

Transcription



Boardable Advanced Features Webinar - August 30, 2020

Laura: Good afternoon and thanks so much for joining us today for our Advanced Features Webinar. My name is Laura Clark and I am a Customer Success Manager here at Boardable, as well as a co-founder. And we are excited today to be able to have a little time to dive into some of our features that we don't always get to cover in our beginning admin webinars. So please feel free as we go through the webinar. If you have questions, please chat those to us. We will get those answered. At the end, we're gonna do kind of a walkthrough and then we'll answer those.

I also have with me today Adam Pedersen, who is our Strategic Partnerships Manager. Do you wanna say hello, Adam?

Adam: Hey everyone. Yeah, as Laura said, I'm a strategic partnerships manager here at Boardable. Really excited to be here with you all and answer some questions and do a deeper dive into our advanced features.

Laura: Great. And then we do have Michelle Mullen, who's on our back end and she's helping to answer those chat questions and just help us out. So that is your team today for our webinar. As we get started, just to remind you all that Boardable is really designed to be a board meeting and management software. And our goal is to help meetings be run more effectively, more organized and be impactful and fun for everyone who's a part of them.

Our quick agenda for the day is just we're gonna go over all of the features quickly through a little slide show, and then we're actually gonna jump into the product and I'll explain some of these deeper areas like goals, reports, e-signatures, the broadcast announcements, and then you'll have a chance to ask any kind of questions you might like. We'll also cover our [Boardable Meetings with Video](#), which is a new feature that we've put out.

Adam and I are gonna go ahead and turn off our cameras while we go through the remainder of our slides. Again, Boardable really is designed to centralize all of your communication for your

board, all your meetings, documents, to help with automating and scheduling those calendars and reminders. And then we do integrate with Gmail and Outlook as well just to make all of those things come together for a seamless board operation.

We have several different plans as a customer of Boardable: Legacy, which is our oldest plan, and then we have [Essentials, Professional, and Enterprise](#). Today, we'll primarily be focusing on Essentials and Professional with more emphasis on Professional Plans because they have a few more of those tools, but we'll walk through those. If you have a question and you're not sure whether or not you should or should not have a tool that you see, please feel free to reach out to us and we'll help you out with that.

Also, another point to point out, which probably you're aware of, but just to... Let us know about the different user permissions. We have administrators, members and observers. Administrators, which is what you are, you can see and do everything within the platform. Our members are gonna be able to create meetings, polls, discussions, they can upload those documents and view everything that they are assigned to. And then our observers, they're gonna be able to view everything that they're assigned to, but they will not be able to see that [Document Center](#), which is the primary difference between an observer and a member.

As I mentioned, we have also rolled out our Boardable Meetings with Video, which is a part of our kind of plan of helping organizations now with virtual meetings with Boardable. Right now, we're all meeting virtually, and so Boardable is a great spot to help with that. You're able to use the [Meeting Center](#) with the documents. You can use our public meeting page.

The [Task Tracker tool](#) helps you keep organized all of those tasks. [Discussions](#) is an easy way for people to communicate back and forth when they can't be together in person. We also have our mobile app that your members can certainly log onto and use. It's very handy for that purpose. And then again, [those e-signatures](#) are helpful as well.

All right, as we mentioned that Boardable Meetings with Video, it is a new feature for us. It's been out maybe six weeks. It is still in beta for us, but it is a one-stop shop, a virtual boardroom for your organization, where you have your agenda there. You can take your minutes there and all relevant information for that meeting is gonna be right there on one page. You're also able to see all your other meeting participants in one screen on your computer

With the Essentials Plan, you do have access to that Boardable meetings with video, and you're only allowed to have the people who have licenses on your account to use the Boardable meetings with video. If you're on the Professional Plan, not only are your members able to use it, but you can invite guests, outside guests who don't have a license to a Boardable account. They would be able to receive an email notification and log into a meeting on your platform.

Adam: All right, I'm going to give us all a nice little overview of our Essentials and Professional level plans. We'll start off with the Essentials features. As with everything here in Boardable,

you'll get a nice overview of everything we get, that offers within the Essentials and Professional Plan. The [people directory](#) here with the Essential Plan, you'll receive a nice directory of all of your board members and you can see their contact information. You're able to email them and see that type of...all that information in plain view here.

Then each, on the Essentials Plan here, this dashboard you'll be able to see announcements and you're able to RSVP really quickly and see the tasks that you have and select upcoming or select availability. We do have a scheduling tool built within Boardable that allows your members to schedule times that works best for them. You also be able to view upcoming meetings, change RSVP, and see activity that's going on within the groups that you're a part of.

