BoardBook®

Sending Meeting Notifications

The purpose of this document is to discuss how a meeting notification email may be sent to your board, users, and even nonuser contacts. Sending the notification email to your board members at a minimum is generally part of the meeting release process.

In this document we will cover the following subjects:

Notification email overview
When to send the notification
Sending the notification
Controlling who will receive the notification email
What is included in the notification email
Adding additional information to the email
The sent email

Notification email overview:

The notification email is intended as a way you can send an email about a specific meeting to your users. This is typically sent once the meeting materials have been made available to at least the board members and serves to let your users know the meeting is ready for them to look at. A link to the 'View Meeting Details' page for the meeting will automatically be attached. Note that if the email is being sent to any 'email only contacts' the meeting link will be to the public page.

When to send the notification:

If the mail is only going to be sent to your voting members, it can be sent once the meeting has been placed in the 'Review' status. If other users, or email only contacts are included the mail should be sent only after the meeting has been moved to the 'Published' status. If the mail is sent earlier in the process, the included link will not work as expected and your users / contacts may be confused.

Sending the notification:

On the Meetings, Minutes and Agendas screen find the row for your meeting. In the 'Emails' column click on the 'Notify' button. This will take you to the 'Email Your Users' screen where you can identify who is to be sent the email as well as make some additional configurations.

Controlling who will receive the notification email:

Once you reach the 'Email Your Users' screen, you will see a list of all of the users on your account. Note that the users with the voting member permission (your board members) will already have check marks next to their names. Place check marks next to the names of any other users you wish to include on the email. Below the users section you will find the 'Email-Only Contacts' section where non-users can be added to the mail. These contacts can be added, edited, or deleted as needed. For most organizations these tend to be media contacts for local news organizations.

What is included in the notification email:

Below the Email-Only Contacts section you will see a preview showing the email subject and contents. Note that in the email body, the last line states ‘Use the Link below for more information.’. In the actual email this line will be followed by the link to the specific meeting you are sending the email for as well as any additional information you choose to ‘attach’.

Adding additional information to the email:

Below the preview window you have options to attach meetings, policies, documents, and goals. Note that no files will be attached, instead links to the material in BoardBook will be added to the email. Meetings – this allows you to add links to additional meetings to the email.

Policies – this allows you to add links to documents stored in ‘Book’ type online storage.
Documents – this allows you to add links to documents stored in ‘Stores’ type online storage.
Goals – this allows you to link to your goals page.

Note: For more information on Online Storage and Goals, see the ‘Advanced Features’ section at the bottom of our support page.

The sent email:

Once the mail has been sent you will be taken to a Previously Sent Emails screen which will show a list of sent emails, who they were sent to, and the date / time they were sent. If you wish to view one of the listed emails, click on the email’s subject.

Note: It is common for this screen to appear before the system has confirmed all recipients of the email have been included. Simply refreshing the screen should show the complete list of recipients.