

# PayBiz – Meetings

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23/02/2026

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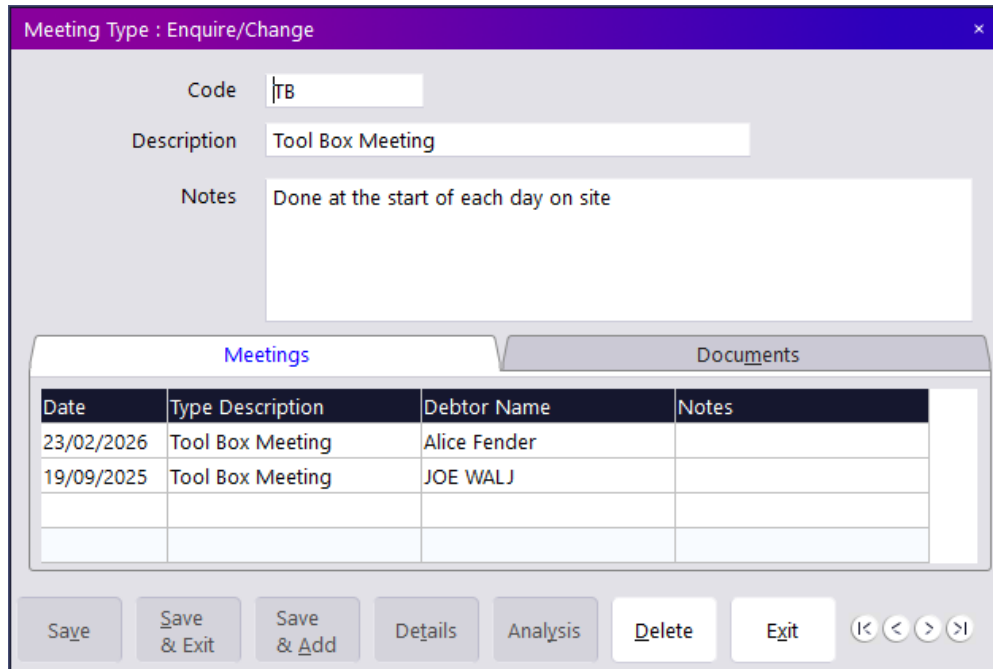
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## Meetings

PayBiz main menu > Health & Safety > Meetings

Meeting details are entered into the header.

The table beneath shows each meeting in reverse chronological order (most recent at the top).