And then we have a [Meeting Center](#). Meeting Center is one of the most robust features within our product. It's really great for administrators to put together meetings and you have the ability to create collaborators and group owners can participate in creating those meetings as well, but you can create agendas within it, minutes, polls, send meeting messages and then reserve dates by publishing to your calendar as well. And we do have a really nice integration with your calendars.

And within the Meeting Center, this [Agenda Builder](#) again is really great to create your meeting agendas. You can add personal notes. You can create, you can add also documents to this agenda, export those as PDFs and then you're able to share that agenda onto a public meeting page as well.

And then after you've created that agenda, then you can populate into our meetings maker. So that agenda then pulls over into the meetings maker, and then you can record your notes and record decisions and assign tasks to your group members as well. Then you're able to save that as a PDF and send that out to your members too.

I already touched on it a little bit, but calendar integration, which is really useful, it can integrate with your Google calendar, iCalendar, any type of calendar that you have, that you're using. Boardable will communicate back to that personal calendar. And then the meeting scheduler tool really quick. I touched base on that, but you can add those specific meetings into that scheduling tool and have your members to use. Then we also have the [Polls](#) and the Discussions features. You can create polls, you can add polls, very customizable, and also you can create discussions that are maybe around those polls or certain documents as well.

Then we have our Document Center. You can upload documents within this Document Center. It is secure, like it says accessible and organized. And we do allow any type of format to be uploaded into that Document Center from PNGs to PDFs.

And then we'll move on to the Professional. As Laura had mentioned, those e-signatures, we just brought e-signatures into the product, and now you have the ability to upload those PDF documents and get them signed by your members.

We also have a really great tool that we just rolled out recently. It was the notifications history. So now you can see your board members and see the type of activity that's going on within your accounts. And then we do have goals tracking as well. So with the Essentials, you can track one goal. With the Professional, you can track unlimited amounts of goals within your account. So that's pretty great.

And then we have our reports feature which breaks down members' participation and attendance. You can see activity as well, so you can pull those reports. With the Professional level, you can pull unlimited amounts of reports. So that means from the day that your account was created, we will keep track of those reports and you can go back and reference those.

And then last but not least with a Professional level, you get a [customer success manager](#). And like the slide says, it's 100% dedicated to your success. They will help you onboard. And then come, not only help you onboard, but you can ask them questions, they can give you enough support as well. And they'll also connect with you for an annual account review, which is really great.

Laura: Okay. Our additional resources, we just wanna make sure to hit on is that mobile app, which I mentioned earlier, but it really is designed for the board member as opposed to an admin. So it's everything they would need right there on their phone to...that they're gonna be able to access for their board meeting. You as an admin are gonna find that a lot of your tools aren't on that mobile app. Again, as I mentioned, it's really specifically designed for that end board member to have a very simple way to communicate.

Should you ever have any questions as you're in the app, we have [our help center](#) and you can search by article or search by topic, and we will pop up articles for you about those items. We also have our chat bubble in the lower right-hand corner where you'll be able to chat any questions you might have.

All right, let's go ahead now and hop into our platform. I am gonna share my screen with you and we will take a quick look into there. Okay, just a second. All right. Make it a little bigger. All right. Okay.

We are gonna pop into one of our accounts. And the first thing that we're going to look at is notifications. And I know we mentioned that a little bit earlier, but I just wanted to point out to you all these broadcast announcements. It's going to be at the top of your screen. You can find it regardless of what page you happen to be on. But you can pop into that.

Only administrators are going to see this, but you can send out an email announcement to everyone or a particular group or certain individuals on your account. You would be able to type up whatever your messages, and then you can assign it to the group. And then you're able to hit

submit, and it fires out that message to everyone. So that's what that broadcast announcement is going to look like.

The next thing too, along the notification, is just to point out this notifications history. If you clicked on that, on the left-hand side, administrators are going to see is organization notifications. And this is a spot where you're gonna be able to come and see all emails that have been sent out from your account. So for example, if you sent out a message, maybe from your meeting page to remind everyone of something, and then two days later, you can't quite remember if you sent that message or not, you can always pop in here and you would be able to search for it by scrolling or by typing in a name and it would pop that up for you.

