Managing Active Clients: Client Engagement and Communication Review

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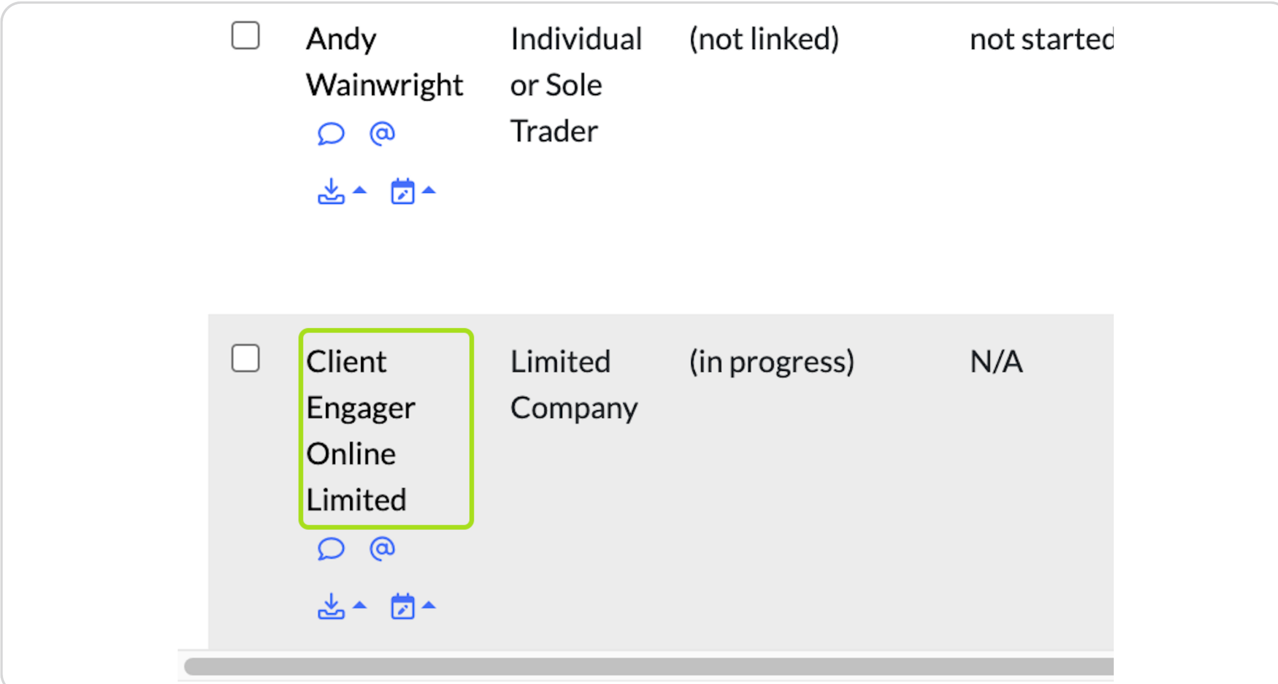
Created by	Creation Date	Last Updated
Johann Goree	December 31, 2023	December 31, 2023

