LeanData

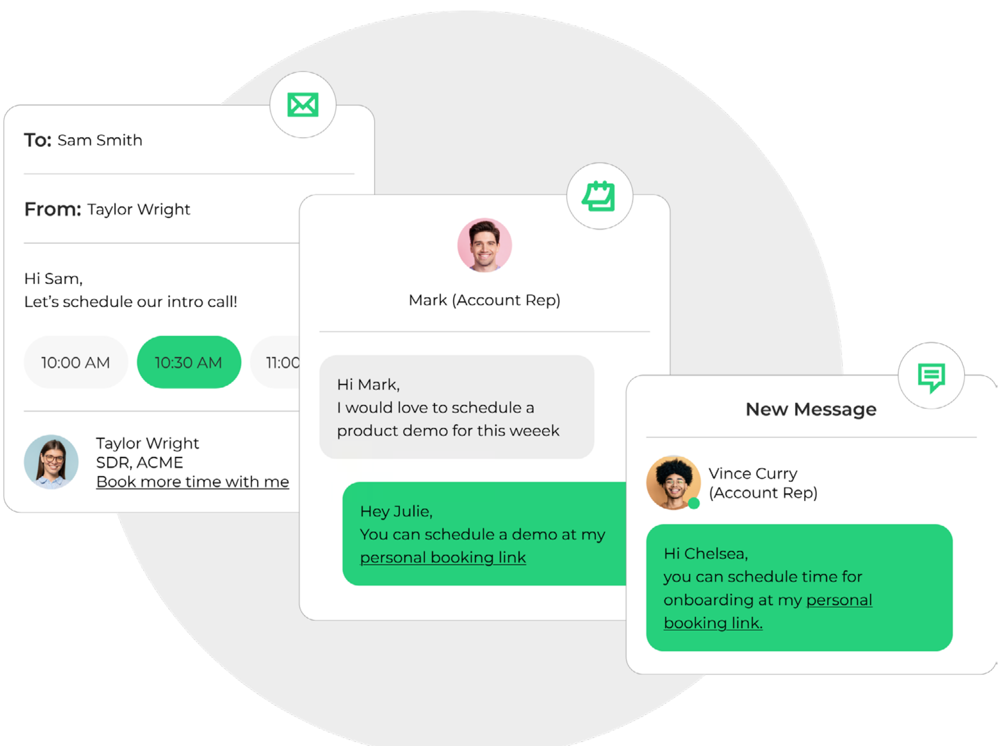
BOOKIT LINKS

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

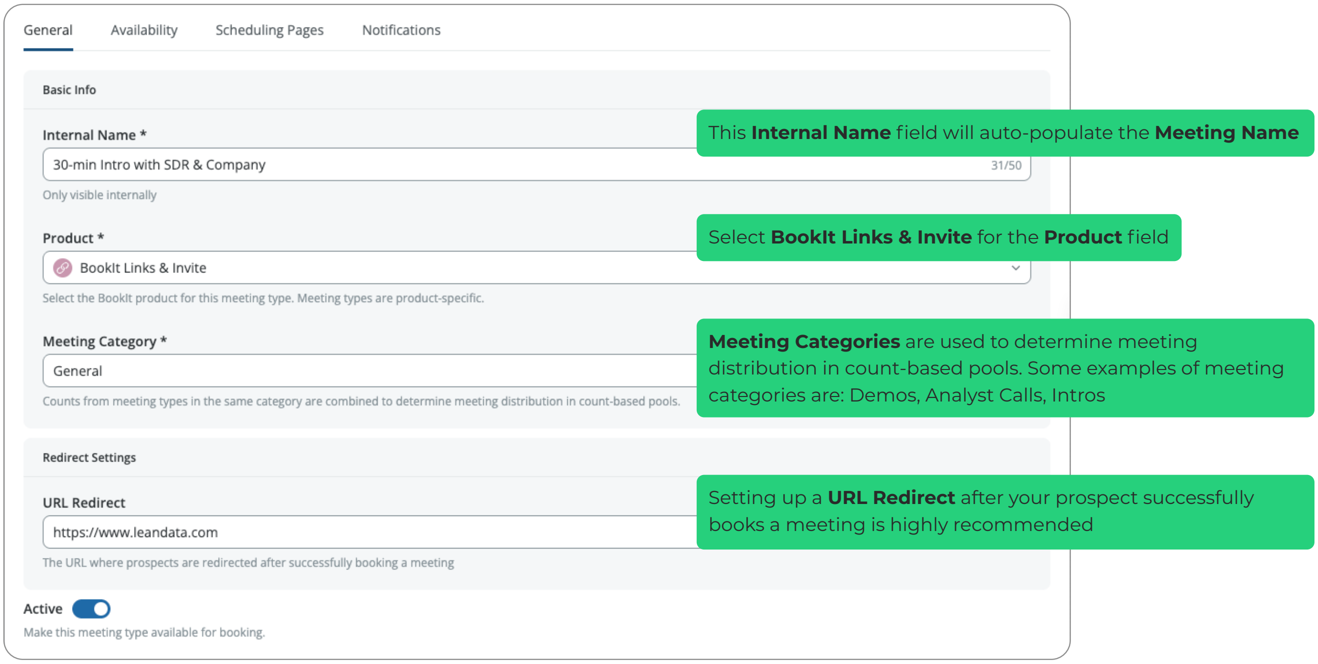


Set Up Meeting Type Templates & Admin-Managed Link

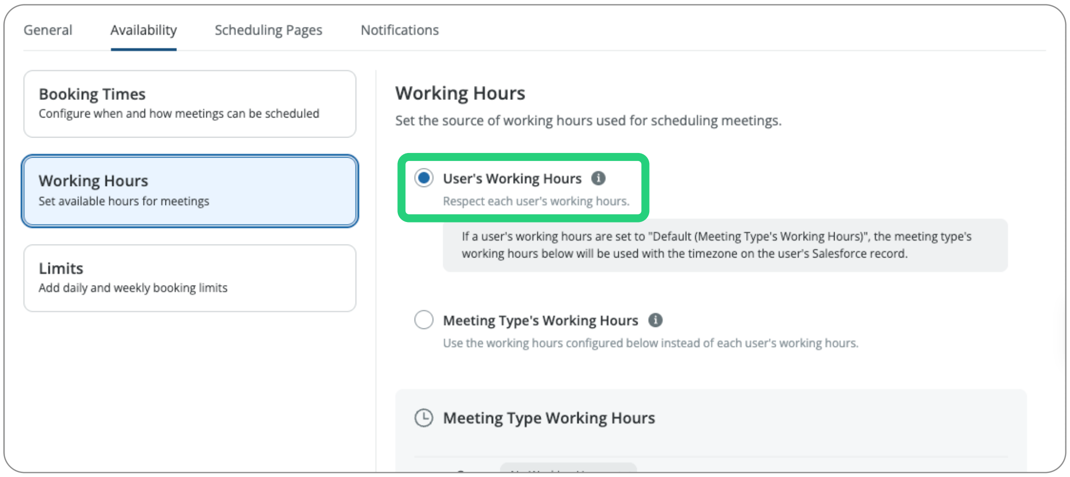
To get your users started quickly, we recommend setting up a few meeting type templates and a managed link that they can reference. You can start by creating three Meeting Type Templates with different meeting durations: 30-minutes, 45-minutes, and 60-minutes.

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**.