It also indicates here whether an email was delivered successfully or not. If you see a red, there could be a couple of reasons as to why that happens. One is that the user has not accepted an invitation to Boardable yet. So we can't send them information yet until they set up their account. Another reason could be that they have turned off all notifications from Boardable inside their personal settings for Boardable. So those are a couple of reasons that it could be.

You may also sometimes see a yellow or orange bar here. And what that might mean is that if they have set their notifications to periodically, meaning they send them twice a day, it would mean that it's not yet sent it. It hasn't hit that time in the queue of the day to send out that email, but it will send it out as soon as it's ready or hit that timeframe. All right. So that is gonna be our notification log.

The next thing I want us to pop into is our documents center, and we're gonna take a look at e-signatures. In your Document Center, as an admin, you're going to be able to see your access documents up here. Below that, you'll see all of your signature documents. Your members will only see documents that they have been assigned to sign, but you as an admin have the ability to see all of the ones that have been created for your organization. You can also see all those that are completed and all those that are waiting for signature. You also have the ability over here to resend should you need to remind someone to add a signature to something.

But we're gonna go ahead and add a document to sign. So I'm going to open up that. We'll open up our page. Give me just a second as we pop into the right spot here. Here we go. All right. And I am gonna open up. It does need to be a PDF document, so we'll upload that. And it's uploaded that document.

When I'm ready to add the signature, I can come here. Choose whether I...with the drop-down being a little slow. There it is. A signature or a date. So we're gonna start with that signature. I then can choose the member that I want to assign it to, and then I can choose which page do I want that signature to live on. So if I want to choose page three, I can choose add. It's going to drop that signature. Oops. On the page, I can move it to wherever I need to move it. On the page, I can adjust the size and it sets that up for you.

I can then go ahead and choose the date. I still want that for Sam. I'm gonna add that. Oops. Scroll down and find it. I can scroll back up. I can drop that just below and it is set to be signed. Now, I can go ahead and click save. And Samantha is going to be notified that she has a document that needs to be signed.

If your user has a document that needs to be signed first, let me show you. You can sign it from this page. You can see that here. They also can see it on their dashboard, awaiting signature. So I'll pop into this one because I know it's awaiting my signature to show you how we do that.

So when I'm ready, I can come down. It's telling me I have one signature remaining. Again, it's loading. There we go. Here's where I would be able to sign. I can choose if I want to add a signature or if I have one that I want to already use, I can use that. Whoops. I can also have the ability to draw type or upload.

So I'm gonna go ahead and draw my signature here. We'll create that. And it's put it in that spot. Many people have a signature saved on their computer already, and that would also be, you would be able to upload that into this. We can click submit, and it auto-populated that date. We click submit and it's signed. So it's a very simple, easy way for you as an admin, to get those signatures done that you need to get done, and then also house them right in your Document Center.

Okay. The next thing we're gonna do is hop into our meeting suite over here on the left. And I just was going to point out the board packet quick print. Take a quick look at that. So on the meeting page, we do have a feature for our Professional Plan to create a board packet for your board.

So you can create that. I can choose to just open them all as a PDF, or I can choose to print them. I'm just gonna go ahead and open that. It's generating a file for me. There it goes. All right. So it's created that for me. It's going to have the agenda in there with all the pertinent information at the top, and then below that it's going to load up all those documents that I had loaded in the order that they were within the agenda.

I then would have the ability, if I wanted to, I can download this as a PDF and send it out. I also can, yeah, I can download it as a PDF or your board member can also access it directly from their meeting page here and open it. So it is a handy tool for you as an admin if you do want to create that board book for your board.

All right. The next thing that I want to point out is our Boardable video. So our meetings with video, if you set up your meeting that you chose a Boardable Meetings with Video, I'm gonna go ahead and show you how that would do. You've all seen the create a meeting page. Down here would be your remote options. If you choose to use a third party remote, such as Zoom or GoToMeeting, you would be able to drop that link in here, and it would appear on the meeting

page. If you choose to use the Boardable video conference, you would be able, you would just make the selection there. And then as you create your meeting and it's ready to go.

We'll open that meeting page back up and we'll pop into Boardable video meeting. Opening that up. To join, you simply hit request access. You are going to have to allow Boardable to access your camera and your microphone. Really, that only happens the first time you log in. After that, you're not prompted for that anymore.

The agenda you'll see automatically populates here on the left-hand side. So during the meeting, you're able to see all of your participants. They're gonna populate. Should there have been others, they would be populating here across the side of this meeting page. No, I'm sorry. I didn't click the join meeting. I need to click join meeting got ahead of myself.

