

User Guide

Outlook Calendar Connector

07-12-2023

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Error! Bookmark not defined.

1.Type of Users:

a. Existing Salesforce User

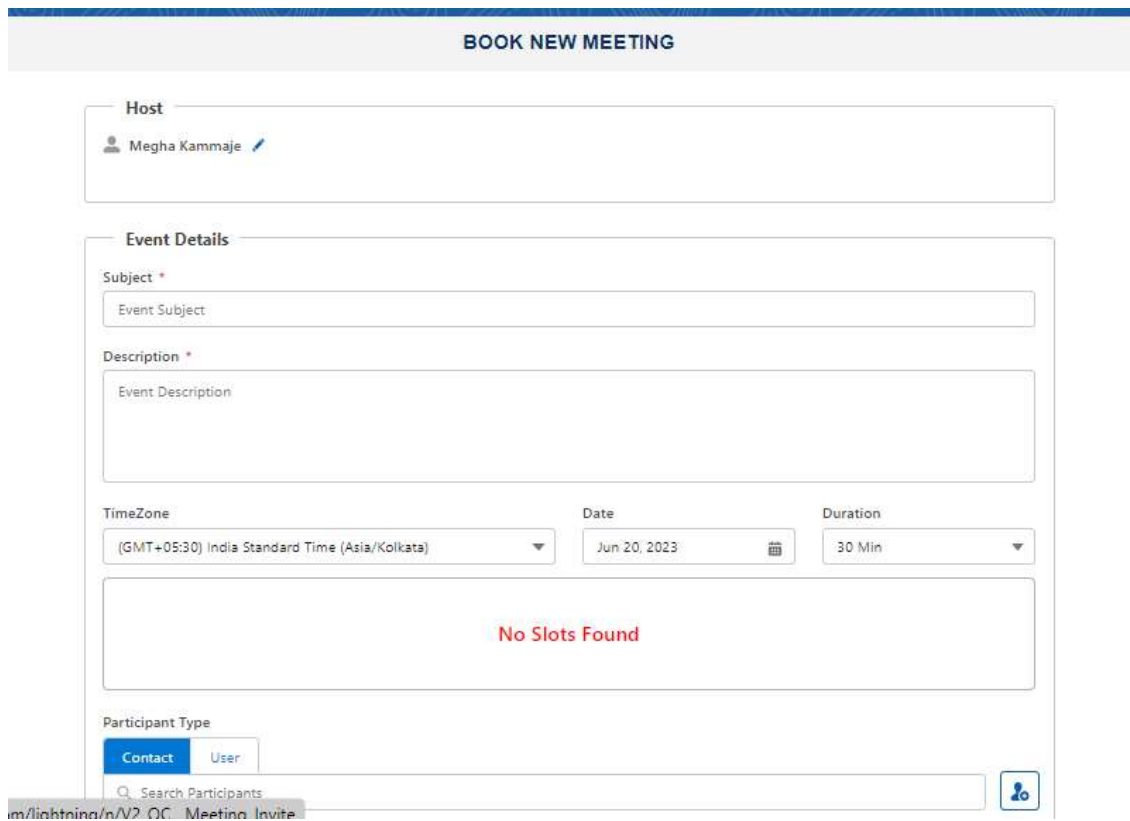
b.External User (Public User)

2. Book Meeting Tab:

2.1 Steps to Book Meeting:

Scenario: If an internal user of an organization wants to book a meeting with his fellow colleague or a user who is also a part of the same organization.

1. Click on the **Book Meeting** Tab on Outlook Calendar Integration app.

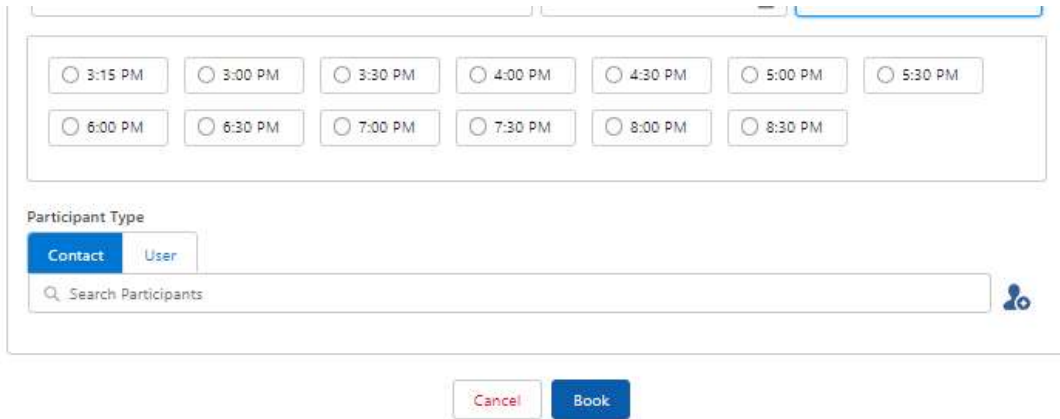


The screenshot shows the 'BOOK NEW MEETING' interface. At the top, there's a header bar with the text 'BOOK NEW MEETING'. Below this, the form is divided into several sections:

- Host:** A field containing the name 'Megha Kammaje' with a small edit icon.
- Event Details:** A section containing:
 - Subject:** A text input field with the placeholder 'Event Subject'.
 - Description:** A larger text input field with the placeholder 'Event Description'.
 - TimeZone:** A dropdown menu showing '(GMT+05:30) India Standard Time (Asia/Kolkata)'.
 - Date:** A date picker showing 'Jun 20, 2023'.
 - Duration:** A dropdown menu showing '30 Min'.
- No Slots Found:** A large red text message indicating that no meeting slots are available for the specified criteria.
- Participant Type:** Two tabs, 'Contact' and 'User', with 'Contact' currently selected.
- Search Participants:** A search bar with the placeholder text 'Search Participants' and a magnifying glass icon.
- Meeting Invite:** A button with a person icon, likely to generate the meeting invite link.

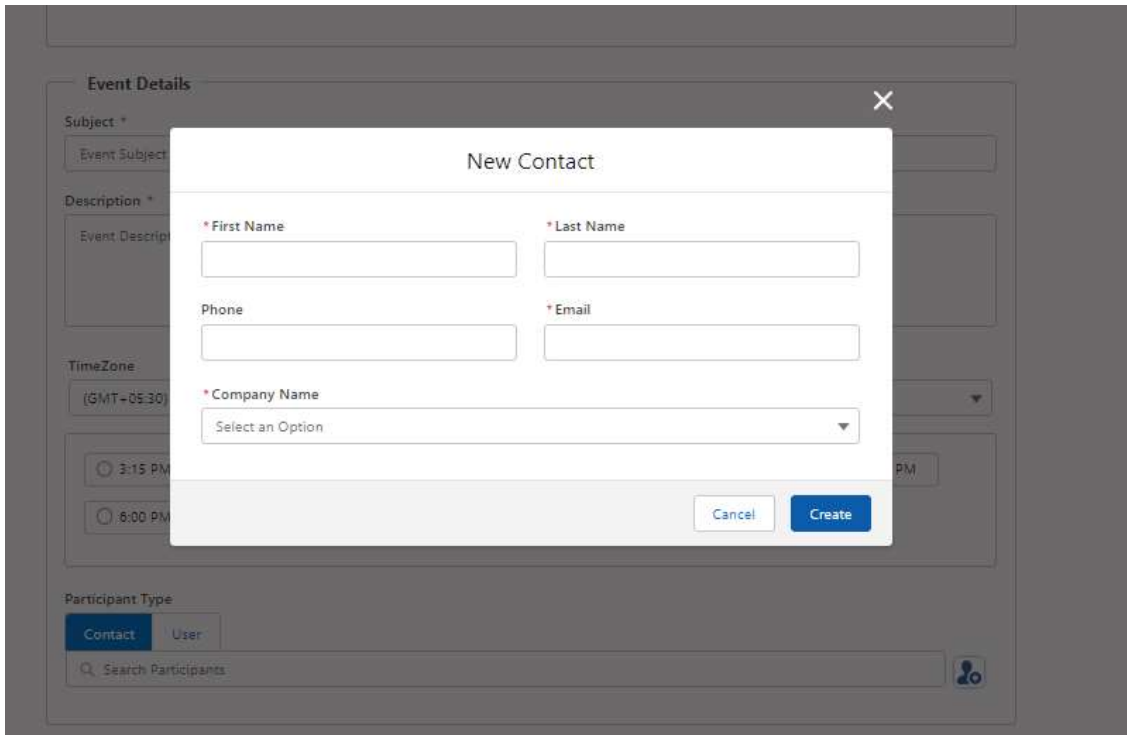
2. In the book meeting Tab, fill up the meeting details.
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- a. Enter Subject name.
- b. Enter Description.
- c. You can change the Host according to your choice.
- d. Time zone- Select the time zone according to your region.
- e. Select the Participant Type-with whom you want to schedule a meeting.
- f. You can select either of two options- Contacts or User OR Contact and User.
- g. Select the date



