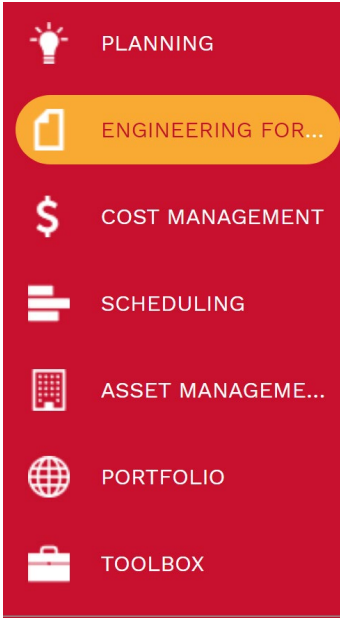




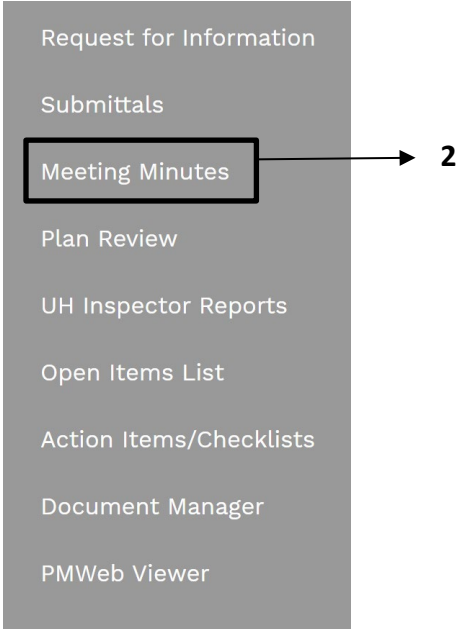
Vendor

How to Issue Meeting Minutes

1- Click on **ENGINEERING FORMS** from the buttons on the left.



2- Under Engineering Forms, select **Meeting Minutes**.



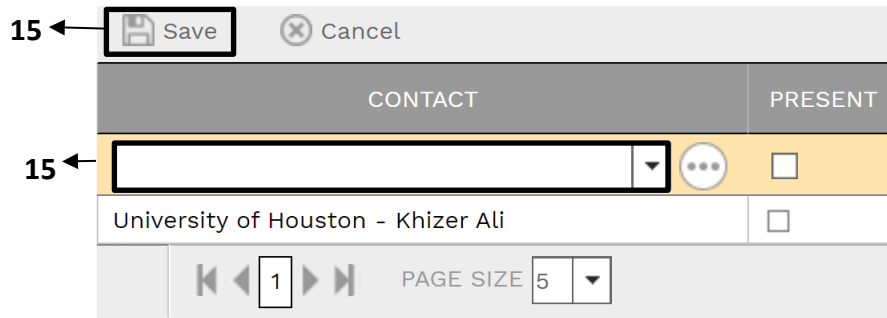
- 3- Click on **+Add** in the top bar.
- 4- **Project** field - Select the project from the Project drop down menu.
- 5- **Type** field – This field will auto-populate.
- 6- **Meeting #** field – Enter meeting number.
- 7- **Description** field - Enter a brief descriptive explanation of costs.
- 8- **Location** field – Enter location.
- 9- **Meeting Date** field – Enter meeting date.
- 10- **Started** field – Enter Start Time.
- 11- **Ended** field – Enter End Time.
- 12- **Status** field – Select from the Status drop down menu.
- 13- **Save the header.**



Project*	<input type="text" value="4"/>	▼
Type	01 - Project Evaluation	5 ▼
Record #*	<input type="text"/>	
Meeting #	<input type="text" value="6"/>	
Description	<input type="text" value="7"/>	
Location	<input type="text" value="8"/>	
Meeting Date	<input type="text" value="9"/> 01-08-2023	📅
Started	<input type="text" value="10"/>	🕒
Ended	<input type="text" value="11"/>	🕒
Status / Revision	Draft	12 ▼ <input type="text"/>
NEXT MEETING		
Next Location	<input type="text"/>	
Meet Date	<input type="text" value="01-08-2023"/>	📅
Start	<input type="text"/>	🕒

14- Within the “**Participants**” box, click **+Add Multiple**.