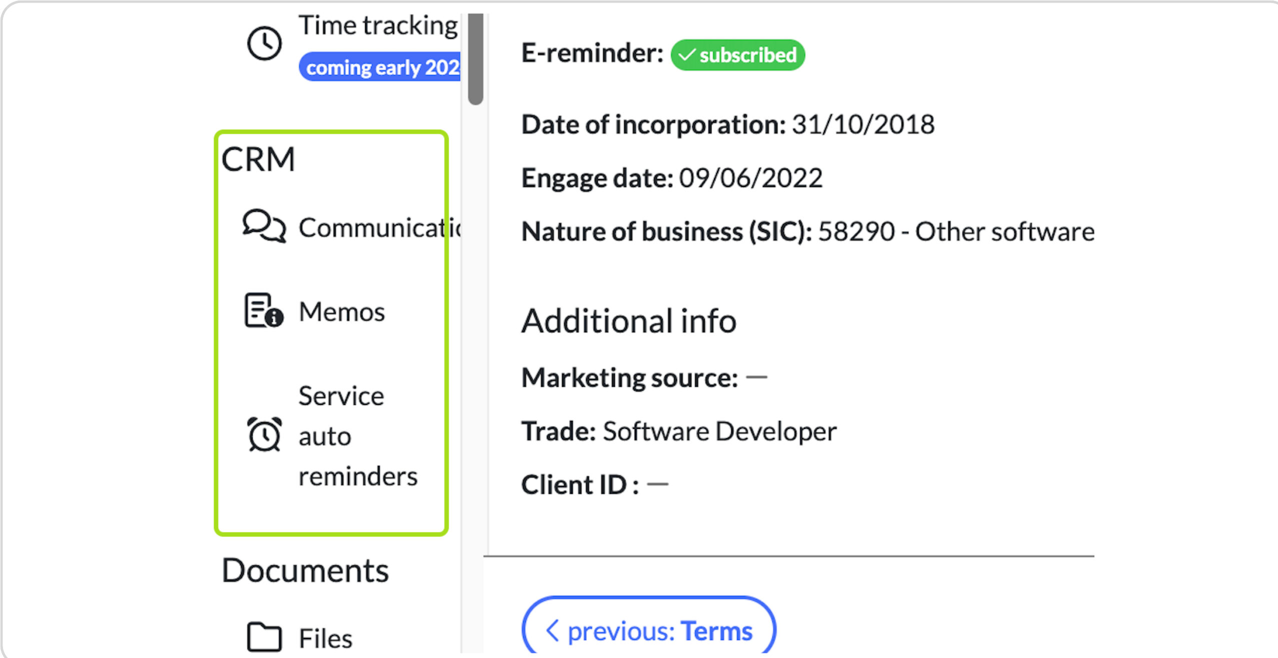
STEP 1

Click on Client Engager Online Limited



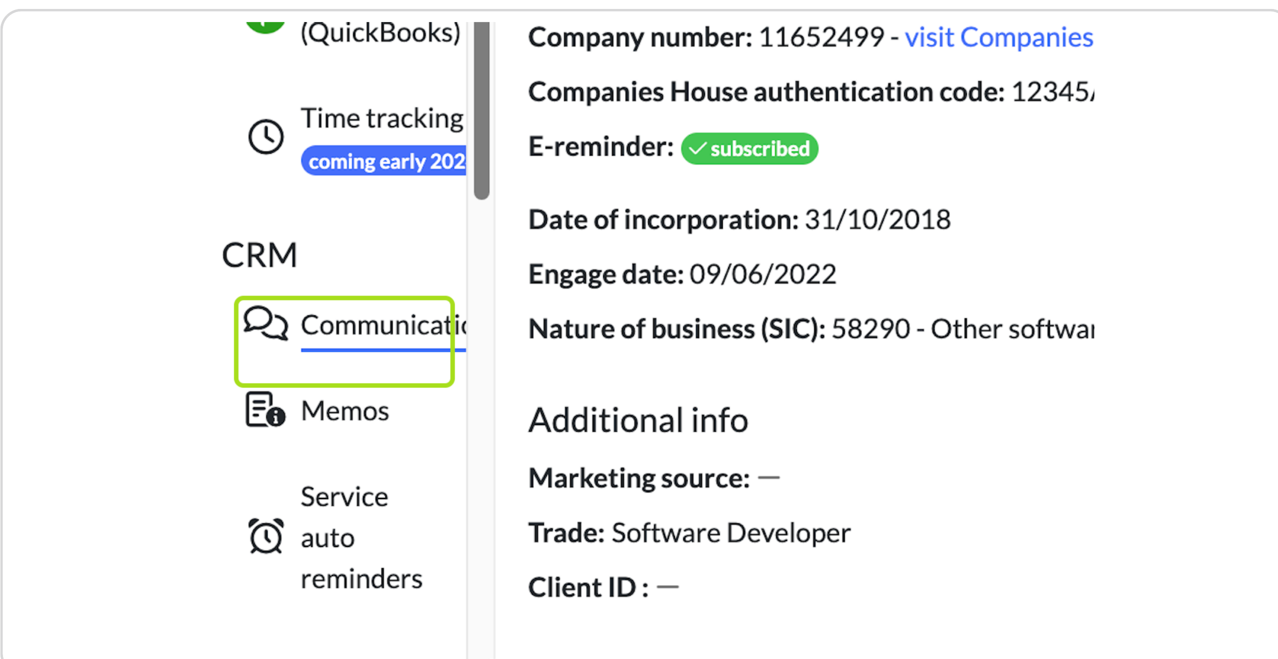