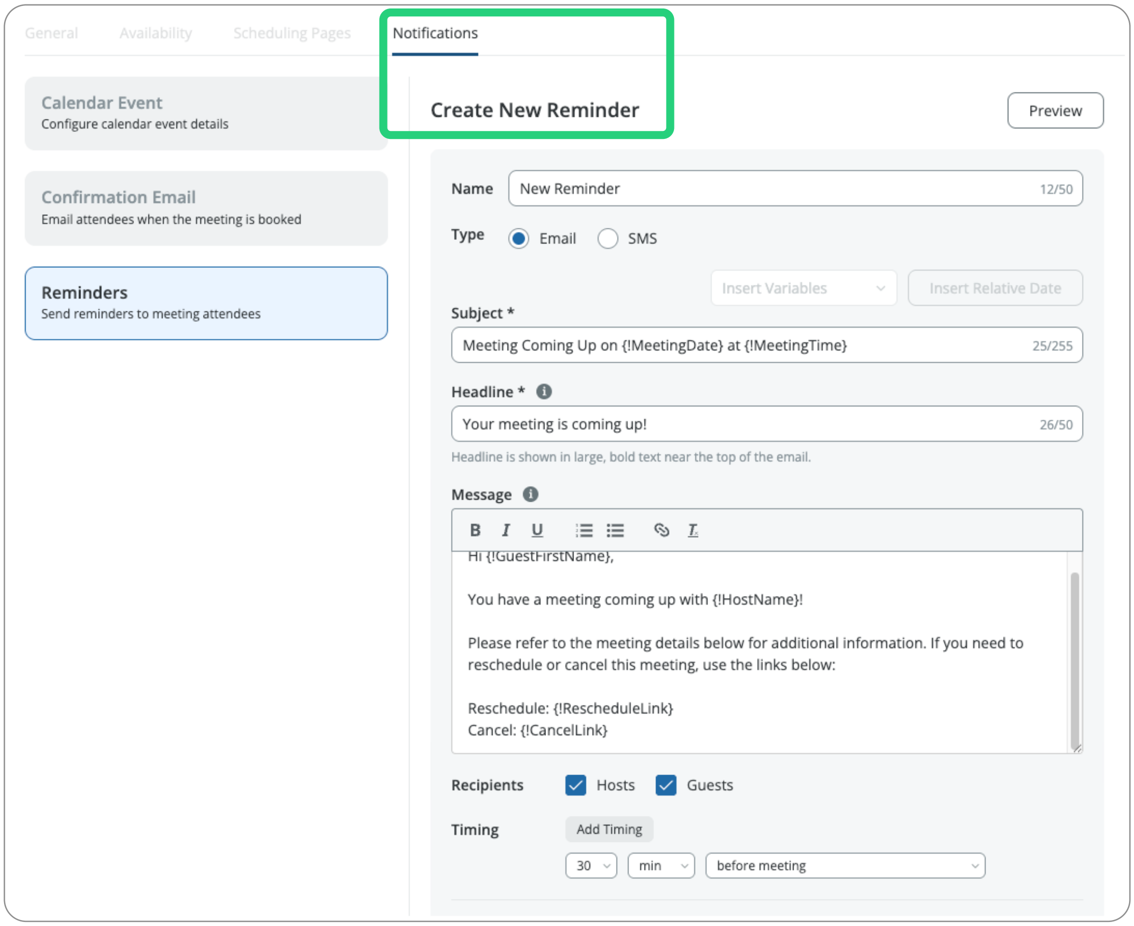


3. Navigate to the **Availability tab**, click **Working Hours**, and select **User's Working Hours**. This is the recommended default, as it respects each user's individual schedules.
4. The **Scheduling Pages tab** is where you can configure how the page will appear to whomever is booking the meeting.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

