Quick Start

Manual

Version 2 — Last update: September 26, 2013

MeetingKing

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Quick start guide

What is MeetingKing?

MeetingKing is a meeting documentation and task management tool. It helps you to

- easily prepare a **meeting agenda**
- turn your short notes into **professional minutes**
- manage all your **tasks**
- get a comprehensive overview of your **projects and departments**

You can use MeetingKing alone or as a true collaboration tool.

Who is it for?

MeetingKing is used by all kinds of individuals and organizations all over the world. Our users include:

- consultants
- lawyers
- schools
- churches
- restaurant and hotel chains
- retail chains
- (semi) government organizations
- large corporations

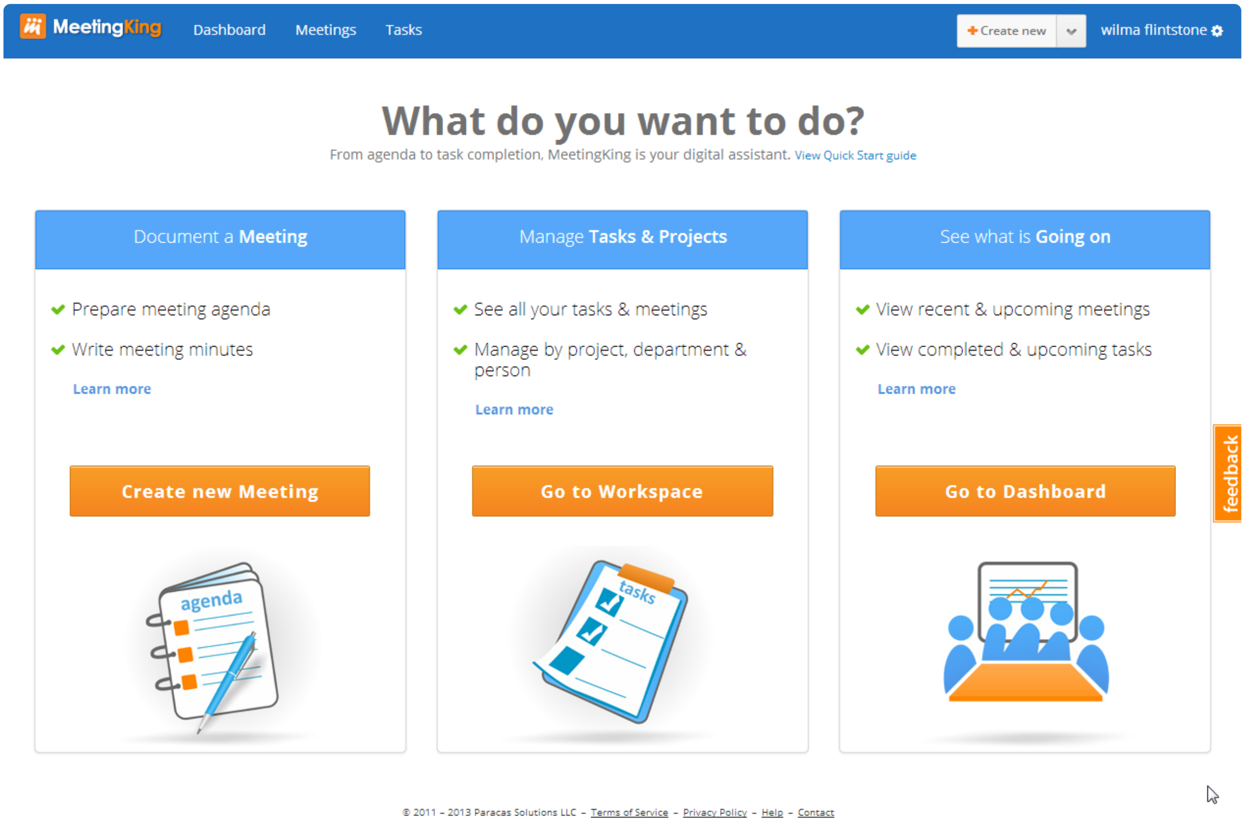
When can I use it?

- Use it **alone** or as a **collaboration** tool
- Great for **on-line** meetings and **face-to-face** meetings

How to get started?