STEP 2

The logs are under CRM



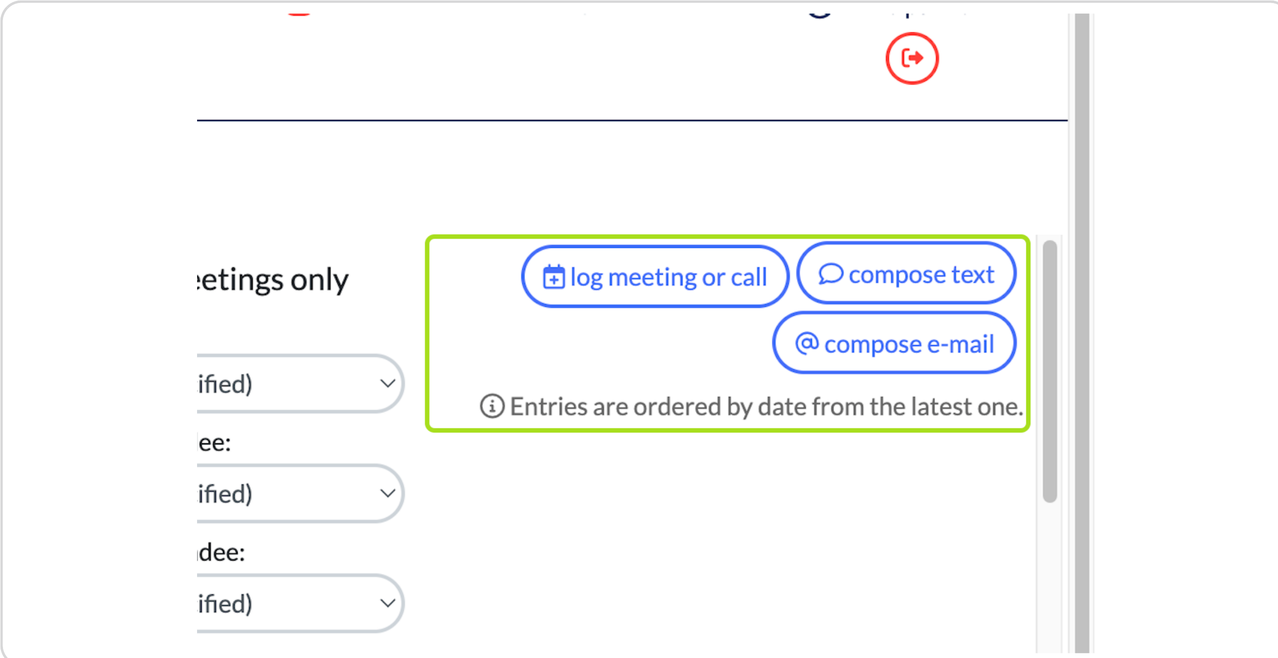
STEP 3

Click on Communication



