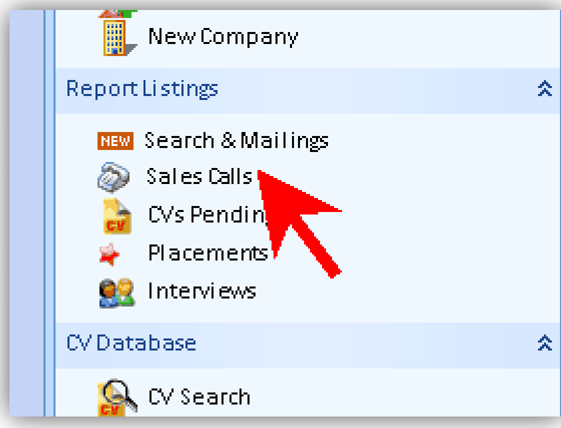
How do I manage my client meetings?

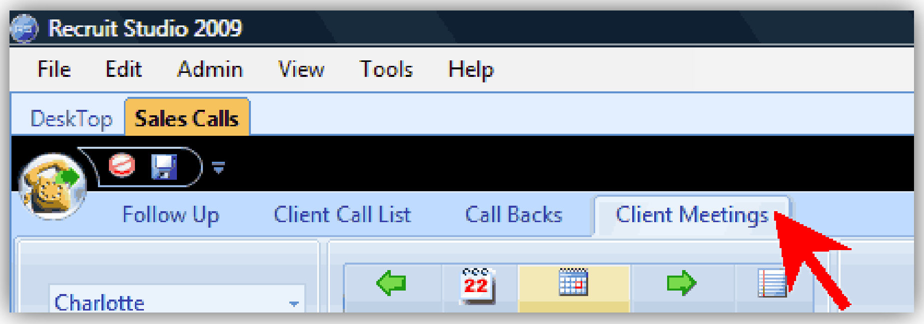
When you have arranged a client meeting you can view and manage them in one convenient screen called 'Client Meetings'. You will find it in the Sales Calls facility.

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

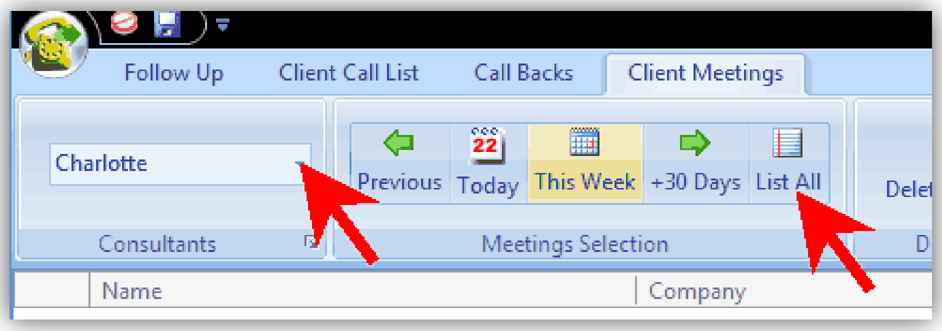
1. Open 'Sales Calls' from the main menu.



2. Go to the 'Client Meetings' tab.

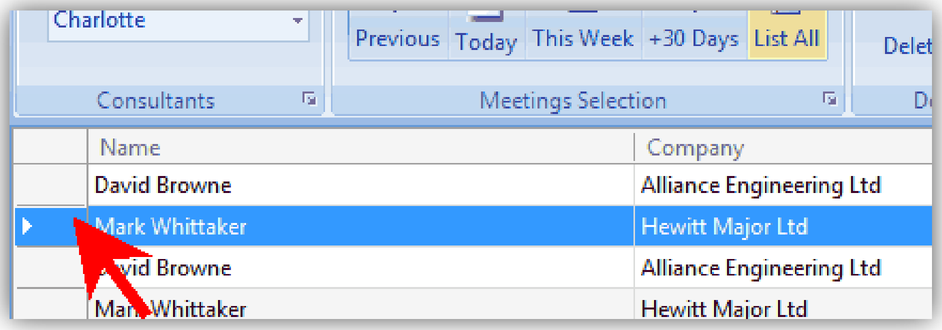


3. Change the view if you need to – you can view meetings per consultant and you can change the time frame using the buttons on the toolbar.

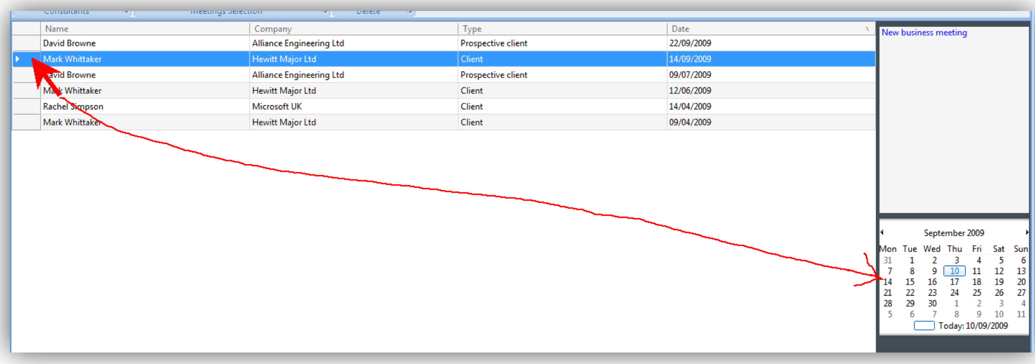


4. The list of meetings will appear in the panel below.

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



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



6. **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.