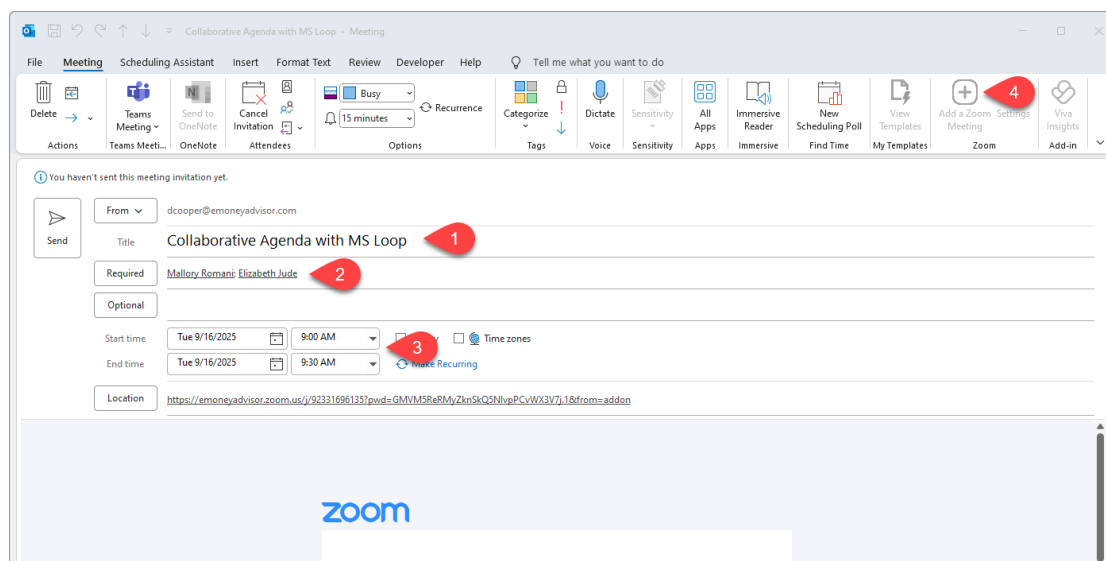


Adding a Loop Agenda to Outlook Calendar Invitation

Using Loop agendas may be helpful for **internal meetings**, **collaborative** agendas for multiple contributors, **real-time updates**, or **ongoing** projects or **recurring** meetings.

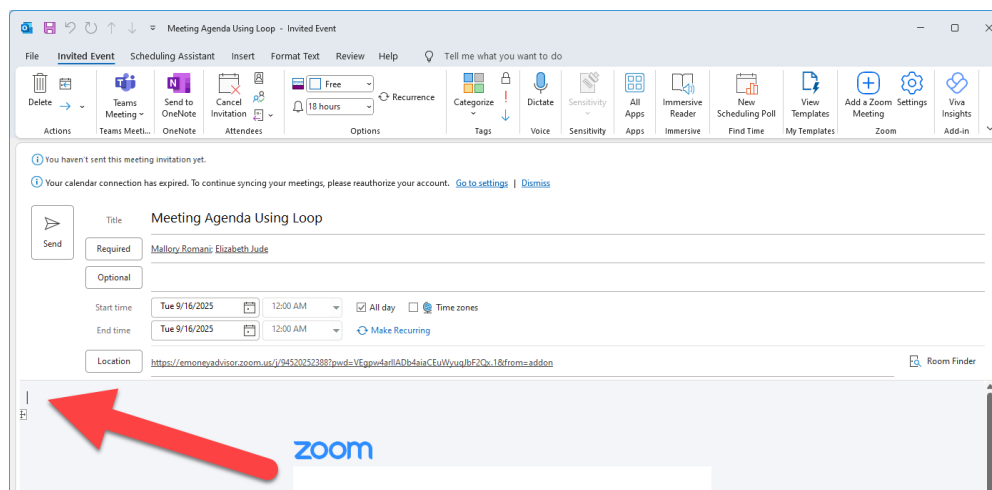
STEP 1: Create a New Meeting Invitation

1. Enter a meeting title.
2. Add attendees
3. Select the date and time
4. Select a meeting format (Zoom, Teams, etc.) In this example we used Zoom.



