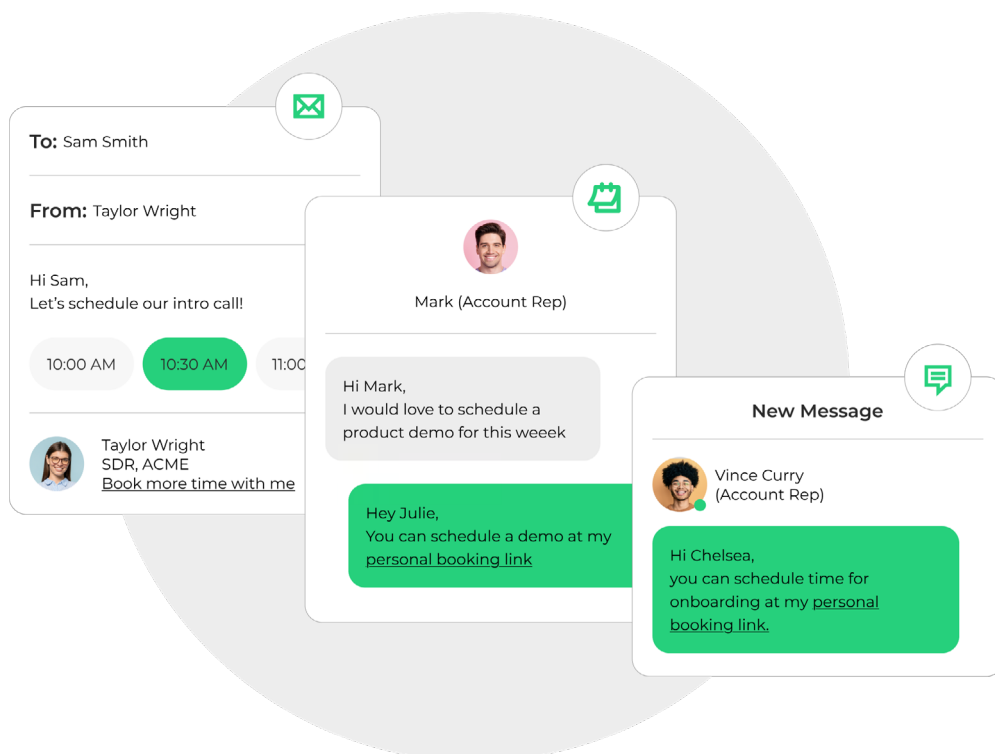


BOOKIT LINKS

Quick Start Guide 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 your reps will be using a static conference link or connect directly to Zoom Conferencing, Google Meet, or Microsoft Teams.
- **[RECOMMENDED] Connect to Zoom / Google / Teams**
LeanData > User > [find your name] > click on video conferencing tab > Zoom / Google / Teams Connect
 - **Static conference link**
Create custom field Conference Link / Conference_Link__c on the user record & populate with user’s conference link



Set Up Meeting Type Templates & Admin-Managed Link

To get your users started quickly, we recommend setting up a few meeting type templates and a managed link that they can reference. You can start by creating three Meeting Type Templates with different meeting durations: 30-minutes, 45-minutes, and 60-minutes.

Below, we'll walk you through how to create your first meeting type & managed link.

1. From the **LeanData** tab, navigate to **BookIt > Meeting Types > Meeting Type Management**.
2. On the **Admin-Managed** tab, click **Create Meeting Type**.

General | Availability | Scheduling Pages | Notifications

Basic Info

Internal Name *
30-min Intro with SDR & Company 31/50
Only visible internally

Product *
BookIt Links & Invite
Select the BookIt product for this meeting type. Meeting types are product-specific.

Meeting Category *
General
Counts from meeting types in the same category are combined to determine meeting distribution in count-based pools.

Redirect Settings

URL Redirect
https://www.leandata.com
The URL where prospects are redirected after successfully booking a meeting

Active ☒
Make this meeting type available for booking.

Callouts:

- This **Internal Name** field will auto-populate the **Meeting Name**
- Select **BookIt Links & Invite** for the **Product** field
- Meeting Categories** are used to determine meeting distribution in count-based pools. Some examples of meeting categories are: Demos, Analyst Calls, Intros
- Setting up a **URL Redirect** after your prospect successfully books a meeting is highly recommended

3. Navigate to the **Availability** tab, click **Working Hours**, and select **User's Working Hours**. This is the recommended default, as it respects each user's individual schedules.
4. The **Scheduling Pages** tab is where you can configure how the page will appear to whomever is booking the meeting. This is where you can configure the **meeting details, form fields, and styling of your scheduling page**.