The screenshot displays a web interface for scheduling a meeting. At the top, there are two rows of time slots, each with a radio button and a time label: 3:15 PM, 3:00 PM, 3:30 PM, 4:00 PM, 4:30 PM, 5:00 PM, 5:30 PM in the first row, and 6:00 PM, 6:30 PM, 7:00 PM, 7:30 PM, 8:00 PM, 8:30 PM in the second row. Below the time slots is a section titled "Participant Type" with two tabs: "Contact" (selected) and "User". Under the "Contact" tab is a search bar with the placeholder text "Search Participants" and a magnifying glass icon. To the right of the search bar is a small icon representing a group of people. At the bottom of the interface are two buttons: "Cancel" and "Book".

- h. You can create new /add participant by clicking on icon in the right- hand side of the screen.

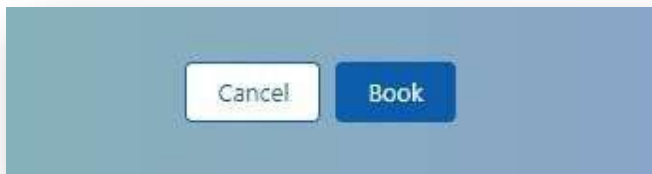


The screenshot shows a 'New Contact' dialog box overlaid on the 'Event Details' form. The dialog box contains the following fields:

- * First Name
- * Last Name
- Phone
- * Email
- * Company Name (with a dropdown menu showing 'Select an Option')

At the bottom of the dialog box are 'Cancel' and 'Create' buttons. The 'Create' button is highlighted in blue.

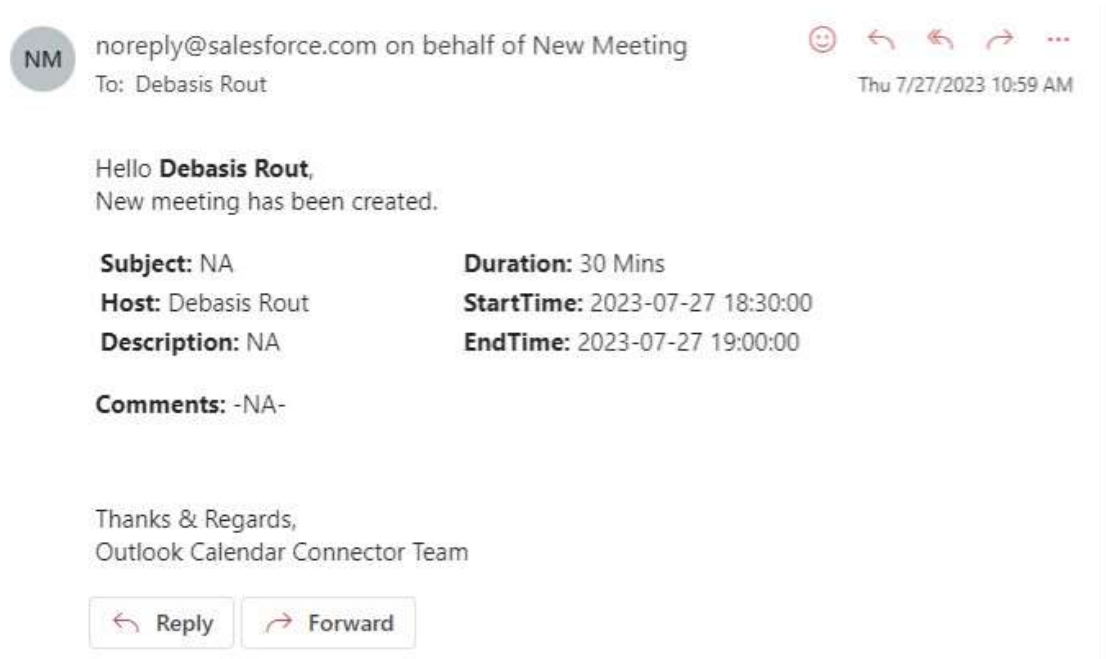
- i. Enter first name, last name phone, email, and company name to create **new contact**.
- j. Duration of the meeting
- k. After selecting the duration, the calendar shows up where you can select slots whichever suitable
- l. Click on book meeting.

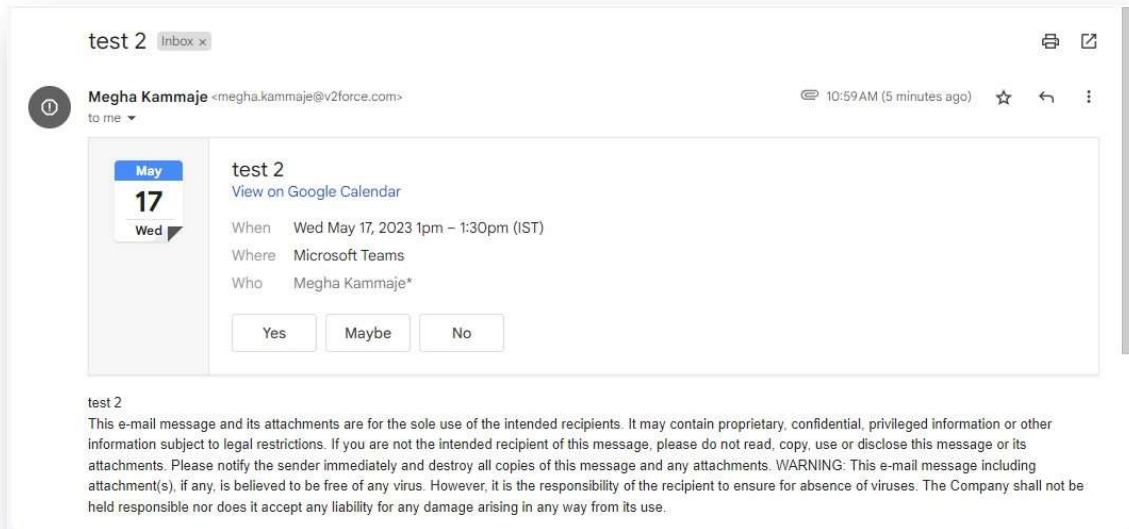


The screenshot shows a blue rectangular button with the text 'Book' in white. To the left of the 'Book' button is a smaller, lighter blue button with the text 'Cancel' in white.

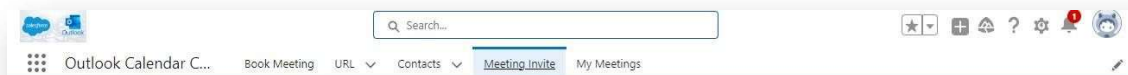
- m. Once you click "Book" a successful toast message will appear which means Booking has been done successfully.
- n. Once meeting has been booked, the sender and the recipient will receive an email of confirmation.

