## **🛠 Engineering Request: Automated Meeting Scheduling via Notion Form with Client Reminders**

### **Request Summary**

We need to create a fully automated system where freelancers can fill out a **Notion Form**, which triggers a series of actions: data entry into a Notion database, automatic meeting creation on the preferred platform, and structured reminder emails to the client with built-in options to confirm or reschedule.

### **Background**

Currently, our internal sales team manually updates a [Notion database](https://www.notion.so/1dd194d9d1e280728907d8f3c7fc92e5?v=1dd194d9d1e281fdbfe9000c3e82fab9&pvs=4), which then triggers automated meeting scheduling and client reminders. This request replaces manual data entry with a **public-facing Notion Form** that freelancers can use, while also introducing a more interactive client experience via email reminders.

### **1. Notion Form – New Requirement**

Create a new **public Notion Form** with the following fields and input types:

| **Field Name** | **Input Type** | **Notes** |
| --- | --- | --- |
| **Client Name** | Text | Single-line text input |
| Meeting Title | Text | Single-line text input |
| Attendees' Email IDs | Multi-email input | Must support multiple email addresses |
| Start Date and Time | DateTime picker | 24-hour format |
| End Date and Time | DateTime picker | 24-hour format |
| Sender’s Email ID | Email input | Validated format |
| Preferred Platform | Dropdown (Zoom / Teams / GMeet) | Select one |
| Enable Recording | Dropdown (Yes / No) | Select one |

Form must auto-populate the linked Notion database upon submission.

### **2. Notion Database Updates**

Update the existing database with:

* **New column:** Client Name (Text)

All other fields already exist. Ensure proper mapping of form data to the database columns.

### **3. Meeting Scheduling Logic**

When a form is submitted:

* Automatically schedule a meeting using the preferred platform and time.
* Invite:  
  + All attendee emails
  + From the sender’s email
* Calendar invite should include:  
  + Meeting Title
  + Client Name
  + Meeting time and duration

### **4. Client Reminder Emails**

Send four automated email reminders to the **first client email** in the Attendees field using the content and logic below.

#### **📨 Subject for ALL reminders:**

**Introduction and Discovery**

### **Reminder Emails**

#### **📧 Reminder 1 – (2 Days Before Meeting)**

**Subject:** *Introduction and Discovery*

**Body:**

Dear **[Client’s Name]**,

Just a quick heads-up about our meeting scheduled for **[Insert Date and Time]**. Could you do me a favor and accept the calendar invite we sent over? It helps keep everything organized on both ends.

Also, before our call, I’d love for you to watch the short 2-minute video. It showcases some real programs we’ve delivered. I think you’ll find it insightful: **[Video Link]**

Looking forward to our conversation!

Warm regards,  
 **Dr Bakul J. Parekh**

**P.S.** We’ve successfully partnered with over 30 brands. You’re in good company!

**Buttons:**

* ✅ **I CONFIRM**
  + When clicked:  
    - Show confirmed meeting time
    - Show **“Add to Calendar”** option (Google / iCal)
    - Optionally say: “We’ve saved this time for you.”
* 🔁 **Reschedule**
  + When clicked:  
    - Show available time slots starting from **9:00 AM to 5:00 PM**
    - **Meeting duration: 30 minutes**
    - **30-minute buffer after each slot** (e.g. available slots: 9:00–9:30, 10:00–10:30, 11:00–11:30, etc.)
    - Allow client to select a new slot
    - Automatically:  
      * Update calendar event
      * Send updated invite to all attendees
      * Reset reminder timers based on new time

#### **📧 Reminder 2 – (1 Day Before Meeting)**

**Subject:** *Introduction and Discovery*

**Body:**

Dear **[Client’s Name]**,

This is to confirm your online meeting with Amit on behalf of IAP is at **[Insert Date and Time]**.

Warm regards,  
**Dr Bakul J. Parekh**

#### **📧 Reminder 3 – On the Day of Meeting**

**Subject:** *Introduction and Discovery*

**Body:**

Dear **[Client’s Name]**,

This is a friendly reminder that your meeting with Amit is today at **[Insert Date and Time]**.

Warm regards,  
 **Dr Bakul J. Parekh**

#### **📧 Reminder 4 – 1 Hour Before Meeting**

**Subject:** *Introduction and Discovery*

**Body:**

Dear **[Client’s Name]**,

This is a friendly reminder that your meeting with Amit will start shortly at **[Insert Date and Time]**.

Warm regards,  
 **Dr Bakul J. Parekh**

### **5. Technical Considerations**

* Placeholder fields in emails: Client Name, Meeting Date/Time, Video Link.
* Interactive elements (Confirm/Reschedule) must:  
  + Be trackable
  + Trigger back-end updates for rescheduling
  + Regenerate and resend calendar invites
  + Reschedule email reminders accordingly

### **✅ Final Deliverables**

* ✅ New public Notion Form with defined fields and formats
* ✅ Database update with Client Name field
* ✅ Meeting creation automation with platform support
* ✅ Full email reminder engine with correct subject lines and content
* ✅ Interactive **I CONFIRM** and **RESCHEDULE** logic
* ✅ Rescheduling limited to half-hour slots from **9 AM to 5 PM**, with **30-minute gaps**