Note: “Select” usually means click, tap, etc. when it comes to buttons and links.

## Setting Goals (do this at start and middle of the year at minimum, may want reviews every other month)

1. Make a worksheet to give out at the meeting to get this year’s goals for all members; use that data to update and add goals
2. From the Scheduling & VPE Tasks side menu, select 
3. From the Action column on the right, select the  button to add a goal, the  button to edit, and the  button to delete the goal.

## Adding Meetings/Events (add next month’s meetings at the start of every month)

1. Go to the current meeting (Meetings > Meeting on [Date])
2. Keep selecting  in the upper right corner until you reach the last meeting
3. Select the  button that appears
4. On the Post a New Event screen, verify the date, time, and other details
5. Change the Meeting Manager to yourself
6. Make sure to change the agenda to Wilco TM Default (or whatever agenda is appropriate)
7. Select 
8. Optional: Select “Submit a new event” on the next screen

Alternatively, you can use the Meetings > Calendar, then use the New Event button in the lower right.

## Deleting Meetings/Events

1. Open the meeting you want to delete
2. Select  in the upper left corner
3. Check the  box at the bottom, and select Submit

Note:  can be used to change the meeting date/time, meeting manager, agenda to use, etc.

## Filling Roles (do after meeting for the next meetings that people have signed up for)

Note: this applies to non-speech roles (e.g. timer, GE, table topics master, etc.) – use the signup sheet to help with this

Note 2: Pre-fill the Toastmaster slot for the next two months with eligible candidates at the start of each month

1. Open the meeting you want to modify
2. In the dropdown for a role, select the member who will fill the role
3. Select 

## Filling Roles (adding speeches)

1. Open the meeting you want to modify
2. If there is an existing speech in the drop down for the speech slot you can use that. If not, keep going
3. Select the button next to that slot (new window appears)
4. Select a member from the drop down list, then select 
5. Fill in the speech title if you have it in the Title box, otherwise enter “To Be Determined” or TBD
6. Select the Workbook / Speech tab
7. If there is an existing workbook in the list, select the link for it, then the project
8. If there isn’t, use the “Select a Workbook” dropdown to choose the manual, then select the project
9. Select in the upper right corner (all three tabs must have check marks)

## Working with Speech Requests

Members can request speeches; you will receive an e-mail. Pay attention to the requested dates, and use the link in the e-mail to process them (the process is the same as adding them yourself, but you must also select 1st and 2nd date preferences).

## Sending Meeting E-Mails (do this after filling roles, no more than a day after the meeting, and also 3 days before the meeting)

1. Go to the current meeting (Meetings > Meeting on [Date])
2. In the upper right corner, select the e-mail button
3. Edit the Subject line if you like
4. Select the Member, Inactive Member, and Special Guest lists (set them to Yes)
5. Copy the text from the Hello Toastmasters text file and put it below the existing text
6. Click the “First e-mail” button

Note: Text or call the Toastmaster directly to confirm they received the check list

## Adding Members

You will need the first name, last name, e-mail, and phone numbers for the new person

1. Go to the current meeting (Meetings > Meeting on [Date])
2. Select  in the upper right corner
3. Change the status to Member
4. Set the appropriate date
5. If there was someone who introduced them to the club, select that from the list
6. Use one of the options to verify they don’t already have an Easy Speak account (if they do, use it)
7. Assuming you are using the “Input full name and email”, enter their name and e-mail address
8. Enter more details as needed

## Closing Meetings (do this after a meeting)

Meetings must be closed to get the next meeting ready. You will need to know who actually did what, as well as any award winners

1. Go to the current meeting (Meetings > Meeting on [Date])
2. You will likely be asked to close the previous meeting if it hasn’t been done, select Yes
3. Confirm the word of the day is there. If not, select the button.
4. A new window will appear; enter the word that was used and select 
5. Next, confirm attendance and absences. For each member that attended, select  - a green checkmark should appear. Select  for non-attending members that previously confirmed – a red X should appear
6. Select once that is done
7. Verify the actual meeting roles, then select  again
8. Select any award winners for Best Speech, Best Table Topics, and Best Evaluator drop downs, then select  again (if a guest won, leave it blank)
9. Once all meeting info is confirmed, use  in the upper right corner.

Note: If you need to, you can use  to open the meeting back up, then

## Printing Signup Sheets (do this one day before/day of meeting)

1. From the Scheduling & VPE Tasks side menu, select 
2. Change “Look ahead up to: 4 Meetings” to 5
3. Check the  checkbox
4. Select the  button (the chart will open)
5. Print the resulting page

## Printing Agendas

Note: The Toastmaster should do this, but they don’t always. I usually like to have one for myself

1. Go to the current meeting (Meetings > Meeting on [Date])
2. In the upper right corner, select either  or  (detail is preferred)
3. A new browser tab will open with the agenda. Print the agenda using browser controls (Ctrl-P for Windows)
4. Close the tab