

Confero Technologies, SIA
Registration No.: 40203176720
23 Elizabetes St., Riga, LV-1010, Latvia

Tel.: +371 6777 5111
info@confero.tech
www.confero.tech



TimeSlot for Creatio

Interactive invitation

Version 1.0

User's Manual





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1. Introduction

Add-on TimeSlot for Creatio enables one to plan and coordinate time for a meeting or a call in the most convenient and technological way, avoiding the need to exchange numerous emails between the parties. The host sends a single email with an invitation and available time slots for the invitee (client or partner) to choose. After the invitee chooses the preferable time slot, it is automatically registered in the host's calendar. The same time slots can be offered to several invitees: when they open an invitation email, the system automatically updates the availability of time slots, and removes the already unavailable ones from the offered choice.

Options:

- Create invitations
- Manage invitations
- Sending multiple invitations
- Control of invitations calendar
- Synchronization with the corporate calendar
- Individual design

This user manual contains sections Activities and Process of organizing a meeting.

The basic functionality of Creatio is available at company's website <https://academy.creatio.com>



2. Process of planning a meeting

Add-on TimeSlot for Creatio is a simple and convenient tool for planning both internal and external meetings, calls or other events in Creatio calendar.

2.1. Initiating a meeting

A meeting can be booked in section Activities both from Calendar and list of Activities.

To initiate a meeting, click on Actions button and choose Schedule a meeting from the dropdown menu.

