

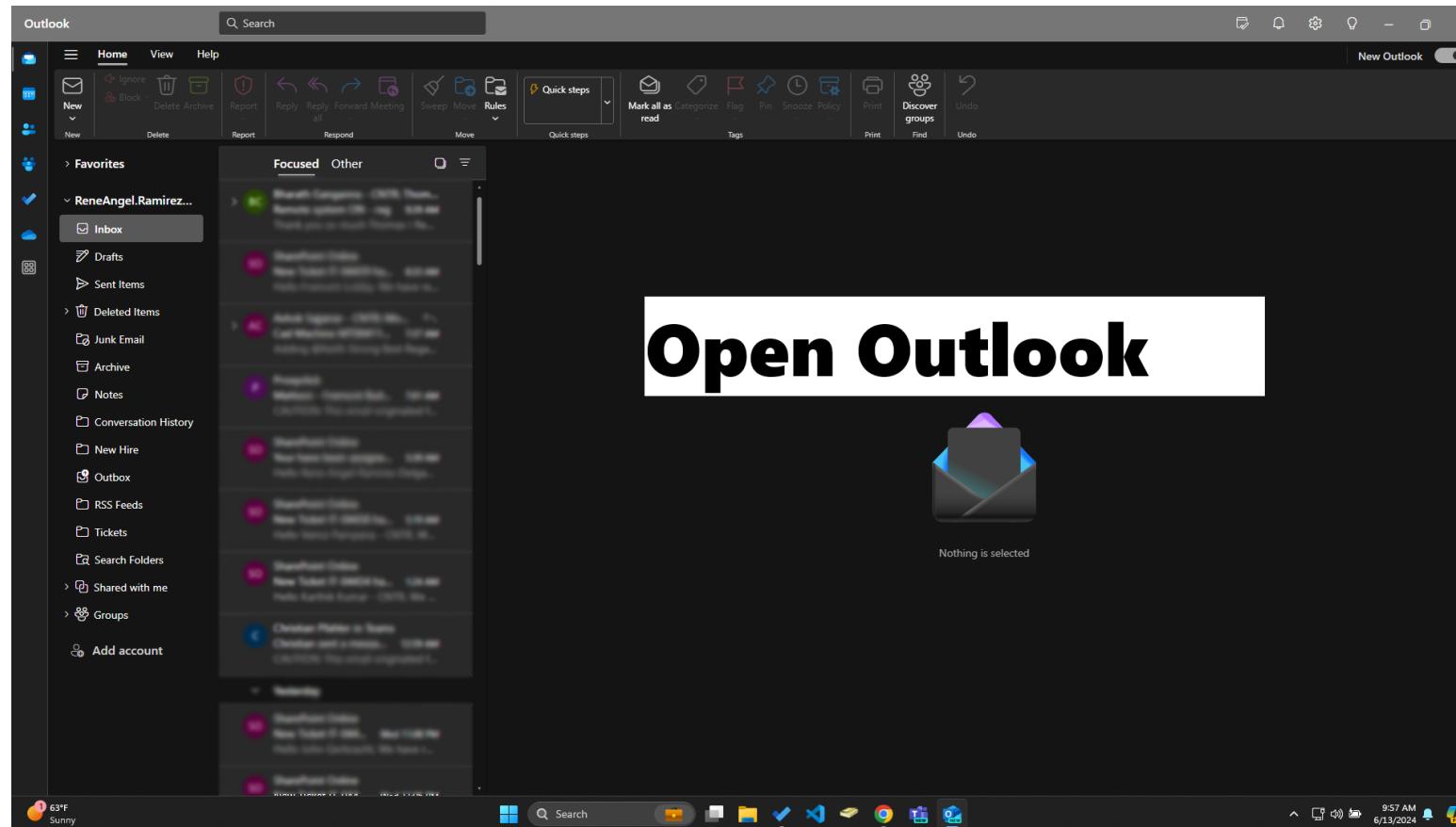
Proxy Click Email Integration

Rene Ramirez

last update:
June 19, 2024

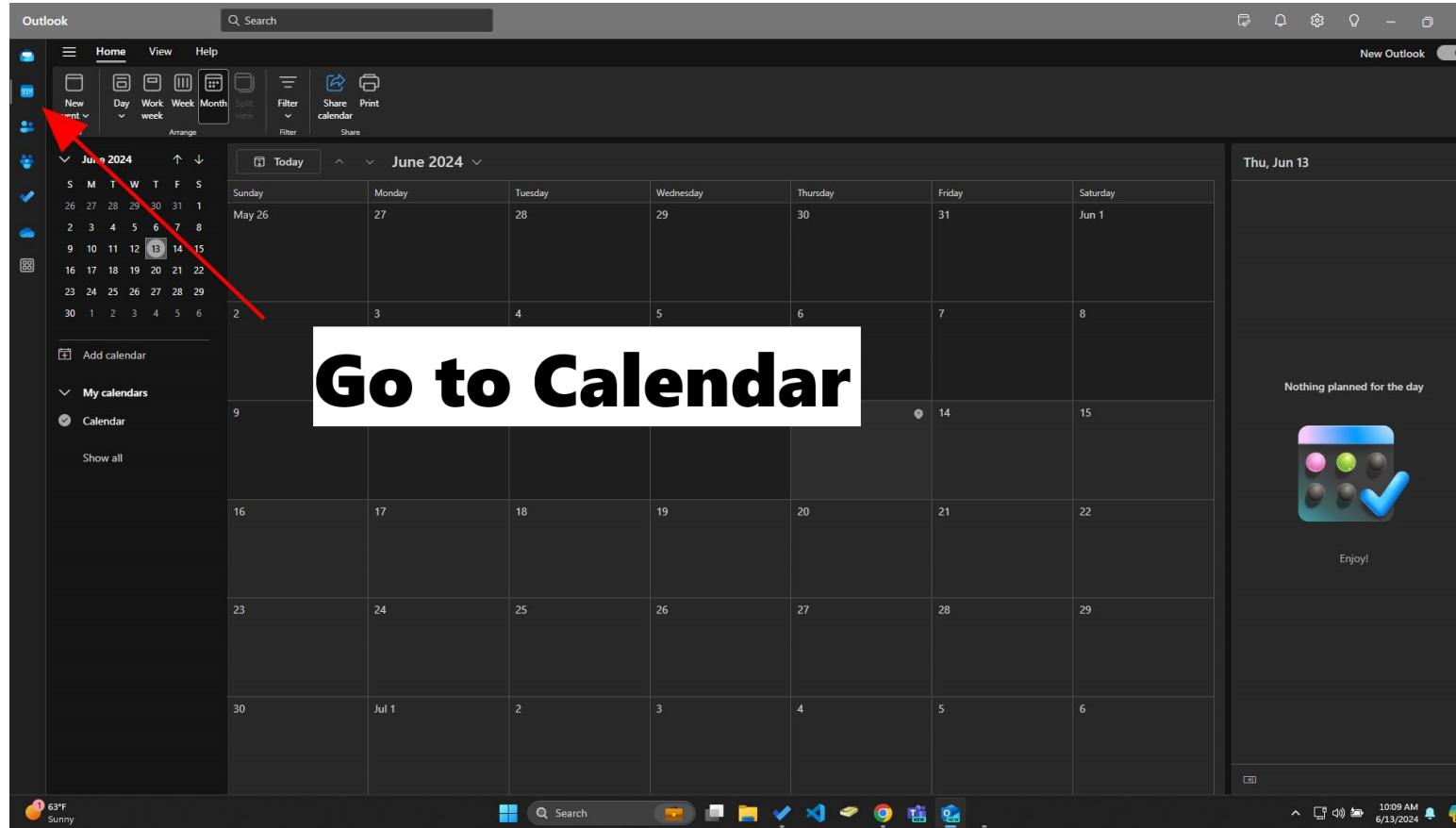
Step 1

Open Outlook either via web or the app, This example uses the new version of Outlook Details will be same in any application