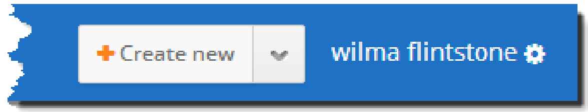
After logging in, you will get to the home page. From this page you can:

- easily start a new meeting to prepare an agenda and make meeting notes
- go to your workspace to create and manage your tasks and view all your meetings
- go to the Quick Overview to see what is coming up and what was recently done



[Create new meeting —>]

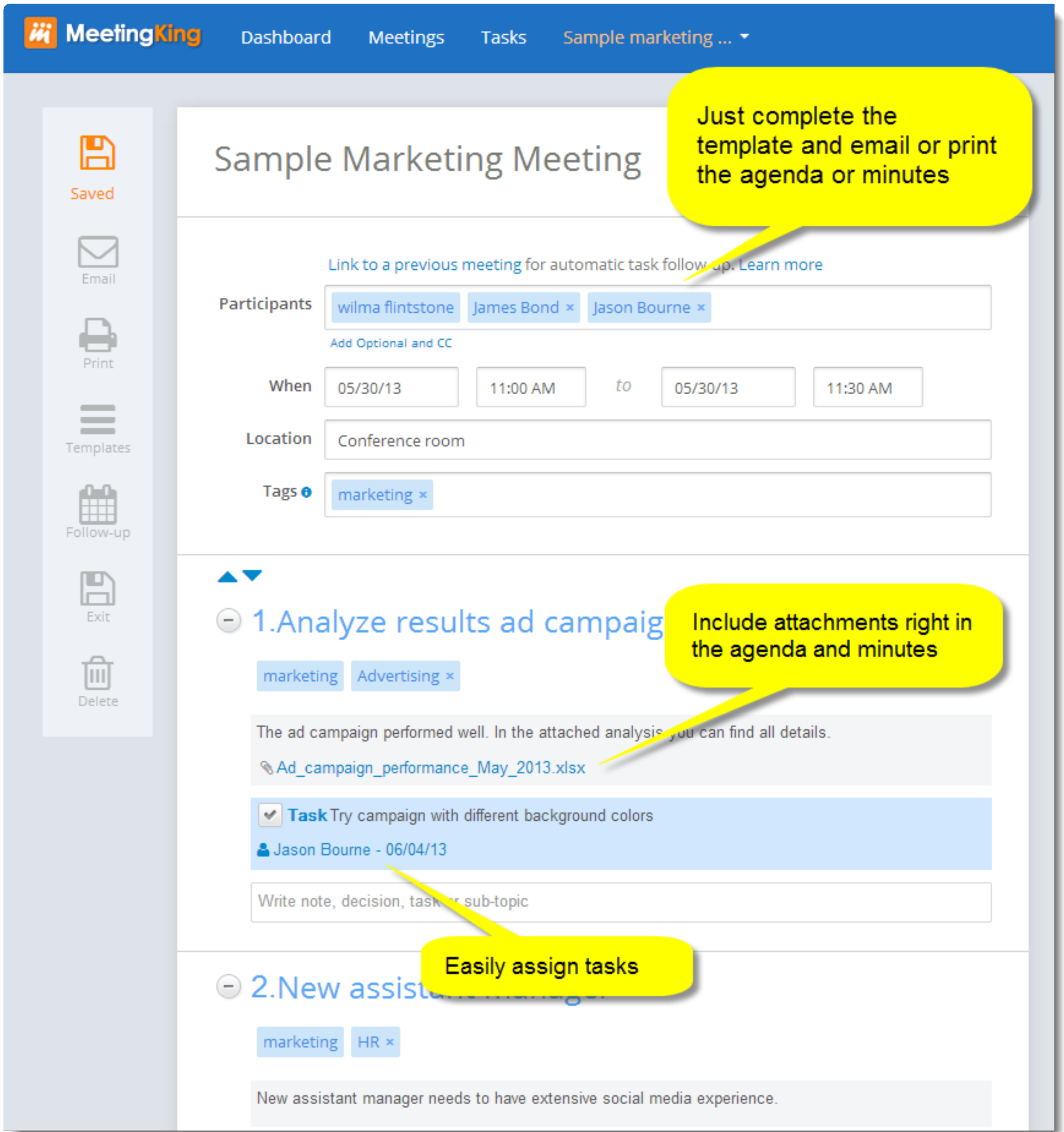
Create new meeting



Click the Create New Meeting button in the home screen or the Create New button in the main navigation bar.