So once I joined the meeting, you're going to see that I populate here. All the other participants would also populate here. You can view in a tile view like this, or you do have the option of going grid mode. If there were other people, they would be split among this screen.

You'll see the agenda is over here on the left-hand side, and you can scroll right through the agenda. You can click directly into documents. From that page, I can click back and get right back to that agenda page. I also, if I wanted to, I could share a document or present a document by clicking on that document. Whoops, it's opening. Whoops, sorry about that.

If I open a document, I can go ahead and present it. It would show right here for everyone else who is viewing this video conference for me because I'm the presenter, it's going to be over here on the left-hand side. When I'm done, I simply hit stop presenting. I can close. Whoops, I closed. You can close that screen out or you can go right back to your agenda. And you'll see them all there or your agenda all there.

I can also access the documents right here as well. I would be able to click into any of those documents if I want to do that. If you needed to share your screen for some reason to show another window, you could do that by hitting "share screen." You also can raise your hand. We have the raise the hand option. Obviously, control mute, we're not in your camera.

And we are adding recording. It's not live yet in the product. It's just here in our demo products at the moment, but in the next week or so, you're gonna see that starting to come out as we are gonna be adding the recording to your meetings as well. It is optional. You don't have to record a meeting. So know that too.

If you want, you're also able to take minutes directly on this page. You can simply hit minutes. I can start from the agenda. It's gonna tell me only one person's able to take those minutes. I say, I acknowledge that. I'm gonna be that person. Open it up. I can go ahead and start typing in here. I also can add items. If I wanted to put in a meeting information header, I could do that. If it

popped it below where I want it, I'm able to move that. Simply by clicking on this little box here, I can pop that up to the top. I also can scroll down.

If we, for example, took a vote, I would be able to record that vote right here in these meetings. It populates everyone who's invited to that meeting, and then I can walk through and record their votes. I also have the ability to take notes should I need to.

A couple other of your options in the minutes, just to point out, you can take attendance. It's very similar to the votes, it populates everyone who's in the meeting. You're able to walk through, hit present or not present or present remote, so you can choose those options. You also could you can put a list in, a heading, a page break, a decision if you need to record a decision.

You also could assign a task if you needed to assign a task. You can create that task, I could type in, let's see, record giving. I can assign it to someone who's in the meeting and then I would give it a due date. Molly's going to be alerted, receive an email notification, that she has been assigned a task during the meeting.

So that is gonna be our Boardable meetings with video. At the moment, it is capped at 15 users in a meeting at one time. As I mentioned, we are in a beta still for our Boardable meetings with video. So to provide the best experience for everyone, we're keeping it at 15 users. That will change as time goes on. Okay. So that is gonna be our Boardable meetings with video. Oops, close that out. We're gonna pop back into our meeting.

And the next thing we'll talk about before we jump into answer questions is we're gonna talk about reports and goals. Reports is an admin function. It's really here so that you can look back over different parts of your year and pull out information that you might need. If you need to report anything, you're able to do that. You can pull in, drop into each separate area. You have people, polls meetings and goals.

Let's drop into our people area, open it up. If I want to get some information about the board group, I could decide if I want all of their information or I want to pull in their attendance, or maybe just see all the tasks that are assigned to the board group. I would be able to do that. I can then download the CSV if I'd like to do that. And you would be able to do that for your entire board or particular group.

For meetings, you can pop into the meetings area. Again, you can choose a group or everyone will pop into that board group. I can look at attendance again. I can look at RSVP. I also can look at any downloads that have been added to that board group. I then, once the report is created, I can go ahead and I'll be able to download that as a CSV. I'm gonna hop back.

Polls again, you would be able... Any poll created for your organization, you would be able to pull out those results for yourself in a CSV form and again, all or by group.

And then goals. So those goals, you would also be able to pull out if you needed to download any of those by all or group, and you can also just, you would be able to see their progress as they go.

Speaking of goals, we are going to hop into the goals tab over here on the left-hand side. So our goals as a Professional customer, you can have unlimited number of goals. Essentials, you are allowed to create one goal for your organization. But goals are really just a way for you all to be able to track the progress of something that you're working towards for your organization.

So we're gonna go ahead and hop into a goal that I created. If you have the Give Get campaign that you might wanna do, I created this. It creates a really nice line graph for you that you can track and see the progress as you go. So you can see how I did this, you know, pop back over and we're gonna create a goal.