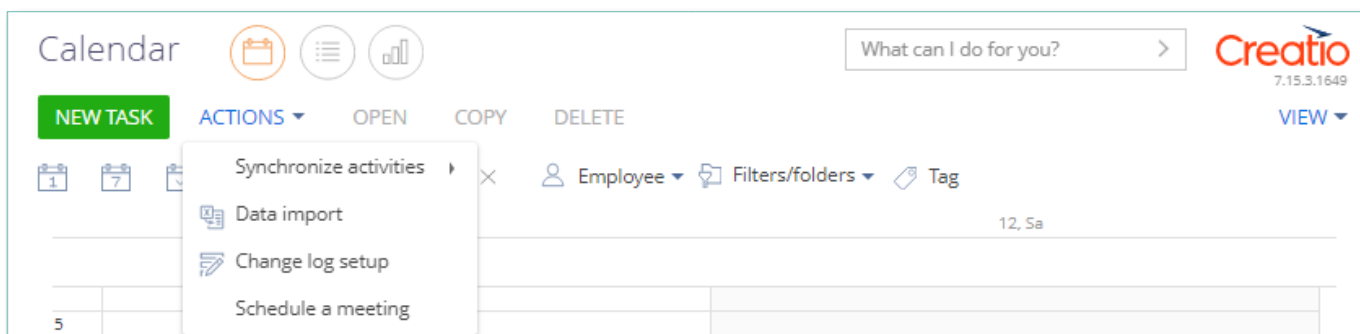


Image 1. Reservation of a meeting through Calendar

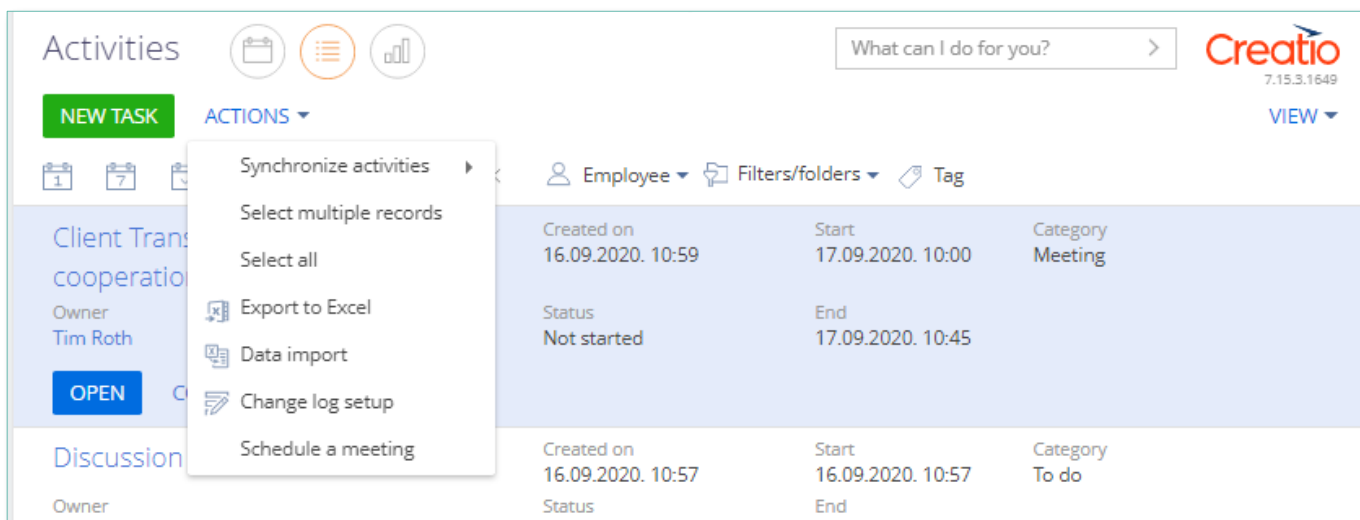



Image 2. Reservation of a meeting through Calendar

2.2. Form for reserving a meeting

The card for creating a meeting consists of selection of fields of general data and several tabs.

Rates for the IV quarter

What can I do for you? >


7.15.3.1649
[VIEW](#)

SAVE
PERFORM LATER
CANCEL
ACTIONS ▾
✎

Add meeting schedule

< SCHEDULE
AUDIT
>

Email*

Subject*

Description*

⏏ Time slots

Date* Timezone

Duration*

⏏ Selected timeslots + ⋮

| Date ▾ | Time slot |
|-------------|---------------|
| 23.09.2020. | 09:00 - 10:00 |
| 21.09.2020. | 10:00 - 10:45 |
| 22.09.2020. | 10:00 - 10:30 |

Image 3. Form for reserving a meeting

In order to create an invitation:

- Indicate addressee
- Create body text
- Choose date and meeting duration
- In the detail “Selected timeslots” using + add several preferable options (for one or several days), the system will offer the time slots available in the calendar
- Upon necessity, the values in fields Date and Duration can be edited, so that one invitation would offer slots for different dates and different timeslot duration
- Send invitation.

List and description of the fields is provided below:



| Field | Description |
|-----------------------------------|---|
| Tab Schedule | |
| Email * | Invitee's email address |
| Subject * | Invitation subject |
| Description * | Body text |
| Time slots Block of fields | |
| Date * | Value from calendar |
| Timezone | Set automatically |
| Duration * | Value from lookup |
| Selected timeslots | Selected timeslots (detail) Clicking on + one can add different times of the meeting, having previously changed the value in fields Date and Duration |

NB!

The system allows sending several invitations with the same choice of time slots. As the invitees choose the time slots, they will become unavailable in the invitations sent to other invitees (the choice is updates upon each opening of the invitation email).

2.3. Email template in TimeSlot for Creatio

Card of the email consists of a selection of general data fields and several tabs. The fields automatically import the information from the invitation.

The system allows the user to introduce the necessary corrections in the addressee and subject fields, as well as in the body text. The text can also be formatted using the text editor. Time slot buttons are read only.

