

ScheduleOne Overview

Account Settings

Invite Management

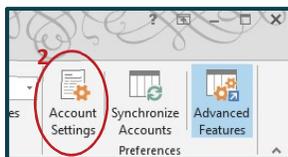
Meeting invites are customized through ScheduleOne’s **Account Settings, Invite Management** dialog. There are no limits to the number of invites that can be created. The following section outlines how to create, modify, and remove a customized meeting invite.

Follow the steps below for Invite Management options!

1. Open Microsoft Outlook: Account Settings will be located by clicking the **Advanced Features** under the **MeetingOne ScheduleOne** tab.



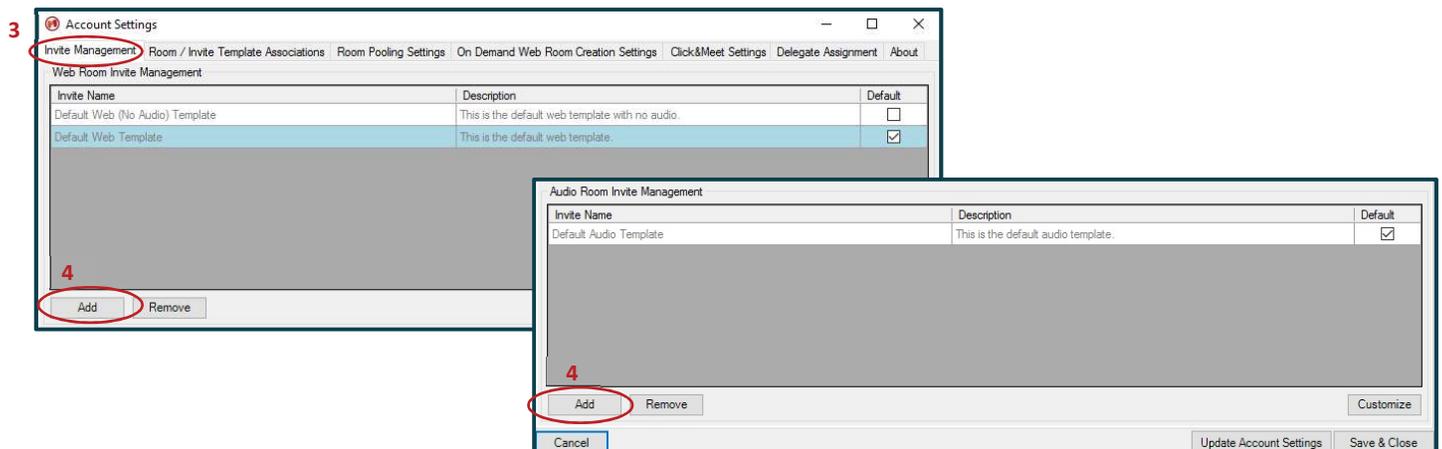
2. Click **Account Settings**, the Account Settings will open.



3. The Invite Management tab is the default.

△ There will be two grid view controls displayed (as shown below) if the Adobe Connect integration was purchased with ScheduleOne, otherwise, only Audio Room Invite Management will be displayed.