So if I wanna create a new goal, I open it up. I give it a title. I can give it a description. If I like. I then can choose whether I want this to be a number, tracked item, a currency or percentage. So I'm gonna go with a currency. We're gonna choose the start date of today and that we have \$0 as of this point.

We're now gonna set some targets. So I'm going to say by next month, we want to have \$500. We're gonna then go on and add another target. We'll pop that forward another month and we're gonna have \$1000. You just keep adding these targets for as long as you like. And we'll say by this point, we're gonna be at \$5,000. So that's gonna be our end goal is \$5,000.

I can decide whether I want this to be open to anyone and that they can all view the detailed information about the progress of this goal or I can decide that it's private, where you're not gonna see those progress reports. I'm gonna choose open. I'm gonna assign it to our board, populate those folks in there. You can add additional individuals just like you would do in a meeting. I hit create goal, and it's created that goal for me.

The yellow line is showing you what your target is, so where you should be on that date. And then the blue line is showing you where you are. So if I wanna record some progress, I can go ahead up here. I'm going to say we've had a donation. I'm gonna say add progress. Whoops, let's first put in our dollar amount, we're gonna say \$300. And that Andy Clark made that donation. I can type in a memo if I like, click save. And it creates the progress of where we are.

So it's showing that we started at zero. According to our target, we're supposed to be at zero today, but we actually have \$300. So we're doing well so far. We can go ahead and add another progress update. Let's move down the road a little bit and we're gonna save 500 and then I made that donation. Whoops, went too fast there. 500. Whoops. All right. We'll click save. And it's going to note my progress and you'll see that here in our chart.

So really the goals are a great way for you to really keep track of something like a strategic plan or some sort of metrics, board giving, individual committee level metrics, lots of different ways you can use it. And I think too because you can use either a dollar amount, you can use a percentage amount, or you can just use a numerical number. There are a lot of ways you can tweak it to use it for what you'd like to track.

All right. So those are the main features we had wanted to cover today to begin with. We will now go ahead and open it into questions. So if you have questions, please chat those. I'm sure some of you have already been chatting those questions. But we will go ahead and start answering some of those questions. All right. And Adam's gonna come back in as well to help me do that. All right.

It looks like Peggy has a question about, "If a board member terms off the board, how do I keep history information on this person in Boardable? And can I run a report of who is on the board with their term dates? "

So any of the board members who have been on there, at the end of their term, you have a couple options, different customers do it differently. You can either keep them on in a user seat and possibly give them observer rights, if you want them to be able to still have access to some things. If you don't, you can go ahead and delete them from the account. Anything they have done in the account after you have deleted them, but anything they did while they were in the account is going to stay there. So you'll see all the history of everything they've ever done. If you want to, with term dates, you wondering if you can run a report with your board with term date.

So let's look real quickly at our reports. So if I open up the reports and I open the people page, if I want to open that board, it would be in the attendance and it is going to list their term dates here. So you would be able to download the CSV and you would be able to see those term dates.

All right. A quick question about the reports only available Professional level. Kathleen, no, actually they are available for Professional and Essential. The Essential users can use reports and they can pull reports for the last 90 days in their account. I should also mention, if by chance you don't see reports as an option on your left-hand bar, it could be that you're on our Legacy Plan, which is our older plan, and it does not have access to reports and goals.

However, if you're interested, please reach out to us because we can help you make that switch to the, at least the Essentials plan so you do have access to those. It really is very similar pricing. So reach out if you're not seeing that there,

Adam: How's it going, Laura? I will jump in with a question. Is it going well?

Laura: I think it's going great.

Adam: Hey, I have a question from Kathleen Burley about the Document Center, "Is it possible to upload word docs?" Yes, it is. It is possible to upload word docs. Anything that you upload within the Document Center will stay that exact same type of file. So as you're uploading those files, just to remember that those files will stay the same.

And then your members will be able to download those files. If there's ever a time to edit a file and then re-upload. They could edit that file, let's say it's a word document. They get edit that word document and then re-upload that word document as well. Just know that that file will not change. You'll have to delete that old file before or keep it if you'd like to, but just know that both files will stay in the Document Center.

Yeah. And I've got one more question from... Oh, Laura, do you have something to add to that ?

Laura: I was just gonna say, yeah. Adam and I were just in a meeting this morning and we did find out that we do have an update coming to our documents center where you are going to be able to upload shared documents within the documents center. Currently, you cannot, if we don't integrate with Google docs, OneDrive, any of those from the documents center. But that is going to change soon. I can't tell you the exact date, but I know it's coming soon. So. ..