15- Select contacts from list, then click **Save and Close** button.



16- Within the “**Next Meeting**” box, **Location** field – Enter location.

17- **Meet Date** field – Enter date.

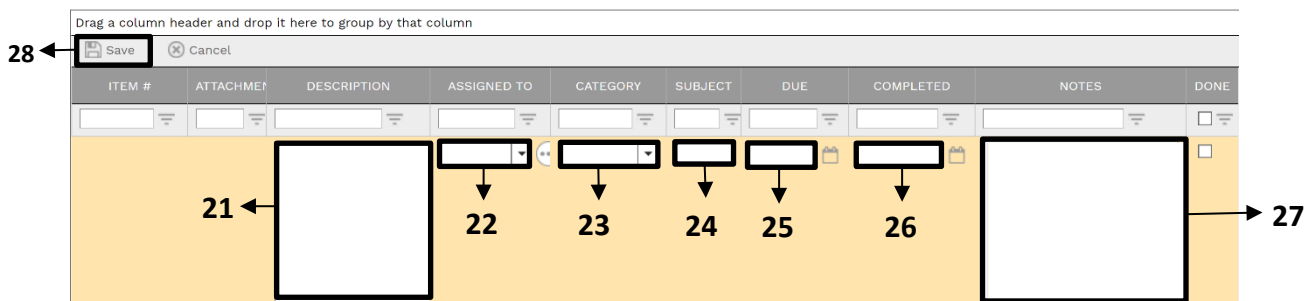
18- **Start** field – Enter start time.

19- Click on **Save** button at top header.

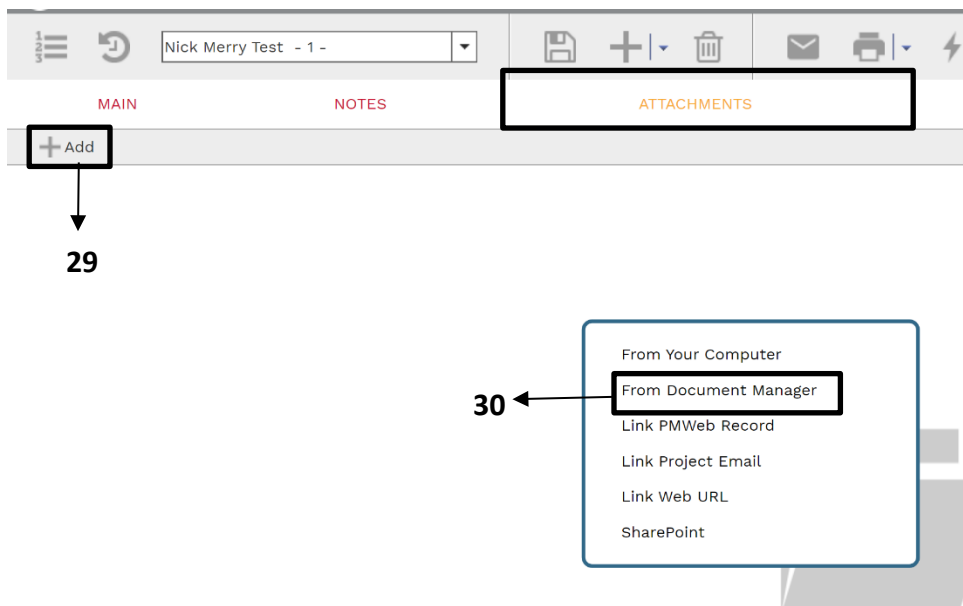
NEXT MEETING

Next Location	<input type="text" value="16"/>
Meet Date	<input type="text" value="17"/> 01-08-2023 <input type="button" value="Calendar"/>
Start	<input type="text" value="18"/> <input type="button" value="Clock"/>

- 20- In the **Lower**, select **+Add**
- 21- **Description** field – Enter brief description of issue.
- 22- **Assigned To** field – Select contact from drop down menu.
- 23- **Category** – Select type.
- 24- **Subject** field – Enter brief description.
- 25- **Due** field – Enter date.
- 26- **Completed** field – Enter date, as applicable.
- 27- **Notes** field – Enter additional description and details, if desired.
- 28- Click **Save**



- 29- Under **“Attachments”** in the top navigation bar, select **+Add**
- 30- Click **+Document Manager**
- 31- **FILES LOOKUP** window will pop up, then select desired file; i.e. Completed Punch List.