△ *The default invite templates cannot be customized.*

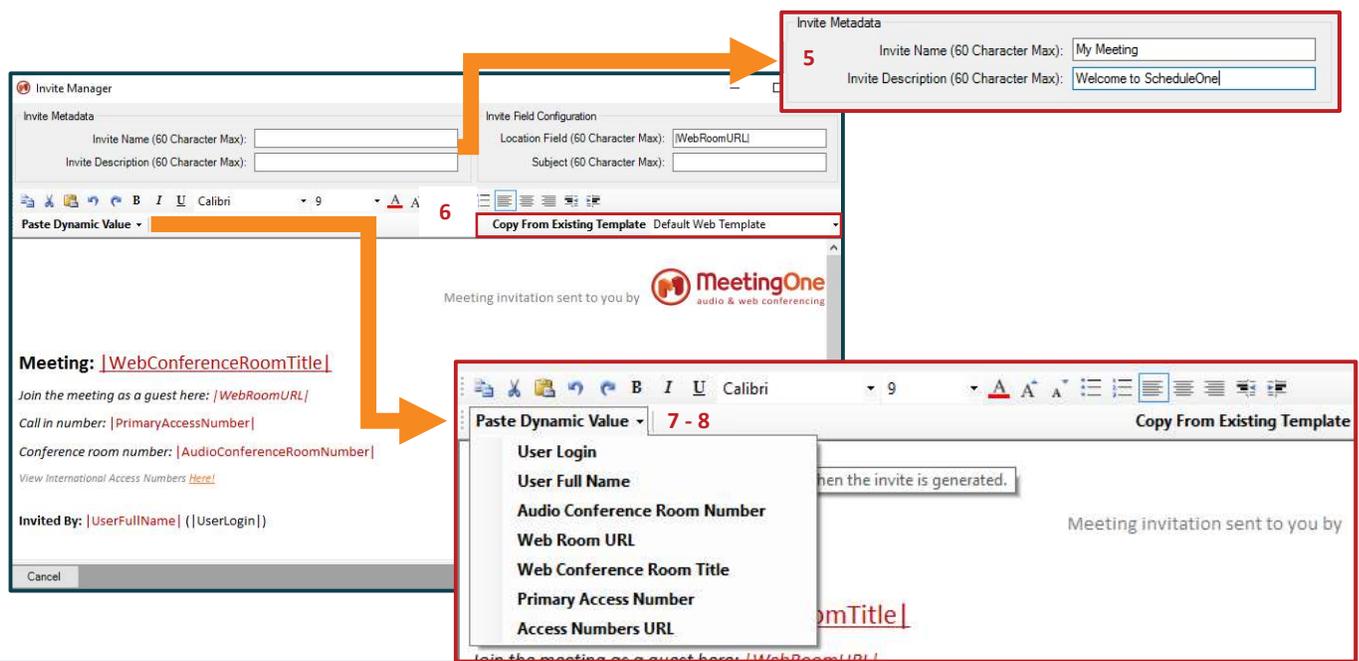


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Invite Management, continued

4. Click the **Add** button to create a new meeting invite template.
 - △ You can choose to create specific templates for audio and web rooms.
5. Give the new invite template a unique **Invite Name** and **Invite Description**; both fields are required and the Invite Name cannot match an existing template name.
6. You can choose from creating a new template or you can choose an existing template to copy which then could be customized.
 - △ To **Copy From Existing Template** use the drop down control and select the existing template you would like to copy from.
7. **Paste Dynamic Value:** You can use a number of dynamically replaceable fields to be populated when a new invite is created from Microsoft Outlook. Place your mouse cursor within the body of the invite at the location in which you want to have a dynamically replaceable value, then select **Past Dynamic Value** drop down control and select from the available options.
 - △ The Location Field and the Subject Field can accept dynamic parameters in addition to the body.
8. Finish customizing your new invite by entering the needed data, images, and using the rich text controls that are available within the Invite Manager toolbars



The screenshot displays the MeetingOne Invite Manager interface. It features several key components:

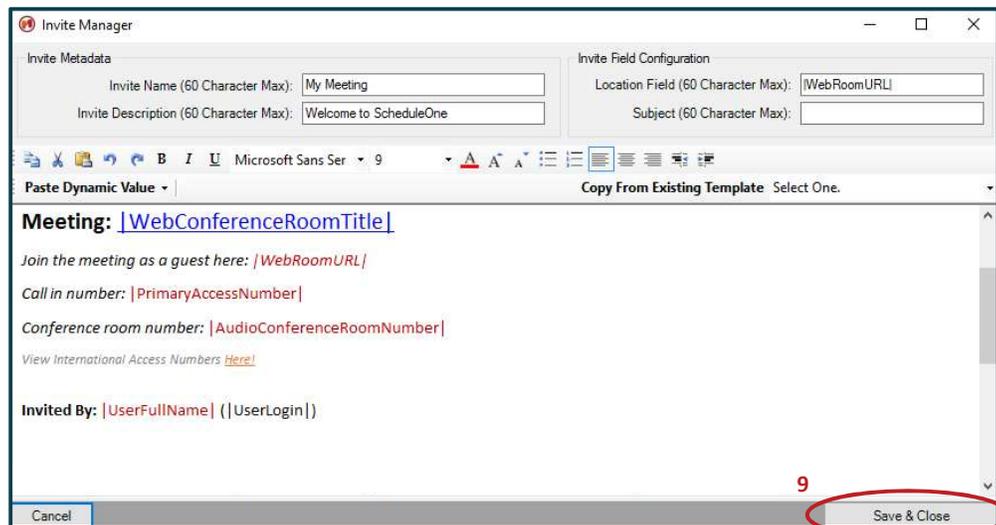
- Invite Metadata:** Fields for 'Invite Name (60 Character Max):' (containing 'My Meeting') and 'Invite Description (60 Character Max):' (containing 'Welcome to ScheduleOne').
- Invite Field Configuration:** Fields for 'Location Field (60 Character Max):' (containing '|WebRoomURL|') and 'Subject (60 Character Max):'.
- Rich Text Editor:** Includes a toolbar with options like Bold (B), Italic (I), Underline (U), and a 'Paste Dynamic Value' dropdown menu.
- Dynamic Value List:** A dropdown menu showing options such as 'User Login', 'User Full Name', 'Audio Conference Room Number', 'Web Room URL', 'Web Conference Room Title', 'Primary Access Number', and 'Access Numbers URL'.
- Preview:** A section showing a meeting invitation template with dynamic fields like '|WebConferenceRoomTitle|', '|WebRoomURL|', '|PrimaryAccessNumber|', '|AudioConferenceRoomNumber|', and '|UserFullName| (|UserLogin|)'.

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Invite Management, continued

9. Once your template is ready, click the **Save & Close** button and you will be returned to the Invite Management tab where you will see your new invite displayed accordingly.
10. To **complete** the process, click the **Save & Close** button on the **Account Settings** dialog box.
 - a. If you click the Cancel button on the Account Settings dialog your newly created invite and/or customizations will be discarded.



Invite Manager

Invite Metadata

Invite Name (60 Character Max): My Meeting

Invite Description (60 Character Max): Welcome to ScheduleOne

Invite Field Configuration

Location Field (60 Character Max): |WebRoomURL|

Subject (60 Character Max):

Paste Dynamic Value - Copy From Existing Template Select One.

Meeting: |WebConferenceRoomTitle|

Join the meeting as a guest here: |WebRoomURL|

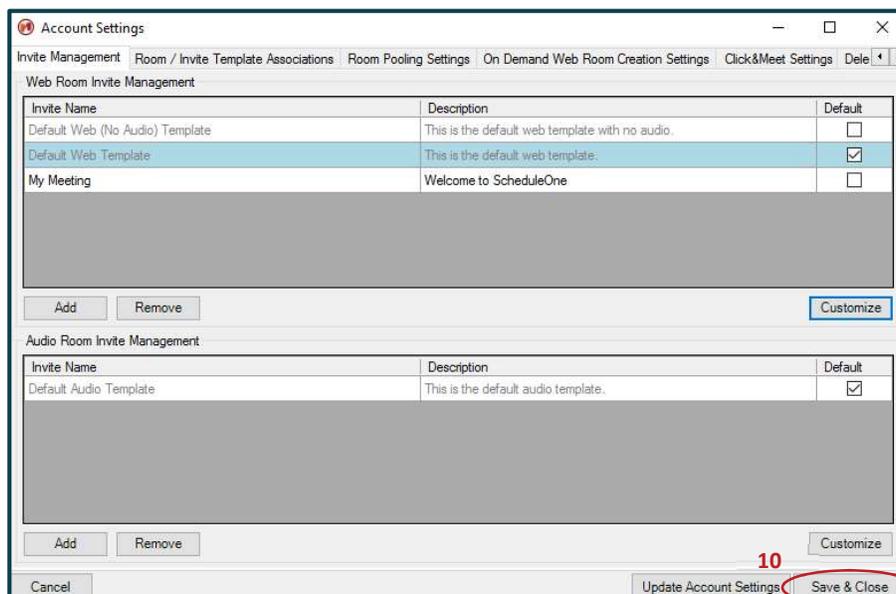
Call in number: |PrimaryAccessNumber|

Conference room number: |AudioConferenceRoomNumber|

View International Access Numbers [Here!](#)