Email received by the sender:

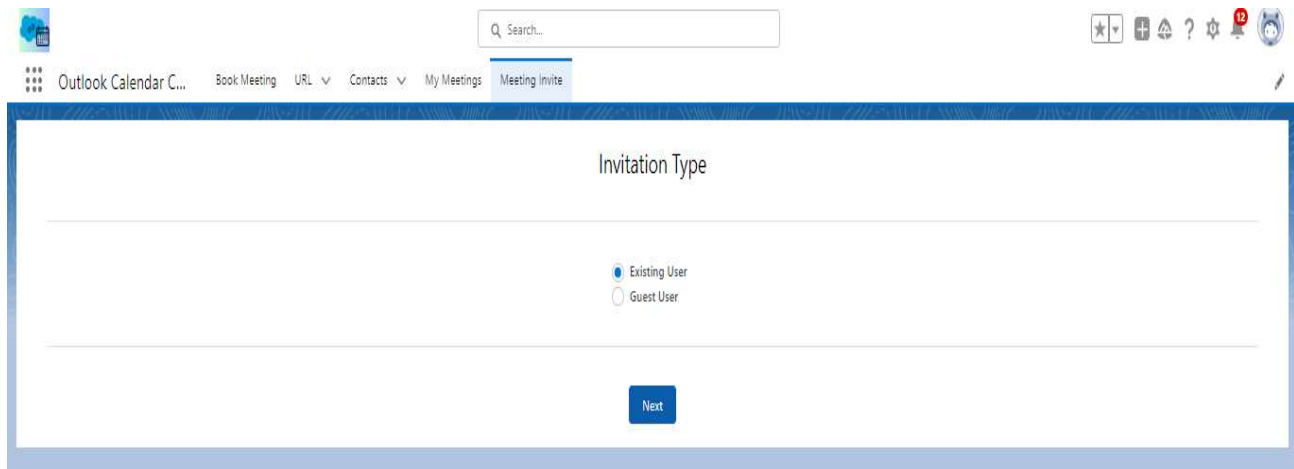




3.Meeting Invite Tab



1.Click on the **meeting invite tab** in the application.



1.Select Invitation Type.

Existing:

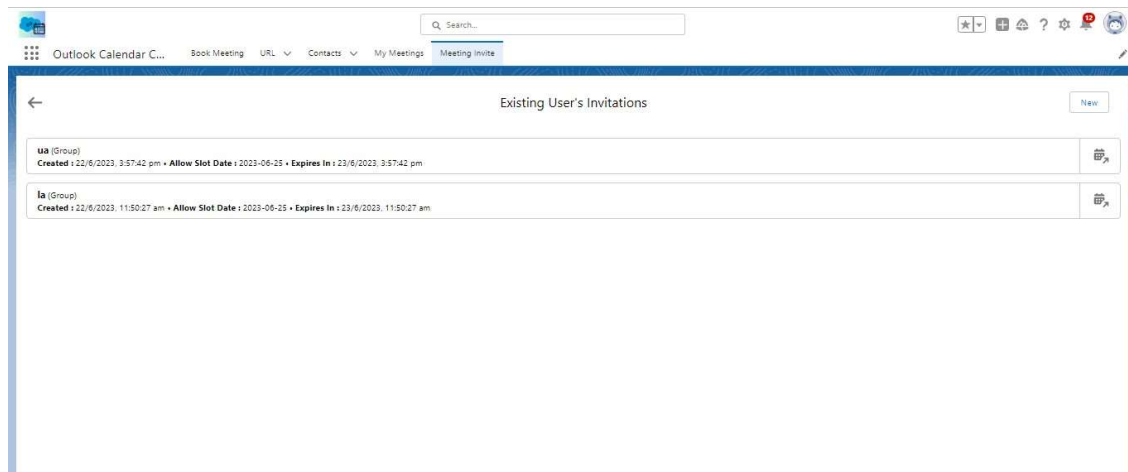
a) Individual

b) Group

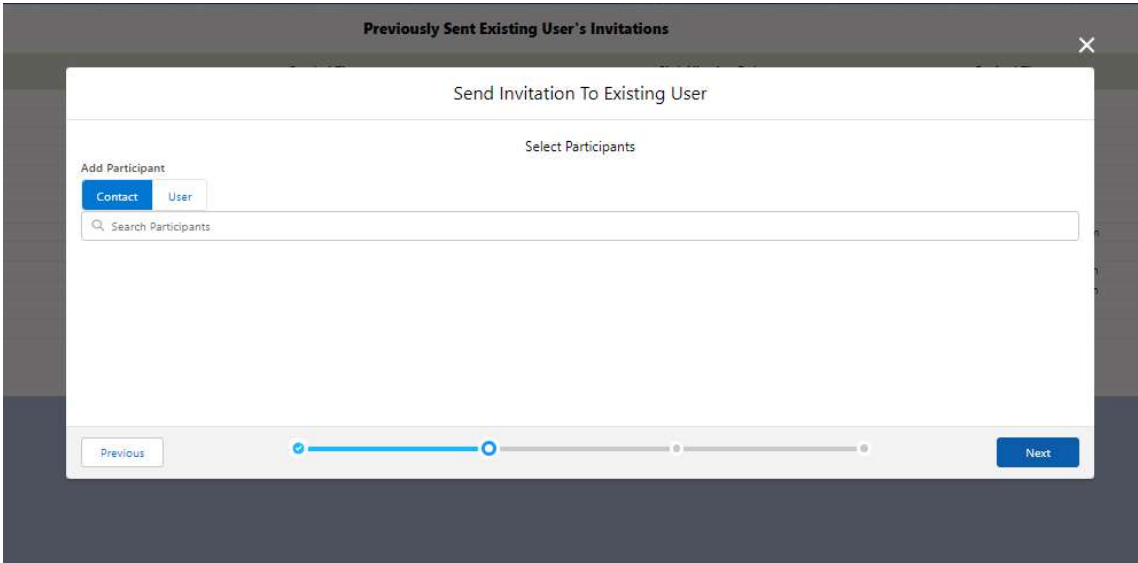
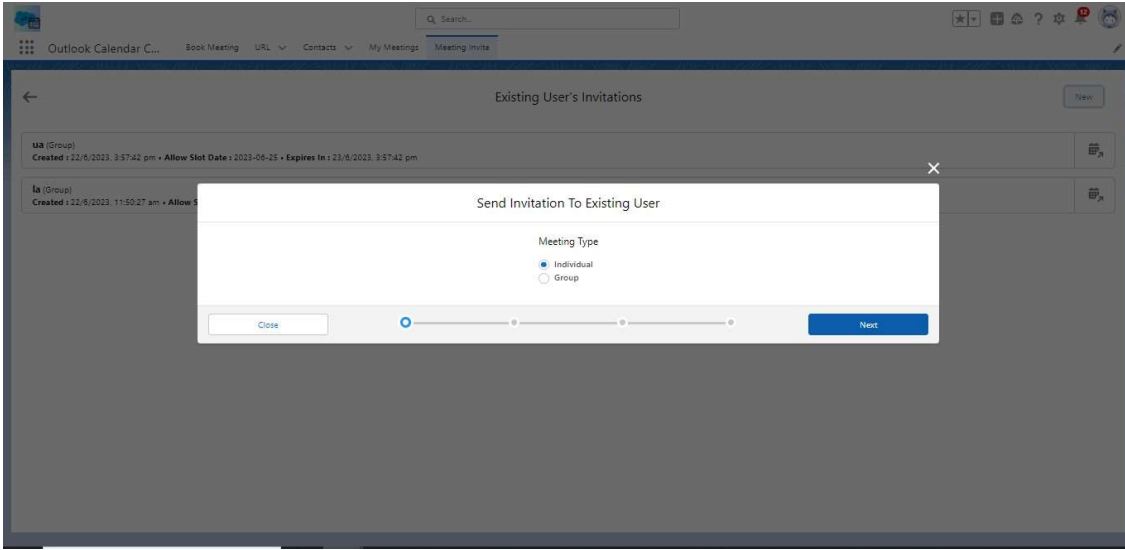
3.1 Individual Invitation

a) Individual: If you select Individual, the meeting invite via email will be sent individually/separately to each one of them in the selected participant list. Each one of them can book the meeting at their own pace.

Note: All the previously sent invitations are visible. If you are going to create new meeting invite, then Click New.



Note: Click on the new to create new meeting invite.



2. Select Participant Type i.e., Contact/User OR you can select both.

4. Add Participant of your choice.

Send Invitation To Existing User

Invitation expire details

Invitation Expire In: 24 Hours

Allowing Slot's Last Date: Jun 24, 2023

Previous Next

- 5. Select hours in which the link needs to get expired.
- 6. Click Next

Send Invitation To Existing User

Invitation details

*Meeting Subject: Enter meeting subject

*Meeting Description: Enter description

Previous Send

- 7. Enter Meeting Subject.