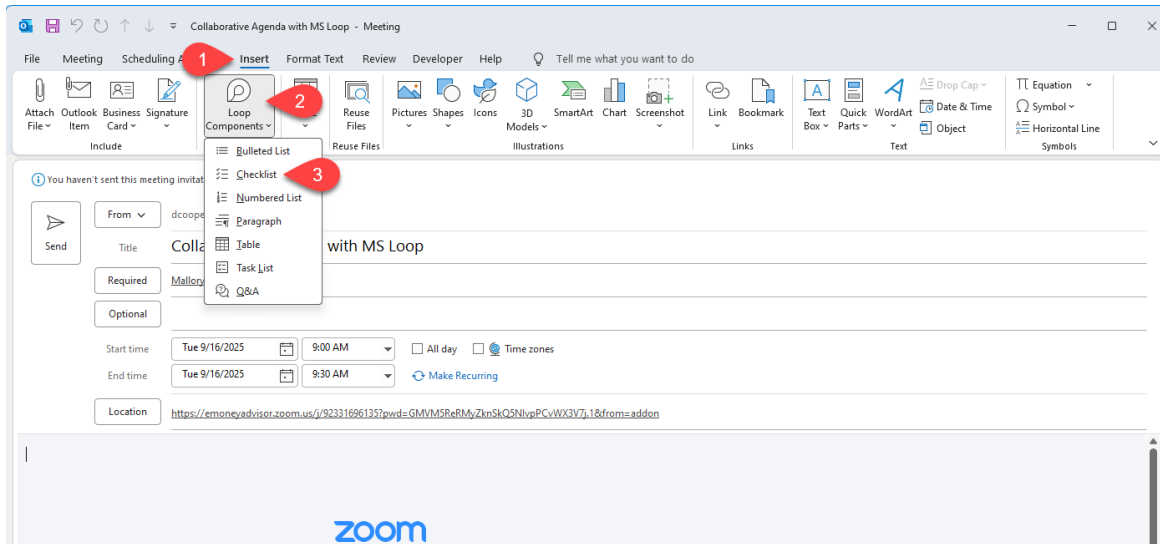
STEP 2: Open the Email Body Editor

Next, click into the body of the invitation. This is where we'll insert the Loop component.



