Admin Onboarding & Installation Guide

Applies to: Bulk Transcript Downloader (by Salesloft Labs) **Required Role:** Platform Admin

Introduction

The Bulk Transcript Downloader is a specialized workflow tool designed to help RevOps, Enablement, and Compliance teams securely export batch conversation data. Instead of downloading transcripts one by one, this application allows you to export hundreds of formatted call transcripts in a single click, ready for QA review or AI ingestion.

Part 1: Installation & Authentication

Because this application handles sensitive conversation data, it utilizes strict Role-Based Access Control (RBAC). Only users with **Platform Admin** privileges can successfully authenticate and run jobs.

1. Navigate to the **Salesloft Marketplace** or your internal Integrations settings.
2. Locate the **Bulk Transcript Downloader** and click **Install**.
3. Upon opening the application for the first time, you will be prompted to authenticate.
4. Click **Log In** to initiate the secure OAuth 2.0 flow.
5. Review the requested permissions (Read access for Conversations, Transcriptions, and Accounts) and click **Allow**.
6. The window will automatically refresh, and the application is now ready to use!

Part 2: Running Your First Bulk Export

The export interface is broken down into three simple steps.

Step 1: Filter by Account (Optional)

If you only need transcripts for a specific client or prospect, you can narrow your export using the interactive search.

- Type the name of the Account (e.g., "Acme Corp") into the search bar and click **Search**.
- The system will query your CRM and present a dropdown of exact matches, including the company domain to help you identify the correct record.

- Select the correct account from the dropdown. *(Note: If you want to export transcripts across ALL accounts, simply leave this section blank).*

Step 2: Select Date Range

- Choose your **Start Date** and **End Date**.
- *Best Practice:* If you are exporting data across all accounts (bypassing Step 1), we recommend keeping your date range to 30 days or less to ensure the fastest download times.

Step 3: Start Export

- Click **Start Export**.
- The application will immediately begin gathering and formatting your transcripts in the background. You do not need to keep the window open; the asynchronous worker will safely process your request without hitting Salesloft API rate limits.

Part 3: Accessing Your Data

Once your export job successfully finishes, the UI will update to **"COMPLETED"** and present you with a secure Download Link.

1. Click the provided **Download** link.
2. A `.zip` file will automatically save to your local machine.
3. Unzip the folder to access your transcripts.

Understanding the Output: Every transcript is saved as a cleanly formatted Markdown (`.md`) file, titled with its unique Conversation ID. Each file includes speaker tags matched to the specific attendees of the meeting, making them highly readable for both human audits and automated Large Language Model (LLM) prompts.

Part 4: Security & Compliance

This integration was built with a strict **Zero-Retention Architecture** to comply with enterprise data security standards.

- **No Permanent Storage:** Your raw conversation data, attendee lists, and transcripts are never permanently stored in our application databases.

- **Expiring Links:** The `.zip` file generated for your download is stored in a private, locked Amazon S3 bucket.
- **24-Hour TTL:** An automated lifecycle policy ensures that your exported `.zip` file is permanently and irreversibly destroyed exactly 24 hours after it is generated. Please ensure you download your export within this window, or you will need to run the job again.