8. Enter Meeting Description

Created Time 25/4/2023, 4:14:59 pm Slot Allowing Date Expired Time 26/4/2023, 4:14:59 pm

Send Invitation To Existing User

Invitation details

* Meeting Subject
Enter meeting subject

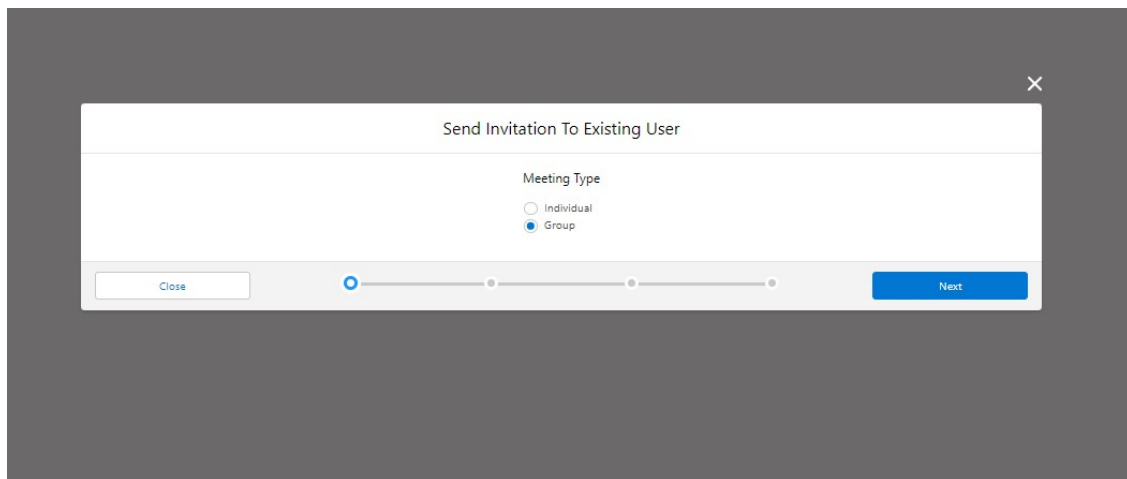
* Meeting Description
Enter description

Previous [Progress Bar] Send

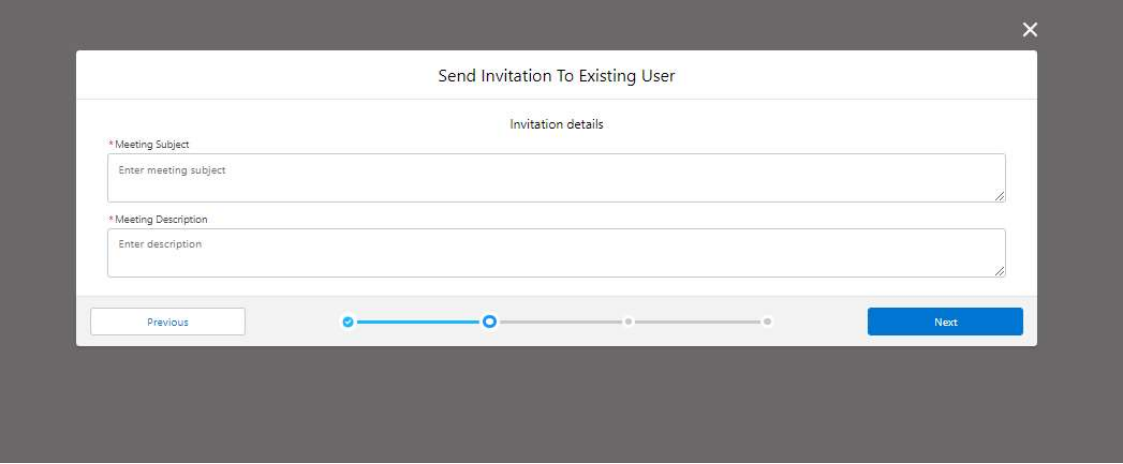
9. Hit send, and the meeting invite link via email will be sent successfully.
10. You will receive meeting invite link via email of the meeting details and the calendar will be blocked at the chosen time slot.

3.2 Group Invitation

b) Group: If you select Group, the meeting invite via email will be sent as in a group and one out of all the selected participants will be able to book the meeting.

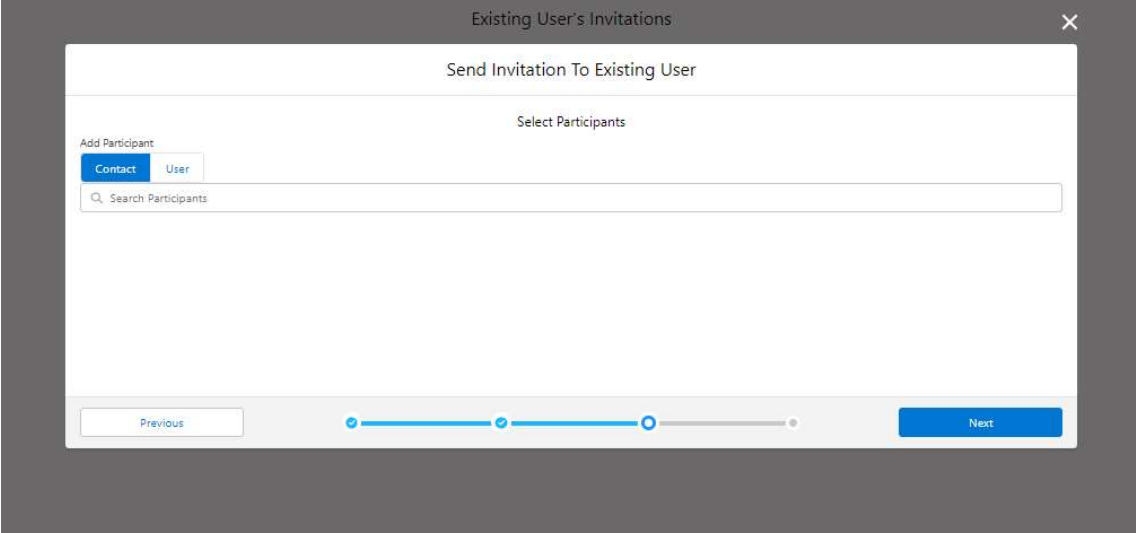


1. Select Group Category
2. Click Next



The screenshot shows a dialog box titled "Send Invitation To Existing User" with a close button (X) in the top right corner. The dialog is divided into two sections: "Invitation details" and a progress bar at the bottom. Under "Invitation details", there are two required fields: "* Meeting Subject" with a placeholder "Enter meeting subject" and "* Meeting Description" with a placeholder "Enter description". The progress bar at the bottom has four steps, with the first step being active. Navigation buttons "Previous" and "Next" are located at the bottom left and right respectively.

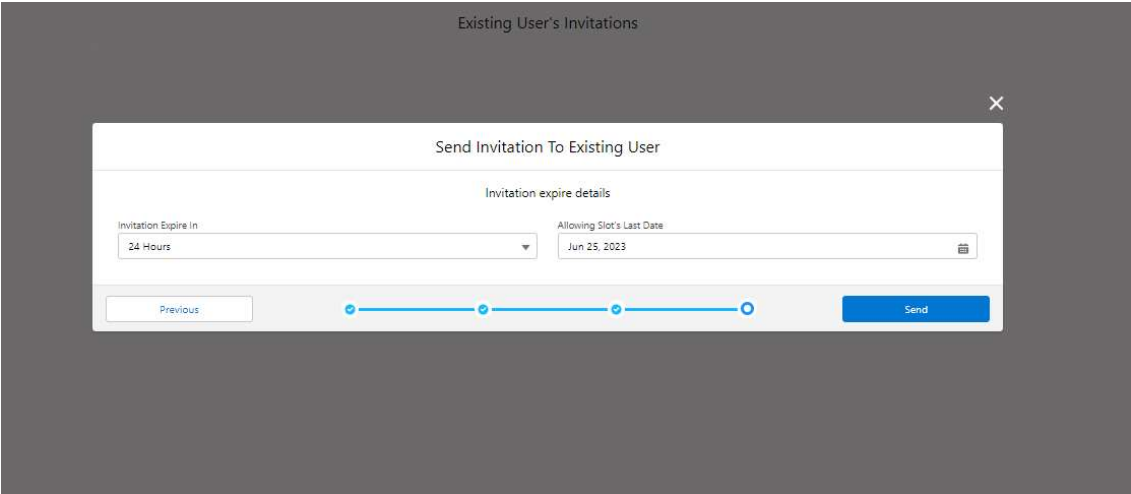
3. Select Participant Type i.e., Contact/User OR you can select both
4. Add Participant of your choice.
5. Enter meeting subject and description.
6. You can add Participants (More than one, it's a group meeting) and click next.