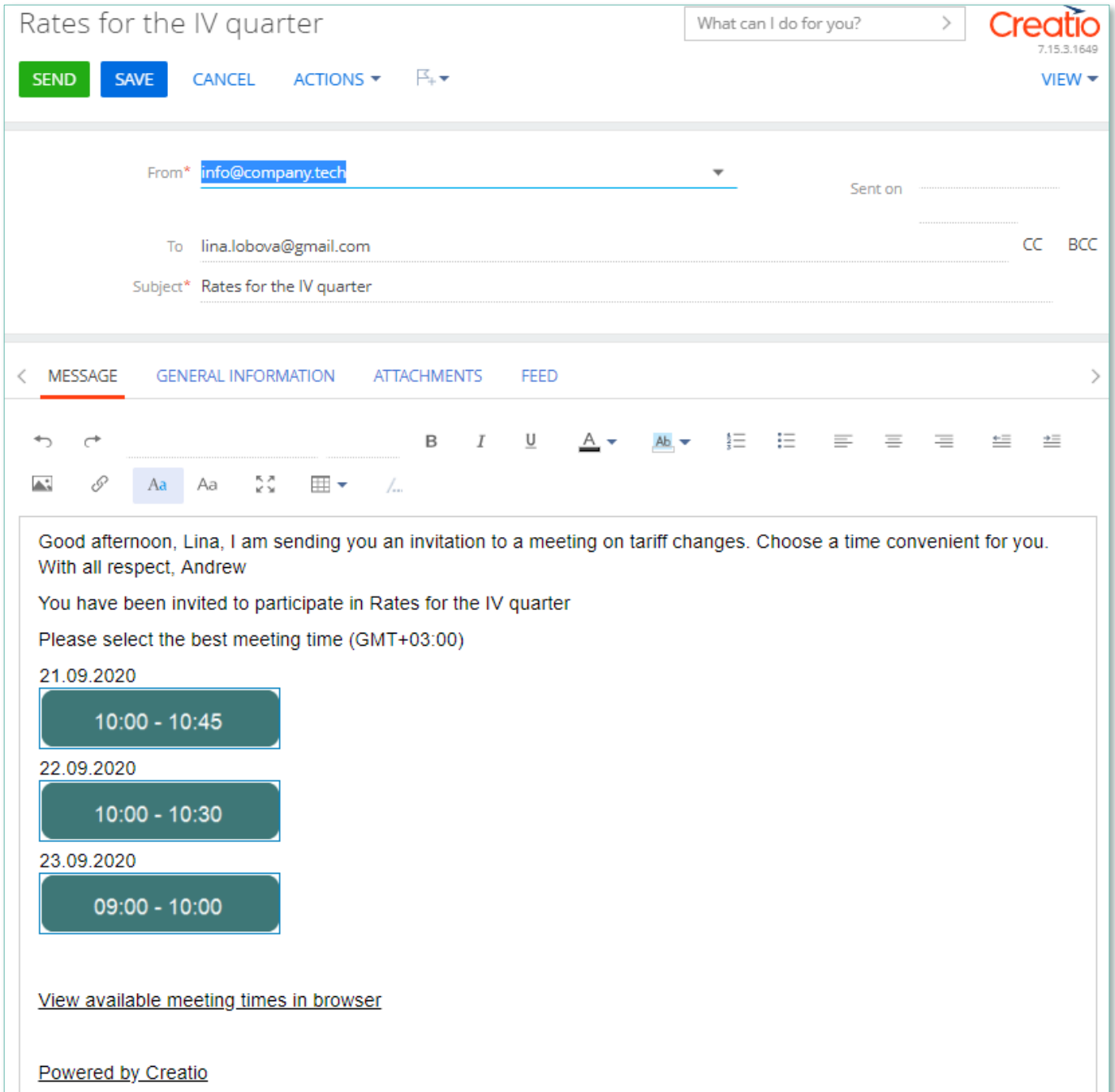


Image 4. Template of invitation to a meeting

Button **SAVE** saves the email; the user can return to editing it later. The user can find the saved email in Drafts / Not processed.

Button **SEND** sends the invitation to the meeting. The user can find the sent email in notifications block in section Outgoing / Not processed.



2.4. Choosing time slots and accepting the meeting

The invitee receives the invitation email with several time slots (as clickable buttons).