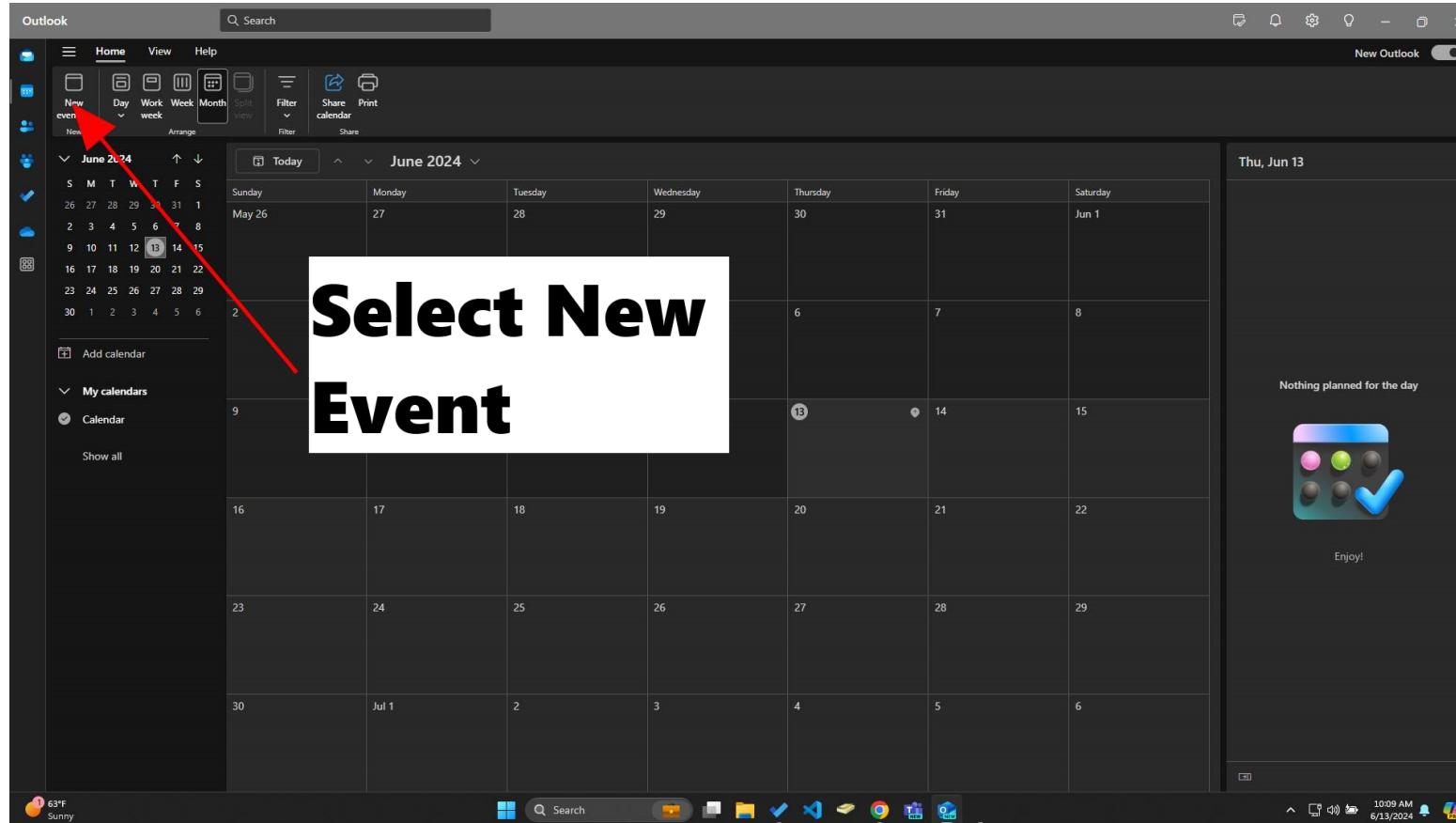
Step 2

Lets now go over to the calendar section



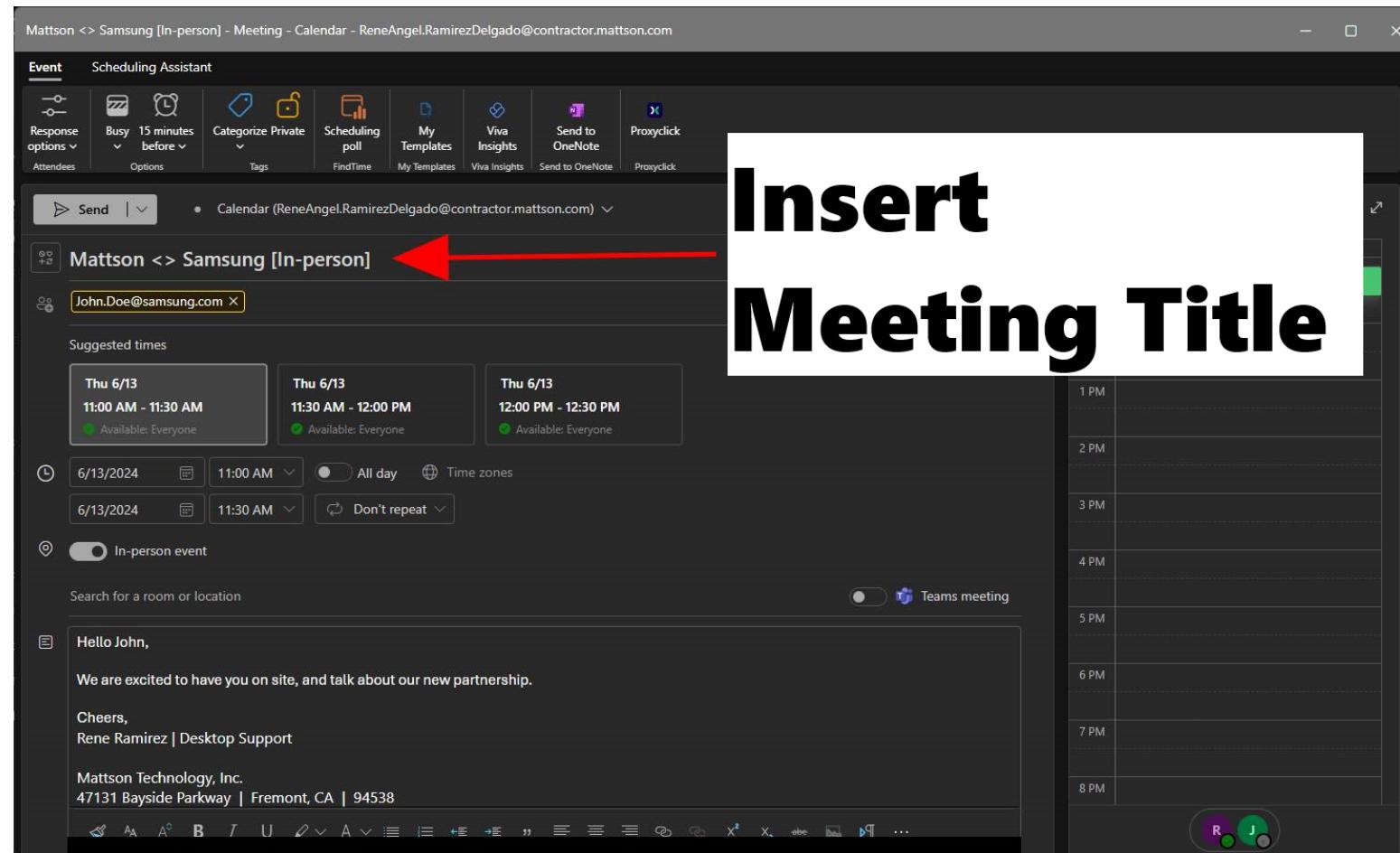
Step 3

Lets create a new event, using the "New Event" or "New Meeting" Button



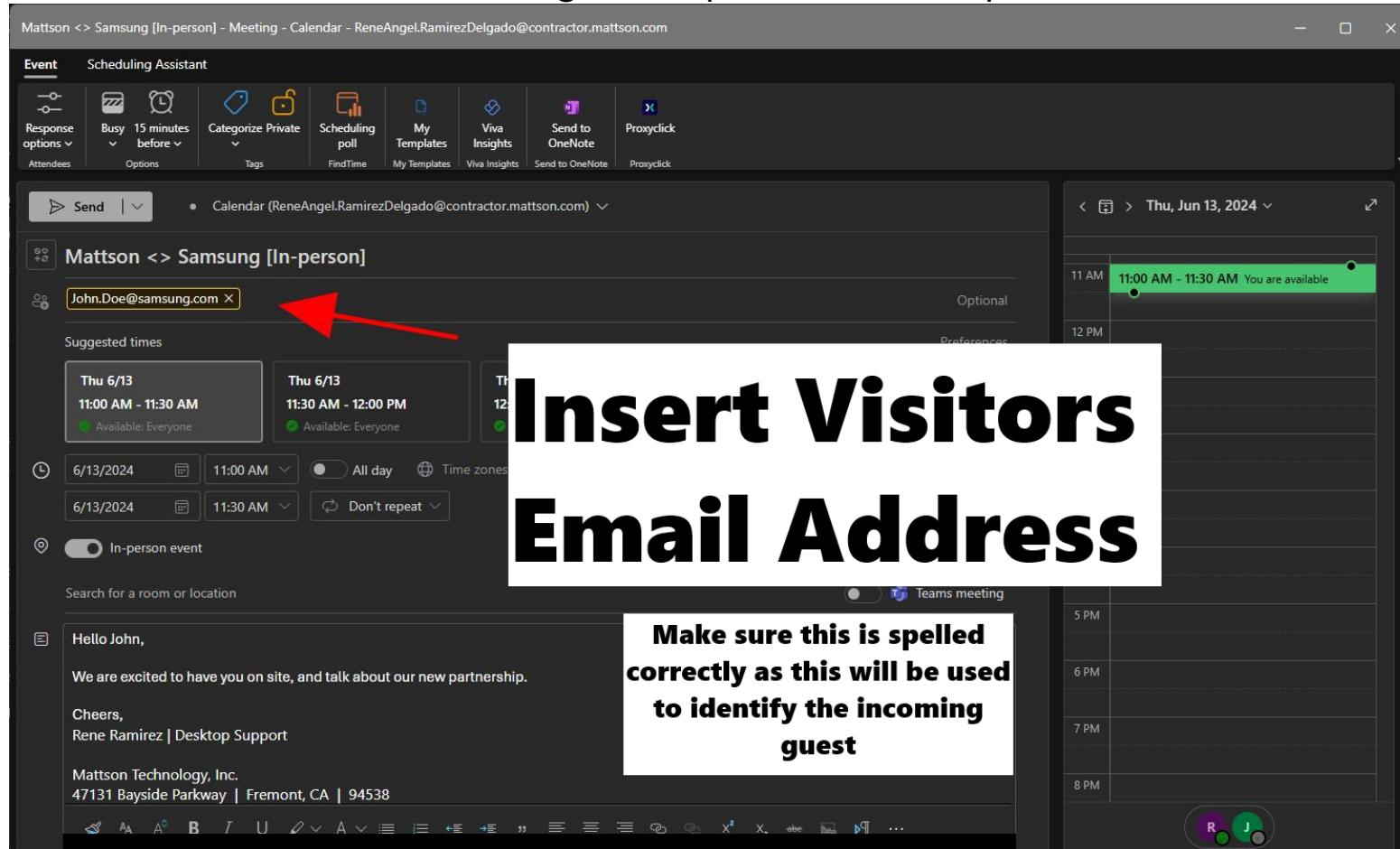
Step 4

Provide all of the following information in this tab to get the visitor meeting created



Step 5

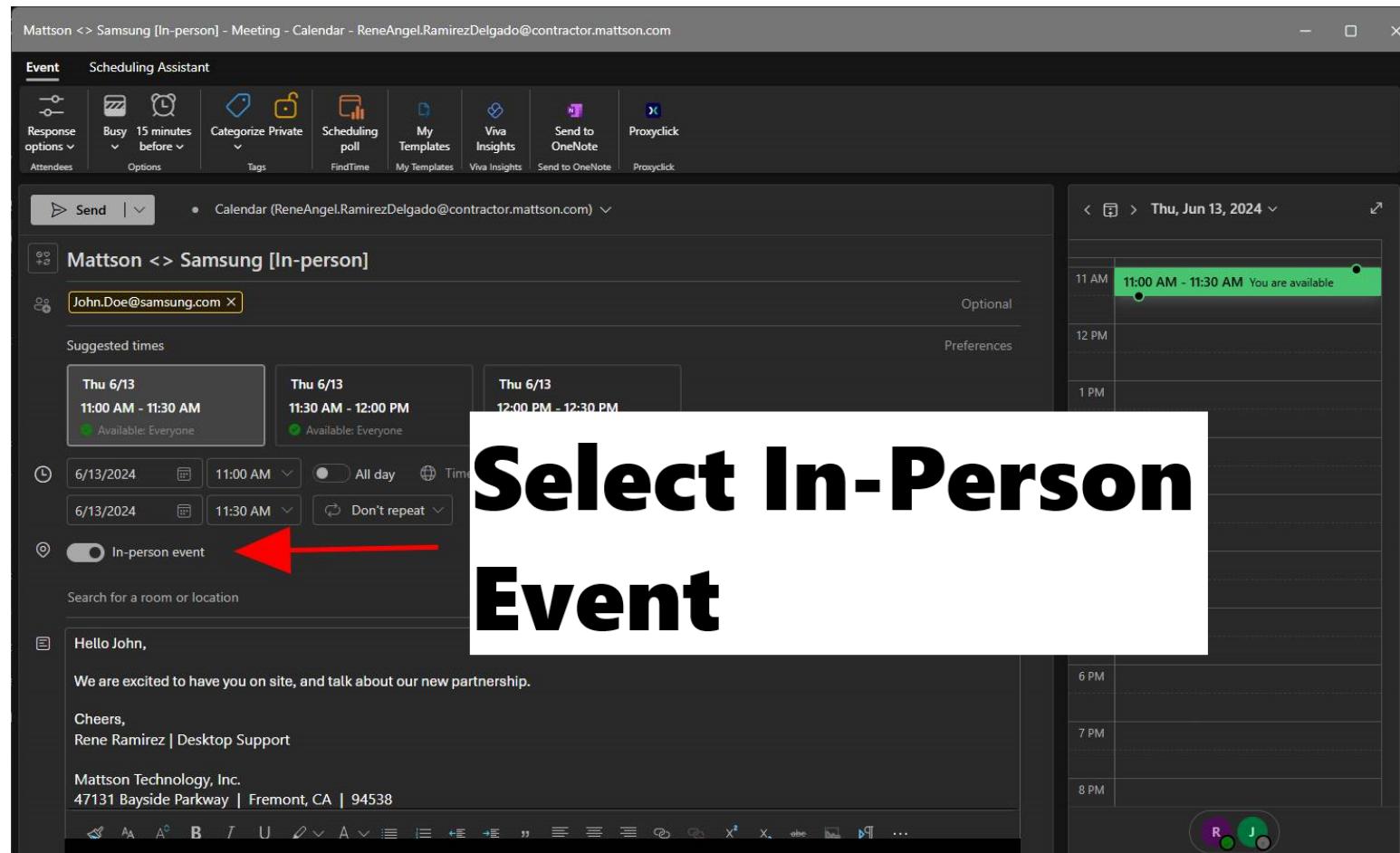
Provide the email addresses of all guests expected to show up



The screenshot shows a Microsoft Outlook meeting invite window. At the top, it says "Mattson <> Samsung [In-person] - Meeting - Calendar - ReneAngel.RamirezDelgado@contractor.mattson.com". Below the title bar is a toolbar with various icons: Response options, Busy, Categorize Private, Scheduling poll, FindTime, My Templates, Viva Insights, Send to OneNote, and Proxyclick. The main area displays the meeting details: "Mattson <> Samsung [In-person]" and the recipient's email address "John.Doe@samsung.com". A red arrow points to this email address. Below the recipient's name, there are "Suggested times" for the meeting, showing two options: "Thu 6/13 11:00 AM - 11:30 AM Available: Everyone" and "Thu 6/13 11:30 AM - 12:00 PM Available: Everyone". Further down, there are fields for setting the date and time, and a toggle for "In-person event". On the right side of the window, there is a calendar view showing availability from 11 AM to 12 PM on Thursday, June 13, 2024. A green bar indicates the user is available during the meeting time. In the center of the slide, there is a large white box with bold black text that reads "Insert Visitors Email Address". Inside this box, another text box contains the instruction: "Make sure this is spelled correctly as this will be used to identify the incoming guest".

