

CAMP Meetings for POs

New Pre-Construction Meeting

1. Click Apps → Click Meetings → Click New Pre-Construction Meeting
2. Enter Subject → Enter Location → Select Date → Enter Time
3. Click Save / Close
4. Select the Meeting record → Click Edit
5. Click Attendees → Insert lines for Attendees → Select users from the dropdown. To add Multiples, Click Add Multiple → Select users → Click Select
6. Insert lines for Other Attendees → Add Name, Company and Contact info
7. Click Meeting Items → Pop out the section or Click Show All
8. Enter Agenda Details for each → Click Save / Close
9. Click View to download/print Meeting Sign-In Sheet and Meeting Agenda
10. After the meeting, update the Attendees list and Meeting Minutes
11. Click Distribute → Click Finalize to lock the meeting

CAMP Meetings for POs

New Meeting

1. Click Apps → Click Meetings → Click New
2. Enter Subject → Select Type → Enter Location → Select Date → Enter Time
3. Click Save / Close
4. Select the Meeting record → Click Edit
5. Click Attendees → Insert lines for Attendees → Select users from the dropdown. To add Multiples, Click Add Multiple → Select users → Click Select
6. Insert lines for Other Attendees → Add Name, Company and Contact info
7. Click Meeting Items → Must Insert 11 lines items and 1-11 items. Add additional as needed
8. Enter Agenda Details for each item → Click Save / Close
9. Click View to download/print Meeting Sign-In Sheet and Meeting Agenda
10. After the meeting, update the Attendees list and Meeting Minutes
11. Click Distribute → Click Finalize to lock the meeting

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Meeting Series

1. Select the Meeting record → Click Unlock → Click Edit Series → Add Meeting Date
2. Select the original Meeting → Click Finalize
3. Click Add Meeting
4. Select the New Meeting from the Log list → Click Copy From Previous → Click Continue
5. Click Edit → Add/Adjust Attendees → Add/Adjust Meeting items → Adjust Type for each item
6. Click Save / Close
7. Click View to download/print Meeting Sign-In Sheet and Meeting Agenda
8. After the meeting update the Attendees list and Meeting Minutes
9. Click Distribute → Click Finalize to lock the meeting

CAMP Meetings for POs

Creating a Meeting with a Past date

1. Click Apps → Click Meetings → Click New
2. Enter Subject → Select Type → Enter Location → Select Date → Enter Time
3. Click Save / Close
4. Select the Meeting record → Click Edit
5. Change the date to past date → Click Save / Close
6. Continue with Meeting process