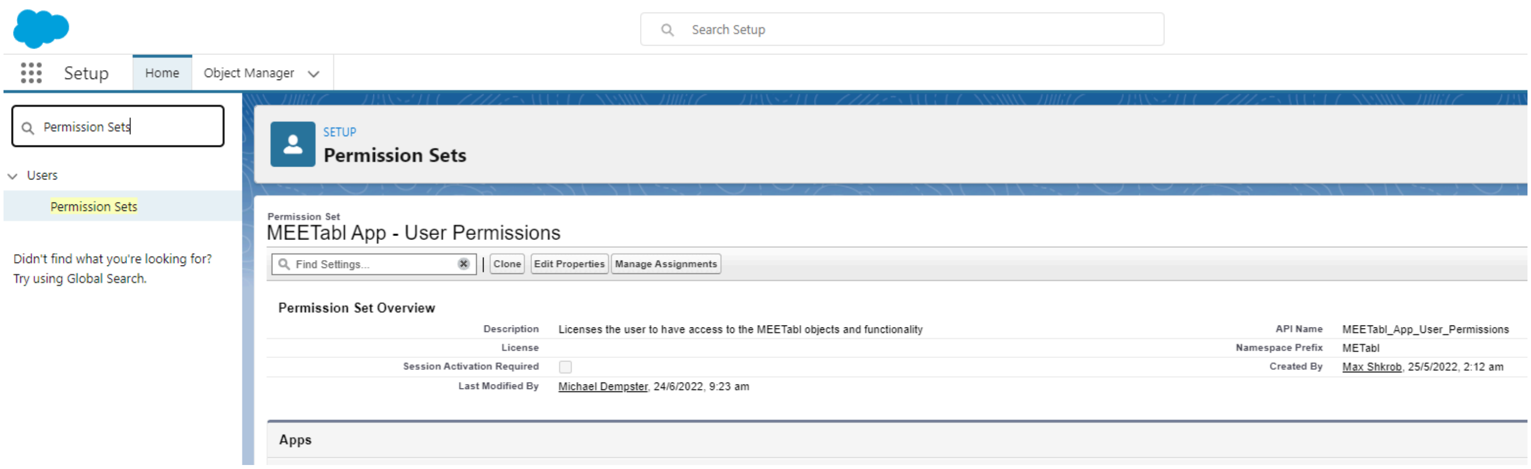
Permission sets have been created to provide access to objects, fields, components and automation related to the Meetabl application. There are two permission sets:

1. MEETabl App - User Permission
   - This permission is to be assigned to any user who will need access to Meetabl functionality or access to relevant object and fields for reporting purposes
   - The permission provides object and field level access to the Meetabl data model.

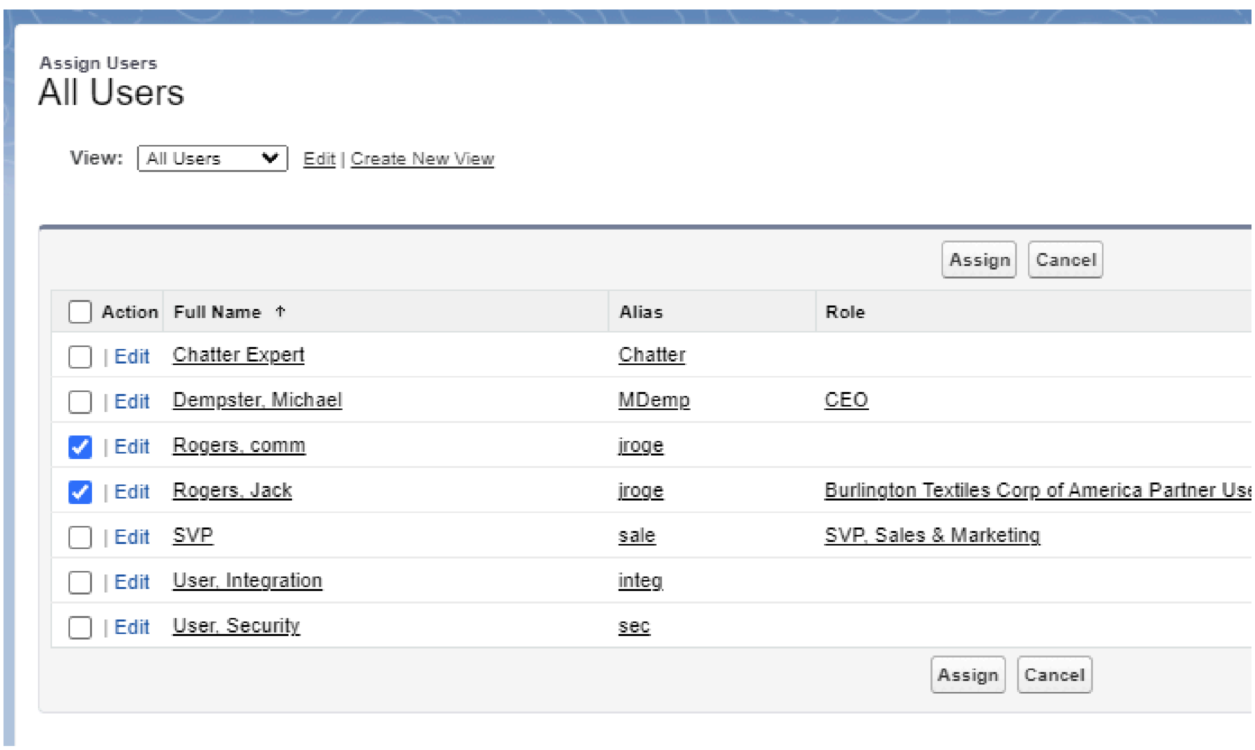
2. MEETabl App - Admin Permission
   - This permission provides the same access as the user permission above as well as access to the MEETabl configuration page used to setup the application
   - Only a Salesforce user with administrative access will be able to use this permission set as it requires access to the setup of Salesforce

