Meeting Summary

The instructions in this article relate to **Meeting Summary.** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.
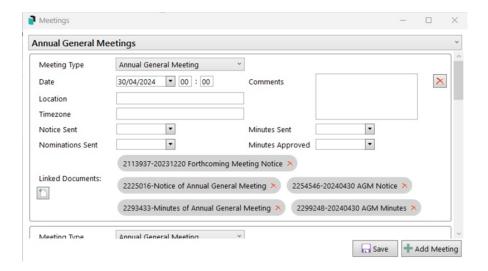
The **Meeting Summary** icon helps you easily record and retain key details for your meetings, including the date, time, location, and notice distribution dates for Annual General Meetings, Committee Meetings, and Extraordinary General Meetings, accessed from **Building Information** or via the **Meeting Summary** icon this feature ensures your meeting history is well-organised and accessible.

Each meeting entry can also be linked to multiple supporting documents—such as the Agenda, Meeting Materials, and Minutes.

Adding a Meeting

To record meeting details in the Meetings window, also located in **Building Information**;

1. Search or select **Meeting Summary**.
2. Select the meeting type from the drop down arrow.
3. Click *Add Meeting.*
4. Add all details (Location, Timezone, etc.) as required.
5. Under the 'Linked Documents' field, click the *Add Meeting Document* button to open the DocMax 'Select Document' window, to select and link a document to this meeting.
6. Once all fields are populated as needed, click *Save*.

Delete a Meeting

To delete meeting information incorrectly recorded;

1. Search or select **Meeting Summary**.
2. Select the meeting type from the drop down arrow.
3. Locate the meeting and select the red X next to the meeting to delete the record.
4. Click *Save*.