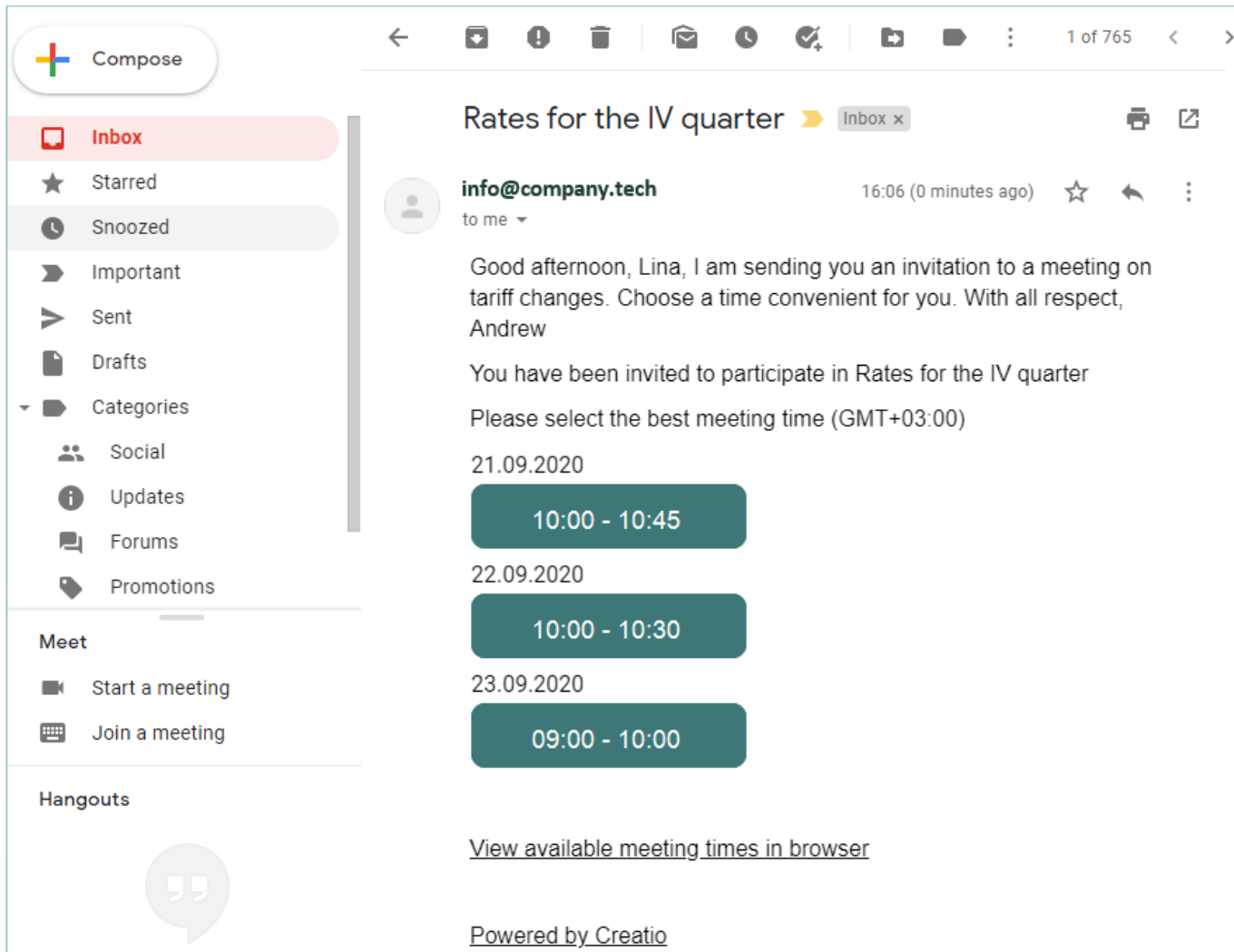


Image 5. Invitation to the meeting in the invitee's mailbox

To confirm, the invitee should click on the preferable time slot in the email, or click on [“View available meeting times in browser”](#) and accept the meeting through browser.

NB!
The time slot buttons are color-coded depending on their availability.