To assign a permission set:

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



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



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 Meetabl users

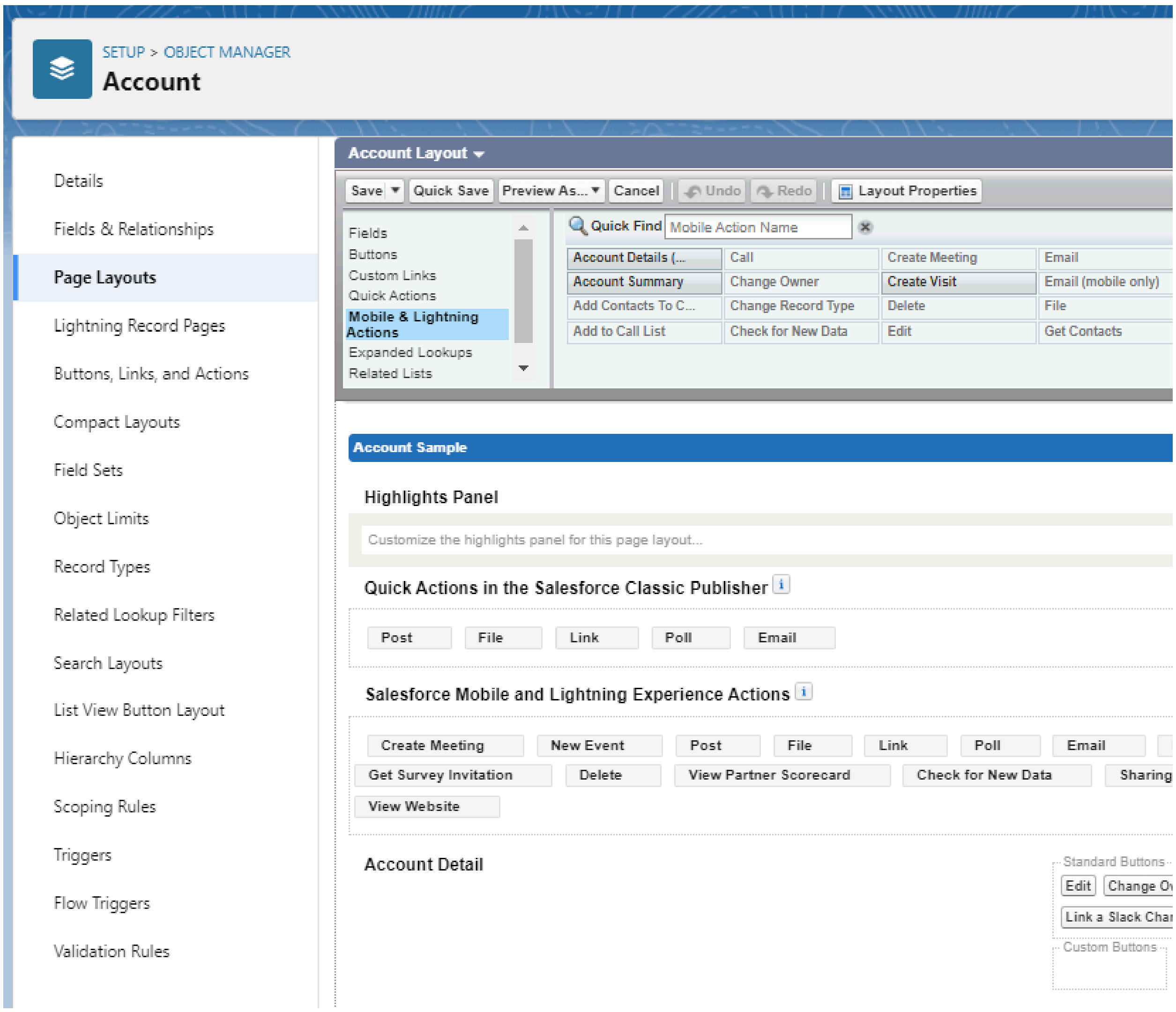
Please see the following article for more details:

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.