General | **Availability** | Scheduling Pages | Notifications

Booking Times
Configure when and how meetings can be scheduled

Working Hours
Set available hours for meetings

Limits
Add daily and weekly booking limits

Working Hours
Set the source of working hours used for scheduling meetings.

☒ **User's Working Hours** ⓘ
Respect each user's working hours.

If a user's working hours are set to "Default (Meeting Type's Working Hours)", the meeting type's working hours below will be used with the timezone on the user's Salesforce record.

☐ **Meeting Type's Working Hours** ⓘ
Use the working hours configured below instead of each user's working hours.

☐ **Meeting Type Working Hours**

Set Up Meeting Type Templates & Admin-Managed Link (cont.)

5. Navigate to the **Notifications** tab, click **Reminders**, and click **Create Reminder**. This will create a meeting reminder email or text message that auto-populates for your meeting type.
6. Click **Done**, then click **Save & Exit**.

The screenshot shows the 'Notifications' tab with the 'Reminders' section selected. The 'Create New Reminder' form is displayed, featuring a sidebar with options: 'Calendar Event', 'Confirmation Email', and 'Reminders'. The form includes fields for Name, Type (Email/SMS), Subject, Headline, and Message. The 'Recipients' section has checkboxes for Hosts and Guests. The 'Timing' section includes a dropdown for minutes and a dropdown for timing relative to the meeting.

Notifications

Create New Reminder Preview

Name New Reminder 12/50

Type ☒ Email ☐ SMS

Insert Variables Insert Relative Date

Subject * Meeting Coming Up on {!MeetingDate} at {!MeetingTime} 25/255

Headline * 1 Your meeting is coming up! 26/50

Headline is shown in large, bold text near the top of the email.

Message 1

B I U **☰ ☷** **🔗** **I**

Hi {!GuestFirstName},

You have a meeting coming up with {!HostName}!

Please refer to the meeting details below for additional information. If you need to reschedule or cancel this meeting, use the links below:

Reschedule: {!RescheduleLink}

Cancel: {!CancelLink}

Recipients ☒ Hosts ☒ Guests

Timing Add Timing

30 min before meeting

7. Your **Meeting Type** is now created!

Meeting Types

Meeting Type Management

Admin-Managed

User-Created

Configure meeting types to determine the length, available hours, reminders, styling, booking flow details, and more for all of your Bookit products.

Create Meeting Type

Products: All

Search for Meeting Type Name

Meeting Type Name ↑↓	Product ↑↓	Category ↑↓	Duration ↑↓	Buffer Time (Before/After) ↑↓	Date Range	Last Modified ↑↓
30-min Intro with SDR & Company		General	30 min	None	2 weeks	07/10/26

Set Up Meeting Type Templates & Admin-Managed Link (cont.)

8. Next, navigate to **BookIt Links > Link Management**, and click **Create Link > Managed Links > Single Meeting Type Link**.

BookIt Links

Link Management

Configure managed links, standard links, or landing page for individual, group, and pooled availability links below. View links created by

Create Link ▾

Managed Links Admin-managed links that are distributed to individual users	Single Meeting Type Link Admin-managed link with a single meeting type
Routing Link Admin-managed link that routes meetings using form responses	Multi-Meeting Type Link Admin-managed link with multiple meeting types on a landing page
Single Meeting Type Link Link for one individual, group, or pool with a single meeting type	pany 30 min 12 Users Never 7/10/2026 02:20 PM
Multi-Meeting Type Link Link for one individual, group, or pool with multiple meeting types on a landing page	

9. Go through the steps in the dialog box, **select the hosts** (your users/ reps) to assign this link to, and **select the meeting type** you just created earlier, and click **Save & Generate Link**.

Create Managed Single Meeting Type Link

✓ Select Booking Type

✓ Select Host(s)

3 Select Meeting Type

4 Enter Link Details

5 Preview Link Details

6 Generate Link

Meeting Type

Select an Admin-Managed Meeting Type for this new link.

Admin-Managed Meeting Types

Search for Meeting Type

Meeting Type	Duration	Buffer Time (Before/After)	Date Range
30-min Intro with SDR & Company	30 min	None	2 weeks
links & invite meeting type	30 min	None	2 weeks
Test Links MT	30 min	None	2 weeks

Set Up Meeting Type Templates & Admin-Managed Link (cont.)