This will create a new meeting document and all you have to do is complete the fields in the template and your agenda is ready. You can **collaborate** with the other meeting participants on the agenda, you can **add notes**, **assign tasks** and **share files**.

Meeting invitees do not need to have a MeetingKing account for MeetingKing to be effective. You can use it simply as an easy way to create and distribute your agenda, to take notes and email the minutes and manage all your tasks.



[Workspace – Manage your business —>]()

Workspace - Manage your business

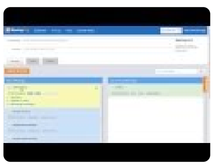
The workspace gives you a complete overview of what is going on, what was done and what needs to be done.

There are three main areas in the workspace:

- Meetings
- Tasks
- Calendar

The real power of MeetingKing is the ability to quickly filter information by project, department or person. You can also make combinations. For example find all tasks and meetings that have to do with “marketing” for “project xyz” that you discussed with “Jason Bourne”.

See how easy it is to find all your information and be in control

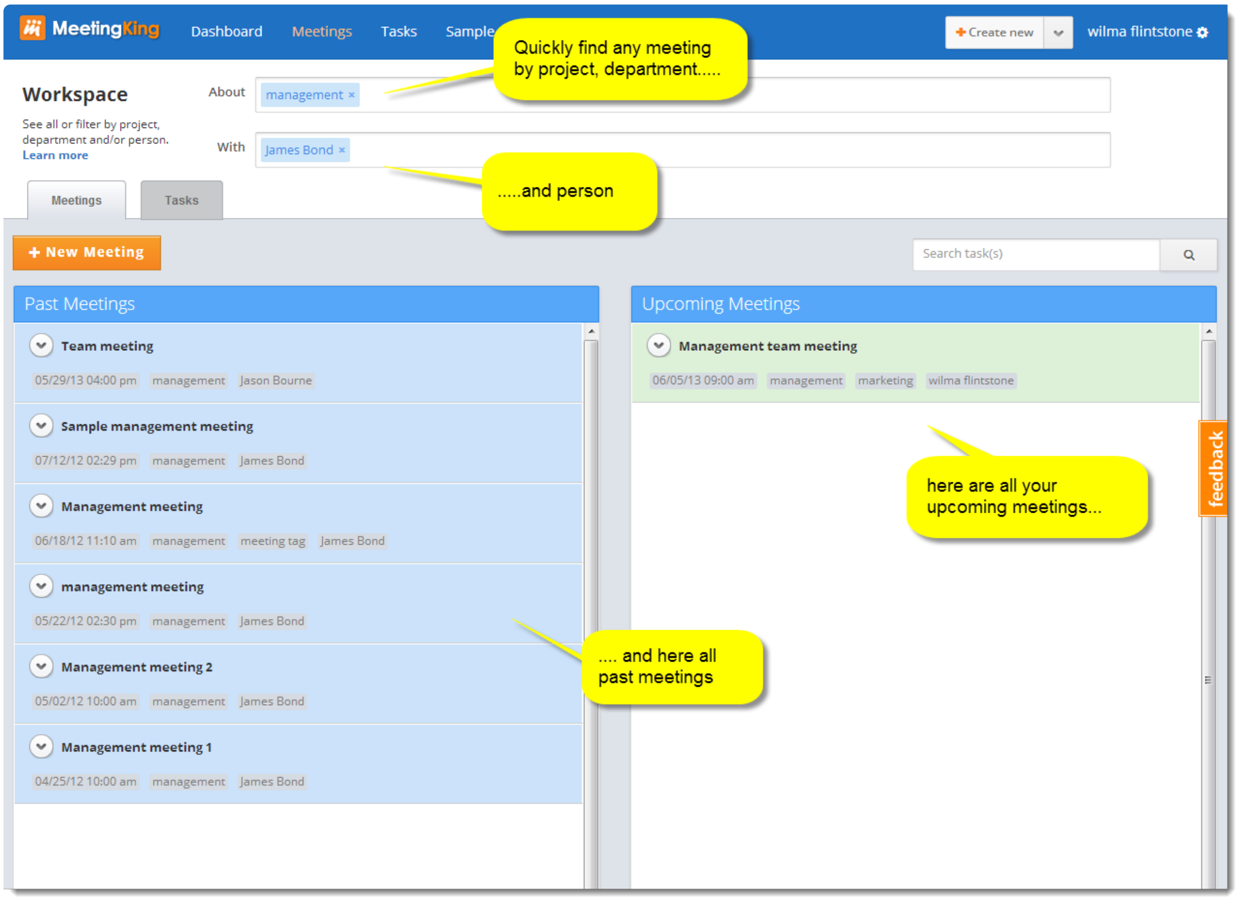


More on filtering by tags.

Meetings overview —>

Meetings overview