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

Record Types (1-3 of 3)

Profiles	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

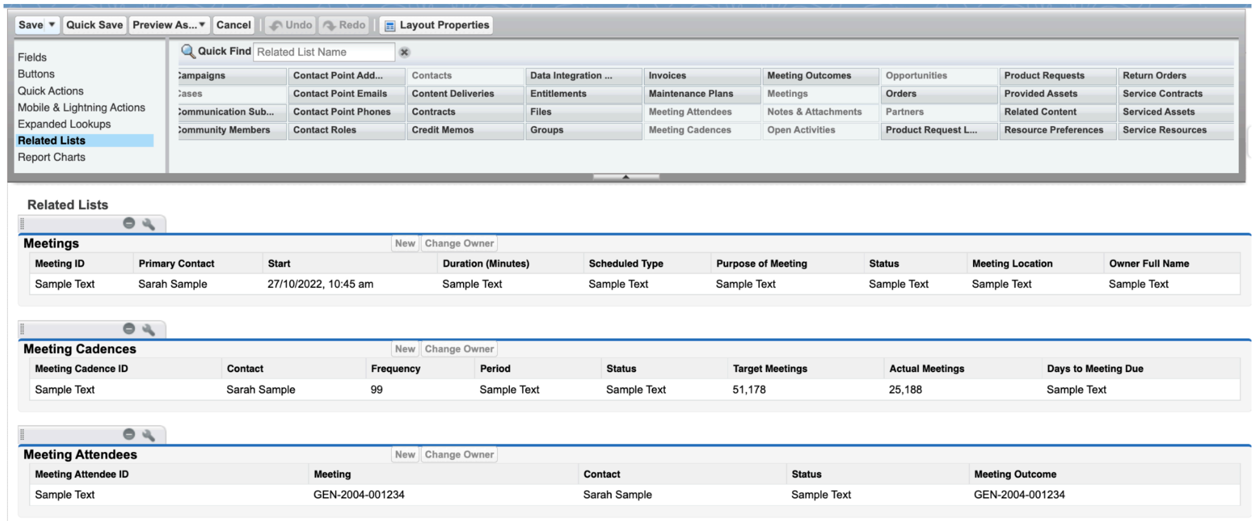
Page Layout Adjustments

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



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

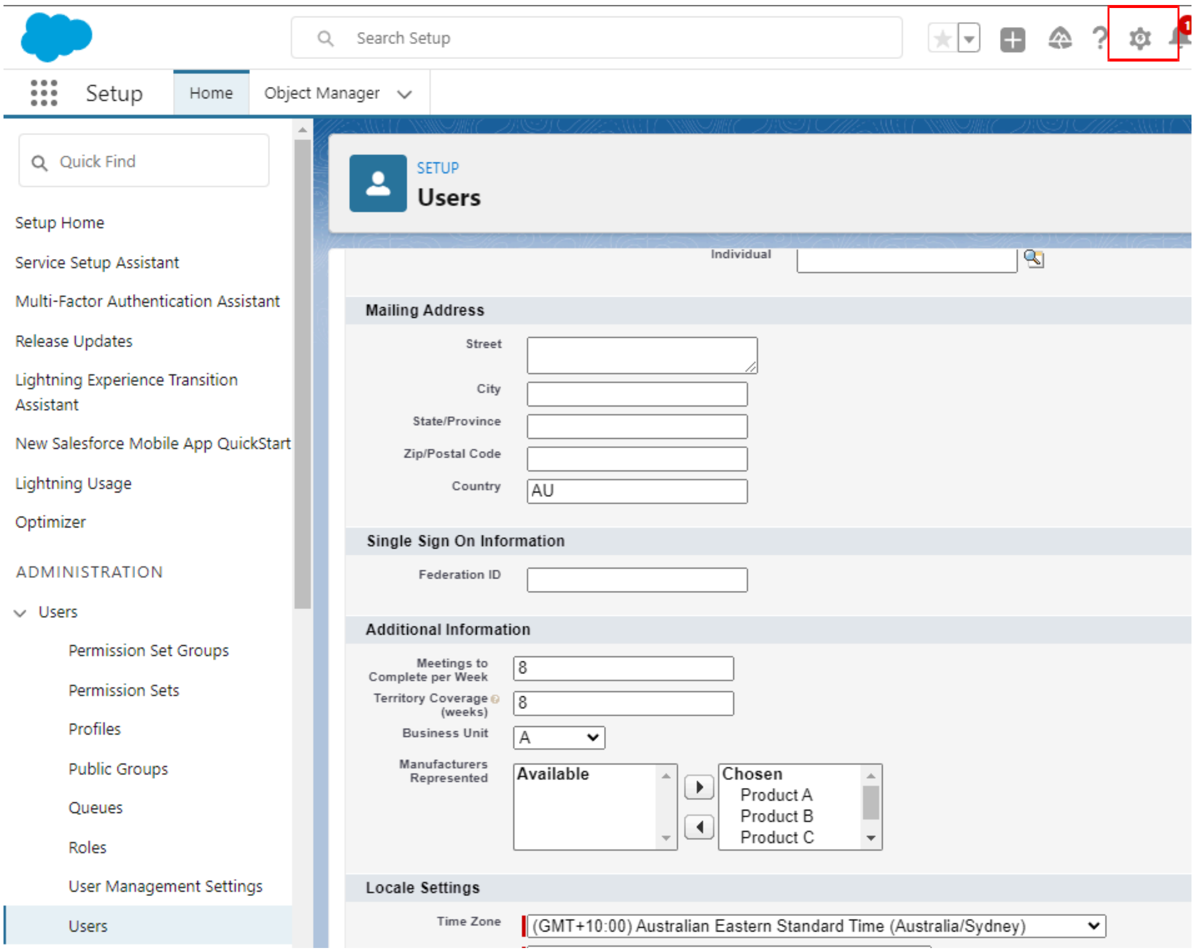
Each user who will be assigned a MEETabl permission set license requires a number of fields populated on their user record. These include:

- **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.

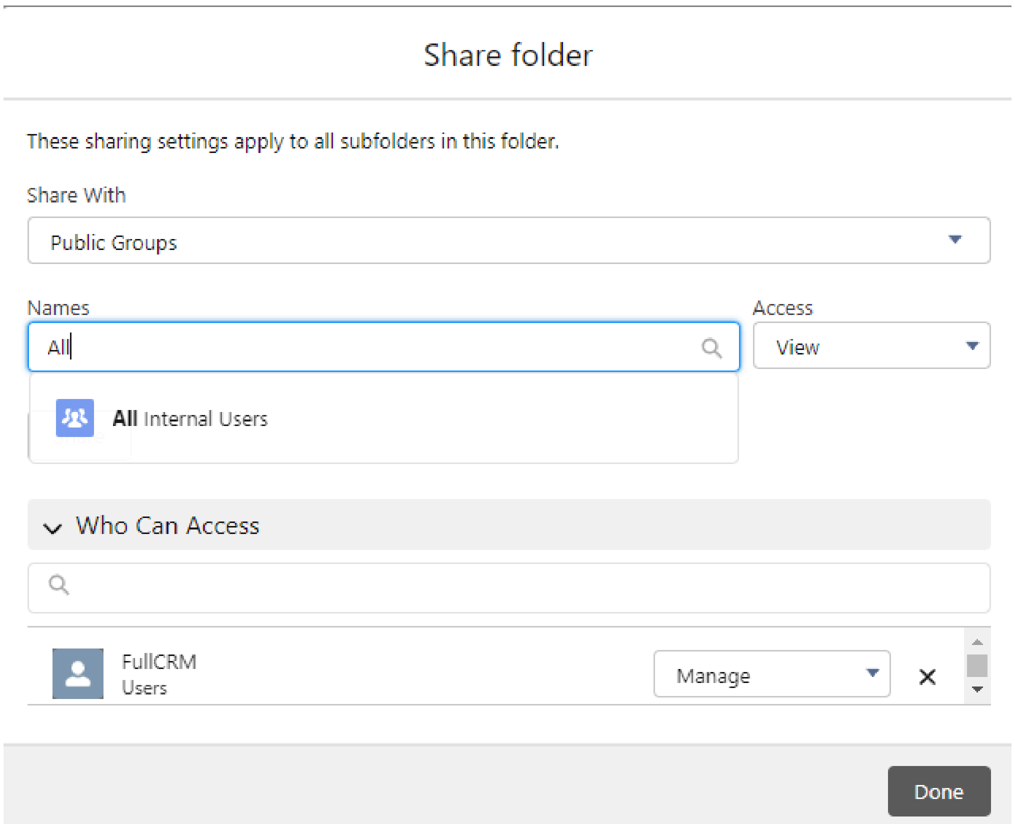
Alternatively users can be updated on mass using our data load template. Please contact us for more information.



