

# HOW TO SEND CALENDAR INVITES

1. Go to your **Active Planning List**
2. Open a donor record you wish to schedule
3. Schedule as you normally would
  - a. Select meeting format: **In Person Meeting, Virtual Meeting, or Phone Call**
  - b. Select date and time
  - c. Enter an applicable meeting note (optional), i.e., *Jim and Jane's daughter will join next meeting*

Next Meeting

In Person Meeting 2/13/2024 03:00 PM (60 min)

Central Standard Time (GMT-06:00)

Jim and Jane's daughter will join next meeting

4. Next, select **Create Invite**
  - a. This button generates the calendar invite as a file download
  - b. Depending on your browser, this file will go wherever your web downloads typically go (usually your Downloads folder)
  - c. Typically, the download will appear to go somewhere once it downloads
  - d. Click to open this download
  - e. You may receive a *Microsoft Outlook Security Notice* dialog box. This is simply to notify you that the file was created by someone else. Select **Yes** you want to continue to open the file.
5. Now, you should see the calendar invite with the title, date, times and location completed.
  - a. Your donor email addresses should be populated, along with your associate's email address, in the recipients field. Add any email addresses from the nonprofit organization that should be on this invite
  - b. Review the populated *Location* field to make sure it is correct, make any changes
  - c. Note: the invites do *not* have a notification reminder set, by default. But, you can add one, if you wish
  - d. Hit **Send** when you're ready! This will now appear on the donors' calendars, your associate's, yours and/or any other team members' calendars that need to be informed of the meeting
6. Return to GO Connect to **Save** the scheduled meeting in GO Connect

John Doe

Meeting: In Person Meeting

2/13/2024 03:00 PM (60 min)

Central Standard Time (GMT-06:00)

Meeting Note: Jim and Jane's daughter will join next meeting

Complete Meeting | Cancel Meeting | **Create Invite**

Send



7. All set!

- a. Reminder that GO Connect does not integrate with a calendar; it's simply creating an invite for you as a time-saver
- b. Know that if any changes are needed, the invite will need to be cancelled or changed separately from GO Connect
- c. GO Connect will need to be updated to reflect any calendar invite changes

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