The screenshot shows the same dialog box, now at Step 2: "Select Participants". The "Invitation details" section is hidden. Under "Select Participants", there is an "Add Participant" section with two buttons: "Contact" (highlighted in blue) and "User". Below these buttons is a search bar with the placeholder "Search Participants". The progress bar at the bottom now shows the second step as active. The "Previous" and "Next" buttons remain at the bottom.

6. Select hours in which the link needs to get expired.

7.Click Next



10. Hit send, and the meeting invite link via email will be sent successfully.

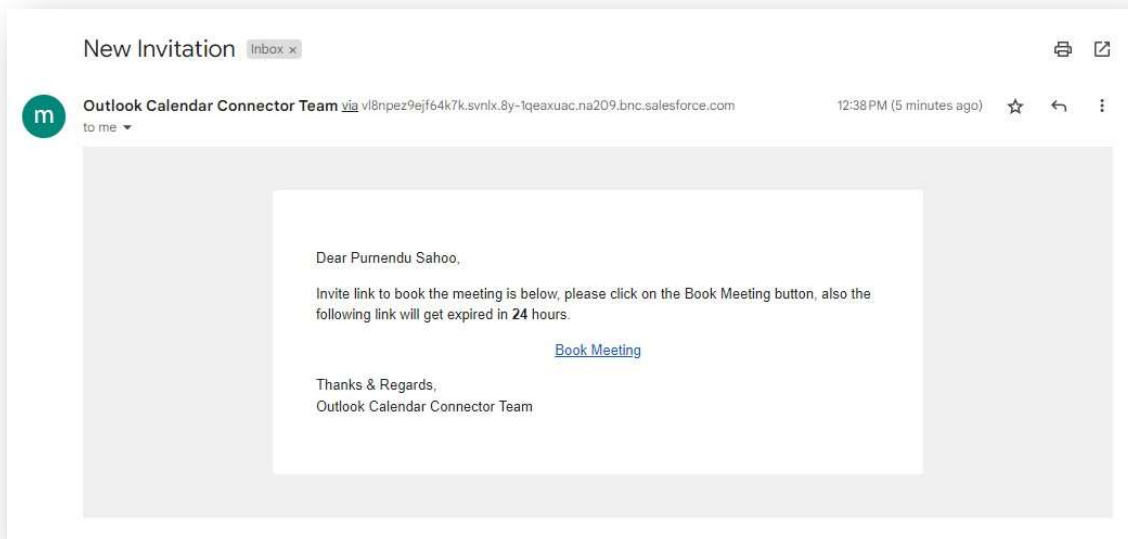
11. You will receive meeting invite link via email of the meeting details and the calendar will be blocked at the chosen time slot.

3.3 Book Meeting (Individual)

(On receiving the meeting invite link)

Steps to book the meeting:

Scenario 1: To book a meeting for an existing User with an invitation type: INDIVIDUAL.



This is an email received for the invitation type: **Individual**.
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1. Go to Book meeting in the email you've received.
2. Enter all the details.
 - a. Subject
 - b. Description
 - c. Date
3. Duration- Select some suitable slots.
4. Time zone- Select the time zone according to your need.

5. Book meeting

- Once you book the meeting a successful toast message shall appear in the top.

BOOK NEW MEETING

Host Details
Megha Kammaje
megha.kammaje@v2force.com

Participant Details
Koppalli Bhuvaneswari
bhuvaneswari.koppalli@v2force.com

Event Details
Subject: lala
Description: lala
Add Comments: Add Comments

TimeZone: (GMT+05:30) India Standard Time
Date*: Jun 21, 2023
Duration*: 30 Min

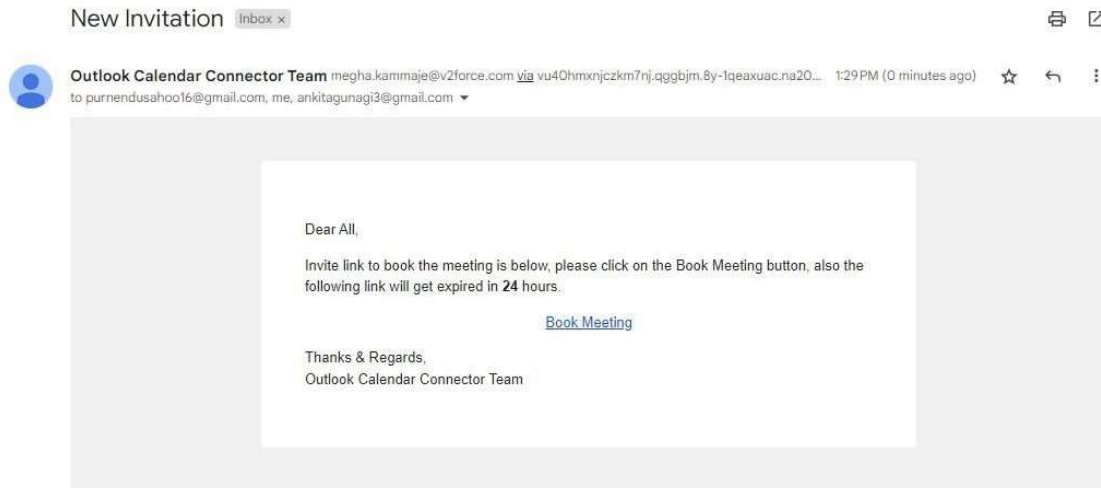
Time Slots
12:00 PM, 12:30 PM, 1:00 PM, 1:30 PM, 2:00 PM, 2:30 PM, 3:00 PM, 3:30 PM, 4:00 PM, 4:30 PM, 5:00 PM, 5:30 PM, 6:00 PM, 6:30 PM, 7:00 PM

Book Meeting

3.4 Book Meeting (Group)

Scenario 2: To book a meeting for an existing User with an invitation type: GROUP.

1. Go to the Book meeting link in an email you received.



2. Enter all details.
 - a) Subject
 - b) Description
 - c) Date

BOOK NEW MEETING

Host Details

Debasis Rout
debasis.rout@v2force.com

Participant Details

Megha Kammaje
Outlook Calendar
megha.kammaje@v2force.com

Event Details

Subject: TEST 27-07

Description: NA

Add Comments: Add Comments

TimeZone: (GMT+05:30) India Standard Time (Asia/Kolk...)

Date*: 27-Jul-2023

Duration*: 30 Min

Time Slots:

☐ 12:30 PM	☐ 1:00 PM	☐ 1:30 PM	☐ 2:00 PM	☐ 2:30 PM
☐ 3:00 PM	☐ 3:30 PM	☐ 4:00 PM	☐ 6:00 PM	

[Book Meeting](#)

3. Select some suitable slots- Duration.
4. Time zone- Select the time zone according to your need.

5. Click Book meeting.

Subject: TEST 27-07

Description: NA

Add Comments: Add Comments

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolk...)

Date: 27-Jul-2023

Duration: 30 Min

Time Slots: 12:30 PM, 1:00 PM, 1:30 PM, 2:00 PM, 2:30 PM, 3:00 PM, 3:30 PM, 4:00 PM, 6:00 PM

Book Meeting

Important note: In the group Invitation Type, only one participant will be able to book the meeting. The meeting will be booked on mutual understanding of all the participants who belong to the same meeting.

3.5 Book Meeting (Guest User)

Scenario 3: To book a meeting for Public Users.