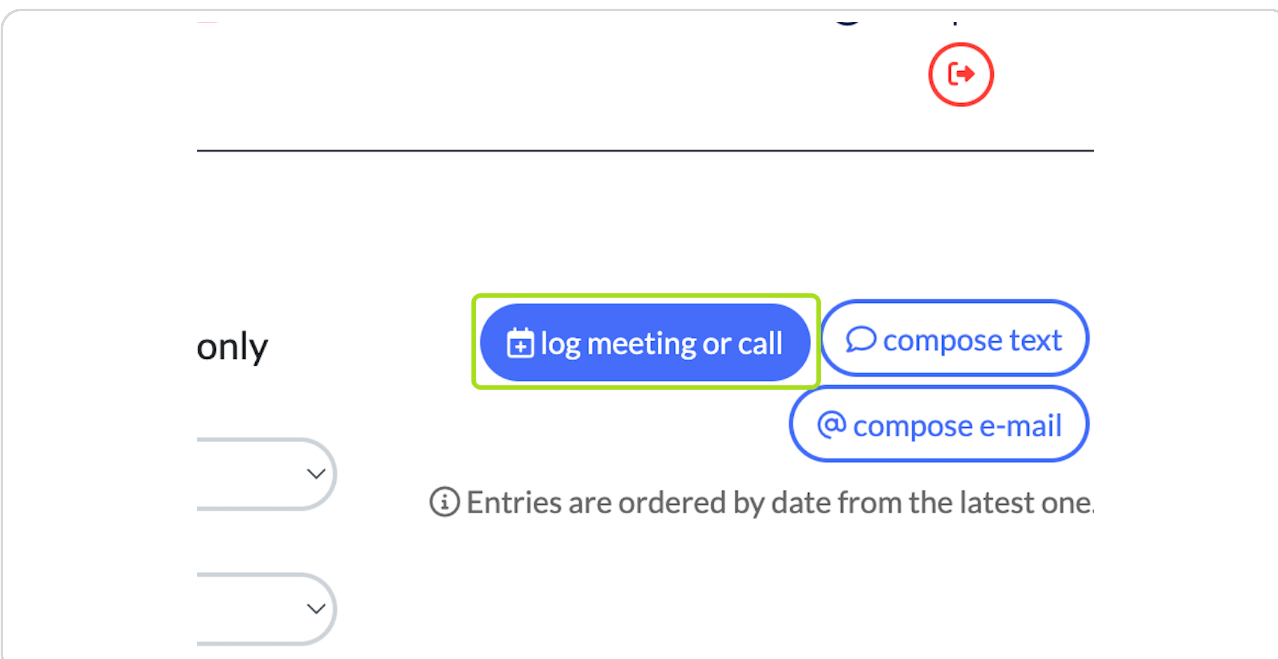
STEP 4

The ability to log a meeting or call is on the top right.