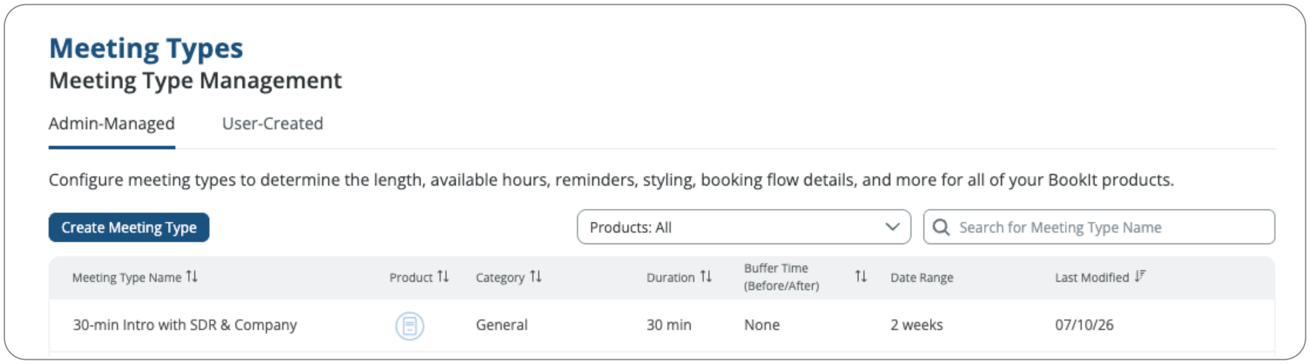


Set Up Meeting Type Templates & Admin-Managed Link (cont.)

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**.