1. Go to the meeting invite tab.
2. Go to Public User Category

Outlook Calendar C... Book Meeting URL Contacts My Meetings Meeting Invite

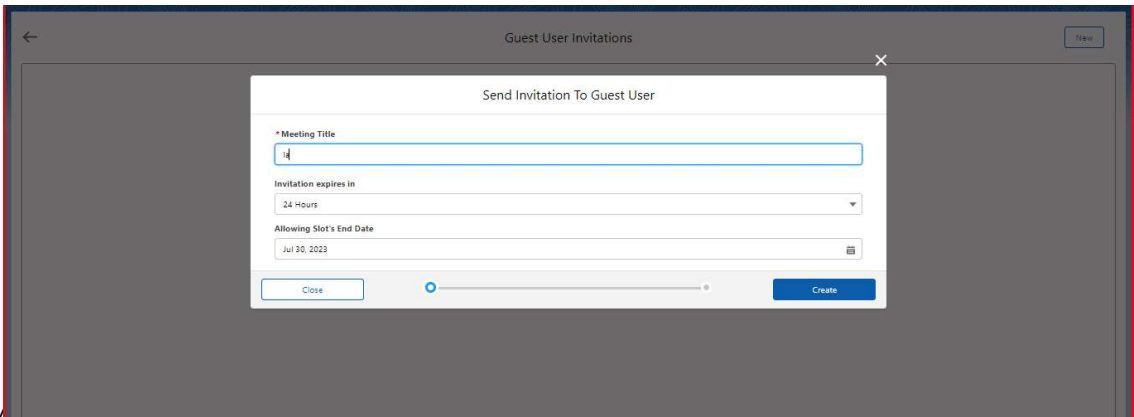
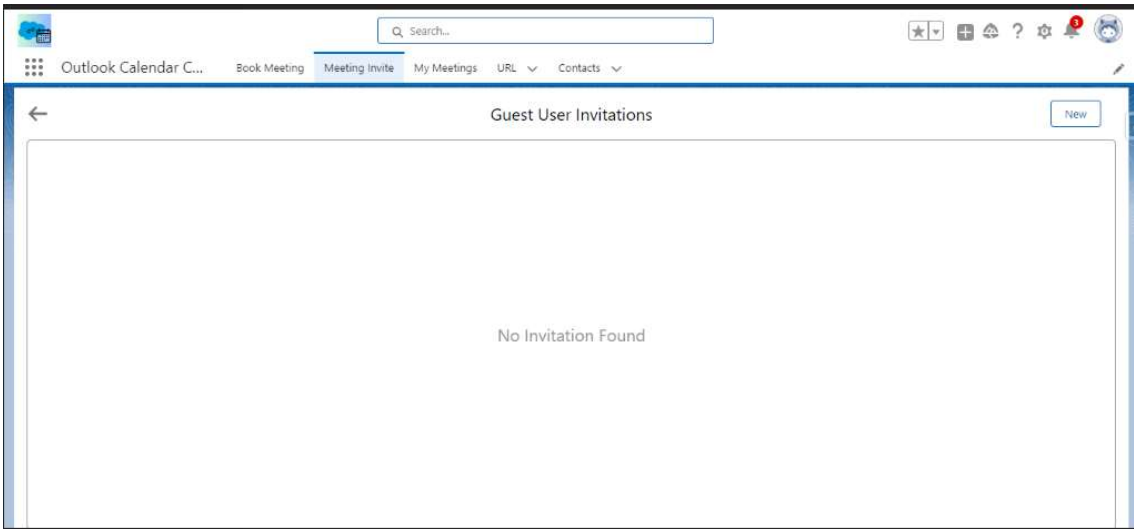
Invitation Type

☒ Existing User

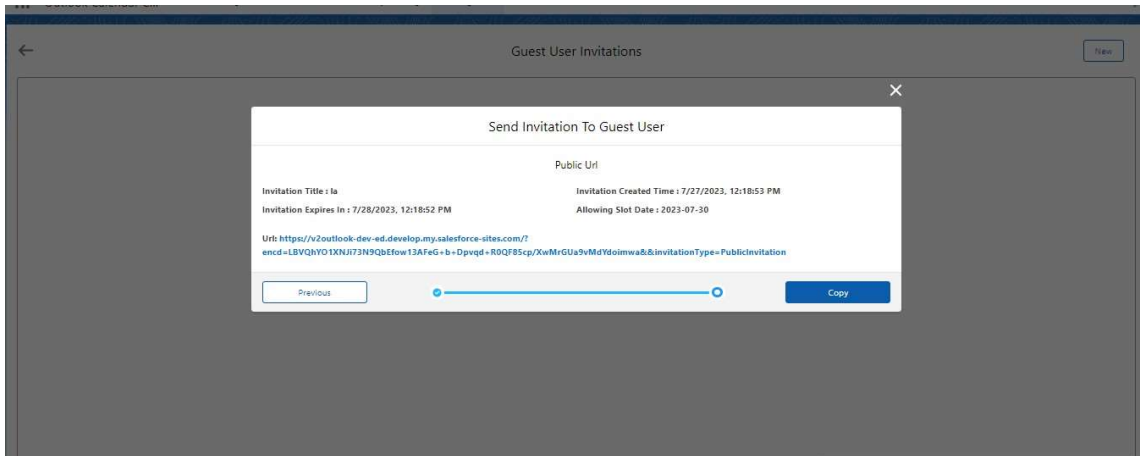
☐ Guest User

Next

3. You could see previously generated links.
4. Create New to create new Link.



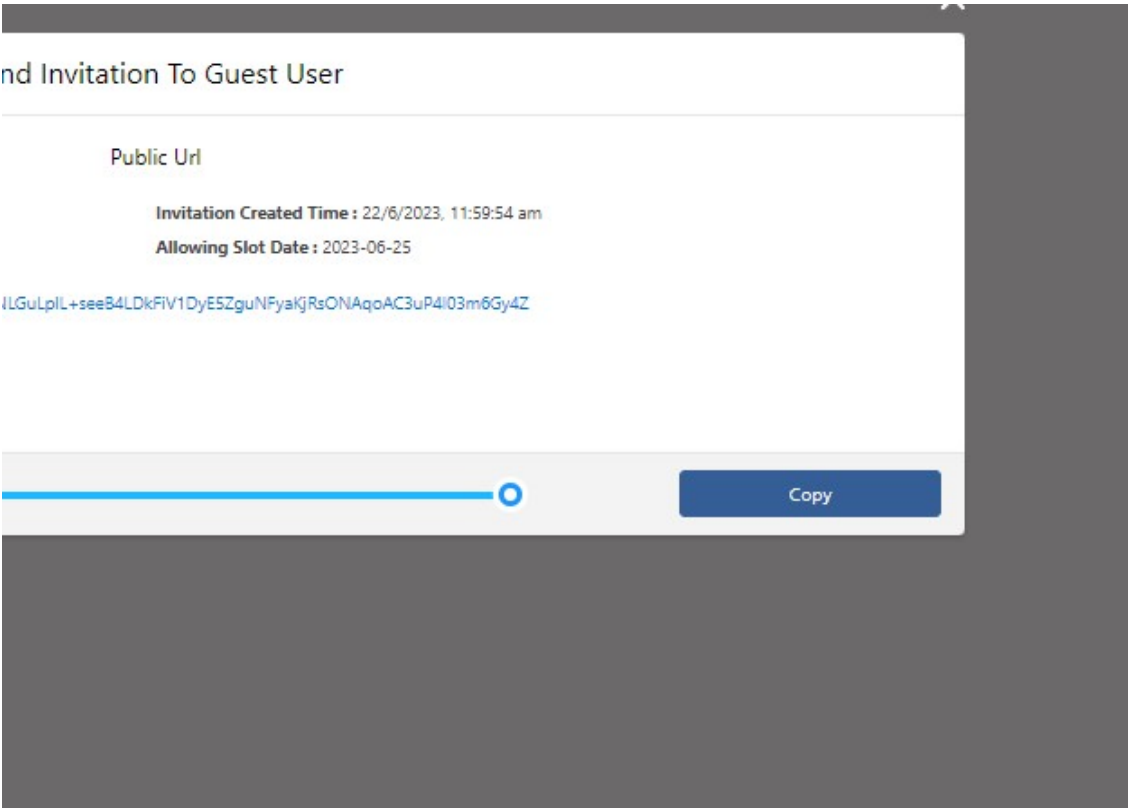
5. Enter the meeting title of your choice.
6. Set the Link expiry time by clicking on the drop down “**Invitation expires in**”.
7. Click on Create