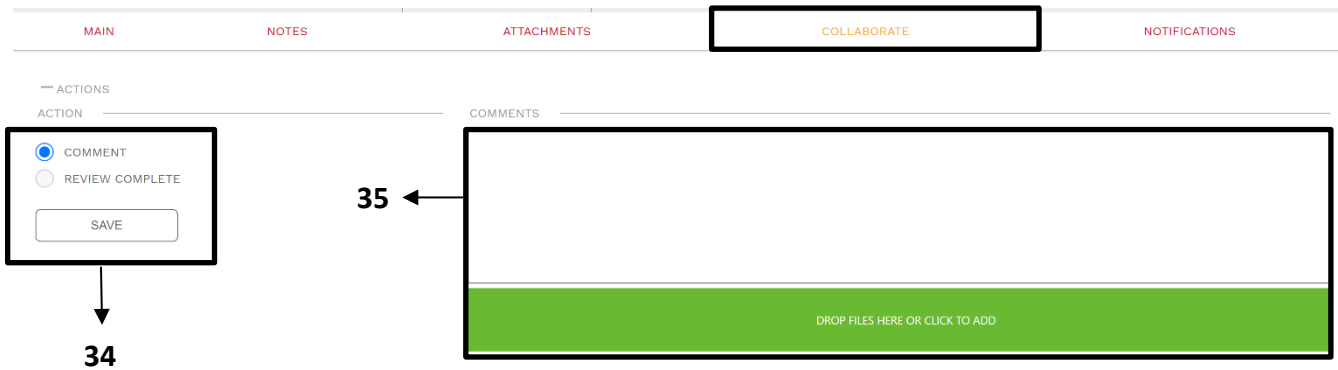
32- Click on “Collaborate” tab at bottom.

33- Click on the +Add to add people.

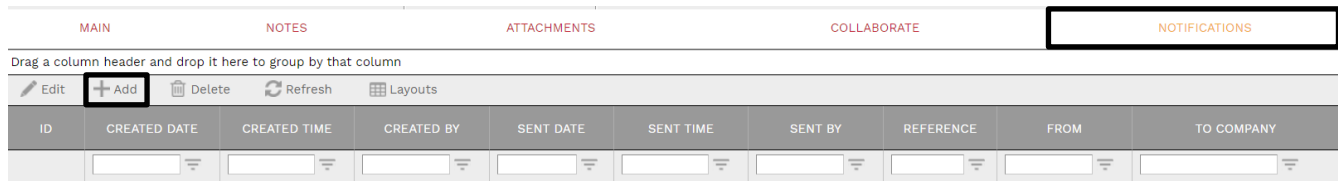
34- In “Actions” box, click “Comment” or “Review Complete” as applicable

35- In “Comments” box, enter comments.

36- Drag and drop any files if needed.



37- Under “Notifications” tab, click +Add.



38- Status field – Select from drop down menu.

39- Notification type field – Select from drop down menu.

40- Reference field – Enter brief description.

41- Due Date – Enter desired date and time.

42- Reminder Completed – Click.

43- Completed Date – Select desired date and time.

44- Within the “Select To Attach To Email” box, click on the desired files to include in the email notification.

45- Click on “Save” icon in the top bar of window.

46- Click the Send icon.

45 ← **NOTIFICATION** **46**

From: System

To:

CC:

BCC:

Manual CC:

Subject:

Status: **41**

Notification type:

Reference:

Include Link:

Reminder: **42**

Completed: **42**

Completed Date: **43**

SELECT TO ATTACH TO EMAIL

<input type="checkbox"/>	TYPE	DESCRIPTION
<input type="checkbox"/>	Report	Assigned Meeting Minutes Dunning Letter
<input type="checkbox"/>	Report	Meeting Minute Details
<input type="checkbox"/>	Report	Meeting Minutes Dunning Letter

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