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

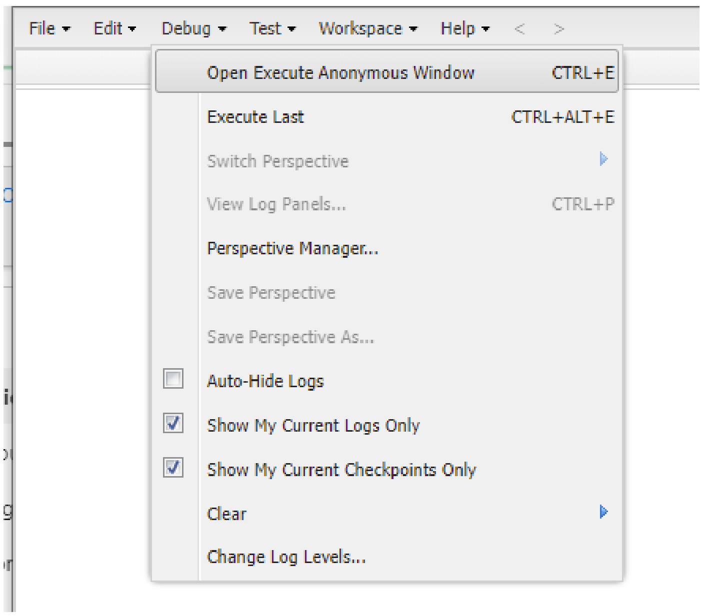


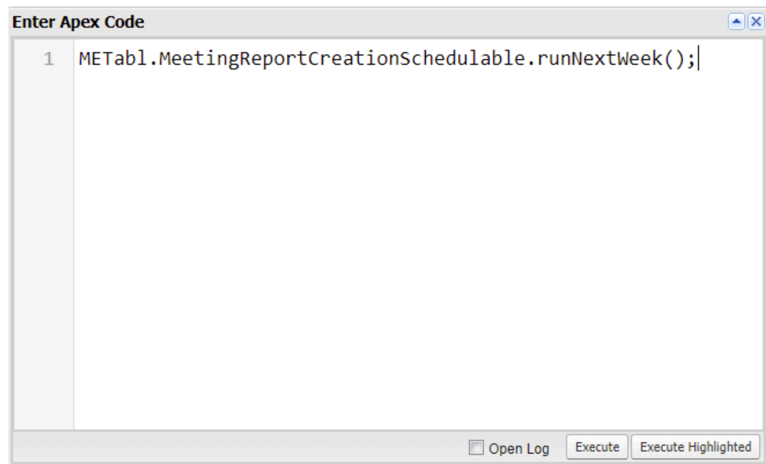
5. Select Share With = Public Groups
6. Select Names = All Internal Users
7. Press Share and then Done

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

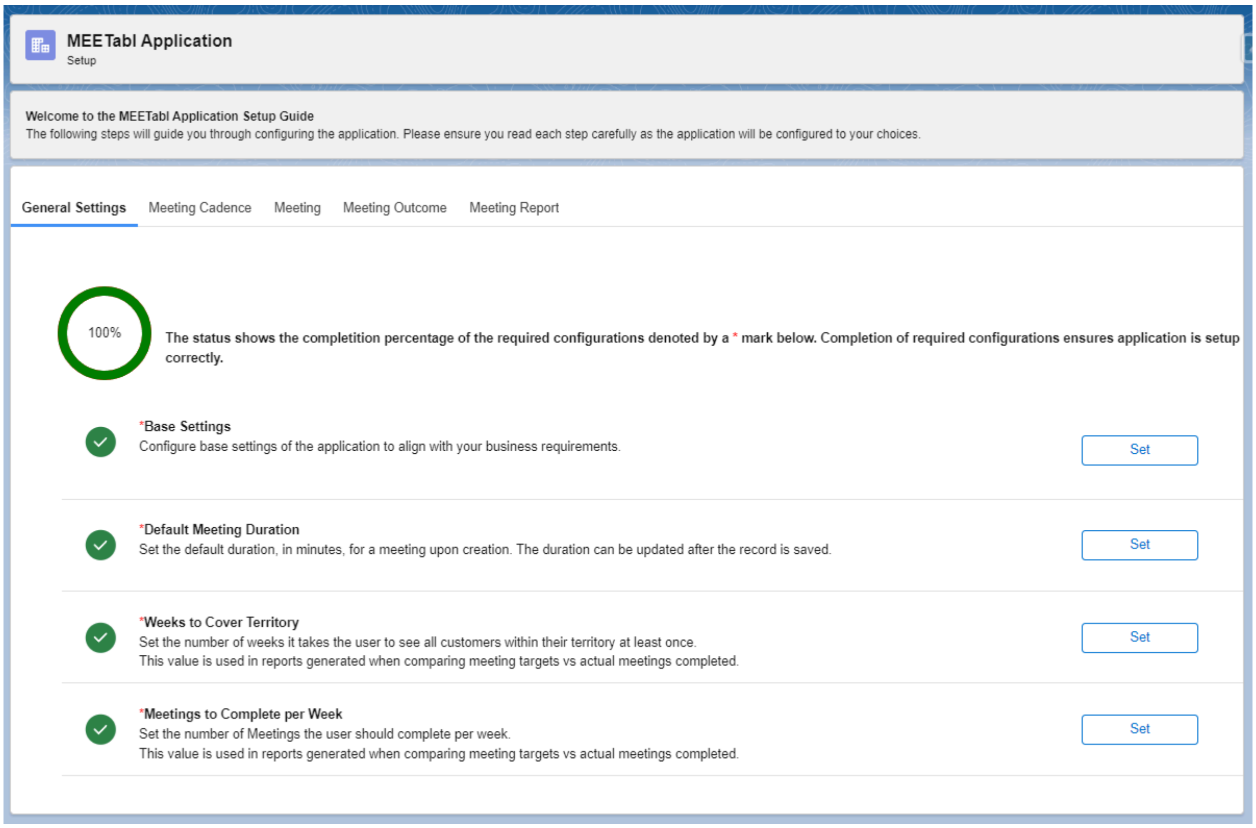
Einstein Activity Capture is a standard Salesforce function available in all Salesforce orgs. This feature allows for the synchronization of email, event and email records between Salesforce and Outlook/Google. This feature is used in Meetabl to synchronize meetings created in Salesforce with the Outlook/Google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



