

Julie's options

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What are Julie's functionalities? How do they work?

Julie and the automatic follow-up

To simplify even more the scheduling process for your meetings, Julie can automatically follow-up with your interlocutors who have not yet given a response to the suggested dates or any other email requiring a response in order to finalize the scheduling process for an event.

This feature is available in the Solo Executive and Enterprise plans.

How does this feature work?

As always, after you send an email in which you ask that Julie to suggest dates for a meeting, she will send a set of dates to your contact:

- If Julie does not receive a response from your contact, she sends out new dates
- If there is still no response from your interlocutor, Julie asks them for their availabilities
- If after these follow-ups, your contact still does not respond, Julie will come contact you to notify you that she abandoning the scheduling process for this meeting.

The frequency of automatic follow-ups depends on the dates suggested by Julie. The first date at which Julie will follow-up with your interlocutor is calculated on an average between the date of the first email and the suggested dates. **Julie will follow-up on weekdays between 8:30 and 18:30 depending on the timezone of the main client.**

Julie can also use this automatic follow-up option to contact you if she expects

a response from you on a blocking matter regarding the scheduling process for a meeting.

You want Julie to send less emails

In some cases, you might want Julie to be less insistent when it comes to her follow-up messages. If so, you can directly ask your contact for his availabilities in the email initiating the meeting scheduling process.

After that, Julie will contact your interlocutor once to follow-up.

If she does not receive a response, Julie will get back to you to notify you that she is abandoning the scheduling process for this meeting.

You want to modify a planned follow-up

Every monday, you will receive an email with a summary of Julie's scheduling work during the previous week. In this email, all events currently being scheduled are listed, as well as the number of days before the first planned follow-up will be sent.

If you want this follow-up message to be sent at an earlier date, you can ask Julie, by replying to this summary email, to follow up with specific contacts. This way, she will directly follow-up with your contact.

If you do not want Julie to follow-up on a specific meeting that she is currently scheduling, you can ask her, by replying to this summary email, not to follow up for specific meetings. Therefore, she will stop scheduling this meeting.

Managing the circle of trusted people

If a person directly asks Julie to make an appointment with you, she will ask you for your approval, even if you are in copy of the email.

With the circle of trust feature, available in our Solo Executive and Enterprise plans, you allow Julie to schedule a meeting without your approval, thus allowing her to be more efficient and help you save even more time!

Remember:

When you sign up for Julie Desk, your domain name is automatically added to your circle of trust. Any colleagues using the same domain will automatically be added as well.

What does that mean? If Paul Ochon (paul.ochon@france.com) signs up for Julie Desk, the domain @france.com will be automatically added to his circle of trust. As a result, Paul Ochon won't have to ask us to add Lucie Fert (lucie.fert@france.com) to his circle of trust, because having the same domain in her email address means she'd be automatically added!

You want to limit your circle of trust to a certain number of email addresses/ domain names

It is possible to provide Julie with a list of domain names and/or email addresses authorized. Julie will directly schedule meetings with the people on this list but will ask you for your approval before handling any request sent from people whose address or domain names are not referenced on this list.

Note: You still have to be put in copy of the email sent to Julie; that's how she knows to schedule the meeting for you.

Example: Sandy works with Pierre at "My small company". Pierre has a Julie Desk license and has opened his circle of trust to the people with the same domain name as him: @mysmallcompany.com

Sandy sends an email to Julie from her address sandy@mysmallcompany.com and it says: "Julie, can you help me schedule a meeting with Pierre?"

Julie will send Sandrine an email with Pierre's availabilities, who will also be in copy of Julie's answer.

You want Julie to organize all your meeting requests

With a circle of trust that is open to all, Julie will directly answer anyone who asks her to schedule a meeting with you.

Note: You still have to be put in copy of the email sent to Julie; that's how she knows to schedule the meeting for you.

Example: Paul sends Julie an email to schedule a meeting with Mary. Mary has a Julie Desk license.

"Julie, can you help me schedule a meeting with Mary?"

Mary has an open circle of trust, Julie will directly answer Paul, with Mary's availabilities, and she will obviously be in copy of Julie's email.

You want to monitor all the incoming meeting requests?

You want to monitor and validate all the incoming meeting requests? Your circle of trust stays empty. Julie will notify you every time she receives a meeting request coming from external contacts and you have to give her your approval to suggest your availabilities and schedule the desired event.

To update your circle of trust, send an email to Julie or our support team at hello@juliedesk.com

Julie reads your collaborators' availabilities

Julie is now able to read your collaborators' "Free / Busy" availabilities status in shared calendars, as long as they are included in your emails. They do not need to have a Julie Desk license. (For information, this feature is available if you have subscribed to our Solo Executive or Enterprise plan.)

Add Julie in CC in the email sent to the collaborators that you wish to see at an event. She will then suggest dates based on both their availabilities and yours:

You want to schedule an internal meeting with collaborators who do not have a Julie Desk licence

Julie will directly send out invitations, after taking into consideration:

- Your calendar
- Your preferences
- Events marked as "Busy" in the calendar of your participating collaborators.

You want to schedule a meeting with colleagues and external people who

do not have a Julie Desk licence

For meetings including one or more external participants, Julie will suggest your availabilities, after taking into consideration:

- Your calendar
- Your preferences
- Events marked as “Busy” in the calendar of your participating collaborators.

Important remarks on this feature

- This feature is available only for Microsoft Exchange and Office 365 accounts.
 - Julie accesses the calendars of your collaborators only to see their Free/Busy status. She does not see the details of their events. This implies that she cannot consider their location or their eventual travel time requirements.
 - Julie do not add any time travel nor delay to Busy events.
 - Julie is transparent about her limited access to the calendars of your collaborators who do not have a licence. In her emails, she will explicitly ask them to let her know if the suggested availabilities do not correspond to their constraints.
 - In the interests of efficiency, Julie does not wait for a response from your collaborators before suggesting dates or scheduling a meeting. The whole process happens as if they were clients, therefore it will be their duty to notify Julie if the dates suggested or booked are no longer convenient for them.
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