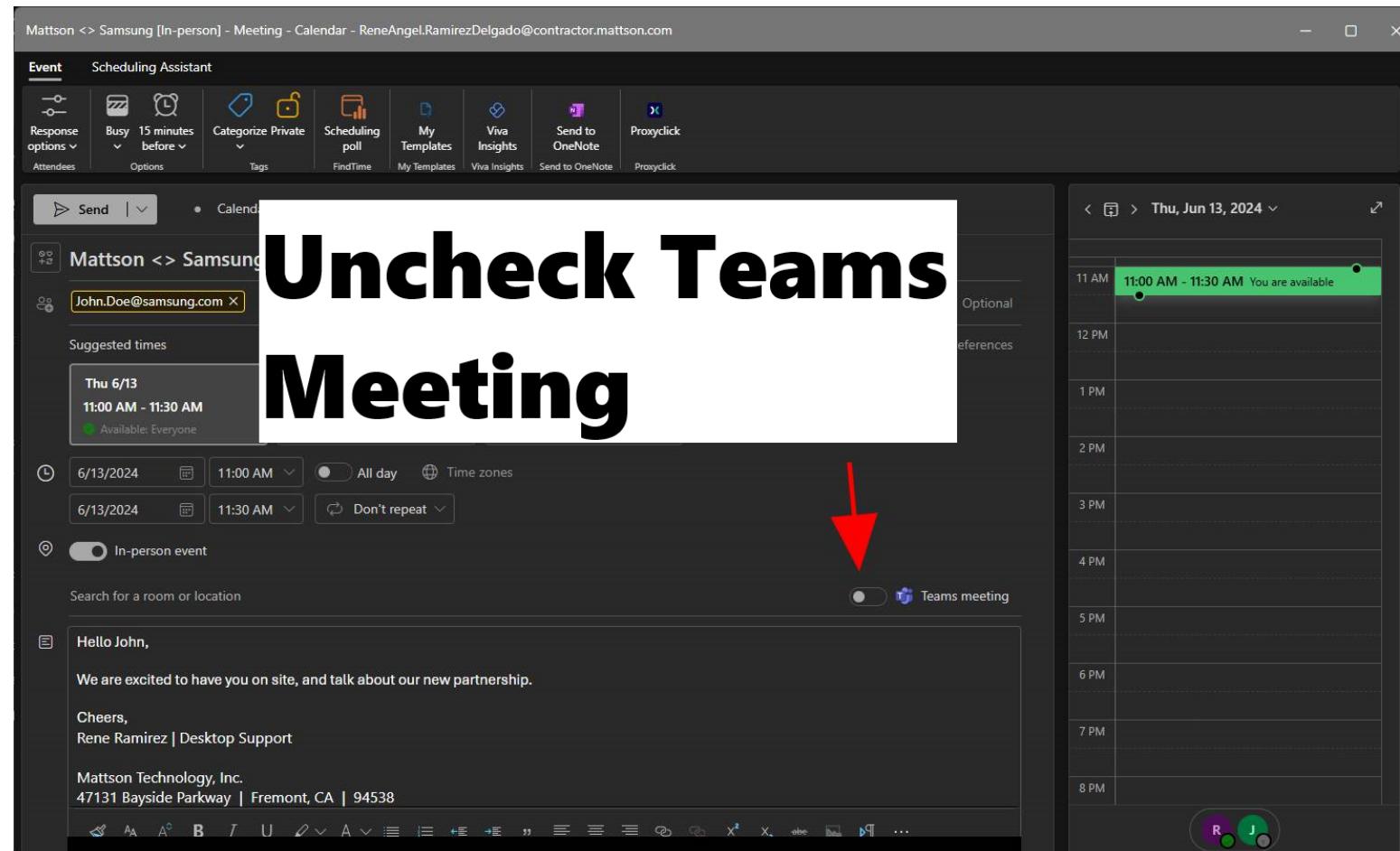
Step 6

Proceed to step 8 if not present Lets select this to be an In-Person event



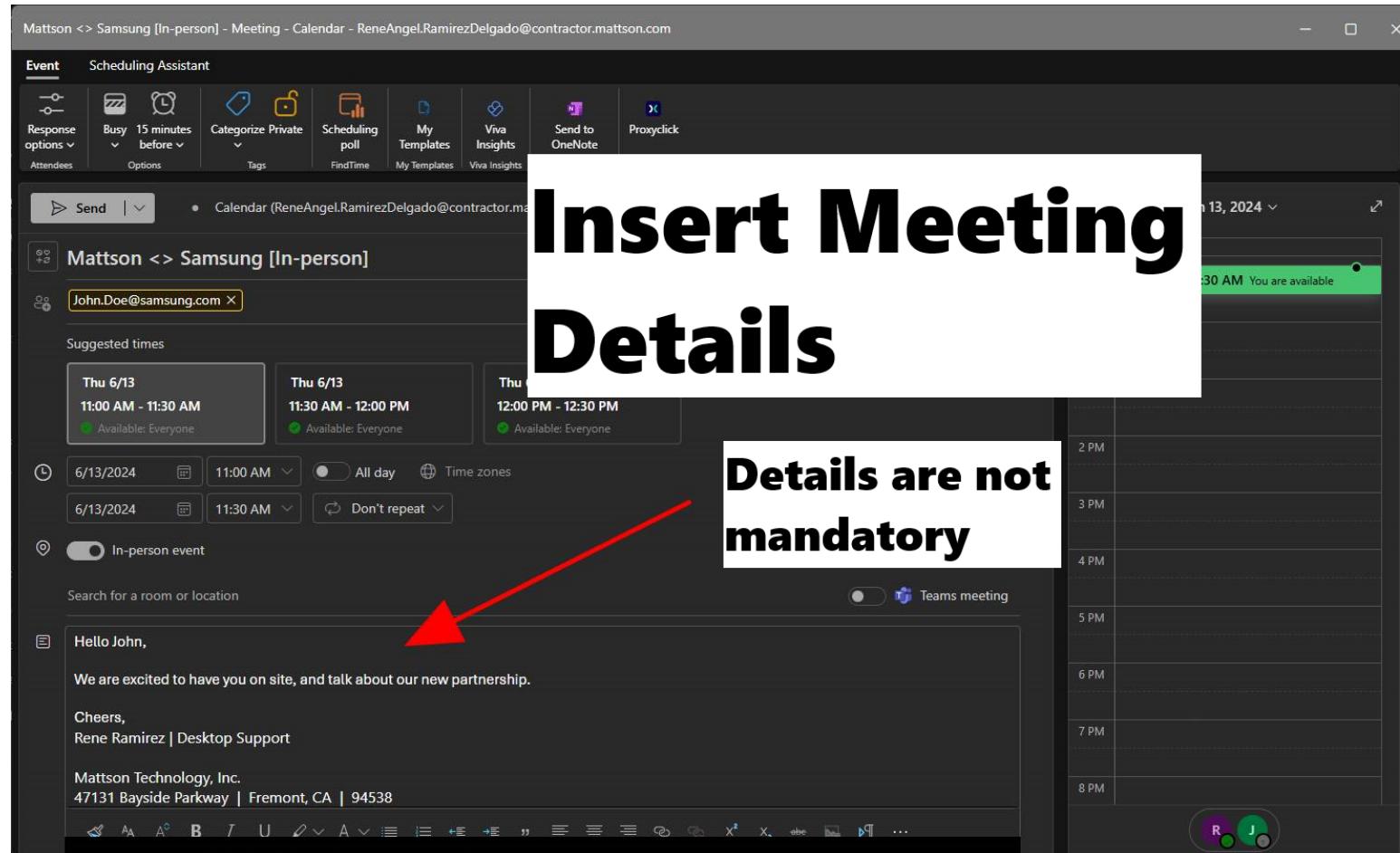
Step 7

Uncheck Teams Meeting as this will be an in-person event



