

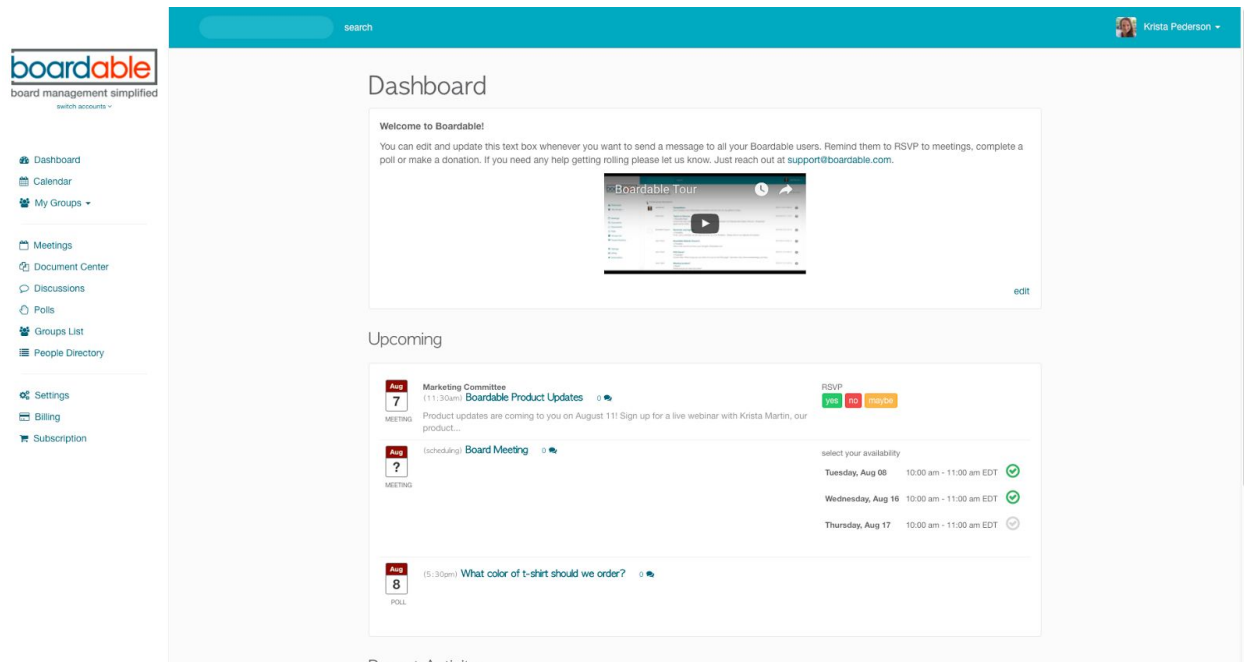


# 2017 August 2.3 Release Notes

<b>Updated Dashboard</b>	<b>2</b>
Upcoming	2
Recent Activity	3
<b>Account Types</b>	<b>3</b>
Administrator	3
Member	4
Observer	4
<b>Calendar</b>	<b>5</b>
<b>People Directory</b>	<b>5</b>
Welcome Email Icon	5
Login Email	5
Account Type Indicator	6
<b>Group Page</b>	<b>7</b>

## Updated Dashboard

You can now view all upcoming deadlines including polls, upcoming meetings and meetings that are being scheduled! Recent activity for your group or organization is also displayed on the dashboard.



### Upcoming

- Select availability for meetings in the Scheduler mode

select your availability

Tuesday, Aug 08 10:00 am - 11:00 am EDT

Wednesday, Aug 16 10:00 am - 11:00 am EDT

Thursday, Aug 17 10:00 am - 11:00 am EDT

- RSVP to a scheduled meeting

RSVP

- View and respond to a poll

(5:30pm) What color of t-shirt should we order?


POLL


## Recent Activity

- Displayed below the upcoming items is a recent activity module. This will display all recent activity in any group or organization that you belong to.


### Recent Activity

Aug 07

 Krista Pederson added a meeting **Board Meeting**

 Krista Pederson added a poll **What color of t-shirt should we order?**

We will be ordering t-shirts for the team and for new customers, what colors should we get? Please select your...

 Krista Pederson added a meeting **Boardable Product Updates**

Product updates are coming to you on August 11! Sign up for a live webinar with Krista Martin, our product...

## Account Types

There are three account types that you are able to assign to each user in your organization's account. The Member role has been updated. To review here are the permissions for each type.

Account Type	Billing Settings	Subscription	Organization settings: name, logo	View all org activity	Add Person	Add Group	Add Meeting	Add Poll	Add Discussion	Doc Center Access	Respond to Poll/Meeting/Discussion	User Profile
Admin	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Member					✓	✓	✓	✓	✓	✓	✓	✓
Observer											✓	✓

## Administrator

- People
  - Add new users to organization
  - Edit existing users in organization
- Groups
  - View activity for all groups, even if they are not a part of the group
  - Create groups
  - Edit existing groups
- Meetings
  - Create meetings
  - View all meetings across the organization
- Polls
  - Create polls
  - View all polls across the organization
- Discussions
  - Create discussions
  - View all discussions across the organization
- Document Center

- Upload files and create folders
  - Limit access to folders by group
- Account Settings
  - Update logo, name and email for account
- Billing
  - Update billing information for the account
- Subscription
  - Update subscription level

