Boardable
Getting Started

Welcome to Boardable!

Ready to jumpstart your new board management software? It's easy to set up, build, and roll out your Boardable account. We've got you covered in five simple steps.

🔧 Set Up

1 **Customize Organization Settings**
- Click on **Settings** in the left navigation menu
- **Dashboard:** Enter a welcome message and mission statement to the dashboard
- **Organization Info:** Add your organization's name, email "from" name, and logo
- **Content:** Select a default timezone and agenda style formatting
- **Agenda Template:** Create and save meeting agenda templates for easy access

> **Success Tip:** Add your administrator's contact information and links to training resources like the help center to the welcome message in your dashboard.

2 **Add More People**
- Click on **People** in the left navigation menu
- Click **Add Someone** in the upper right corner
- For each user, enter a name and log in email, then assign a role
- Remember to double check for typos and email accuracy.
- Click **Save**

> **Success Tip:** Send a "heads-up email" to the board telling them to expect an email from hello@boardable.com. Remind them to mark Boardable as a safe sender. Send invitation emails for them to join the portal after you finish building your account.

Made a mistake?

If you entered a user's name or email incorrectly, not to worry. Contact product support or your dedicated customer success manager, and we'll correct it right away on your behalf.

3 Add Groups and Assign Users

- Click on **Groups** in the left navigation menu
- Click **Add Group** in the upper right corner
- Enter the Group name and assign users to the Group
- Assign a Group owner and optional Group admins
- Click **Save**

Success Tip: Create multiple Groups. Many organizations add a "Board" Group and additional Groups for committees or departments, such as the executive or fundraising committee.
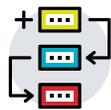
Build And Organize

4 Build a Meeting + Agenda

- Go to **Meetings** in the left navigation menu
- Click on **Add Meeting** in the upper right corner
- Create a meeting date, time, and meeting description
- Add location details and a URL for virtual meeting access
- Assign the meeting to Groups or individuals
- Click **Save and Continue**
- Build an **Agenda** and upload documents
- Test and explore: you can always go back and edit or delete a meeting
- Click **Publish Full Meeting** or **Publish Calendar Only**

Success Tip: Remember to "Publish" the full meeting page to share access to meeting documents or "Publish to calendar only" to help members save the date.

5 Organize Document Storage

- Go to **Documents** in the left navigation menu
- Create **New Folders** and sub-folders
- Upload documents for record-keeping and reference

Success Tip: Documents in the Document Center are accessible to all users unless you lock folder visibility. Limiting visibility for a specific folder also restricts associated sub-folders.
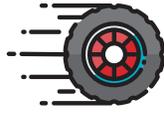
Ready To Roll

Send your invitations to board members and share onboarding and training resources like those found in the User Adoption guide and the Resource Library.

Have Additional Questions?

Check out our **Help Center** in the left navigation menu for step-by-step feature guides. Click on the chat bubble in the lower right corner to start a conversation with our product support team. Or shoot us an email at support@boardable.com.

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Hi Samantha,

Click "New conversation" to ask us anything or search our help articles to find resources on your own.

Start a conversation

> New conversation

See previous
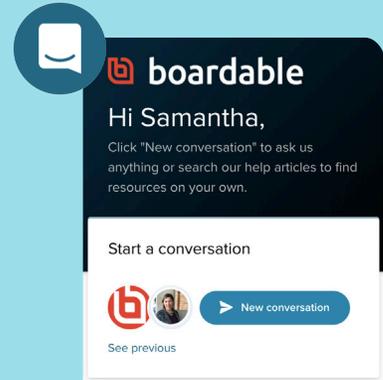
Thank you, and welcome to Boardable!

WANT PERSONALIZED TRAINING?

With a professional plan you get dedicated support from a Customer Success Manager to help get you rolling on Boardable and answer questions every step of the way. Learn more at **https://boardable.com/pricing/**

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