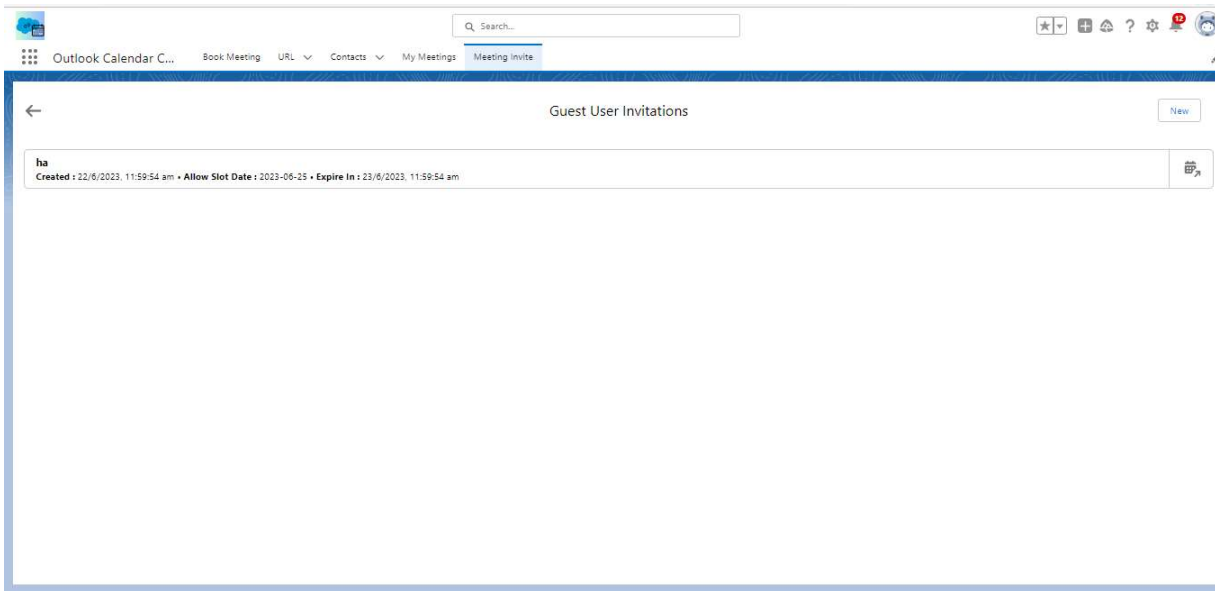


The generated link which can be copied is to be sent via any medium of communication.

Ex: Gmail, WhatsApp, or any social media medium.

8. Copy the link.

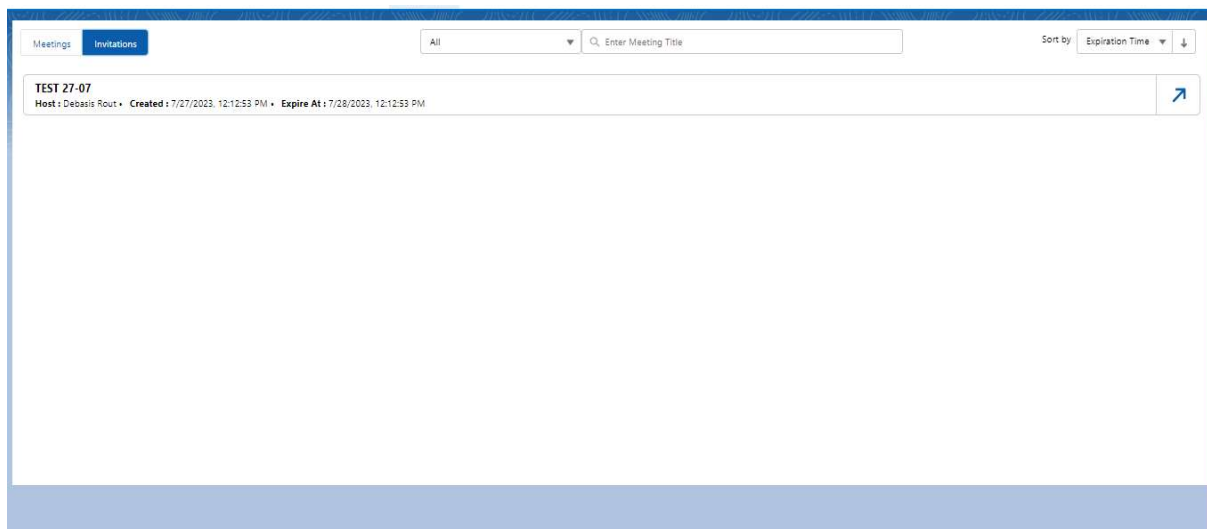




9. You can see set of links that are generated prior. You can reuse it by copying the same and send it to public users via any communication medium.
10. When you click on the Public URL that's generated, here is how you book the meeting.

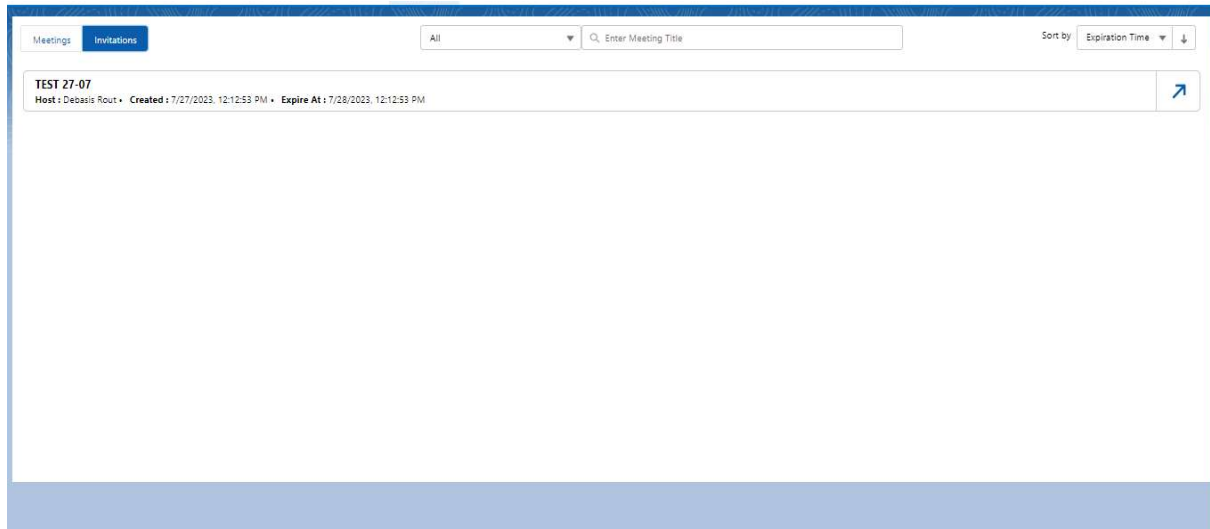
A screenshot of the meeting booking form. It is divided into two main sections: "Host Details" and "Participant Details" on the left, and "Event Details" on the right. The "Host Details" section includes fields for Name (Megha Kammaje) and Email (megha.kammaje@v2force.com). The "Participant Details" section includes fields for Name (Megha), Email (kammaje17@gmail.com), Phone (88344874943), and Company (V2). The "Event Details" section includes fields for Subject (Iala), Description (Ia), and Add Comments (Ia). It also has a TimeZone dropdown (GMT+05:30 India Standard Time (Asia/K...)), a Date dropdown (27-Jul-2023), and a Duration dropdown (30 Min). Below these are several time slots for selection: 4:00 PM, 4:30 PM, 5:00 PM, 5:30 PM, 6:00 PM, 6:30 PM, 7:00 PM, 7:30 PM, 8:00 PM, and 8:30 PM. A "Book Meeting" button is located at the bottom center.

