

Clerk's Quick-Start Guide



From sign-up to your first meeting — in one sitting.

You were elected to keep good order — not to manage spreadsheets and email chains. **Orderly Meetings** gives you a single place for agendas, minutes, attendance, and RSR submission. This guide gets you from sign-up to your first meeting in less than an hour.

PART 1 Set Up Your Account — takes about 10 minutes

- 1 Sign up at app.orderlymeetings.com** — 35-day free trial, full access, no credit card. Use your official church email so members recognize the invitations they'll receive.
- 2 Create your Organization** — your church or legal entity, named exactly as it appears in your records. This is the permanent home for all your governing documents.
- 3 Set up your first Assembly** — the decision-making body you serve. Start with Session. Add diaconate, trustees, or committees later — each gets its own members and records.
- 4 Create a Meeting Template** — your standing docket: Opening, Committee Reports, Pastoral Reports, Special Business, Closure. One template, every meeting. Skip it now and come back — but it pays off fast.

BETTER TOGETHER

The Network Effect

When your session *and* your presbytery both use Orderly Meetings, RSR submission happens automatically the moment minutes are approved. **No ZIP. No email. No two-year lag.** Your review committee gets the records the same day — while you still remember what you submitted.

Ask your presbytery clerk if they're on Orderly Meetings — or share orderlymeetings.com/for-presbyteries with them.

PART 2 Prepare Your First Meeting

- 5 CREATE A NEW MEETING**
Hit *New Meeting*, enter the date, time, type (stated or called), and location. You'll land in *Agenda Mode* — your working space before the meeting.
 - TIP**
The meeting type matters for RSR. Stated, called, and congregational meetings have different record requirements. Orderly Meetings tracks this automatically.
- 6 BUILD YOUR AGENDA SECTIONS**
Create *Sections* for the broad topics of your meeting — Opening, Reports, Special Business, Closure. Add agenda items inside each section. Attach supporting documents inline.
 - TIP**
Add business items, motion language, and attachments right in the agenda. Your elders will have everything they need before they sit down.
- 7 SEND THE AGENDA — WITHOUT EMAIL CHAOS**
Click the **envelope icon** (top right) to notify members. Send to all members or leaders only. They get a link — not a PDF. One URL, always current.
 - TIP**
No more "final-final-final.pdf." Make a last-minute change? The link they already have reflects it instantly. No resend needed.
- 8 RUN THE MEETING — TOGGLE TO MINUTES MODE**
When the meeting starts, toggle to *Meeting Mode*. Your agenda converts to a live minutes template. Record attendance, actions, and votes as you go.
 - TIP**
Comments and questions from members are tracked inline — right alongside the agenda section they're about. One place for every note.

9 SHARE MINUTES FOR REVIEW

After the meeting, share the draft minutes with your session for review. Members can comment directly in Orderly Meetings — no email threads, no feedback scattered across texts and ChMS chats.

TIP

Every comment is attached to the specific section it's about. When it's time to approve, you'll have a clean record of what was discussed and resolved.

10 RUN RSR PRE-CHECK BEFORE YOU SUBMIT

Before submitting to your presbytery, run the *RSR Pre-Check*. Orderly Meetings checks your minutes against your R&C committee's published checklist and flags anything that needs attention.

TIP

Know if your minutes will pass review before the committee ever sees them. No surprise citations two years later — fix it now, while you still remember the meeting.

11 BUILD YOUR PDF PACKET

Use the *PDF Packet Builder* to generate a single, clean document — minutes, attachments, and reports combined, auto-footnoted with file and page references. One click. One file.

TIP

This is your official record packet. Use it for session archives, RSR submission, or sharing approved minutes with members who prefer a printed copy.

12 SUBMIT FOR RSR — ONE CLICK

Once minutes are approved, submit to your presbytery directly from Orderly Meetings. No ZIP file. No email. No hunting for the upload form. If your presbytery is on OM, review can begin the same day.

TIP

Ask your presbytery clerk if they're on Orderly Meetings. When both sides are connected, submission is automatic the moment minutes are approved — no action required on your end.

PART 3

Help Your Assembly Members Get On Board

A ANNOUNCE IT BEFORE YOU INVITE

At your next meeting, let members know you're moving to Orderly Meetings — then send a follow-up through your normal channel so they expect the invite. Cover the three reasons it matters:

- Records are owned by the church, not stored in a personal account.
- No more version confusion — members always see the latest agenda.
- Feedback stays in one place, not scattered across texts and email.

B INVITE YOUR MEMBERS

Go to your Assembly's member list and send invitations from within Orderly Meetings. Members get a simple email link — creating their account takes less than 3 minutes. You can do this right after setup or once you've run your first meeting.

YOUR QUICK-START CHECKLIST

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| <input type="checkbox"/> Sign up at app.orderlymeetings.com | <input type="checkbox"/> Create your Organization | <input type="checkbox"/> Set up your Session assembly |
| <input type="checkbox"/> Create a Meeting Template | <input type="checkbox"/> Create your first meeting | <input type="checkbox"/> Build agenda sections |
| <input type="checkbox"/> Send the agenda link | <input type="checkbox"/> Toggle to Meeting Mode | <input type="checkbox"/> Share minutes for review |
| <input type="checkbox"/> Run RSR Pre-Check | <input type="checkbox"/> Build your PDF packet | <input type="checkbox"/> Submit to presbytery |
| <input type="checkbox"/> Announce OM to assembly | <input type="checkbox"/> Invite your members | <input type="checkbox"/> Ask if presbytery is on OM |

READY TO GET STARTED?

**35-day free trial. All features.
No credit card required.**

Built for Presbyterian clerks, by a Presbyterian clerk.

START FREE TRIAL

app.orderlymeetings.com