simplifi®

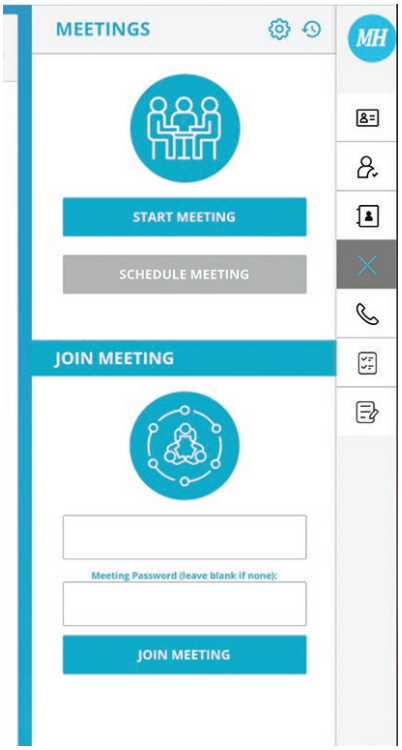
Simplifi Contact

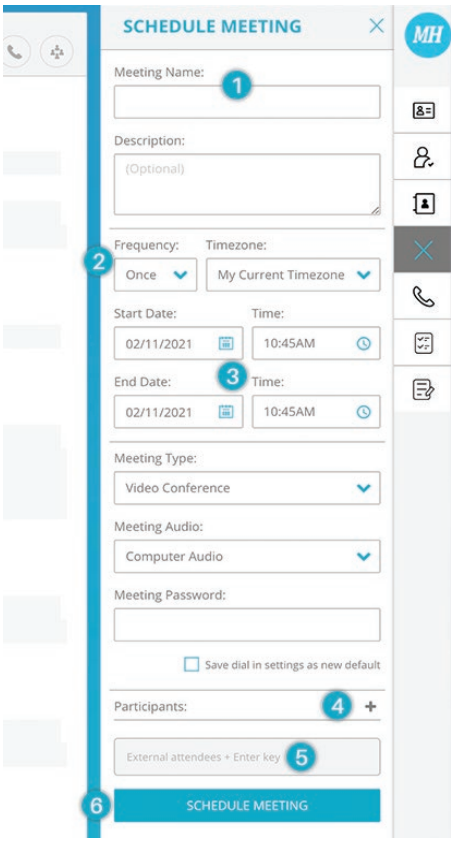
Station: Scheduled Meetings

SCHEDULED MEETINGS

NEW FEATURES

Users can now schedule meetings in Simplifi Contact. When the user clicks the meeting icon on the right-hand side (RHS),there is a button titled SCHEDULE MEETING. In the header, if the user has meetings already scheduled, they will see a calendar icon next to the meeting history icon.

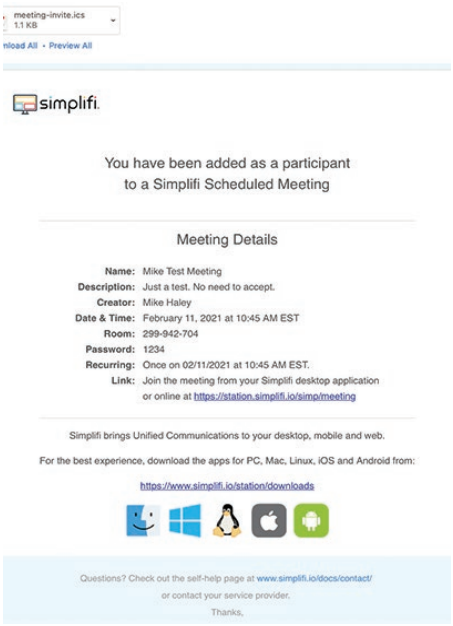




SCHEDULING A MEETING

Clicking on the SCHEDULE MEETING button allows the user to create a new scheduled meeting.