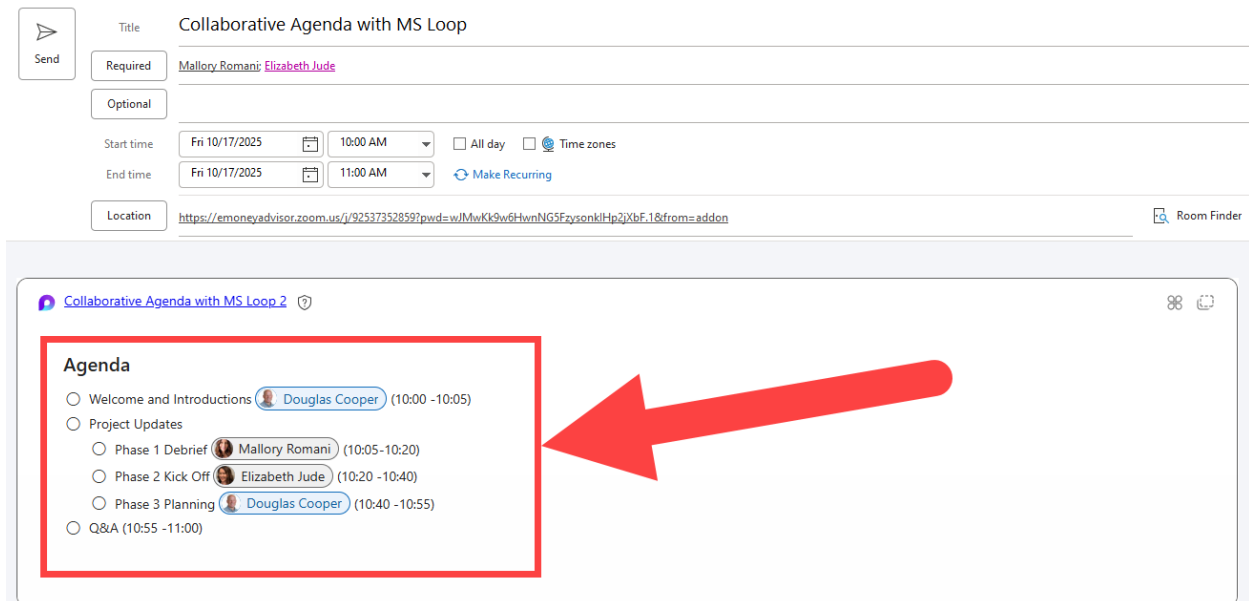
STEP 3: Insert a Loop Agenda Component

1. Click on the Insert tab
2. Click "Loop Component"
3. Select "Checklist."



STEP 4: Customize the Agenda

Now, customize the agenda with your meeting topics. You can add time slots, presenters, notes, and more.



STEP 5: Add Task List

You can also add additional components to the agenda like a task list to track action items.

1. Click the plus sign below the check list you inserted
2. Scroll down to Templates and select Task List (*Be sure to check out the other templates!*)
3. Add tasks, assignees, due dates as needed at the conclusion of the meeting.

➤

Send

Title

Collaborative Agenda with MS Loop

Required

Mallory.Romani; Elizabeth Jude

Optional

Start time

Fri 10/17/2025

10:00 AM

☐ All day

☐ Time zones

End time

Fri 10/17/2025

11:00 AM

[Make Recurring](#)

Location

<https://emoneyadvisor.zoom.us/j/92537352859?pwd=wjMwKk9w6HwnNG5Fy5onkHhp2jXbF.1&from=addon>

[Room Finder](#)

Inline code

Templates

Task list

Voting table

Progress tracker

Calendar

Kanban board

+

Just start typing...

Tasks

Task

Assigned to

Due date

Bucket

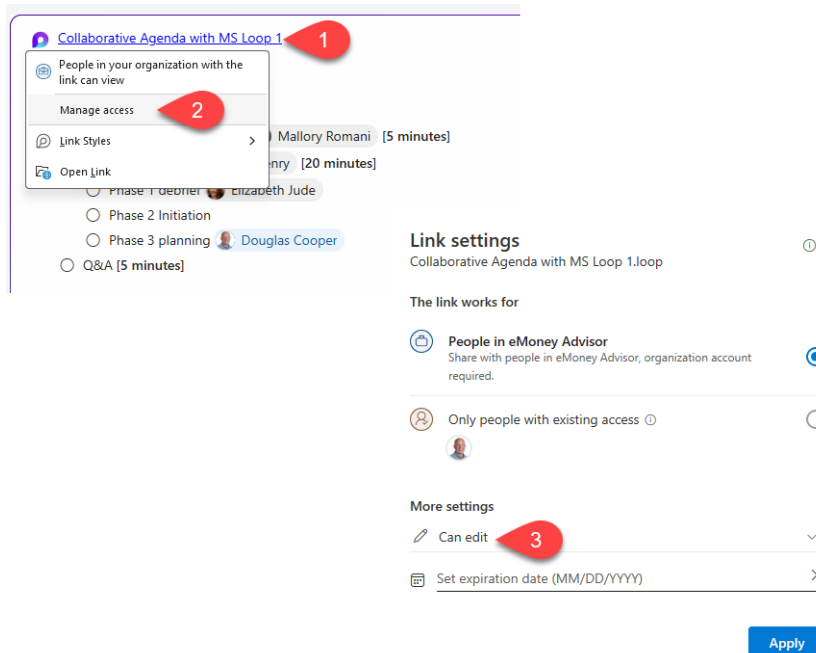
1	Task name	Add assignee	Select date	To do
2	Task name	Add assignee	Select date	To do

+ Add task

STEP 6: Ensure Attendees can edit (optional)

By default, meeting attendees have 'view only' permission. Meeting attendees can be provided 'Can Edit' permissions so they can contribute before, during, or after the meeting.

