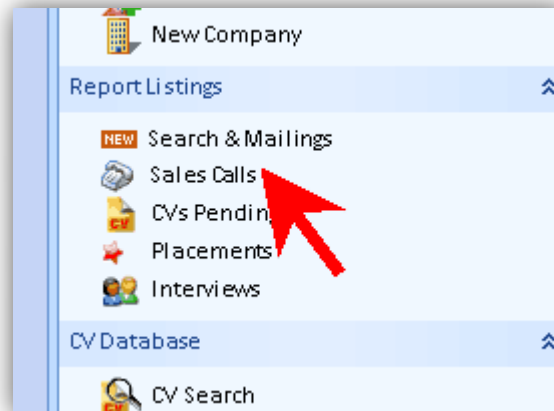


How do I manage my client meetings?

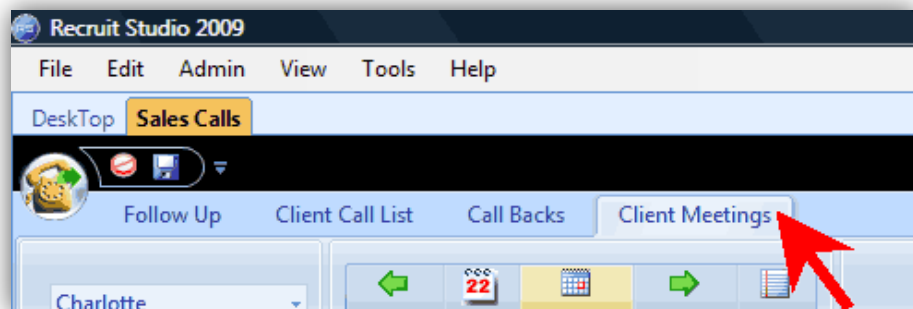
When you have arranged a client meeting you can view and manage them in one convenient screen called 'Client Meetings'. You will find it in the Sales Calls facility.

This is a useful facility for managers because you can review all consultants' activity.

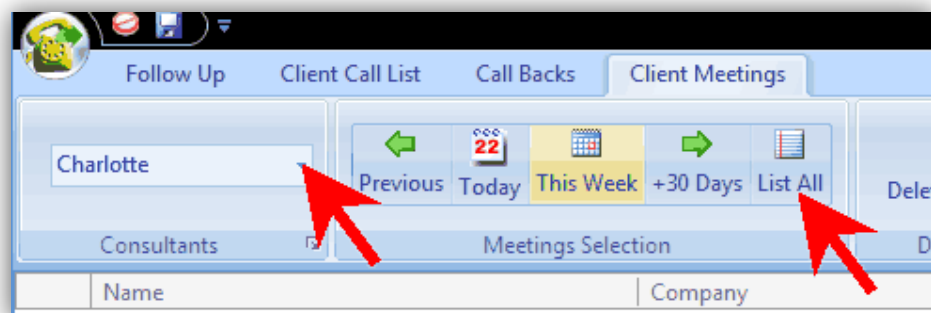
1. Open 'Sales Calls' from the main menu.



2. Go to the 'Client Meetings' tab.



3. Change the view if you need to – you can view meetings per consultant and you can change the time frame using the buttons on the toolbar.



- The list of meetings will appear in the panel below.

Click on a row to see more details including the client's mini record and log.

Name	Company
David Browne	Alliance Engineering Ltd
Mark Whittaker	Hewitt Major Ltd
David Browne	Alliance Engineering Ltd
Mark Whittaker	Hewitt Major Ltd

- To change the date of a meeting, drag the meeting from the list to the new date on the calendar.

Name	Company	Type	Date
David Browne	Alliance Engineering Ltd	Prospective client	22/09/2009
Mark Whittaker	Hewitt Major Ltd	Client	14/09/2009
David Browne	Alliance Engineering Ltd	Prospective client	09/07/2009
Mark Whittaker	Hewitt Major Ltd	Client	12/06/2009
Rachel Suggison	Microsoft UK	Client	14/04/2009
Mark Whittaker	Hewitt Major Ltd	Client	09/04/2009

- To record the content of the meeting after it has taken place, click on the relevant meeting in the list and add a note to the log.

Date	Time	Name	Description
10 Sep 2009	12:51	Charl	New business meeting
11 Jun 2009	13:45	Charl	Note to correct a log
11 Jun 2009	13:39	Charl	Review
11 Jun 2009	12:21	Charl	Call Back on 11/06/2009
09 Apr 2009	13:40	Charl	Sales Call - 1st Interview.
09 Apr 2009	12:18	Charl	Client meeting
23 Feb 2009	19:52	Charl	Sales Call - 1st Interview.
20 Feb 2009	11:24	Charl	Called client
20 Feb 2009	11:24	Charl	Emailed
20 Feb 2009	11:22	Charl	Sales Call - 1st Interview.
13 Feb 2009	13:23	Charl	Call Back on 13/02/2009