

Meetings

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New Meeting

While on your main page (dashboard), scroll down to the meetings section and hit new.

Select the appropriate grant.

Enter a title and description of what the meeting is meant to accomplish.

Select the entity involved in the meeting or N/A as well as the location in which the meeting will take place. If choosing a custom location, be sure to note the mileage traveled.

Enter the assumed start and end date/times.

Click create and your new meeting will now appear on your dashboard.

Import Meetings

While on your main page (dashboard), scroll down to the meetings section and hit import.

Choose if you want to just import meetings, or both meetings and attendees.

Choose if you're importing from a CSV file or an Excel file.

Click "Browse...", and select the CSV or Excel file you wish to import.

Click "Import".

The meetings should then appear at the bottom of the dashboard page.

Note: Within the import menu, there are examples on the right you can download.