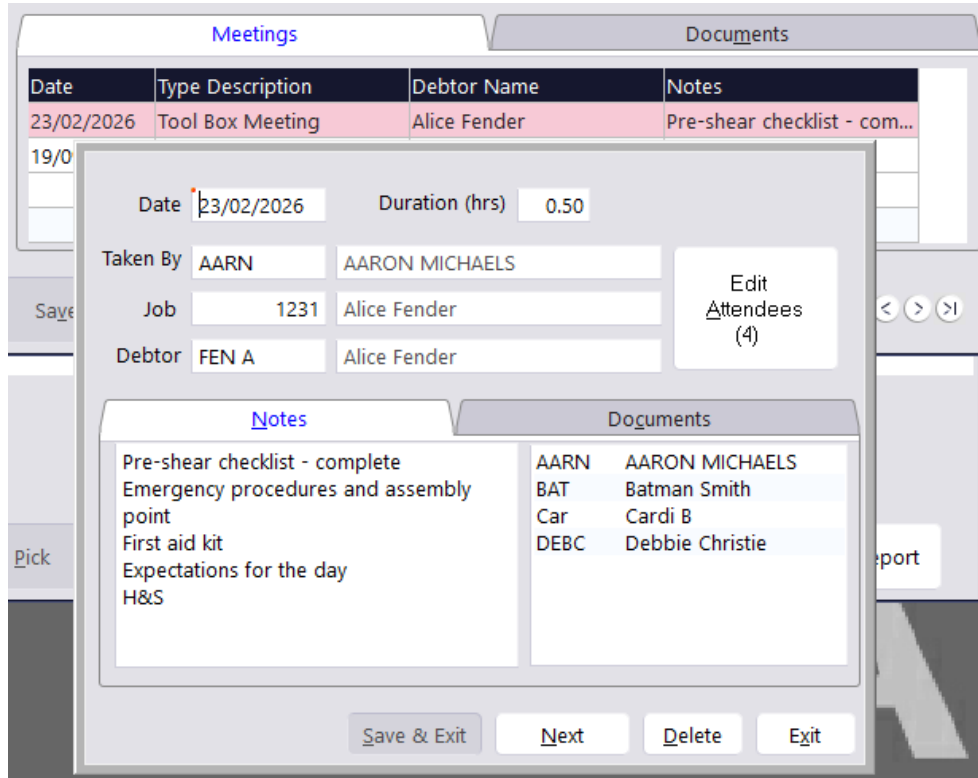


Date	Type Description	Debtor Name	Notes
23/02/2026	Tool Box Meeting	Alice Fender	
19/09/2025	Tool Box Meeting	JOE WALJ	

Figure 1: Job / Tally Sheet header

Field	Description
Code	Up to 8 characters. Unique identifier for this meeting type.
Description	Up to 30 characters.
Notes	Free text area to enter notes. Double-click or F8 to open in a separate window to view, print or save.
Meetings table	Click an existing line to view details of an existing meeting. Click a blank row or Right-click an existing row to add a new meeting. See below for details.
Documents tab	Upload or view documents related to this meeting type.

Meetings can be added from the **Health & Safety** menu or from the **Details** button on the **Job/Tally Sheet** or **Debtor** screens.



**Figure 2: Meeting example**

Field	Description
Date	Mandatory. Date the meeting was held. Double-click or F8 for a calendar to pick from.
Duration	Optional. Duration of the meeting in hours.
Taken by	Optional. Employee who led the meeting. Double-click or F8 for a list to pick from.
Job	Optional. Enter the job/tally sheet associated with this incident if applicable. Hit F8 for a lookup to pick from.
Debtor	Optional. Enter the client code associated with this this incident if applicable. Hit F8 for a Debtor lookup to pick from. If a Job/Tally Sheet has been entered this will default to the Debtor associated with the job but can be overwritten.
Notes	Free text area to enter notes. Double-click or F8 to open in a separate window to view, print or save.
Attendees	Lists the current meeting attendees
Documents tab	Upload or view documents related to this meeting.