Adam: Yeah, we got a sneak peek of it today. And I think I said the meeting, it was a game changer just because now, you're not searching for those drive documents that you wanna collaborate on, it's gonna be in that Document Center in that correct folder. So it's really cool. Really exciting.

I'll go ahead and answer another question about the Document Center with Peggy Herman. Thanks Peggy. "In the Document Center, is there a way to search for a document?"

Laura has that pulled up right there. Laura, if you'd like to show Peggy how to search for that document. You can... The thing is we cannot search, we can't do a deep dive within your documents. We can search by title. And so when we search, it's gonna go ahead, and find that title with those keywords in it there. So there's a nice search bar up in that green title, or it looks like a title screen, the screen up top. And then you can choose where you would like to search within Boardable or within your account.

Laura: Yup. All right. It looks like we have a note, a question about meetings. "Is there a way to integrate upcoming events into the calendar that are not meetings?" That question is from Tamara. That is a great question, Tamara. And we have not added that yet as a feature for Boardable. Currently, you're only able to add meetings.

Now that said, I have seen quite a few customers who do add events to their calendar by creating a meeting for that event. And what they do is they create that meeting, and then in the title field of that meeting, they, in all caps, write event. So everyone is clear, as they're looking at

it, that it's not an actual meeting, it's an event. So that can be a workaround for that. That's a great question.

Okay. We've got another meeting's question. "When you have a published meeting on the calendar and later a new board member joins, if you upload them in people, does a meeting invite go automatically, or do you need to individually send them a new invite to the new board member?"

Peggy, I'm trying to think. I believe that it does go ahead and add it to them. I though will double check that and shoot you an email and let you know that. I'm pretty sure that if you add that user to, for example, the board group and there were already meetings created for the board group, that they would automatically be notified of that meeting. Is that your understanding too, Adam?

Adam: So Laura, yeah, it'll populate when they sign on for the first time and when they see that group. It'll actually populate there for them. The notification piece, I don't believe that we'll get one in their email, but the great thing about the notification side of things is that you do have the ability within the meeting suite to send notifications out to your members and you can send them out either through the group or through individuals. So if there is a new member that's joining and you would love to double check that they're going to or they've received the information, they're gonna be a part of the meeting, you can individually see, as Laura showing you on the screen right now, send that message out to them.

The other great thing is as well is, yeah, there you go, the individuals. The other thing too, is if... I love this features. If you have members that are not RSVPing and you want them to, you can send a message to just the people that have not RSVPed yet, which is really great. I love it.

Laura: That is a great feature. Just a friendly, little reminder

Adam: Just friendly. It's just a friendly one.

Laura: Go ahead, Adam.

Adam: "I'm not seeing the organization notifications, is it a pro feature?" And that is from Ellen Blake. Ellen, it is a pro feature. And, you know, I'm assuming that you have the Essentials package here. If you were to upgrade to pro, you could go down on your left side. Laura, if you wanna scroll down a little bit on the left-hand side there of your navigation bar, you'll see that notification history. That's where you would click and see the organization notification right there on the, on the right hand, upper, up top there on that button.

Laura: Exactly. Yeah. And your users would be able to access their My Notifications, but you as an admin would be able to see the organizational notifications and yeah, you're right those organizational notifications are a pro feature. All right.

Adam: We can go at org notifications again. "Is there a way to see who you sent to in a particular group? Say you forgot to click all and the invite only went to yourself, can you tell who else got the invite?"

You should be able to see that. It depends on if we're ever talking about a meeting. So if you're creating that meeting, it's going to automatically ask you what groups or individuals are going to be a part of that meeting when you're setting up a meeting for the first time. The meeting page, it won't allow you to go to that meeting page unless you filled out that information.

So hopefully, we've created a little stop there, a little check to say, "Hold on, are you sure you have your meeting members in order?" If not, you do have the ability to go back into a meeting and edit who was a part of the meeting as well. Right there on the upper right-hand corner, you click edit meeting, and then you can scroll that down to those specific groups or individuals.

The other great thing is that guests feature too. So if you do have guests that are coming to that meeting, they'll receive an email notification, the save the date, and then they will receive an agenda. They will not receive documents attached to that agenda though, just to throw that out there. It's a part of our privacy security policy that keeps all of your documents within the Document Center secure.

Laura: My thing has...my internet has frozen here. So hold tight everybody.

Adam: Let's see if we got some questions here that we can answer without looking at the screen. So meeting notes, "Are these notes visible to everyone if you're the facilitator?"