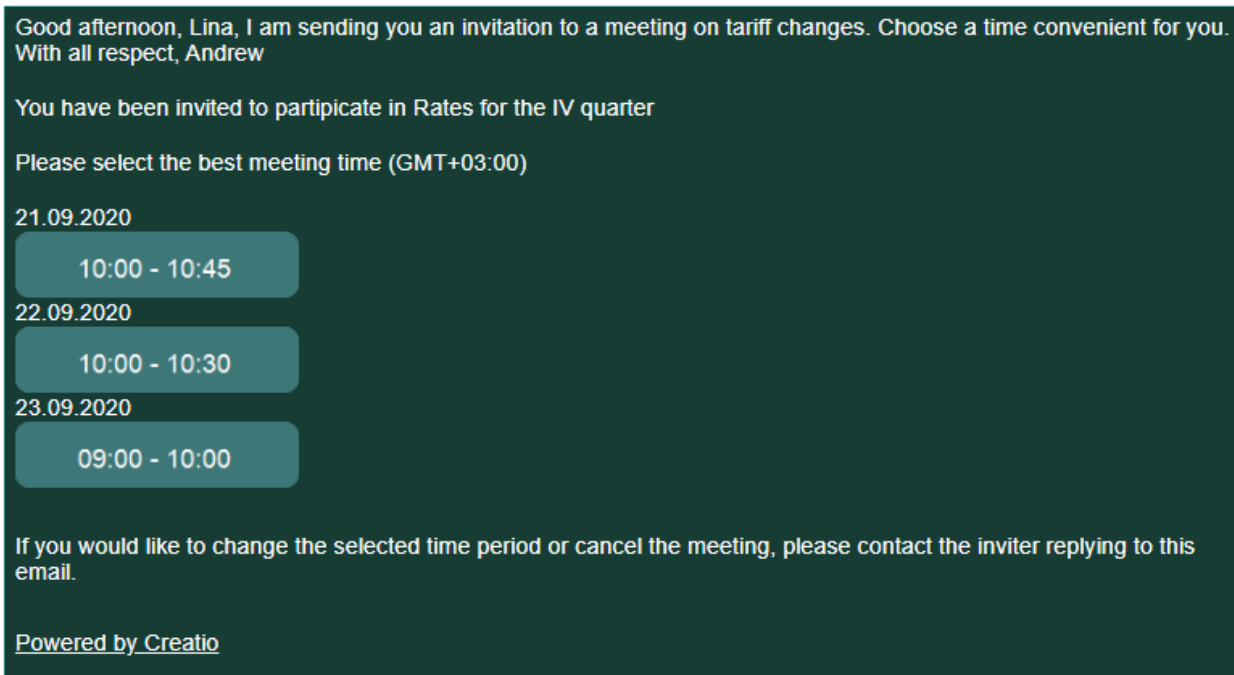


Image 6. Invitation form in browser (not confirmed yet)

After choosing one of the time slots, invitee receives a notification that the time is reserved. If the invitee opens the email later or opens it again after some time, the choice of available time slots will be updated: some slots may already be unavailable and removed from the offer (selected by the invitee or other invitees). After confirming the reservation, the invitee can check the status of the invitation in the same email letter.

