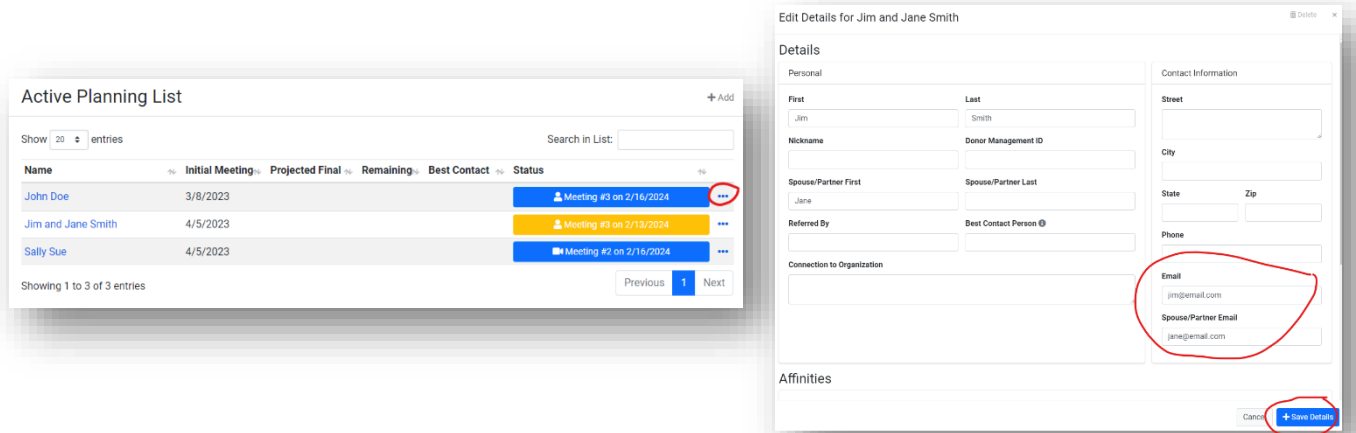
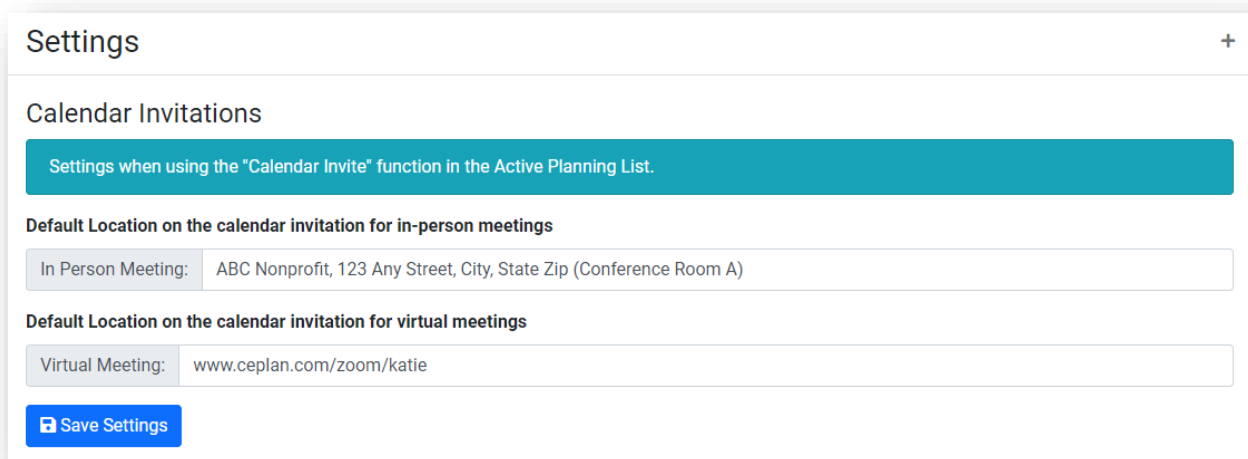


# INITIAL SETUP FOR CALENDAR INVITES

1. Enter email addresses for all of your **Active** donors by selecting the 3-dot icon to the right of each record, selecting **Edit Details** to enter both spouses email addresses and **Save**



2. If you want to set default in-person meeting locations and/or a default virtual meeting link:
  - a. Select the Management **gear icon** in the top-right menu bar
  - b. Under the **Settings** section, you will see two fields to enter both an **In Person Meeting** and a **Virtual Meeting**
    - i. For **In Person Meetings**, you might consider entering your full address including your nonprofit name, full address and the specific room, that way donors can easily tap on the address from their phones to get directions to your location
    - ii. For **Virtual Meetings**, you might consider offering a static meeting link that doesn't change for ease of scheduling, and a vanity link at that – one that is short and easier to type/remember, as opposed to a long auto-generated link with lots of random letters and numbers. [Contact Katie Grassmann](#) if you'd like help setting this up.



If you have any questions, please reach out to Katie Grassmann at [katie@ceplan.com](mailto:katie@ceplan.com).