## Edit Attendees

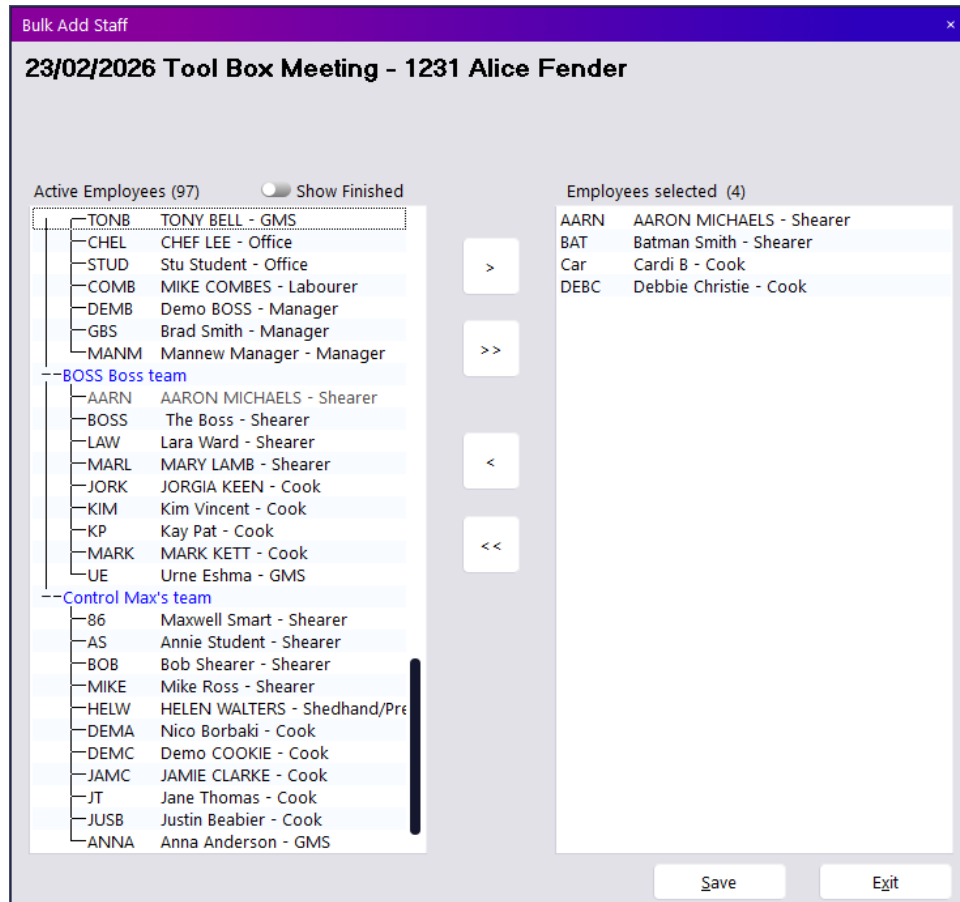


Figure 3: Add / Edit Attendees

Click the **Add / Edit Attendees** button on the Meeting screen to Bulk Add or Remove staff. Active Employees are listed on the left side, organised by teams. Turn **Show Finished** = ON to show employees who have finished.

If the Meeting has been added from a Job/Tally Sheet the **Selected** list will default to the employees on the tally sheet.

To edit the list highlight the desired employees/teams then click the appropriate button to add or remove:

- > - add highlighted employees/teams to the Selected list
- >> - add ALL employees to the Selected list
- < - remove highlighted employees from the Selected list
- << - remove ALL employees from the Selected list

To highlight multiple employees:

- Hold down the **Shift** key to select a range of employees
- Hold down the **Ctrl** key to select multiple employees

Double-click any employee in the **Active** list to add to the **Selected** list.

Double-click any employee in the **Selected** list to open the employee record.

## Meeting Visibility

### 1. Health & Safety menu

All meetings can be viewed from the Health & Safety menu.  
Display a Meeting type to access the associated meetings.

### 2. Employee

Click the **Details** button on the employee screen, then select **Meeting Attendee** on the left to view all the meetings for the selected employee.

### 3. Job / Tally Sheet

Click the **Details and H&S** button on the Job/Tally Sheet screen, then select **Meeting** to view all the meetings for this type.

### 4. Debtor

Click the **Details** button on the debtor screen, then select **Meeting** on the left to view all the meetings for the selected Debtor.

## Window Control Buttons

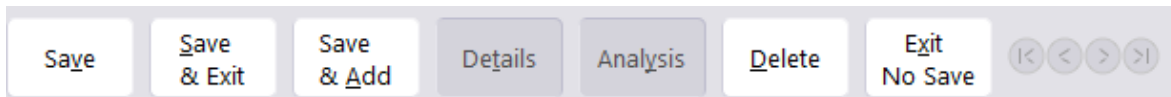



Figure 4: Window Control Buttons

Button	Description
Save	Saves the current record.
Save Exit	Saves and closes the current window.
Save & Add	Saves and opens an empty ADD window.
Details	Not applicable for Meetings
Analysis	Not applicable for Meetings.
Delete	Deletes the current Meeting type. <ul style="list-style-type: none"> <li><i>The meeting type cannot have any linked meetings.</i></li> <li><i>The meeting type cannot have any linked Documents.</i></li> </ul>
Exit / Exit No Save	Close the window.
	Go to: First / Previous / Next / Last record.