10. Click **Done** and now you have created your first **admin-managed meeting link**.

BookIt Links

Link Management

Configure managed links, standard links, or landing page for individual, group, and pooled availability links below. View links created by users in the All Links tab.

Create Link ▾

Admin-Managed All Links

Export ☐ Show Expired Link Type: All ▾ Duration: All ▾

☐	Link Name ↑↓	Meeting Type ↑↓	Duration ↑↓	Assigned To ↑↓	Expiration ↑↓	Last Modified	IF
☐	30-min Intro with SDR & Company	30-min Intro with SDR & Company	30 min	12 Users	Never	7/10/2026 02:24 PM	

11. When your users login to the **BookIt Chrome Extension**, they will now have this managed link available for them to use automatically. See below for an example view:

LeanData

SY

User view of the Chrome Extension

BookIt Invite

Select specific time slots from your calendar or your team's calendar and invite guests to book meetings.

Create BookIt Invite

My BookIt Links

Copy your booking links below. To edit or create new links, visit your [BookIt Links homepage](#).

30 min, Managed

30-min Intro with SDR & Company

Sharon Youn

Copy Link ▾

Meeting type that you created shows up here!

Advanced Features & Best Practices

Personalize calendar event name and confirmation email notifications

Do you want to be able to use the company name or other information that guests enter when scheduling with your reps to appear in the calendar event name or in confirmation emails?

1. Create a Meeting Type > Scheduling Pages tab > Form Fields.
2. Check the **Required** box. This makes the field required for this Meeting Type and can now be referenced in your Notifications.

* For example, if you set a new form field "Company" as a variable, you can use the company name guests enter in the calendar event name or in confirmation and reminder emails.

The screenshot shows the LEANDATA admin interface. The top navigation bar includes 'General', 'Availability', 'Scheduling Pages' (highlighted with a green box), and 'Notifications'. On the left sidebar, there are three sections: 'Meeting Details' (Configure meeting display details), 'Form Fields' (Configure fields on the scheduling page, highlighted with a green box), and 'Styling' (Override default styling settings). The main content area is titled 'Form Fields' and includes a 'Preview' button. Below the title, it says 'Configure the questions that are asked after a time is selected.' and 'Display up to 5 additional fields on the Scheduling Information form. First Name, Last Name, and Email are required by default. ⓘ'. There is an 'Add Form Field' button (highlighted with a green box). Below this, there are five form fields: 'First Name' (Required), 'Last Name' (Required), 'Email' (Required), 'Company' (Required, highlighted with a green box), and 'Phone Number' (Not Required). At the bottom, there is a placeholder 'Enter Form Field' (Not Required) with a 'Delete' link.

Rollout BookIt Links to Your Organization

BookIt Links eliminates the manual back-and-forth processes too often required to coordinate meetings. When scheduling happens without delay, your buyers instantly connect with the right person at their preferred time, allowing your team to focus on the work that matters most.

The full potential of BookIt Links relies on driving adoption and usage of it across your organization. Below is an example rollout plan you can use to help get you started on thinking about how to communicate the value of BookIt Links as well as guides to help train your users.

Sample Rollout Plan

1. Communicate to stakeholders & managers what is happening & when
 - [Sample Email Template: Announcing LeanData BookIt Links](#)
 - [User Resources: BookIt Links User Guide \(Non-Admin\)](#)
2. Schedule training (if needed)
3. Set up users
 - [Guide to Inviting & Authorizing Users for BookIt](#)
4. Host training (if needed)
 - Show them how to navigate to LeanData & connect to Zoom/Google/Teams
 - Show them how to create booking links
 - Show them how to create meeting types
5. Announce & launch availability of BookIt Links to your organization in the appropriate channels for your organization

ADDITIONAL RESOURCES

For more details on creating meeting types, check out this help center article here:

[CREATING A MEETING TYPE](#)

Looking for a comprehensive guide for administering BookIt Links?

[BOOKIT LINKS ADMIN GUIDE](#)

Why LeanData?

LeanData is the leading platform for AI GTM Orchestration, sitting at the intersection of AI agents, human sellers, and the systems they share. As the connective tissue across the entire revenue lifecycle, LeanData ensures every signal, whether AI-generated, system-triggered, or human-driven, is routed, actioned, and governed with the same rigor. The result is faster, cleaner execution and the ability to adapt GTM motions with agility without coding. More than 1,000 leading companies and a community of 5,000+ OpsStars rely on LeanData to translate GTM strategy into coordinated execution across customer acquisition, adoption, account retention and expansion.