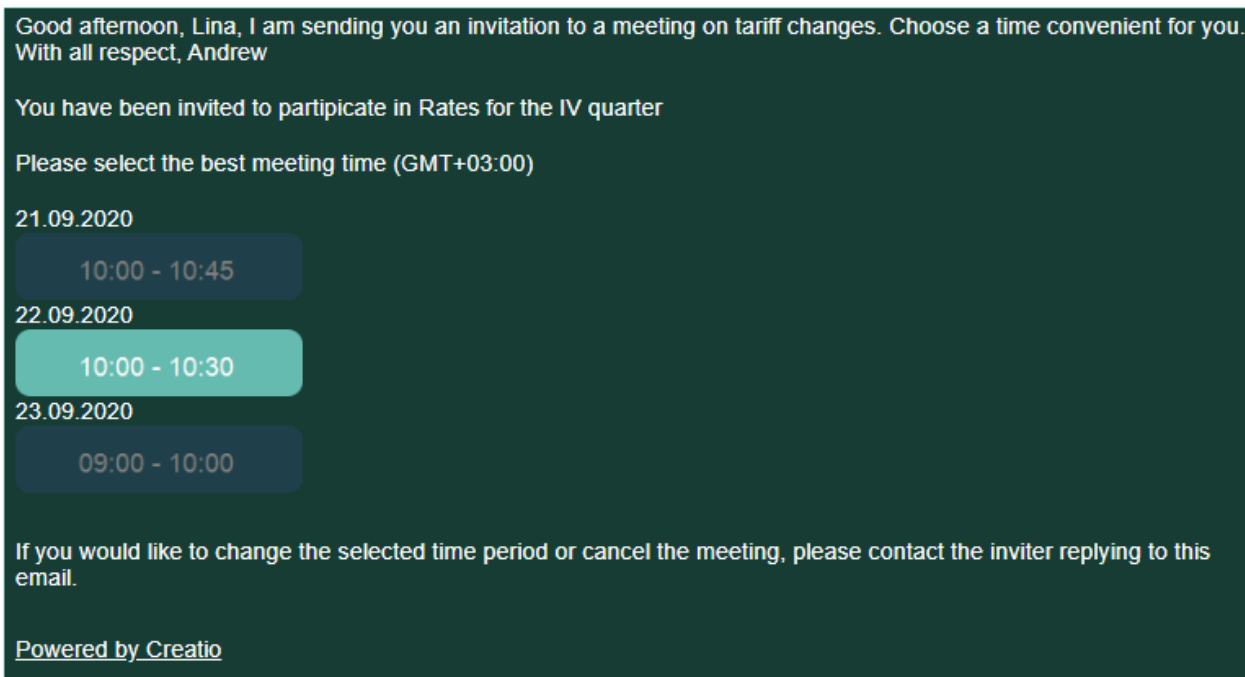





Image 7. Invitation form in browser (already confirmed)