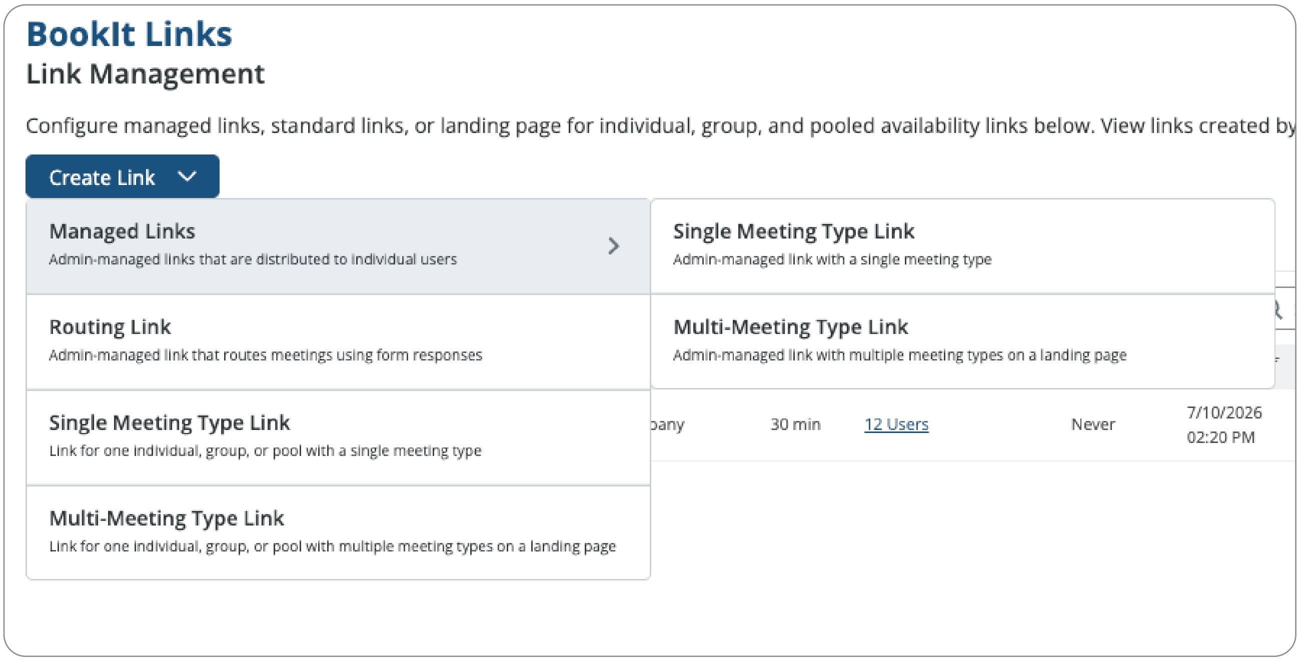


7. Your **Meeting Type** is now created!

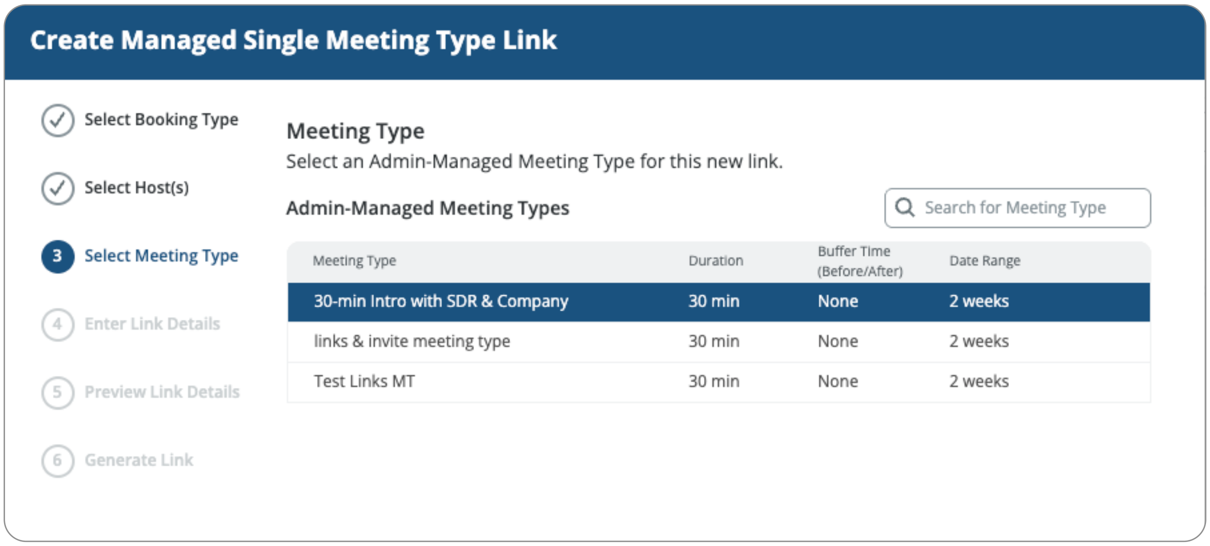


Set Up Meeting Type Templates & Admin-Managed Link (cont.)

