

Schedule a Meeting in Salesforce*

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Purpose

This document walks the user through the process of scheduling a meeting from within Salesforce. The meeting organizer can see their available times and those of the attendees (if calendars are shared), and create the meeting invite from within the email in Salesforce.

Meetings can be scheduled from any object within Salesforce that allows an email to be sent. This includes projects, project tasks, and cases.

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Creating the Meeting

Although the meeting can be created from within Salesforce, a link to an online meeting cannot be added. The link must be added to the meeting after the attendee responds.

Follow the steps below to create the meeting:

1. Open the object in Salesforce from where the meeting schedule should be created; a case, project, or project task
2. From the Activity section, click Email tab
 - a. Click in the Write Email box to open an email
3. Enter the attendees in the email To field
4. To open the calendar, click the Calendar icon

5. Fill in the following
 - a. Event Title
 - b. Duration

c. Location

d. Description

6. Choose the timeslot(s) for the meeting based on the attendee's availability

a. More than one timeslot can be selected. This will give the attendees options to select from if desired

b. Click Add to Email to add the times to the email

7. The email will now show the meeting options and is ready to send

8. Send the email

a. A copy of the email will be linked to the object it was created from and another will be added to the Sent folder in Outlook

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Meeting Response

When the attendee(s) respond, an email will be sent from the sender SalesforceIQ Notification to the meeting owner that the time has been reserved.

The meeting can now be confirmed, and the meeting link added:

1. Locate the meeting on the calendar

2. Open the meeting and add your meeting link and any additional information or attendees

3. Send attendees the Update

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