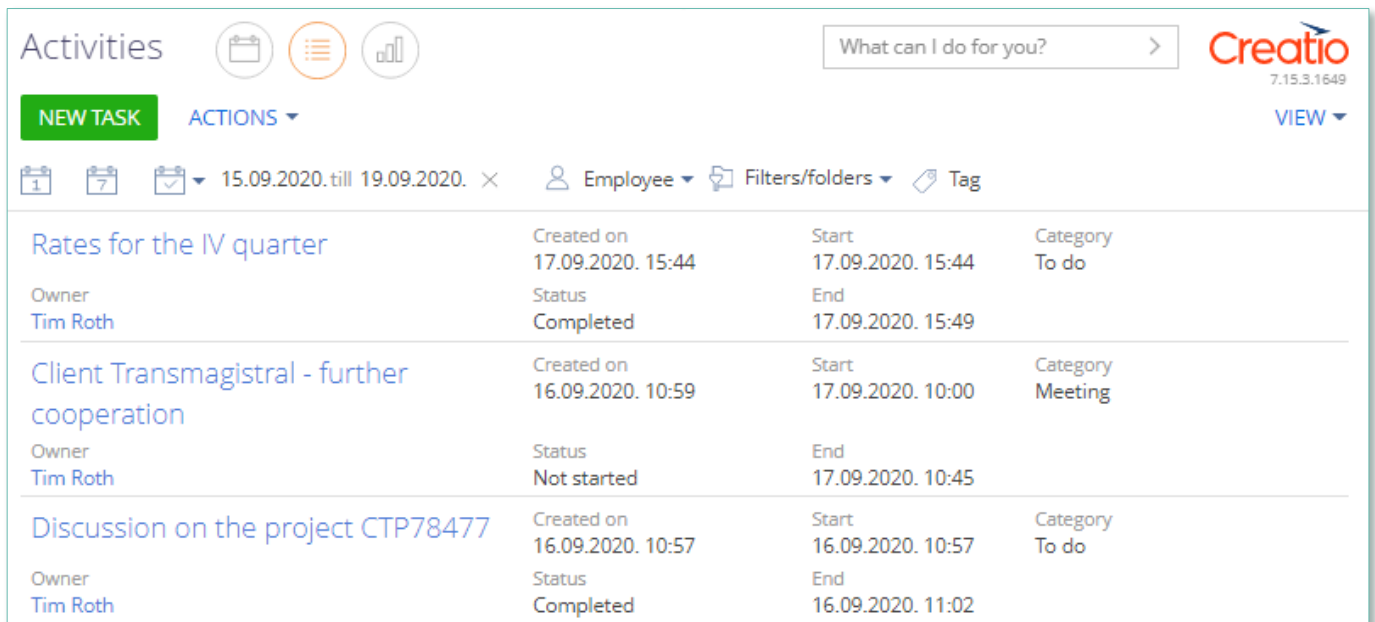
3. Activities

In section Activities of TimeSlot for Creatio, user can manage their work hours, compile schedule, plan work of other employees, track interrelations of activities with other departments, as well as keep track of tasks in progress.

This section has several view options:

-  — schedule. Shows activities as digital planner.
-  — list of activities. Shows activities as a list of entries.
-  — activity analytics. Shows charts, single indicators and ratings used for analysis of the activities.

Card Activities consists of selection of general data fields and several tabs. Upon creating an invitation, the system automatically generates activities and books time slots in the calendar.



The screenshot shows the 'Activities' section in Creatio. At the top, there are three view icons: a calendar (selected), a list, and a bar chart. A search bar contains the text 'What can I do for you?'. The 'Creatio' logo and version '7.15.3.1649' are in the top right, along with a 'VIEW' dropdown. Below the header, there is a 'NEW TASK' button and an 'ACTIONS' dropdown. A filter bar shows a date range '15.09.2020. till 19.09.2020.' with a close button, an 'Employee' dropdown, 'Filters/folders', and a 'Tag' icon. The main area displays a list of activities:

| | | | |
|--|---------------------------------|----------------------------|---------------------|
| Rates for the IV quarter | Created on 17.09.2020. 15:44 | Start 17.09.2020. 15:44 | Category To do |
| Owner Tim Roth | Status Completed | End 17.09.2020. 15:49 | |
| Client Transmagistral - further cooperation | Created on 16.09.2020. 10:59 | Start 17.09.2020. 10:00 | Category Meeting |
| Owner Tim Roth | Status Not started | End 17.09.2020. 10:45 | |
| Discussion on the project CTP78477 | Created on 16.09.2020. 10:57 | Start 16.09.2020. 10:57 | Category To do |
| Owner Tim Roth | Status Completed | End 16.09.2020. 11:02 | |