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

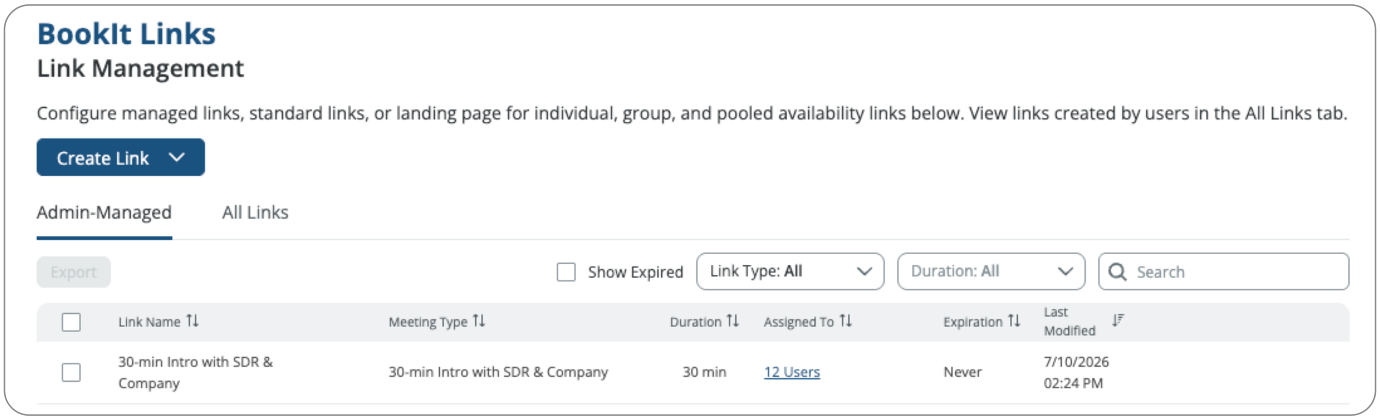


9. Go through the steps in the dialog box, **select the hosts** (your users/reps) to assign this link to, and **select the meeting type** you just created earlier, and click **Save & Generate Link.**

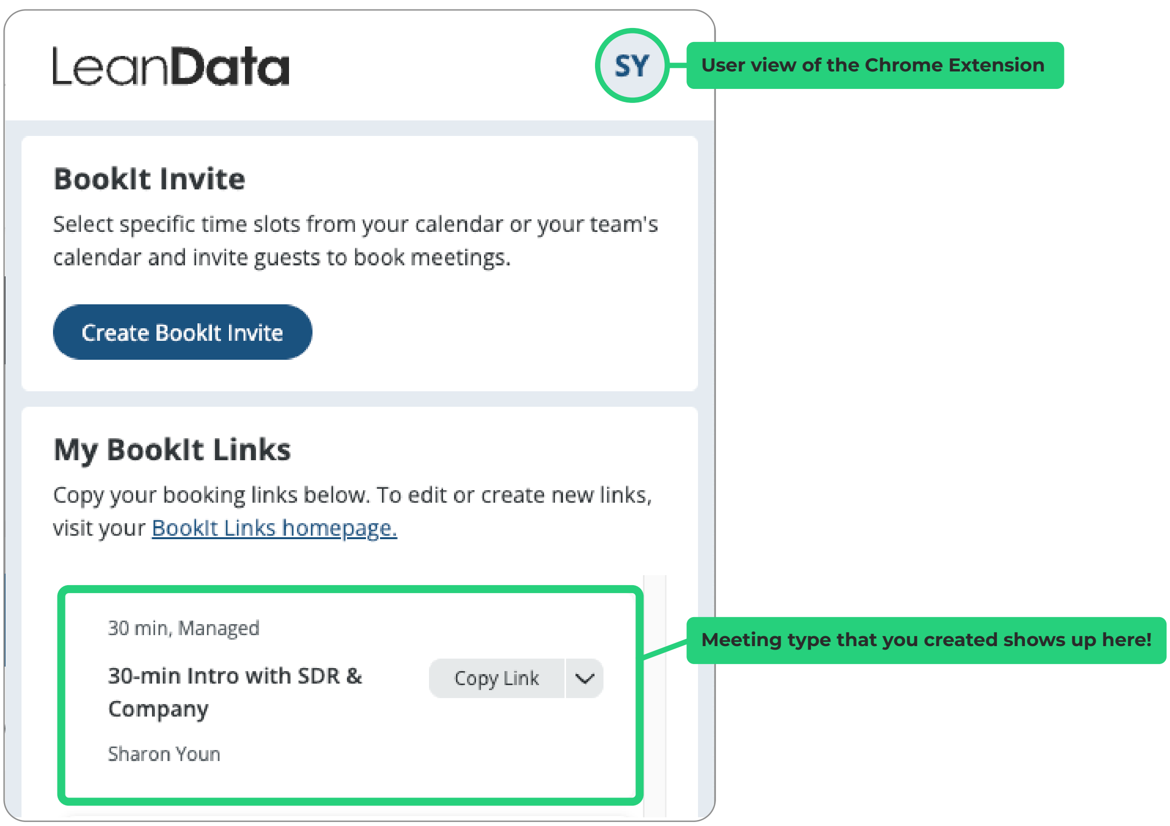


Set Up Meeting Type Templates & Admin-Managed Link (cont.)