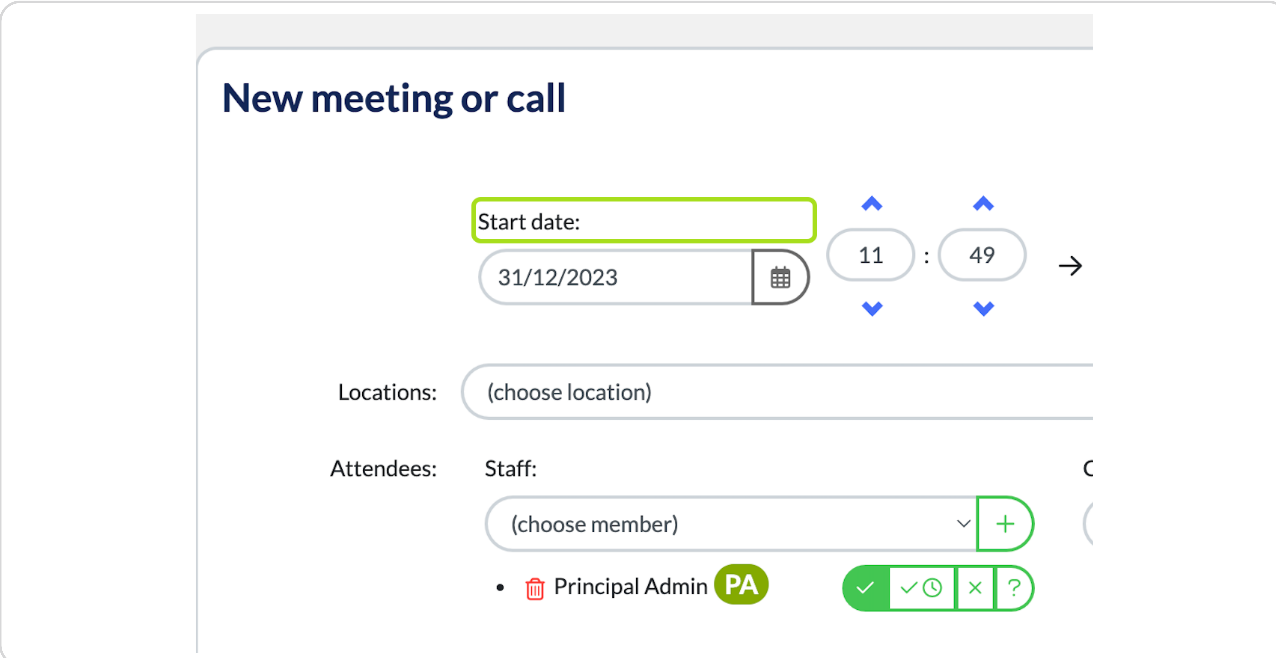
STEP 5

Click on log meeting or call



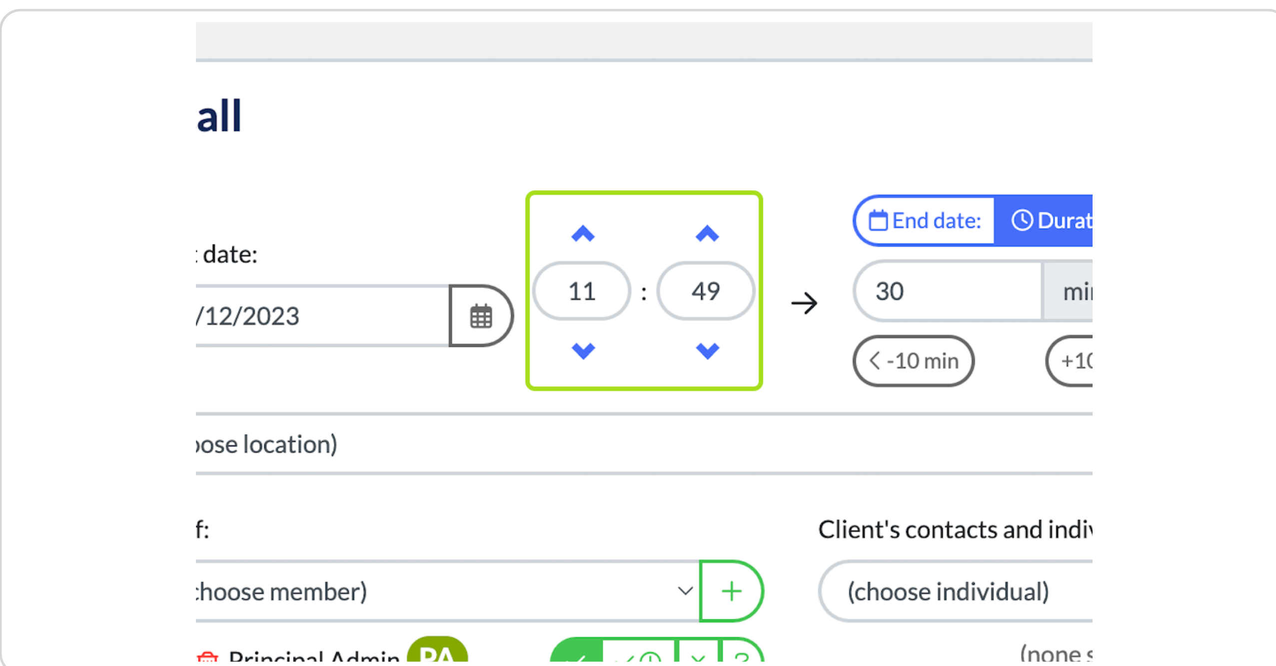
STEP 6

Set a date of the call or meeting, this can be future or past



