

BookIt Links: Best Practices for Admin Setup

Authorization, Permissions and Setup

1. Ensure any Salesforce users with access to BookIt are assigned the “LeanData Dashboard Access” permission set.
2. Ensure those users’ profiles have access to the LeanData tab. Alternatively you can create a permission set for LeanData tab visibility.
3. Confirm the users’ timezone & ensure their Salesforce user records accurately reflect it.
4. Determine if you will be using a static conference link or connect directly to Zoom Conferencing or Google Meet (Microsoft Teams coming soon!)
 - **Static conference link**
Create custom field Conference Link / Conference_Link__c on the user record & populate with user’s conference link
 - **Connect to Zoom / Google (recommended)**
LeanData > User > [find your name] > click on video conferencing tab > Zoom / Google > Connect

Set Up Templates

To get your users started quickly, we recommend setting up a few templates that they can reference.

SAMPLE TEMPLATE (START WITH 3 TEMPLATES: 30, 45, 60 MINUTES)

Meeting Name <Company Name> - 30 Min Meeting

Product Usage Links

Time Slots Duration | 30/45/60 min Date Range | 4 weeks Min. Booking Notice | 2 hours

Buffer Time | 15 min: will only show availability when 15 minutes are available before and after a meeting

0 min: will increase number of available time slots, but meetings could be back to back

Opening Hours By default these will follow the timezones specified on a Rep’s Salesforce User record. These Opening Hours will override any User-specific schedules you have configured for LeanData routing unless you elect to Prioritize LeanData Working Hours in BookIt > Settings > User Defined Open Hours.

URL Redirect <company home page or high value resource link>

Event Name <important as it is the title of the event shown in the calendar>

Confirmations Google/Microsoft will send a calendar invite to both the host and guest when meetings are booked so decide if you want an additional confirmation sent or not

Reminder Default is 30 minutes before, decide if you want to update the timing

Best Practice Add "Company" to fields and use that variable in the Event Name

Have a Rollout Plan

1. Communicate to stakeholders & managers what is happening & when
 - [Sample Email Template](#)
 - [User Resources](#)
2. Schedule training (if needed)
3. Set up users
4. Host training (if needed)
 - Show them how to navigate to LeanData & connect to Zoom/Google
 - Show them how to create booking links
 - Show them how to create meeting types
5. Communicate to stakeholders & managers - this is happening now & include self-serve resources for help

Additional Resources

[BOOKIT LINKS ADMIN GUIDE](#)



[BOOKIT IMPLEMENTATION GUIDE](#)



Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the plays, people and processes needed to transform buying signals into buying decisions. LeanData is inspiring a global movement among its 1,000 customers and community of 5,000+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage. Join the movement!