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



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:

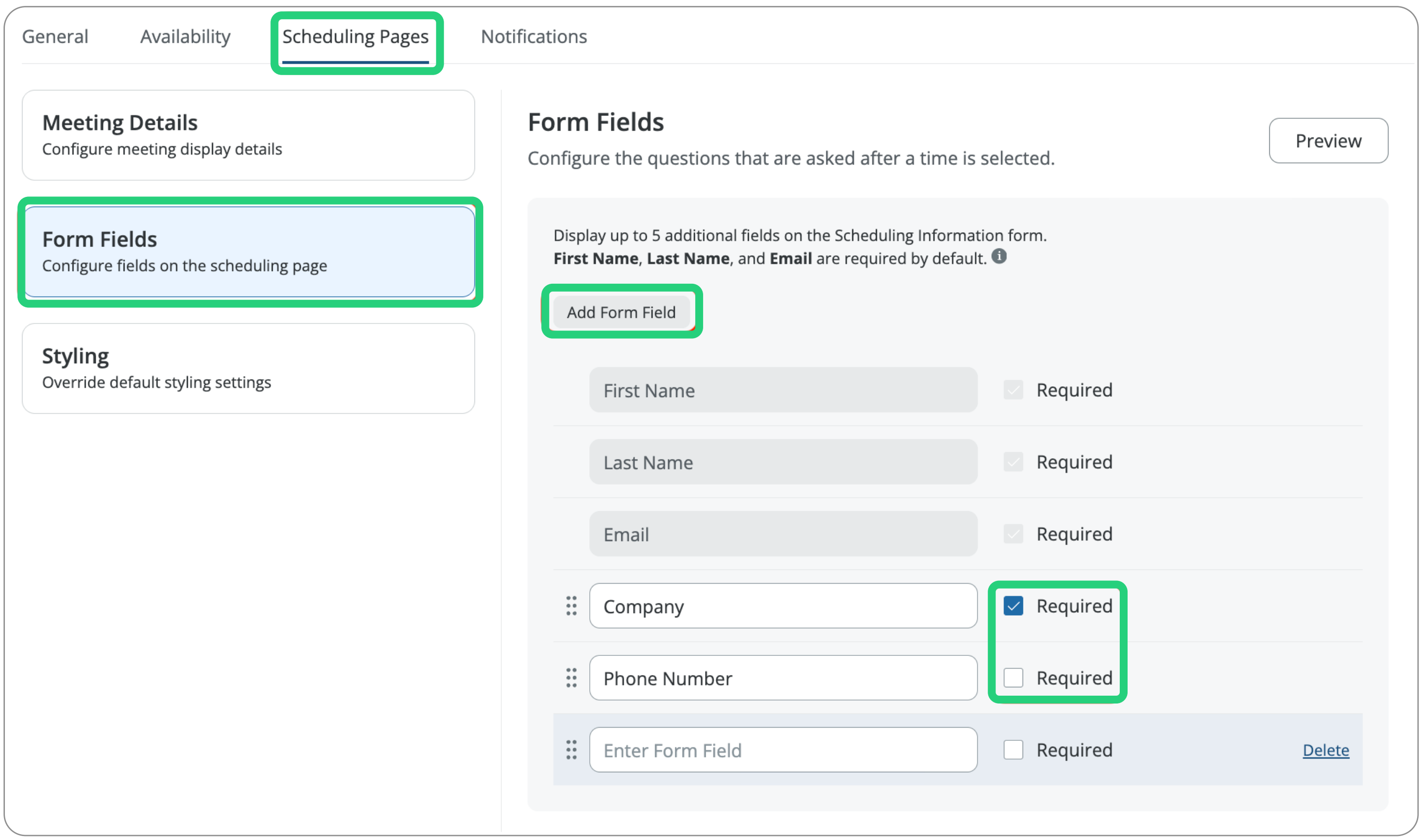


Advanced Features & Best Practices

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.



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.