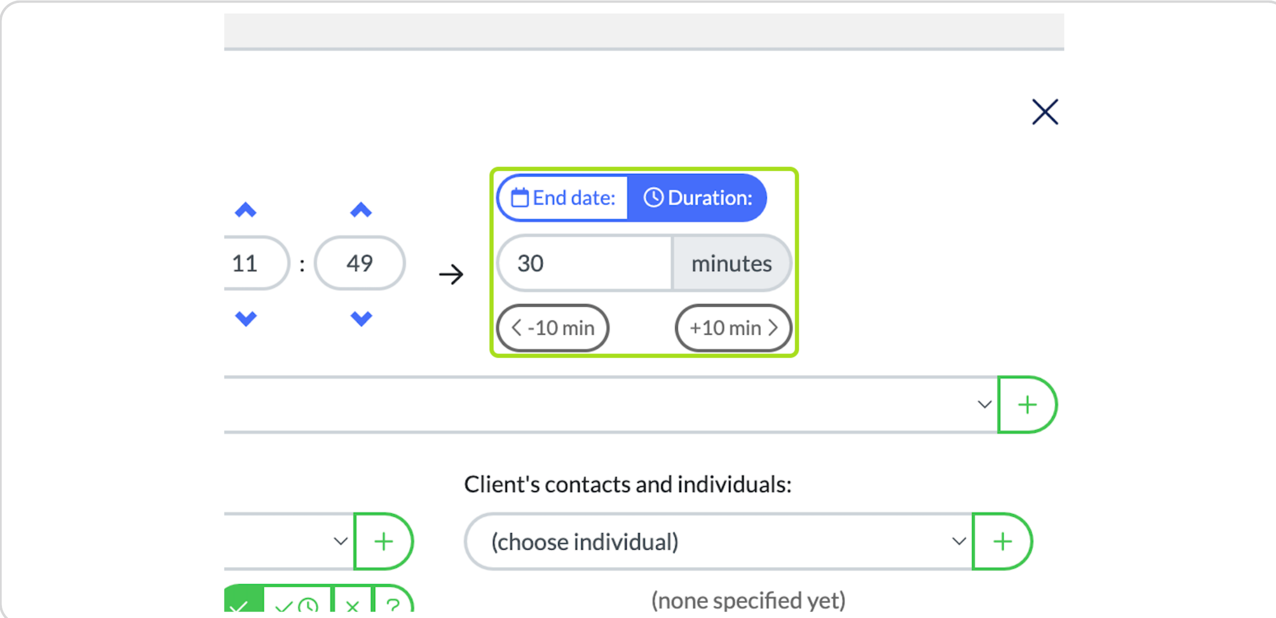
STEP 7

Set the start time



STEP 8

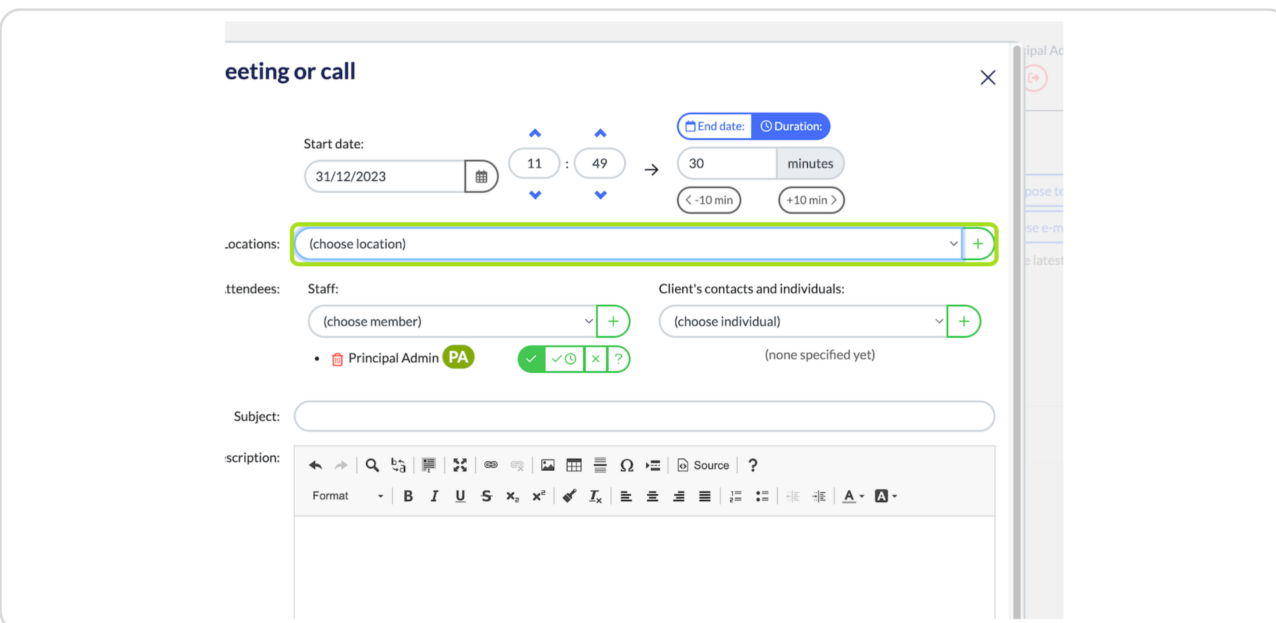
Set how long the meeting or call lasted