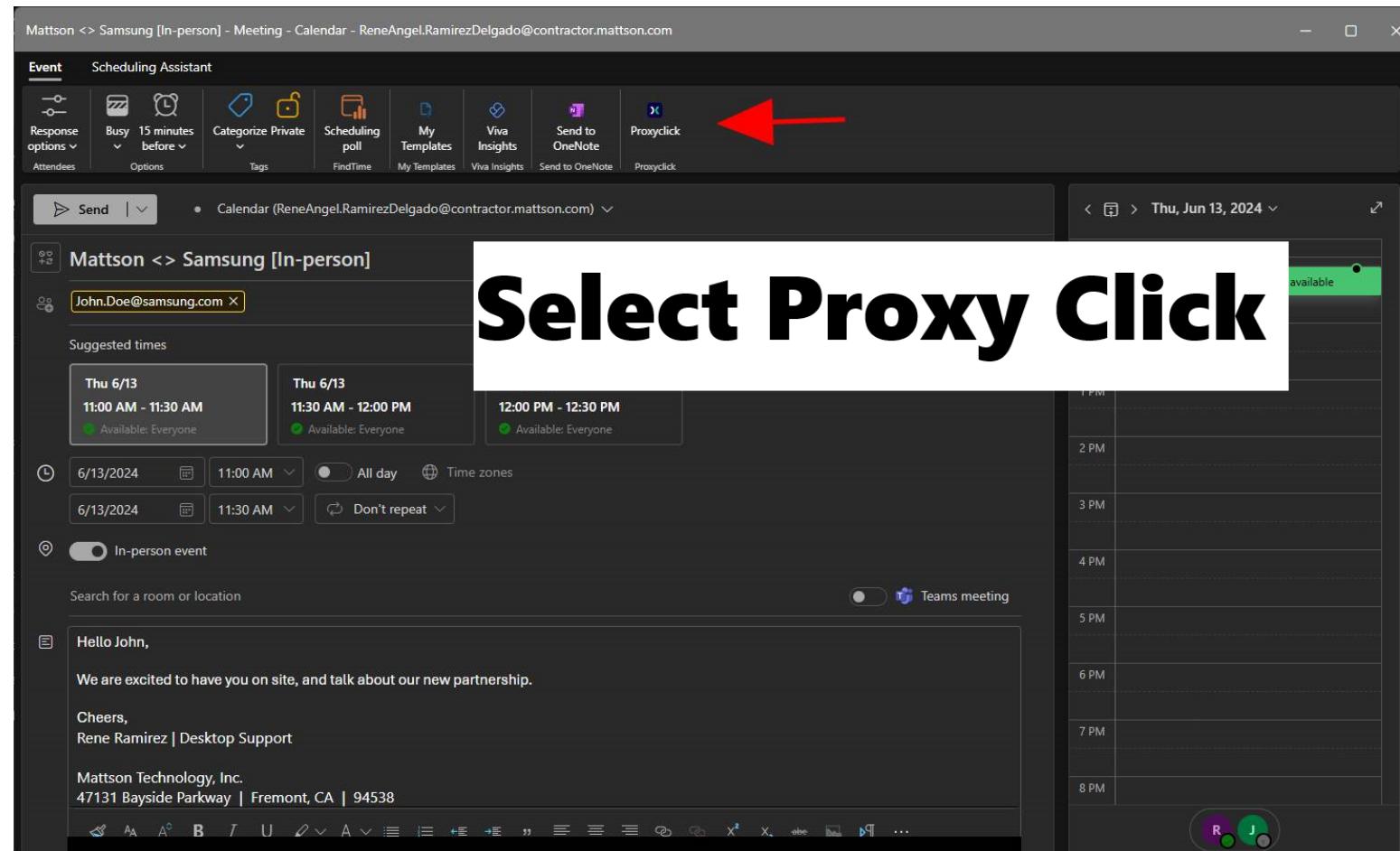
Step 8

OPTIONAL Provide as much information as you want this will be sent to the guest



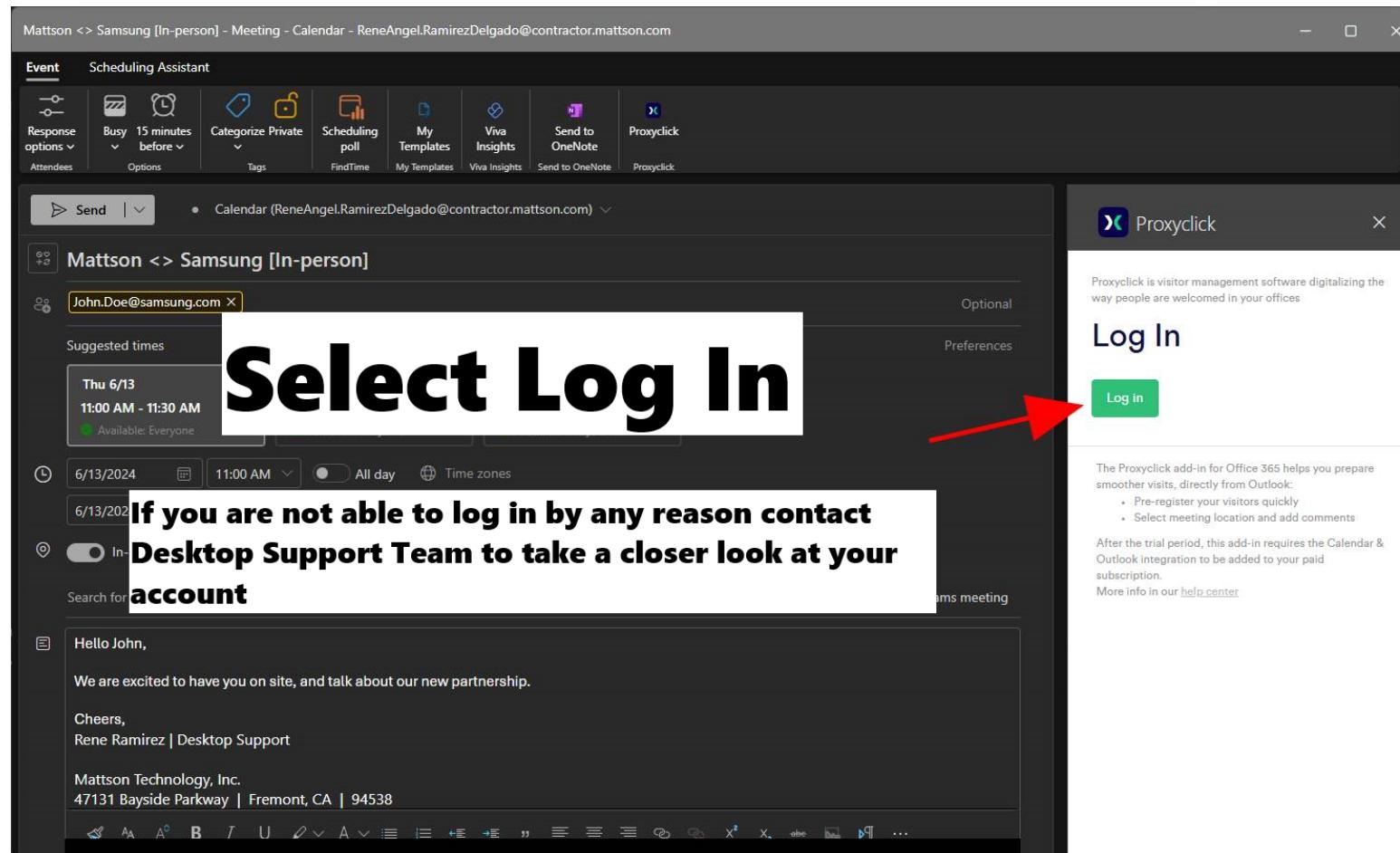
Step 9

Add Proxy Click to the invite. Select the "Proxy Click" button on the top of the menu