The meetings view lists all your past meetings in the left column and any upcoming meetings in the right column. Your past meetings are sorted with the most recent meeting at the top and your future meetings are sorted the other way around with the first up-coming meeting at the top. This way you have easy access to your most recent meeting and your next meeting.



Meetings with a blue background are past meetings and meetings with a green background are future meetings.

Under each meeting title you can see the date and time, projects/tags associated with the meeting and the name of the meeting organizer. When you click the arrow button in front of the meeting title you can see the agenda.

Under each meeting title you can see date and time, any tags associated with the meeting and the meeting organizer. When you click on one of the tags, it will be added to the “About” filter at the top of the page. When you click on the name of the organizer, his/her name will be added to the “With” filter at the top of the page. This filter remains when you switch from meetings and tasks and back.

You can open a meeting by simply clicking on the meeting title.

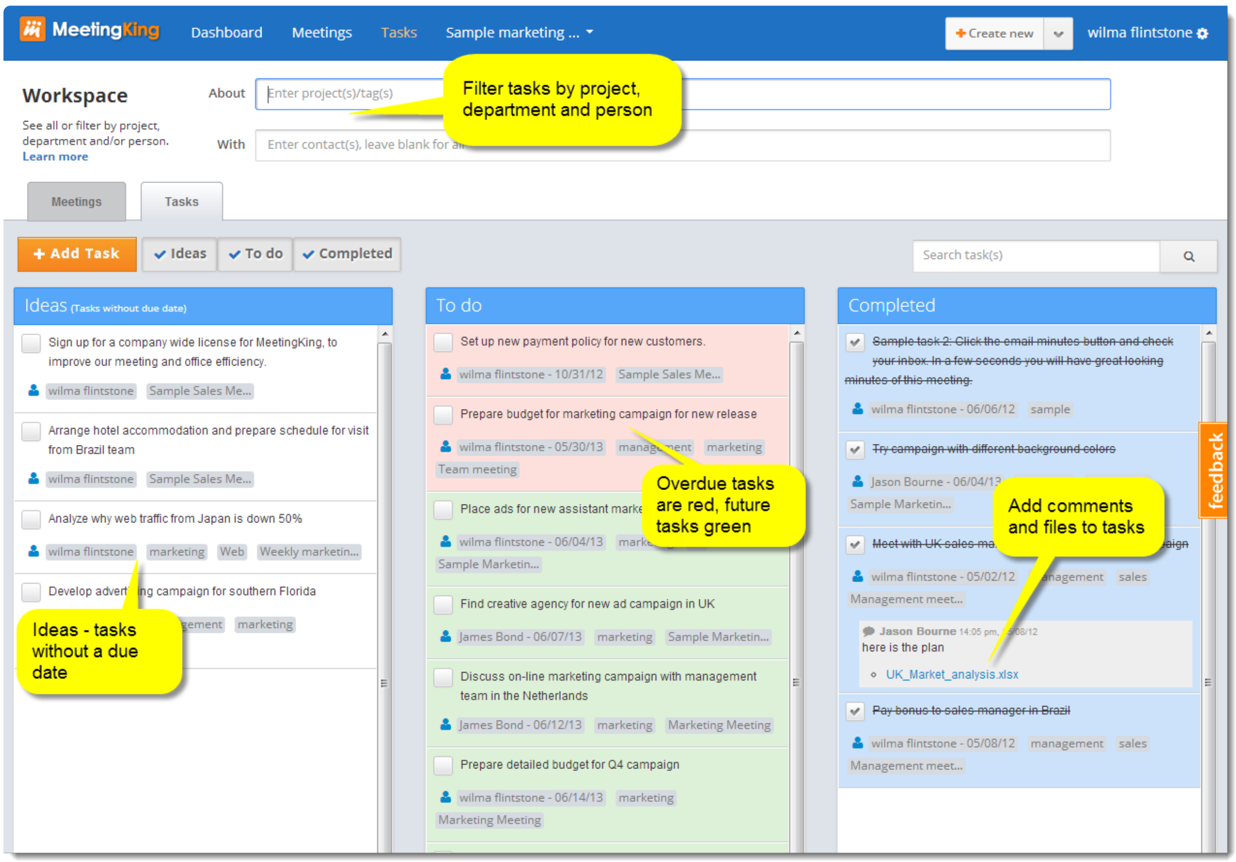
In addition to creating a new meeting through the button in the main navigation bar at the top of the page, you can also create new meetings on this Workspace > Meetings page. When you click the “New Meeting” button, your new meeting will automatically get the tags that you have in the “About” filter that the top of the page.