Invited By: |UserFullName| (|UserLogin|)

Cancel Save & Close



Account Settings

Invite Management Room / Invite Template Associations Room Pooling Settings On Demand Web Room Creation Settings Click&Meet Settings Dele

Web Room Invite Management

Invite Name	Description	Default
Default Web (No Audio) Template	This is the default web template with no audio.	<input type="checkbox"/>
Default Web Template	This is the default web template.	<input checked="" type="checkbox"/>
My Meeting	Welcome to ScheduleOne	<input type="checkbox"/>

Add Remove Customize

Audio Room Invite Management

Invite Name	Description	Default
Default Audio Template	This is the default audio template.	<input checked="" type="checkbox"/>

Add Remove Customize

Cancel Update Account Settings Save & Close

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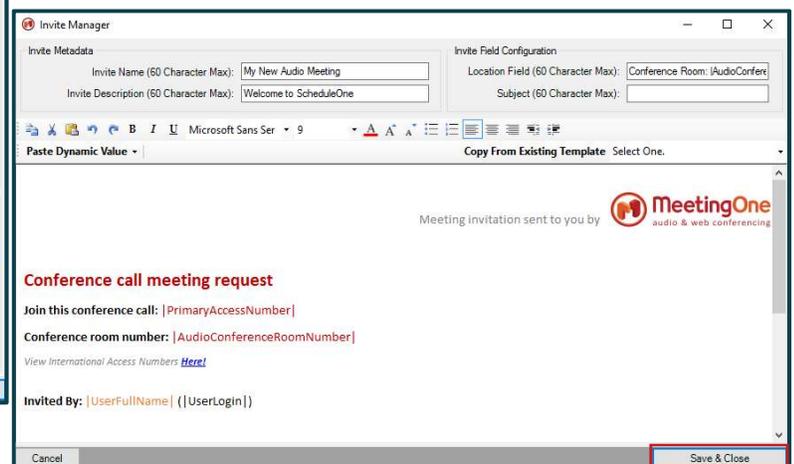
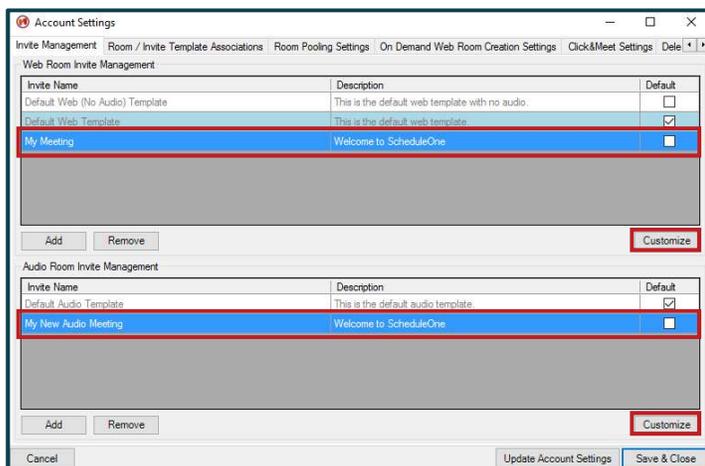
Account Settings

Customizing Existing Meeting Invite Templates

In addition to creating new invite templates, you can also return to a template in order to further customize it without having to generate a brand new template. The following section illustrates the steps required to customize/edit existing meeting invite templates.

Follow the steps below for Invite Management options!