You are able, you have the ability to publish your minutes after the meeting is done. The facilitator will be the only person that's looking at those minutes. But we do have, if maybe you're speaking into, Kim, maybe, you're speaking into notes that you're able to take during your meeting, we do have that functionality within Boardable is you're able to take personal notes during the meeting.

Now, those notes are just, again, when we said personal, they're there just to that individual member. No one else would have access to those personal notes during the meeting, But minutes, if you're speaking on minutes, the administrator, the collaborators are able to see them and then once they publish those minutes, everybody has access to them.

Laura: And here too, I'm a little late, but the note, was that notes on the agenda, so you would be able to...they could take notes here, add a note, and those are gonna be private to that particular user. Great question. All right. All right. [crosstalk 00:45:43]. Go ahead.

Adam: Okay.

Laura: I was just I was gonna jump into, and I'm sure you guys can tell this by now, but Adam and I are in two different places. So that's why we're talking over each other. It's kind of hard doing this not in the same place. But we can answer.

We've got some questions about the Boardable meetings with video, and I can jump into those. One question was about recordings and will they be available in all plans? The answer to that is it's only going to be a Professional feature. So if you have the pro plan, you'll be able to do those recordings.

Is there access to polls during the video meeting? They're not in there right at the moment, but we definitely will take your feedback on that. And I would imagine that potentially they could become a part of it as we roll along. So yes.

Adam: Yeah, the one great thing that you can still do is you can have a poll that is live on your meeting page. As you can see within that screen right there, the polls right underneath the minutes. So you do have the ability to create those polls within the meeting. They're not live, but you do have the ability and access to record those if you were to do a live vote within our minutes maker. You can record everyone's, the way they're voting as well.

Laura: Yes, absolutely. Let's see, "Can you take meeting minutes during the meeting as well without losing the screen and agenda?" You can take meeting minutes and without losing the screen. Let's pop into that real quickly again and show you the experience. You will lose the agenda, but you would not lose...The agenda though, if you choose, when you do your minutes, you can choose to go from the agenda to create those minutes. And so you'd have the agenda there. You're just gonna be able to add into it.

All right. So let me join the meeting. And if I choose to take minutes, you'll see that the agenda is there. Now, I have already taken some minutes in here and I'm disappearing because my screen is a little smaller because I was having the split screen there. But you'll see all the users in the meeting will be over here or in the middle. If something that's being shared, you'll see it in the middle, but you would be able to walk down through the agenda. So you would still have that agenda experience and be able to take those minutes. All right. Let's see, what other questions do we have.

Adam: With Boardable meetings with video, "So we had problems with losing participants connections when screen was shared." So the one thing that we will say right, Laura said it, I'll repeat it, we are in beta in this. But the one thing that we've realized is that using Google Chrome eliminates a lot of these issues. We noticed that if you have some members that are using different...Oh, my goodness. Why am I blanking the type of like...?

Laura: Browsers.

Adam: There it is, web browsers. Yeah. We noticed that web browsers. With different web browsers, we have seen a lot more issues. But Google Chrome has been pretty solid when we have been using Boardable meetings with videos. So just keep that in mind.

Laura: I would add to that too, as well, like, you don't wanna use it, even if it's a Chrome extension, don't do it on an iPad. It needs to be on a computer at the moment, not on your cell phone. So I think we'll get there. But at the moment, it needs to be on Chrome and on a PC to have the best experience. So I would give that a try. Again, if you have still continued to have issues, though, please reach out to us and let us know about it.

Let's see. There was a question. "Can you take minutes while presenting a document from the agenda at the same time?" I believe you should be able to do that. Let's go ahead and test it.

Adam: They're giving you double duty. Hopefully, your board will not give you double duty. No, I'm just kidding. Yeah, taking minutes and presenting would be quite the feat there.

Laura: Seriously, you're working hard. It's not. Well, what I can do is I can pop into the documents. I can choose here to present, and then I can pop back to the minutes and take my minutes. So that's how you could do that. And then when you're done, you would hop back and I would hit stop presenting. And then I could go back to my minutes.

Adam: Yeah. I believe the difficulty there really is. If you're looking at the left-hand side as your navigation tool, you know, there's very little room there anyway, so you're not able to see the agenda as well that's going on if you're taking your minutes. Obviously, the agenda is built into the minutes, but you're not being able to follow through as if a presenter was following the agenda.

Laura: Correct. Do keep in mind, you do have the ability, when you're taking minutes or playing around, you can change your screen size there, which is helpful. All right.