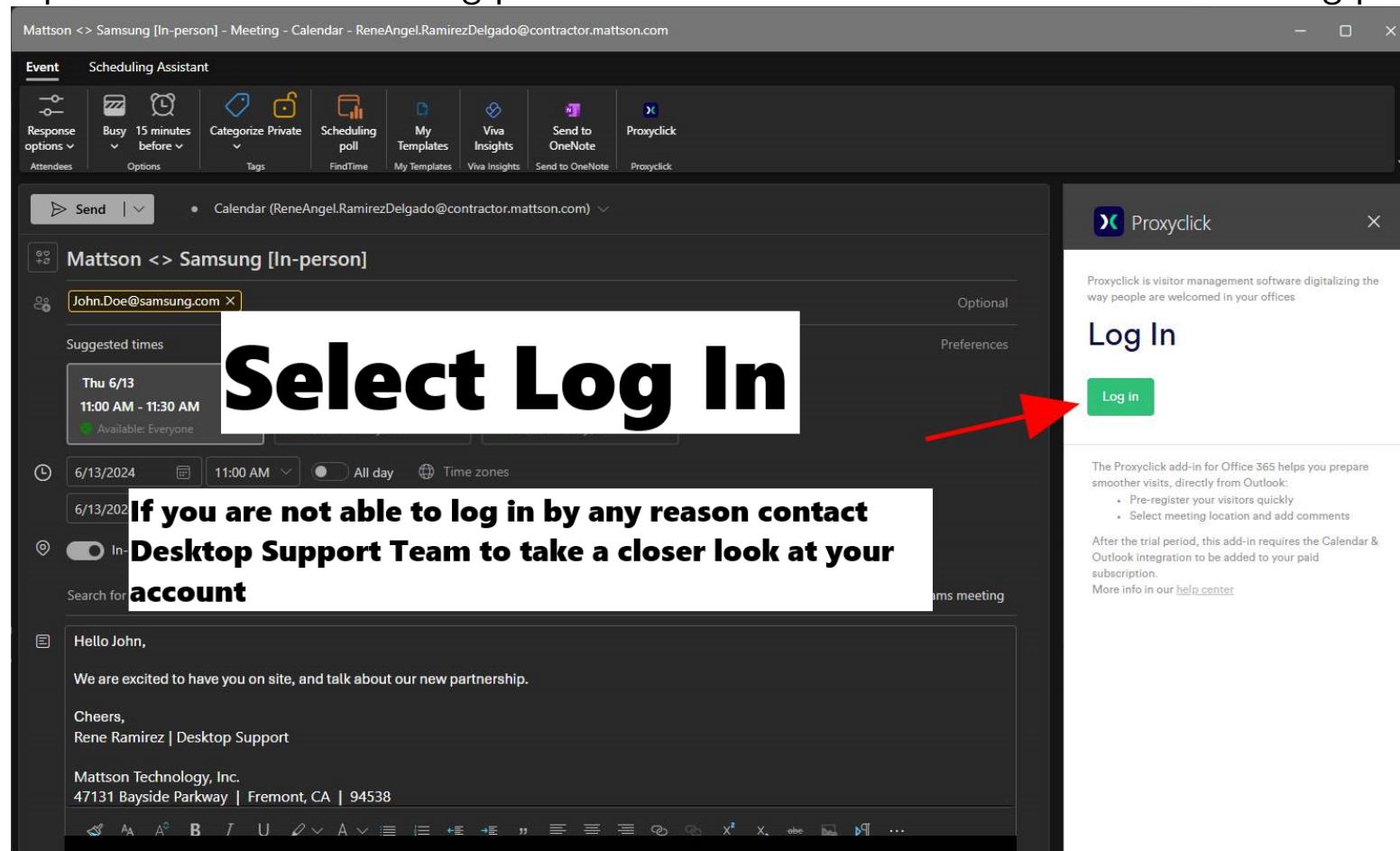
Step 10

There is no log in credentials required as it is associated with your work credentials



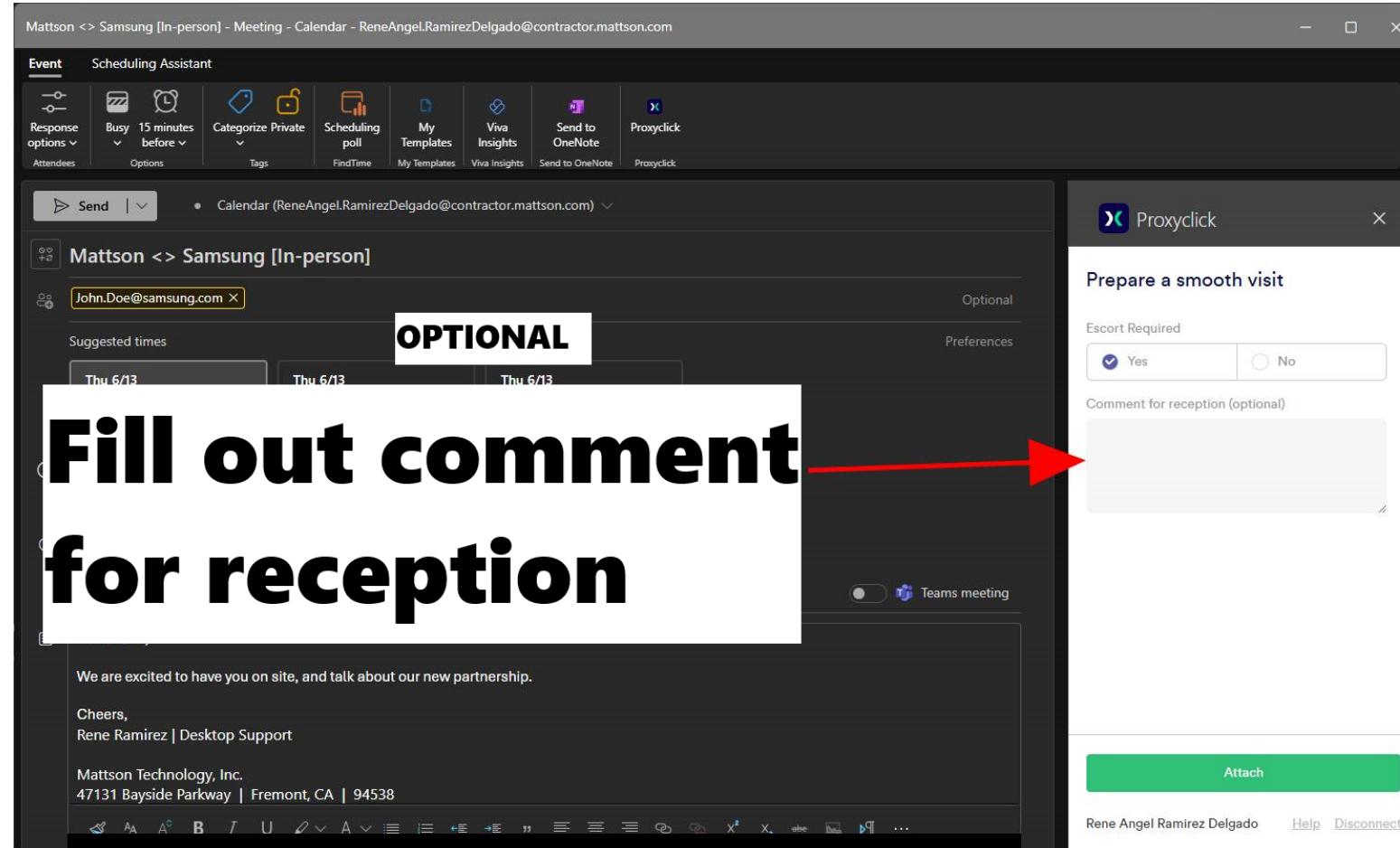
Step 11

Some mandatory requirements that are needed from you will now be inserted here, if your visitor requires escort in the building please make sure to select "Yes" on the following prompt



