



## Meetings

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### Overview

An essential part of most meetings is taking minutes, in order to:

- Record summaries of discussions held
- Confirm any decisions made
- Record any agreed actions to be taken, who is responsible for those actions and when they are due
- Provide details of the meeting to anyone unable to attend
- Serve as a record of the meeting

Using this form, people are able to schedule meetings and subsequently, record the meeting minutes and actions. Following the meeting, a notification can be sent to all attendees and a separate email to those who have actions assigned to them.

### Additional features

**Notifications:** This is a good example of some simple notification rules.

Different templates can be created containing information suited to the recipient, and a trigger chosen to designate when it should fire.

See the *notifications* screen of the project for more details.

Trigger	Notification type	Notification template	Send notifications to	
New issue reported	Email	Issue reported: Attendees	Submitter of ticket Form field: Meeting Attendees (meeting_attendees)	↓ 🗑️
Status NOW Send Meeting Reminder	Email	Status Send Meeting Reminder: Attendees	Submitter of ticket Form field: Meeting Attendees (meeting_attendees)	↑ ↓ 🗑️
Status NOW Meeting Held	Email	Status Meeting Held: Attendees	Submitter of ticket Form field: Meeting Attendees (meeting_attendees)	↑ ↓ 🗑️
Status NOW Send Actions	Email	Status Send Actions: Action Recipients	Submitter of ticket Form field: Action Recipients (action_recipients)	↑ 🗑️

Notifications templates

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Name	Subject line	Type	
Status Send Meeting Reminder: Attendees	📧 Meeting Reminder: {issue:meeting_title} {issue:meeting_date} {issue:meeting_time}	HTML	🗑️
Status Meeting Held: Attendees	📧 Meeting Notes: {issue:meeting_title}	HTML	🗑️
Status Send Actions: Action Recipients	📧 Actions: {issue:meeting_title}	HTML	🗑️
Issue reported: Attendees	📧 Meeting Scheduled: {issue:meeting_title} {issue:meeting_date} {issue:meeting_time}	HTML	🗑️

There are four different conditions (defined as triggers) that can send out notifications. When a new form is submitted, or when the status changes to

either 'Send Meeting Reminder', 'Meeting Held', or 'Send Actions'.

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