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

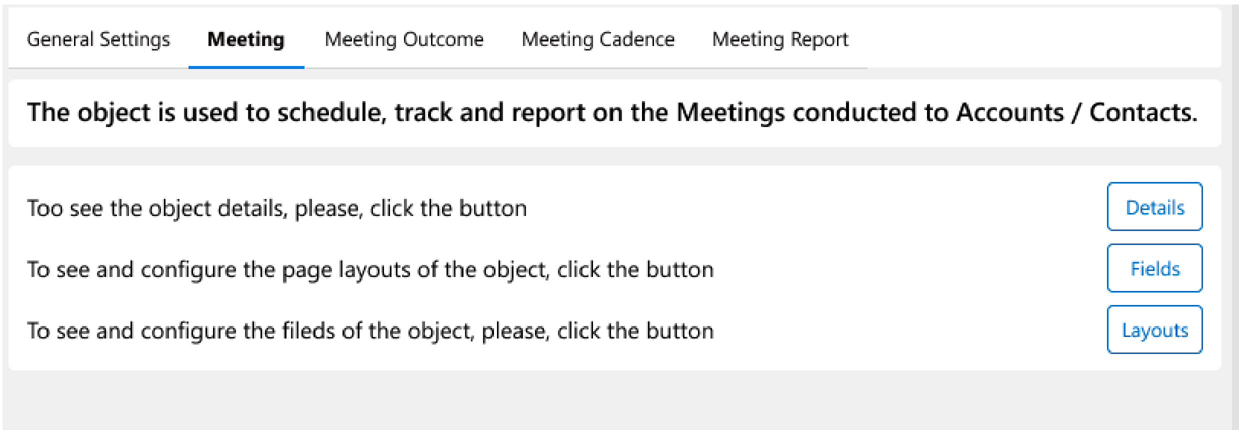
        - *NB: There can be one meeting cadence for a single business unit that multiple users use for their meetings because they belong to the same business unit*
    - **Canceled Meetings Count as Completed**
        - Checkbox that if selected, meetings with a status of “Canceled” are counted as completed 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
    - <u>Change in the default value will update all user records</u>

- **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
    - <u>Change in the default value will update all user records</u>