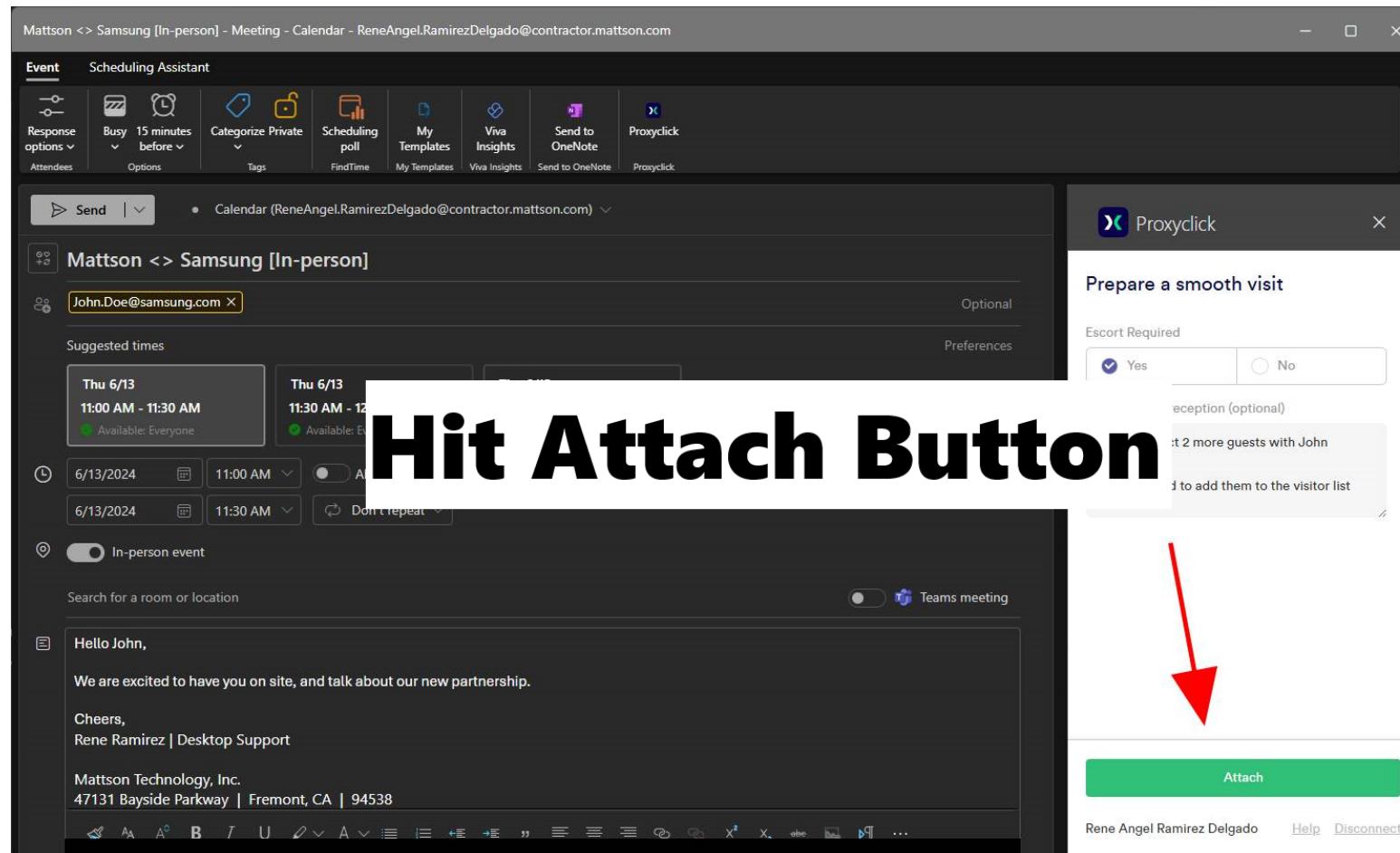
Step 12

OPTIONAL Provide any information for Front lobby reception about the incoming guests