## Member

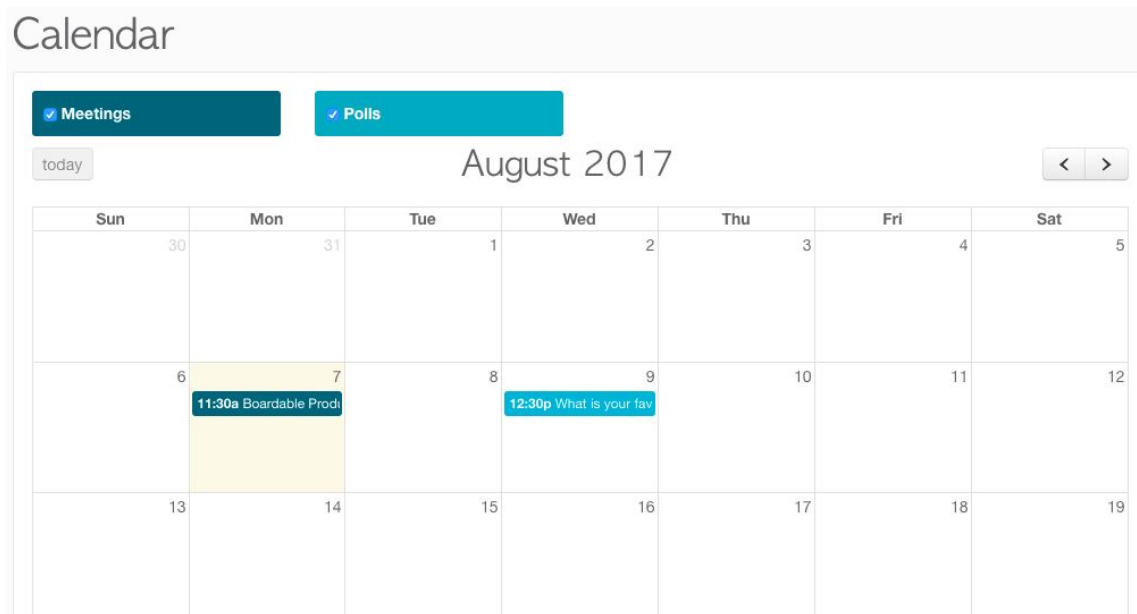
- Groups
  - View activity and information to groups that they belong to
  - Cannot edit or add groups
- Meetings
  - View meetings that they are a part of
  - Create meetings
- Polls
  - View polls that they are a part of
  - View group polls if they belong to the group
  - Create polls
- Discussions
  - View top level discussions (not assigned to any group)
  - View discussions for groups that they belong to
  - Create discussions
- Document Center
  - View all documents that are not in a protected folder
  - View protected documents if they are a part of the group with access
  - View all documents that are attached to meetings or groups they they belong to
  - Create files and folders in Document Center

## Observer

- Groups
  - View activity and information for groups that they belong to
- Meetings
  - View meetings that they are invited to
- Polls
  - View polls for a group they belong to
  - View poll that has been attached to any group that they belong
- Discussions
  - View discussions that are attached to groups that they belong to
- Documents
  - View documents that are part of meetings, groups or polls that they belong to

## Calendar

The calendar now has it's own page. It also includes a reference guide for upcoming items. In the calendar page you can view and add upcoming meetings and polls depending on your permission level.



## People Directory

### Welcome Email Icon

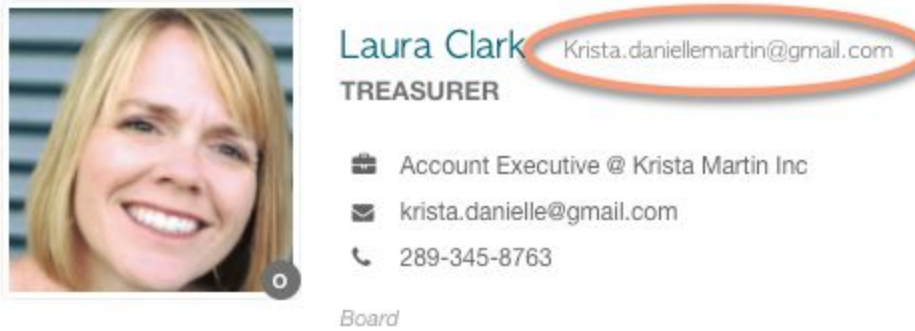
The welcome email will display as inactive if the user has logged in.

- The welcome email can be resent to the user by clicking on the gray



### Login Email

Admins can now view the login email for each user. Next to each user in the People Directory the login email can be found to the right of the user's name.

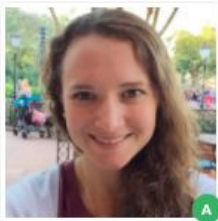


Profile card for Laura Clark, Treasurer. The card includes a photo of a woman with blonde hair, a small gray circle with an 'O' in the bottom right corner, and the following text: **Laura Clark**, *Krista.daniellemartin@gmail.com* (circled in orange), **TREASURER**, Account Executive @ Krista Martin Inc, *krista.danielle@gmail.com*, 289-345-8763, and *Board*.

### Account Type Indicator

As an admin you can view the user's account type in the people directory indicated by a small letter in the bottom right hand corner.

- Admin (Light green circle with an 'A')



- Member (No letter or circle)



- Observer (Gray circle with an 'O')




## Group Page

Sorting options have now been added to the edit group page.

- Sort by
  - Last Name
  - Company
  - Last Updated

### People

	^ Name	Company	Last Updated
<input checked="" type="checkbox"/>	 Laura Clark	Krista Martin Inc	19 minutes ago
<input type="checkbox"/>	 William Joseph	Krista Martin Inc	12 hours ago
<input checked="" type="checkbox"/>	 Krista Pederson	Krista Martin INC	1 month ago
<input checked="" type="checkbox"/>	 Adelaide Wagner	Krista MARTIN INC	1 month ago