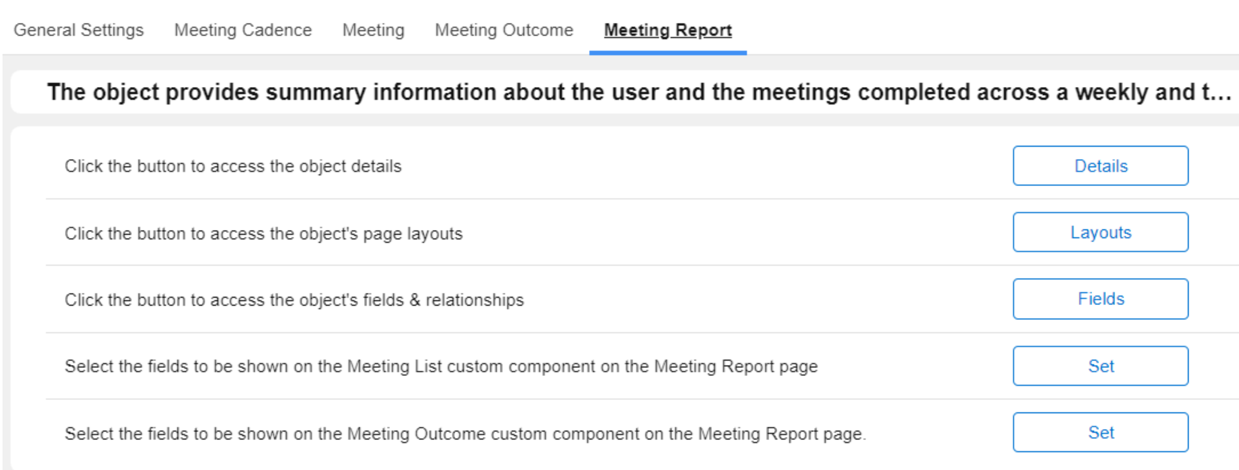
Object Specific Tabs:



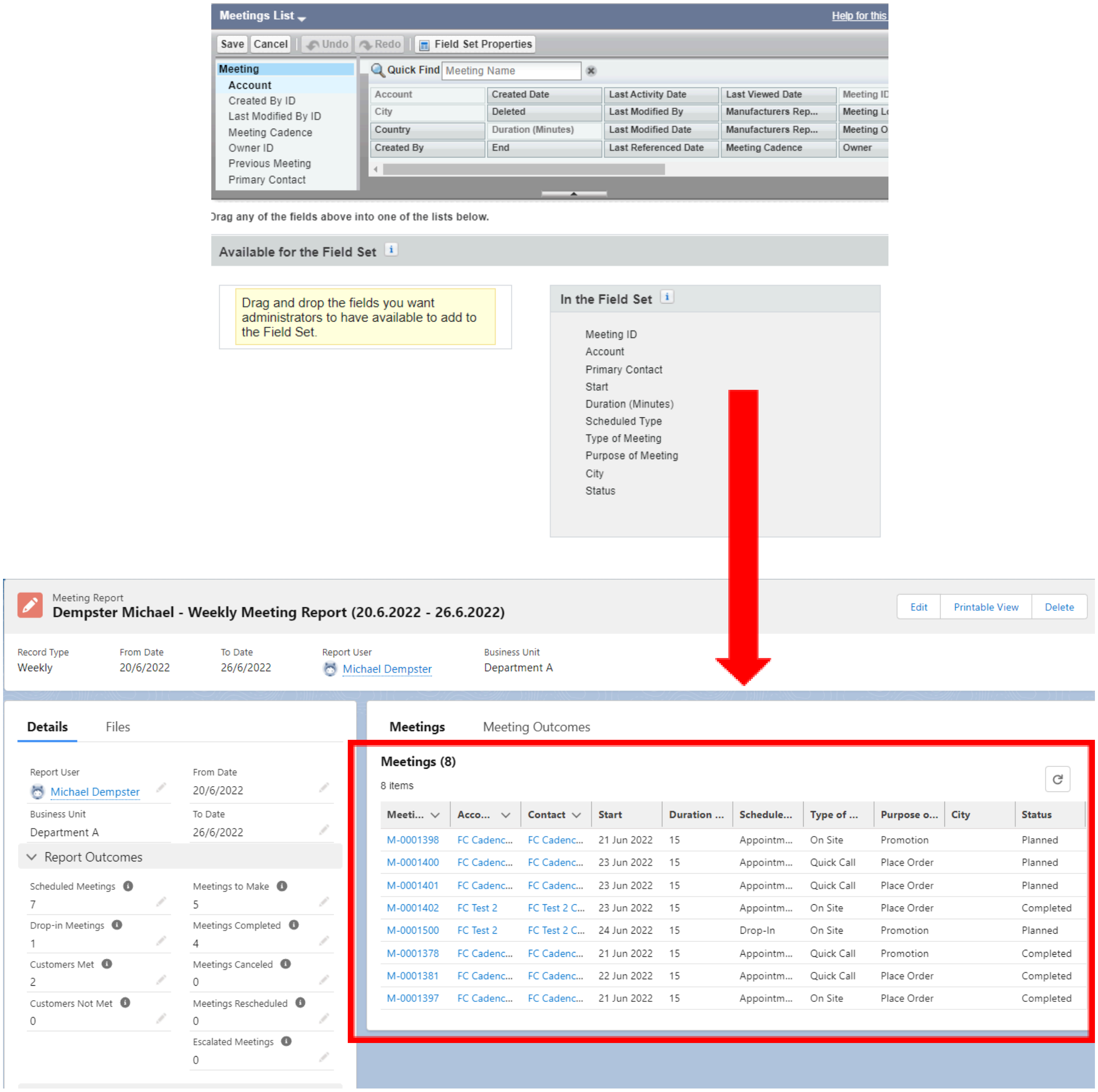
- Nagitate through the following buttons to access each object:
    - Details - Quick access to Setup > Object Manager > “chosen object”
    - Fields - Quick access to Setup > Object Manager > Fields & Relationships for that specific object to make amendments
    - Layouts - Quick access to Setup > Object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