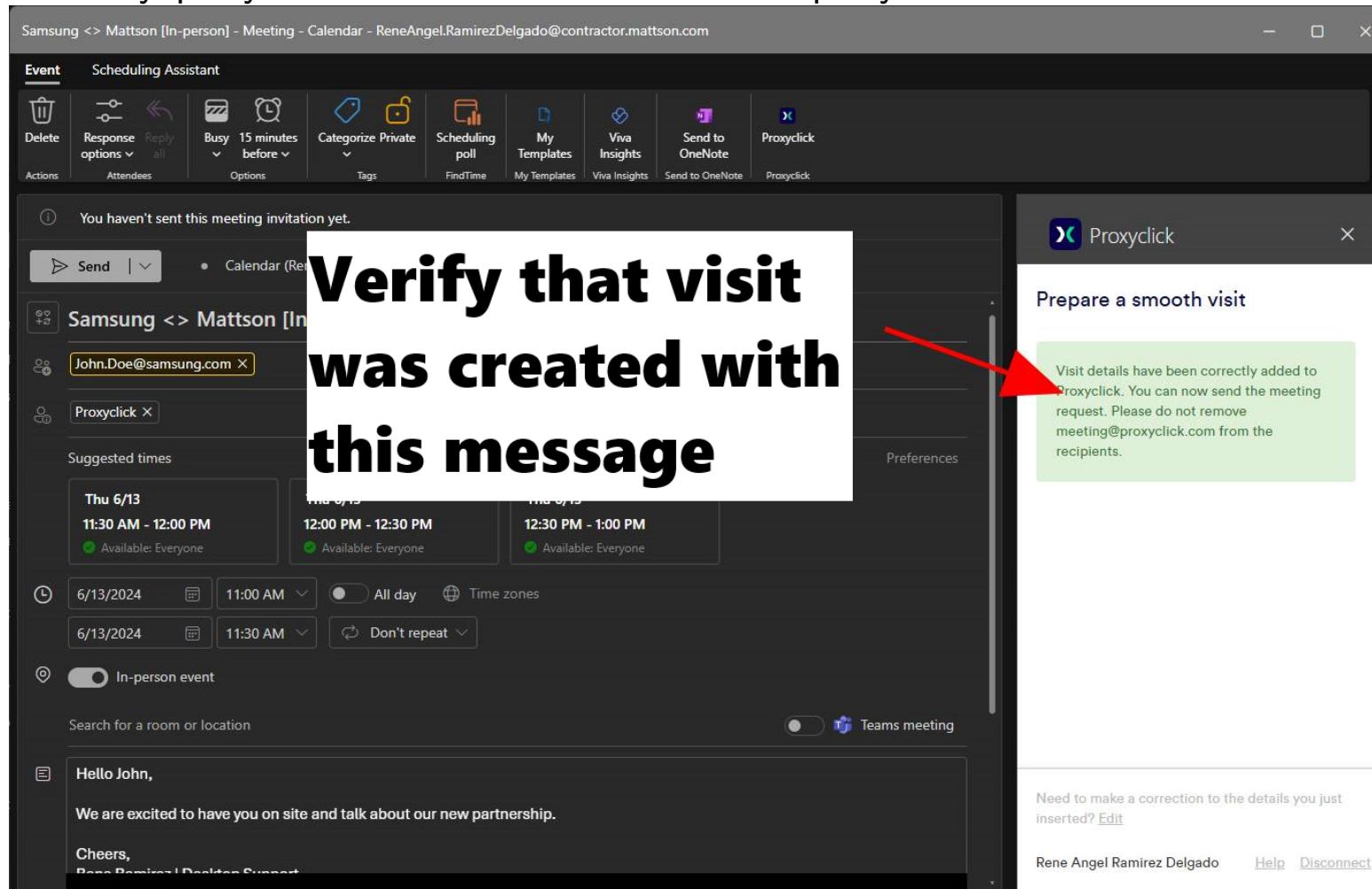
Step 13

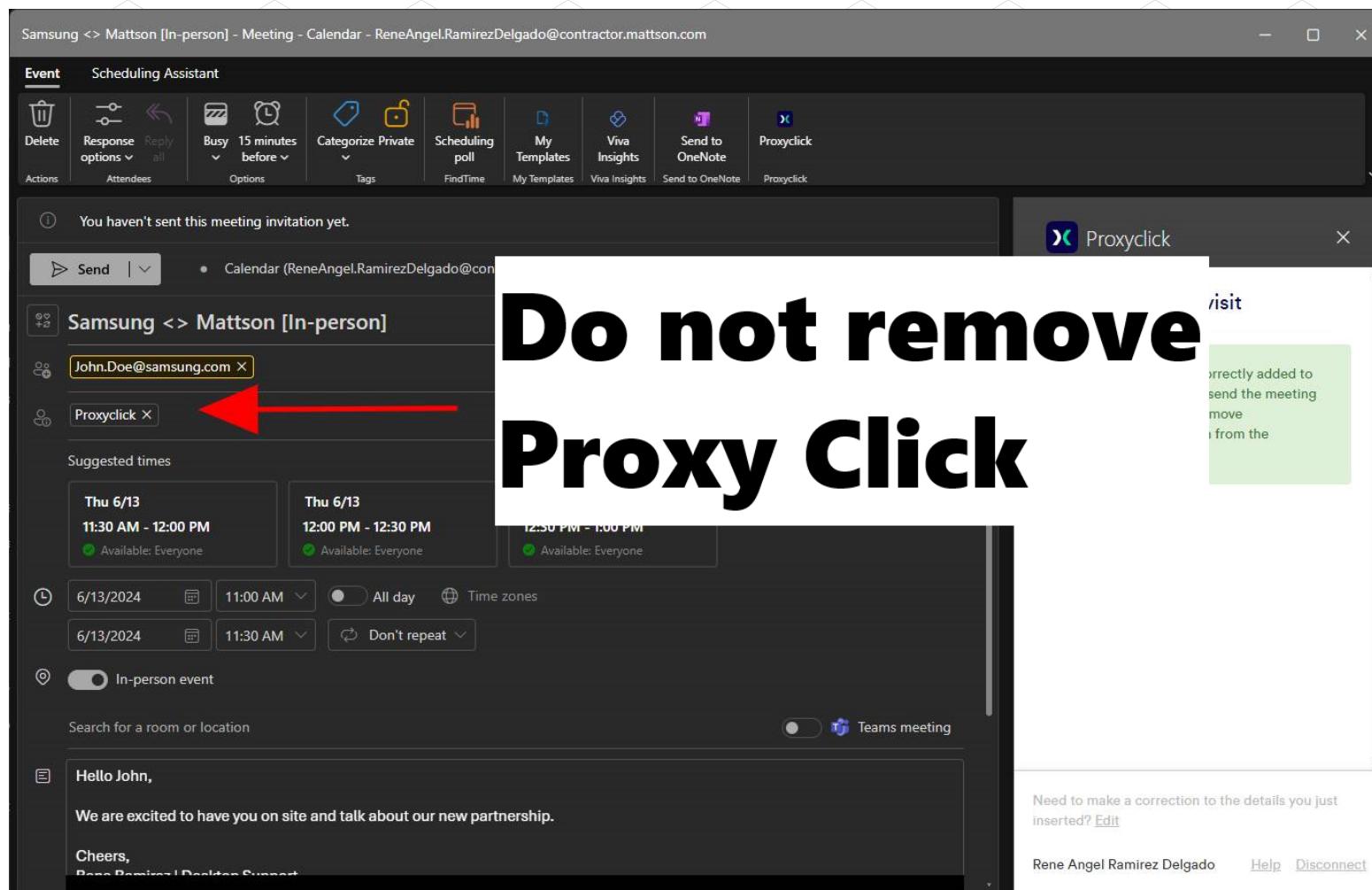
Click the "Attach" button to add proxy click into the meeting



Step 14

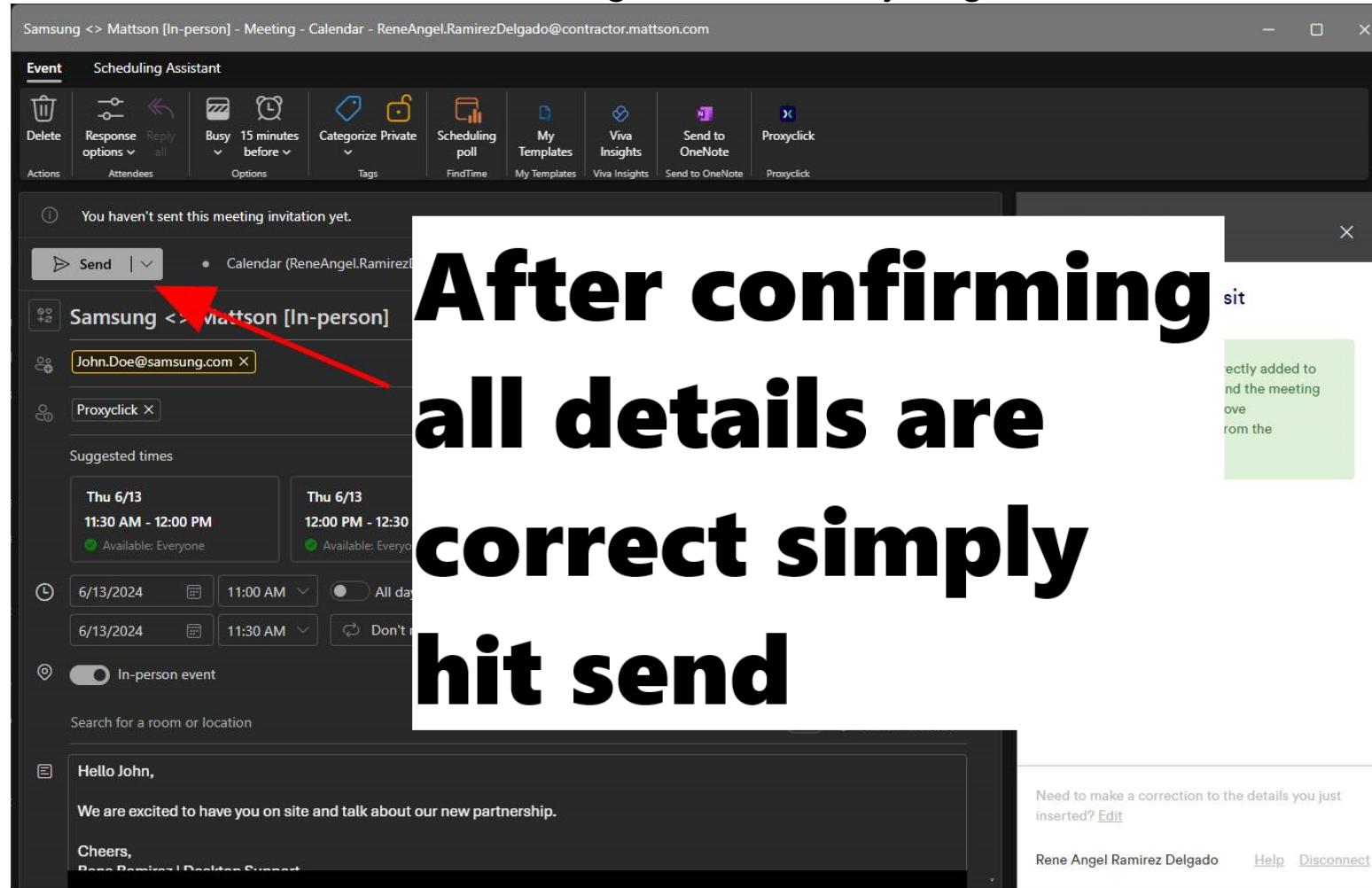
Verify proxy click has been added and that proxy click user has been added as a recipient





Step 15

Confirm all of the details before hitting send, once everything is validated, click "Send"



The screenshot shows the Microsoft Outlook interface for scheduling a meeting. The title bar reads "Samsung <> Mattson [In-person] - Meeting - Calendar - ReneAngel.RamirezDelgado@contractor.mattson.com". The ribbon menu is open with "Event" selected. The toolbar includes actions like Delete, Response options, Busy, Scheduling poll, My Templates, Viva Insights, Send to OneNote, and Proxyclick. Below the toolbar, it says "You haven't sent this meeting invitation yet." A red arrow points from the text "hit send" in the large central message to the "Send" button in the top left of the invite window.

**After confirming
all details are
correct simply
hit send**

Thu 6/13
11:30 AM - 12:00 PM
Available: Everyone

Thu 6/13
12:00 PM - 12:30
Available: Everyone

6/13/2024 11:00 AM All day
6/13/2024 11:30 AM Don't remind

In-person event

Hello John,
We are excited to have you on site and talk about our new partnership.
Cheers,
Rene Angel Ramirez Delgado

Need to make a correction to the details you just inserted? [Edit](#)

Rene Angel Ramirez Delgado [Help](#) [Disconnect](#)

Step 16

Lastly verify the appointment was created by checking you calendar