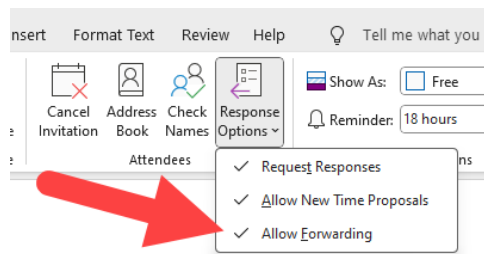
1. Click the title of the Loop component
2. Click Manage access
3. From the More settings drop down menu select "Can edit"



STEP 7: Turn off Allow Forwarding (optional)

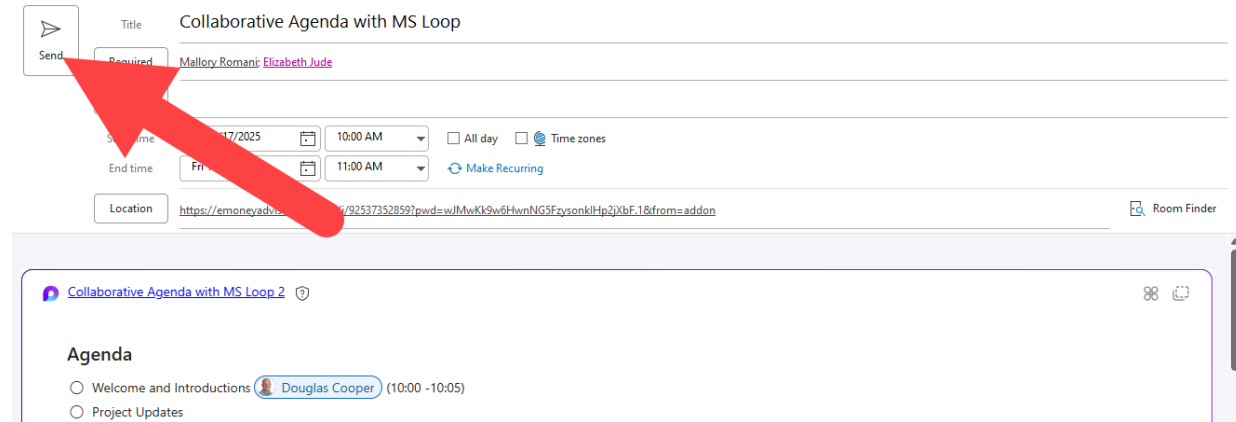
If you want to limit who can share the meeting details, Outlook allows you to disable the forwarding option. This can help maintain control over attendance and ensure sensitive information stays within the intended group.

1. Click on Response Options (in the Invited Event tab)
2. Uncheck Allow Forwarding



STEP 8: Send the Invitation

Once your agenda is ready, click 'Send.' Attendees will receive the invite with the editable Loop agenda embedded.



The screenshot shows the 'Send' interface for a collaborative agenda. A red arrow points to the 'Send' button. The interface includes the following fields and options:

- Title:** Collaborative Agenda with MS Loop
- Required:** Mallory Romani; Elizabeth Jude
- Start time:** 1/17/2025, 10:00 AM
- End time:** Fri, 11:00 AM
- Location:** <https://emoneyadvisors.com/92537352859?pwd=wJMwKk3w6HwnNG5FzysnkiHp2jXbF.1&from=addon>
- Room Finder:** Room Finder

The agenda details are shown below the form:

Collaborative Agenda with MS Loop 2

Agenda

- Welcome and Introductions (Douglas Cooper) (10:00 -10:05)
- Project Updates