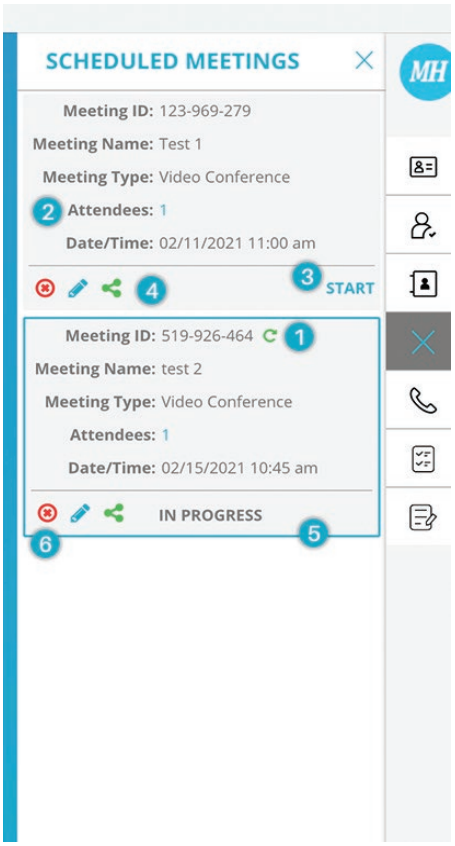
1. The name of the meeting.
2. The recurrence of the meeting
   - Once - The meeting will only occur one time. Once the meeting has been ended, it will automatically be removed from your scheduled meeting list.
   - Daily - The meeting will recur each day.
   - Weekly - The meeting will recur each week. When this option is selected, you are shown days of the week to select. This is so you can select "Monday and Friday of every week".
   - Monthly - The meeting will recur each month on the date selected.
   - Yearly - The meeting will recur each year on the date selected.
3. Select the start date and time of the meeting
4. Click the plus icon to invite participants in your account
5. Type in external email addresses to invite to your meeting. Make sure to hit the enter key after typing each address!



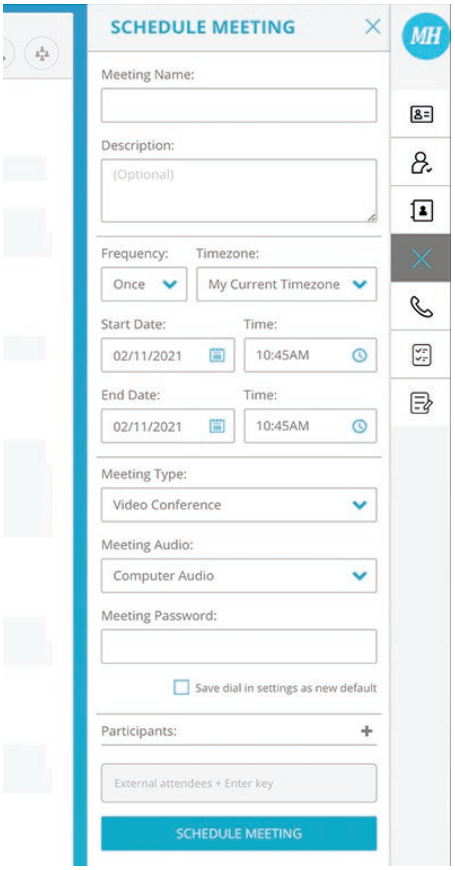
6. Save the scheduled meeting - When the SAVE button is clicked, Simplifi Contact will send out an email to all the participants with the meeting information and contains a meeting invite so that a participant can add the meeting to their calendar!

VIEW A SCHEDULED MEETING

To view a list of your scheduled meetings, click the calendar icon located in the header of the meeting RHS.



1. This is the recurring icon. This indicates that the meeting will repeat. To learn how frequently the meeting will repeat,you can click on the icon.
2. This is the number of attendees. To view the participants, you may click on the numeral.
3. If you've created this scheduled meeting, you can click the START button to begin the meeting
4. These are your action items. From left to right:
   - X icon - This icon allows the meeting creator to delete the meeting. All attendees will receive an email indicating that the meeting has been canceled, and they will also receive a calendar event update that will remove the event from their calendar.
   - Edit icon - This icon allows the meeting creator to edit the meeting.
   - Share icon - This icon, when clicked, will copy the join meeting link to the user's clipboard.
5. If you are only a participant in a meeting, you will see the JOIN button. When clicked, you can join the scheduled meeting. Please note, the meeting cannot be joined until the meeting creator starts the meeting.
6. If you are only a participant in a meeting, you can remove yourself from the meeting by clicking the X icon. You will receive an email that the meeting has been canceled for you and you'll receive a calendar event update that will remove the event from your calendar.

EDIT A SCHEDULED MEETING

The edit scheduled meeting page is like the add scheduled meeting page. The creator can edit the name, recurrence,date/time, and participants. When a meeting is edited, all the participants will receive an email indicating that the meeting has been edited, and a calendar invite that will update the event in their calendar.