1. Open Microsoft Outlook: Account Settings will be located by clicking the **Advanced Features** under the **MeetingOne ScheduleOne** tab.
2. Click **Account Settings**, the Account Settings will open.
3. Select the appropriate template you want to customize and click the **Customize** button to display the current meeting invite template within the **Invite Manager** dialog.
4. Complete any customization or edits (see creating the template for instructions if needed).
5. Once your changes are ready, click the **Save & Close** button and you will be returned to the Invite Management tab where you will see your new invite displayed accordingly.
6. To **complete** the process, click the **Save & Close** button on the **Account Settings** dialog box.
△ If you click the Cancel button on the Account Settings dialog your newly created invite and/or customizations will be discarded.



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Deleting Meeting Invite Templates

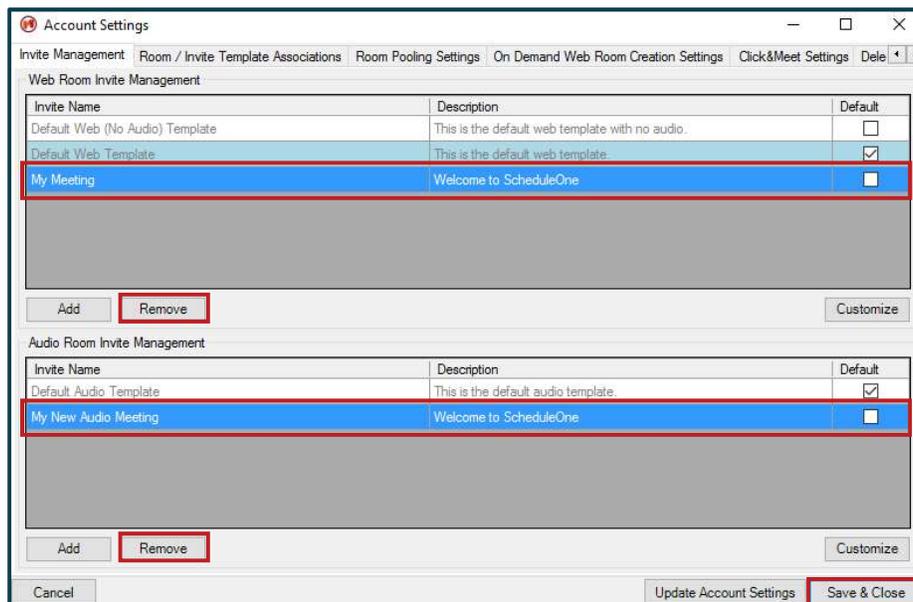
Any user created meeting invite template can be removed from ScheduleOne quickly and easily. The only restriction is that default templates that are installed with ScheduleOne cannot be removed. The following section illustrates how to remove an existing user created template from ScheduleOne.

Follow the steps below for Deleting Meeting Invite Templates!

1. Open Microsoft Outlook: Account Settings will be located by clicking the **Advanced Features** under the **MeetingOne ScheduleOne** tab.
2. Click **Account Settings**, the Account Settings will open.
3. Select the template you want to remove and then click the **Remove** button.

△ The template is removed immediately **without** any confirmation of removal. If you wish to cancel the remove operation, simply click the **Cancel** button on the **Account Settings** dialog. (Default templates installed with ScheduleOne and cannot be removed or deleted.)

4. Click the **Save & Close** button



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Associating Meeting Invite Templates to Meeting Rooms

Once you have created a new meeting invite template, the next step is to associate the newly created meeting invite template to an actual meeting room. The following section illustrates the steps to associate meeting invite templates to Adobe Connect or MeetingOne meeting rooms.

Follow the steps below for Associating Meeting Invite Templates to Meeting Rooms!

1. Open Microsoft Outlook: Account Settings will be located by clicking the **Advanced Features** under the **MeetingOne ScheduleOne** tab.
2. Click **Account Settings**, the Account Settings will open.
3. Click the **Room/Invite Template Associations** tab.
4. Select the template you would like associated with your room by clicking the **Invite Selection** drop down and choosing the desired template
5. Once your changes are ready, click the **Save & Close** button and you will be returned to your Microsoft Outlook.