[Task overview —>]

Task overview

In this page you have three columns with tasks:

- **Ideas** – tasks without a due date
- **To-do** – tasks that have a due date
- **Completed** – completed tasks so you feel good about what was accomplished, but also because you can easily find any comment with attachments.



Ideas have a white background, overdue tasks are red, future tasks are green and completed tasks are blue.

Under each task you can see the due date, the owner, any tags associated with the task and if the task was created during a meeting, the meeting title. To quickly find the context of the task you can click the meeting title to open the meeting. When you click on one of the tags, it will be added to the “About” filter at the top of the page. When you click on the task owner, his/her name will be added to the “With” filter at the top of the page. This way you can quickly see what that person has to do for you. This filter remains when you switch from meetings and tasks and back.

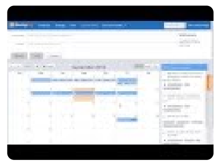
You can also create new tasks on this Workspace > Tasks page. When you click the “Add Task” button, the new task will automatically get the tags that you have in the “About” filter that the top of the page. This makes MeetingKing the easiest project management tool you have ever used.

Calendar view —>

Calendar view

The calendar view is great to get a quick overview of what is going on and to plan your business.

Just like on the meetings and tasks pages you can look at everything or view only the meetings and tasks that have to do with a certain project, department or person.



Adding a new meeting or new task

To add a new meeting or task simply place your cursor on the date and time where you want to create it and click you mouse. Then you select if you want to add a task or a meeting.

Changing the date and time

If you want to change the date and time of a meeting or the due date of a task simply click and hold the meeting or task in your calendar and drag it to another day.

Assigning a due date to Ideas

On the right of the calendar is the Ideas column. Ideas are tasks without a due date. If you want to add a date to an Idea (and thus turn it into a To Do), simply click and hold the task in the Ideas column and drag it onto your calendar.