4. My Meetings Tab



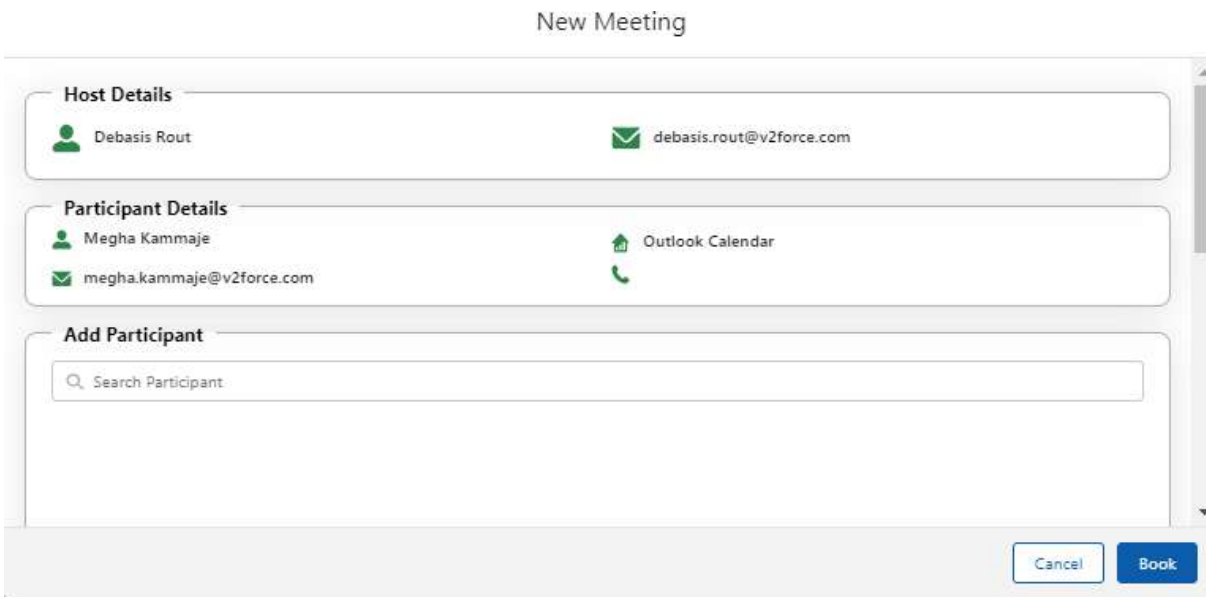
4.1 Invitations:

1. Go to Invitations.
2. You can sort existing invitations based on **Expiration time** and **Created time**.
3. In existing invitations, click the right arrow mark and you are set to book the meeting.



The screenshot shows a web interface for managing meetings. At the top, there are tabs for 'Meetings' and 'Invitations'. Below the tabs, there is a search bar with the placeholder text 'Enter Meeting Title' and a dropdown menu set to 'All'. To the right of the search bar, there is a 'Sort by' dropdown menu set to 'Expiration Time'. The main content area displays a single meeting invitation for 'TEST 27-07'. The invitation details include the host 'Debasis Rout', the creation time '7/27/2023, 12:12:53 PM', and the expiration time '7/28/2023, 12:12:53 PM'. There is a small blue icon with an arrow pointing up and to the right in the top right corner of the invitation card.

4. You have a choice to add participants.



The screenshot shows a 'New Meeting' dialog box. It has three main sections: 'Host Details', 'Participant Details', and 'Add Participant'. The 'Host Details' section shows a host named 'Debasis Rout' with a green checkmark icon and the email address 'debasis.rout@v2force.com'. The 'Participant Details' section shows a participant named 'Megha Kammaje' with a green checkmark icon, the email address 'megha.kammaje@v2force.com', and a green phone icon. The 'Add Participant' section has a search bar with the placeholder text 'Search Participant'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Book'.

5. Enter all details in the tab displayed.
6. meeting Description and title will be pre-populated.
7. Time Zone- Select the time zone of your choice.

8. Enter the date and duration.

New Meeting

Meeting Details

Meeting Title

DEMO-22/6/23-001-11

Meeting Description

DEMO-22/6/23-001-11

TimeZone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Select Date

Jun 22, 2023

Duration

30 Min

12:45 PM 1:15 PM 1:45 PM 2:15 PM 2:45 PM 3:15 PM 3:45 PM 5:00 PM 5:30 PM 6:00 PM 6:30 PM 7:00 PM 7:30 PM

Cancel Book

9. Click on the button 'BOOK'.

10. Now the meeting is booked.

11. You can see list of meetings you've booked in the meetings category.

4.2 Meetings:

Meetings Invitations

All

Q, Enter Meeting Title

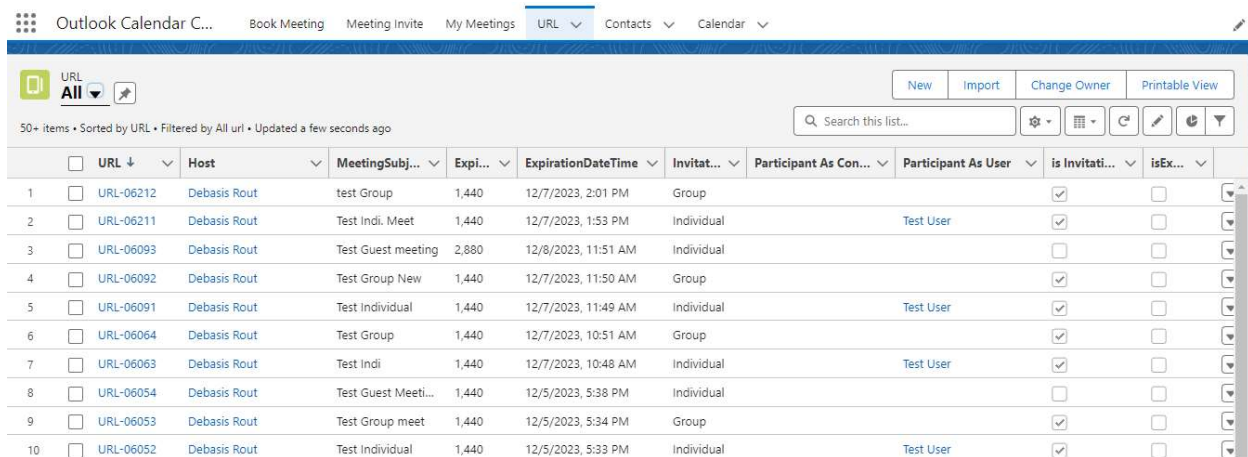
Sort by Start Time

lala (Host)

Start : 7/27/2023, 3:00:00 PM • Duration : 30 Mins

- 1) Click on the icon in the existing meetings to see the details.
- 2) You have a drop down with 3 options.
 - a) All
 - b) Host
 - c) Date
- 3) You can Select and search accordingly in the next Search Bar.
- 4) You can filter with options start time and Created Time.

5.URL Tab



	URL	Host	MeetingSubj...	Expi...	ExpirationDateTime	Invitat...	Participant As Con...	Participant As User	is Invitati...	isEx...
1	☐ URL-06212	Debasis Rout	test Group	1,440	12/7/2023, 2:01 PM	Group			☒	☐
2	☐ URL-06211	Debasis Rout	Test Indi. Meet	1,440	12/7/2023, 1:53 PM	Individual	Test User		☒	☐
3	☐ URL-06093	Debasis Rout	Test Guest meeting	2,880	12/8/2023, 11:51 AM	Individual			☐	☐
4	☐ URL-06092	Debasis Rout	Test Group New	1,440	12/7/2023, 11:50 AM	Group			☒	☐
5	☐ URL-06091	Debasis Rout	Test Individual	1,440	12/7/2023, 11:49 AM	Individual	Test User		☒	☐
6	☐ URL-06064	Debasis Rout	Test Group	1,440	12/7/2023, 10:51 AM	Group			☒	☐
7	☐ URL-06063	Debasis Rout	Test Indi	1,440	12/7/2023, 10:48 AM	Individual	Test User		☒	☐
8	☐ URL-06054	Debasis Rout	Test Guest Meeti...	1,440	12/5/2023, 5:38 PM	Individual			☐	☐
9	☐ URL-06053	Debasis Rout	Test Group meet	1,440	12/5/2023, 5:34 PM	Group			☒	☐
10	☐ URL-06052	Debasis Rout	Test Individual	1,440	12/5/2023, 5:33 PM	Individual	Test User		☒	☐

- a) In the URL tab you can see the booked URL's.

THE END