Image 8. Activities created from invitation

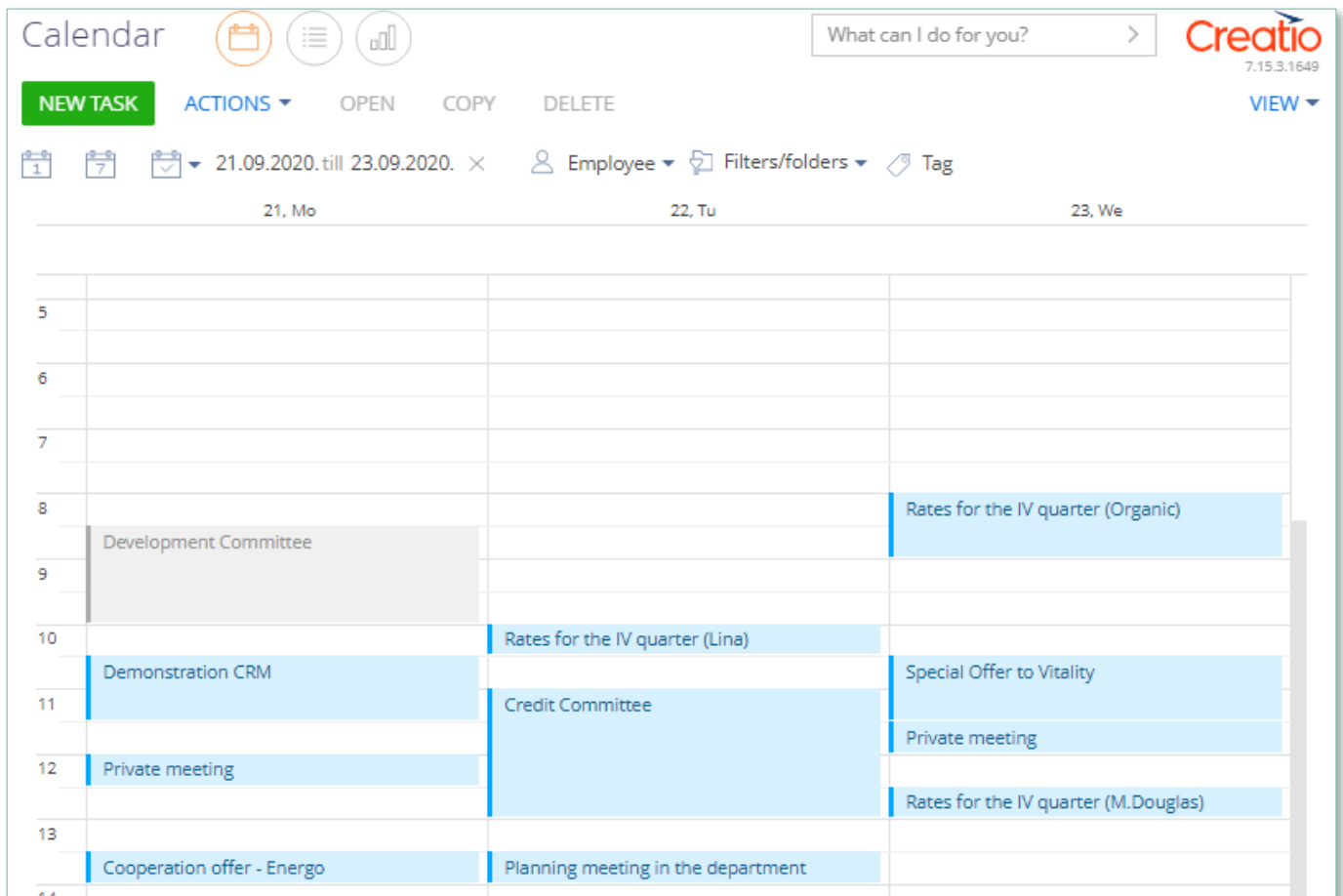


Image 9. Calendar with invitations reserved

All the time slots chosen and sent in invitations as available options are displayed in Creatio calendar as “Reserved”. If the same slot is offered to several invitees, then in your calendar you will see several events in status “Reserved” in this slot. When any invitee confirms any time slot, this time slot becomes booked for this invitee (and unavailable for other invitees) and other events in status “Reserved” are deleted from this slot for that particular invitee. Therefore, you have complete control over your calendar, and at any moment you have a complete overview of available slots, reserved slots and slots already booked

NB!

In your own calendar, you cannot edit the time of an invitation already sent!

If a time slot that is already reserved is now needed for other purposes, create a “To do” or a “Meeting” category Task in your calendar in the same time slot in status “Reserved” or “In progress”. In all the invitations already sent to the invitees this time slot will become unavailable.

NB!

Making the time of a parallel task shorter does not make the time slots sent earlier free! In order to make the time slot in the invitation already sent to invitee available again, you need either to change the status of a parallel task to Cancelled/Completed or delete the task.

The add-on works perfectly upon synchronizing Creatio calendar with your corporate calendar (e.g., MS Outlook), displaying all the reserved slots in your schedule correctly, avoiding overlapping of meetings and offering complete view of the schedule of the day, week or month in the calendar preferable for you.