More features

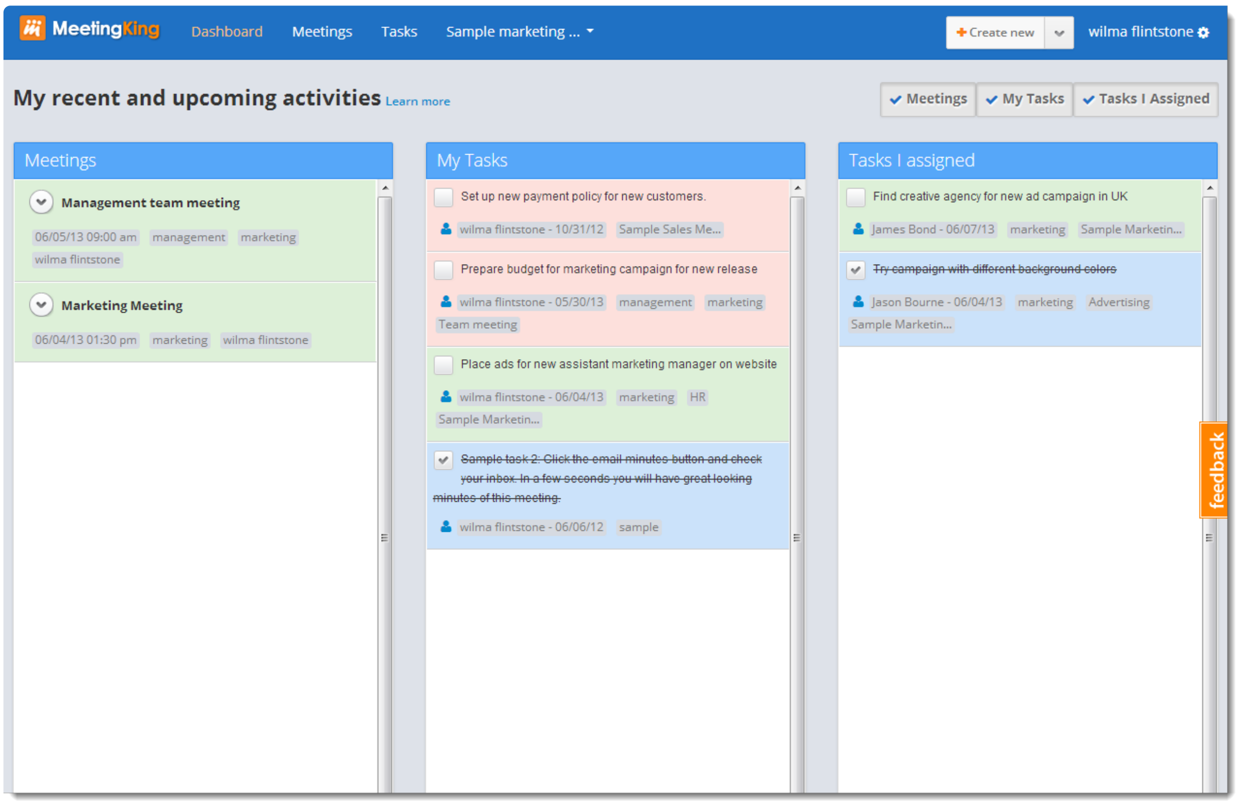
View your Google Calendar in MeetingKing and turn Google Calendar events into MeetingKing meetings.

Dashboard —>

Dashboard

The Dashboard gives you a quick overview your recent and upcoming activities. There are three columns:

- Meetings
- My tasks
- Tasks I assigned



Meetings

The Meetings column shows your meetings of the last two days and your meetings in the 5 days. Meetings with a blue background are past meetings and meetings with a green background are your upcoming meetings.

Under each meeting title you can see the date and time, projects/tags associated with the meeting and the name of the meeting organizer. When you click the arrow button in front of the meeting title you can see the agenda.

You can open a meeting by simply clicking on the meeting title.

My tasks

The My tasks column displays:

- the tasks you completed in the last 2 days (blue)
- your overdue tasks (red)
- your tasks that will be due in the next 5 days (green)

When you hoover over a task you can edit the task, delete it, reassign it and provide comments.

Under the tasks you can see the due date, any tags associated with the task and if the task was created during a meeting, the meeting title. To quickly find the context of the task you can click the meeting title to open the meeting.

> If you don’t want to navigate away from the Quick Overview, right click on the meeting title and open the meeting in a new tab or browser window.

Tasks I assigned

The logic for the tasks I assigned is the same as for My tasks, except of course that this column lists the tasks that others have to do for you. Often times we are pretty good at writing down our own tasks, but keeping track of what is owed by others leaves much to be desired in many cases. With MeetingKing nothing will fall through the cracks.

Navigation buttons

With the gray buttons at the right of the screen you can hide any column if you want to focus on just one column.

Introduction video —>

Introduction video

After this video you will be ready to go and get the most out of MeetingKing.

Continue with the complete user manual —>

Continue with the complete user manual

You now know enough to get started and have more productive meetings with less effort.

If you want to explore more you can do so in the complete manual and continue at:
http://meetingking.com/manual/2/en/topic/document-your-meetings

Contact us

We are committed to helping you have better meetings, managing your organization more efficiently and getting things done.

If you have any questions, suggestions or other feedback, please contact us or call + 1 860 255 8430

Thank you for using MeetingKing,

The MeetingKing team