Let's see what other questions? It looks like, I think we talked about the reports. "Can reports provide data without specifically showing details, i.e. financial goal of give get?" Right now the goals reports reflect progress. So you're going to see the progress that's been made if you pull that report out.

Okay. Let's see. "Is there a way for attendance to be added to board summary right away? I had to wait until the next day."

Currently, right now, Heidi, no. You do have to wait until the next day. You can't populate that board summary until the next day. Now you can use the attendance in the new minutes maker, so you can drop it in that way. But you're not gonna be able to access that board summary until the next day.

All right. A question about polls, "We'd love polls to be available during meetings. Are there any third-party polls that integrate for a live poll?"

I am not sure about a third-party integration poll. I will tell you that you can have your members respond to a poll during a meeting so you could create polls in advance of the meeting and have them ready to roll. They would just need, they would need to go if you're in Boardable meetings with video, they would need to go back to their meeting page screen to take that vote. But it would be another tab open on their screen. So it would be very simple for them to click back to it and record their vote.

You also could, theoretically, on the fly, add a poll to a meeting and then publish it. So if we were in this meeting and all of a sudden, we needed to add a vote that we weren't expecting, I can say approve this at that poll, put it up together really quickly. You do have to give it a due date and a time, and then I would assign. It's already assigning it to that executive committee because we're in that meeting. I'm gonna hit save. You do have to publish that poll, but I could quickly publish it. And then it's gonna show up on that meeting page.

So if I go back to that meeting. I think I'm in the right meeting. Yes, it's gonna sit right here on the page. So your members would be able to vote on it then, and it would be saved and archived in your information.

Adam: And then I believe the last question that we have deals with reporting. "Are reports only available on the Professional level?"

No, they are not. You actually have the ability to have reports on the essentials level. Keep in mind though that it's only 90 days of reporting. So once that 90 days hits, it's going to restart. So on the Essentials level, yes, you can have a 90 days, 90 days' worth of reporting, so a quarter's worth of reporting. Just know that it will restart right after that 90 days.

For Professional though, Professional is unlimited reporting. So you like I mentioned, at the very beginning of the webinar is that it's once you create your account to the end of your account, you can have all of those reports from the Professional level.

Laura: Okay. Well, we really appreciate you all being here today. I think we have answered all the questions that came in thus far. If there are any others, please go ahead and chat those to us. All right. Have you seen any others come in, Adam?

Adam: I believe we've answered all of them. I do not see any others.

Laura: Okay, great.

Adam: I believe you answered this one. There's one more, right. But I believe you answered it, Laura. "Can reports provide data without specifically showing details, i.e. financial goal of gift get?" We already covered that, correct?

Laura: Yeah, I believe we do. And it does. Yeah, you can't. I don't believe that you're able to do that right now.

Adam: Correct. We are not able to do that right now, but it's great feedback.

Laura: It is great feedback. Yeah. And that's a great point. We do love to get your feedback. And if there are things you have wish list items for, please reach out to us and let us know. A lot of our product updates are directly from input we receive from our customers. So can't always promise that it's gonna happen, but the more you ask us about it, the more people that ask about it, the better chance that it's gonna show up in the platform. So we do love to hear from you.

Adam: Oh, really quick.

Laura: Sure.

Adam: Laura, there's one more question.

Laura: Oh, go for it.

Adam: When is the next release of Boardable? So when is there a feature update? Can we let them know?

Laura: Well, we often have little fixes going in. We do have some new things coming out. We talked about the recording within the Boardable video and that should be coming out before too long. What else am I missing? We have the update in the Document Center that'll be coming out before too long, where you can add the collaborative documents.

Adam: Those are the two big ones and will be released within the next couple of weeks here. We can't give you a specific date, sorry, everyone. But know that we are constantly, like Laura said, updating features and moving forward with the product.

And like she said as well, is that we get all of these feature updates from requests like yourself. So we genuinely take your feedback and try to create the product and make the product to the best it can be for you all. So we're thankful for the feedback. We're thankful for these questions, and yeah, we look forward to more.

Laura: Yes, we sure do. All right. Well, thank you so much. We appreciate you guys spending some time this afternoon. And again, always feel free to reach out to us at

support@boardable.com or to me, laura@boardable.com. I'm sure Adam would be happy to help you as well. And he can be found at adam@boardable.com. But yeah, anything we can do to help you guys out, we are here to do so. Thanks so much and have a great weekend.

Adam: Thank you so much. Take care.