Meeting Report Field Sets

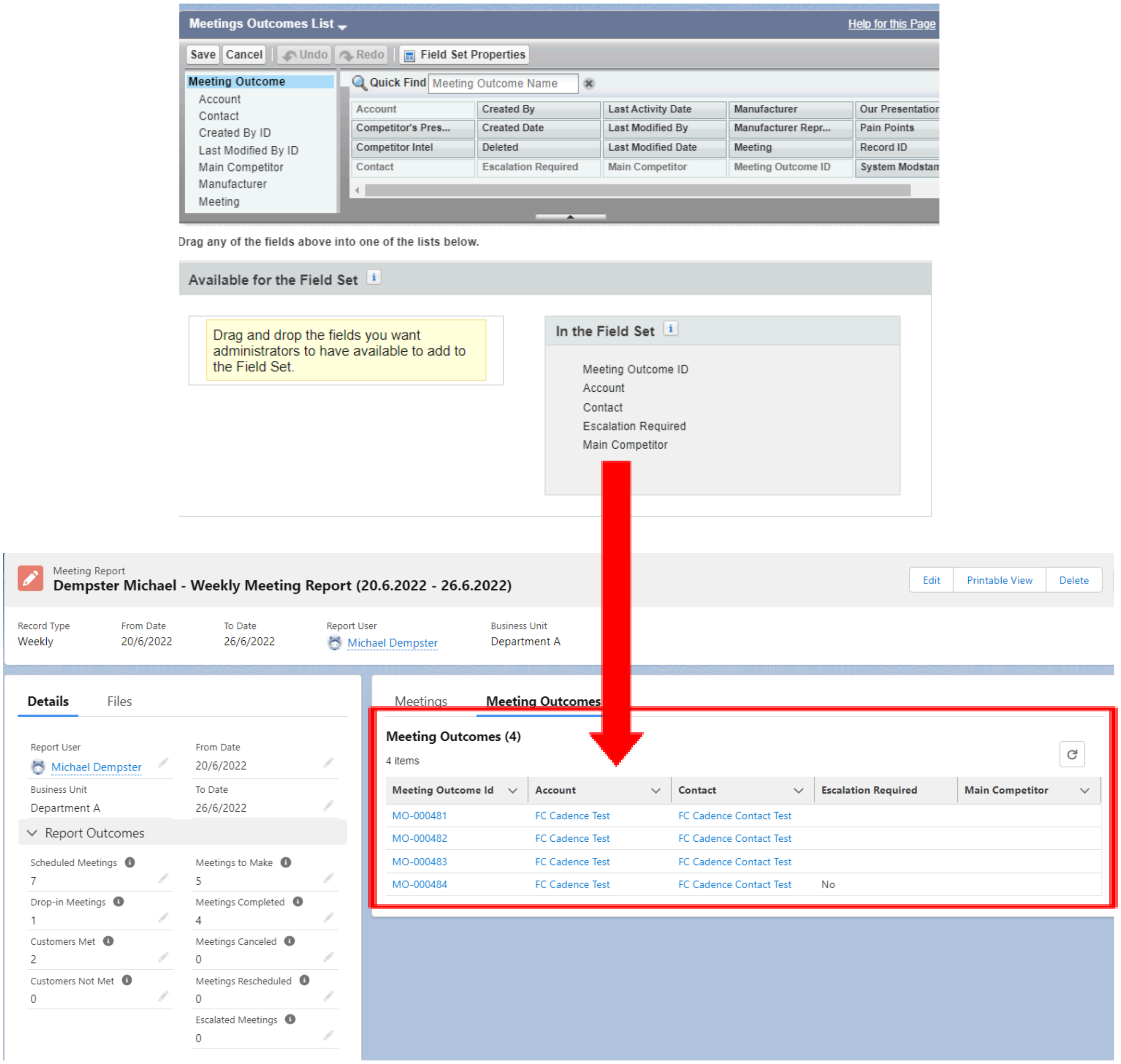
Under the meeting report tab there are an additional two options to access field sets that determine the columns displayed in visual components on the Meeting Report.



- Meeting List custom component



- Meeting Outcome List custom component



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