STEP 9

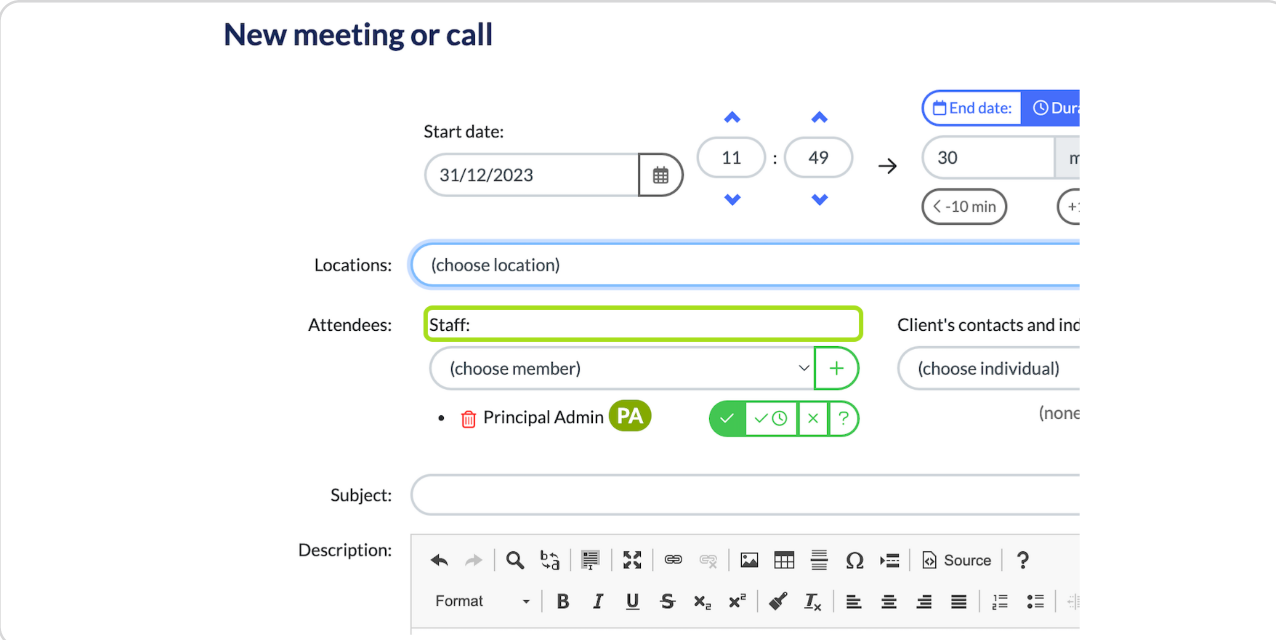
Click on choose location to record where the meeting happened or how the call happened

You can add to the location list in settings



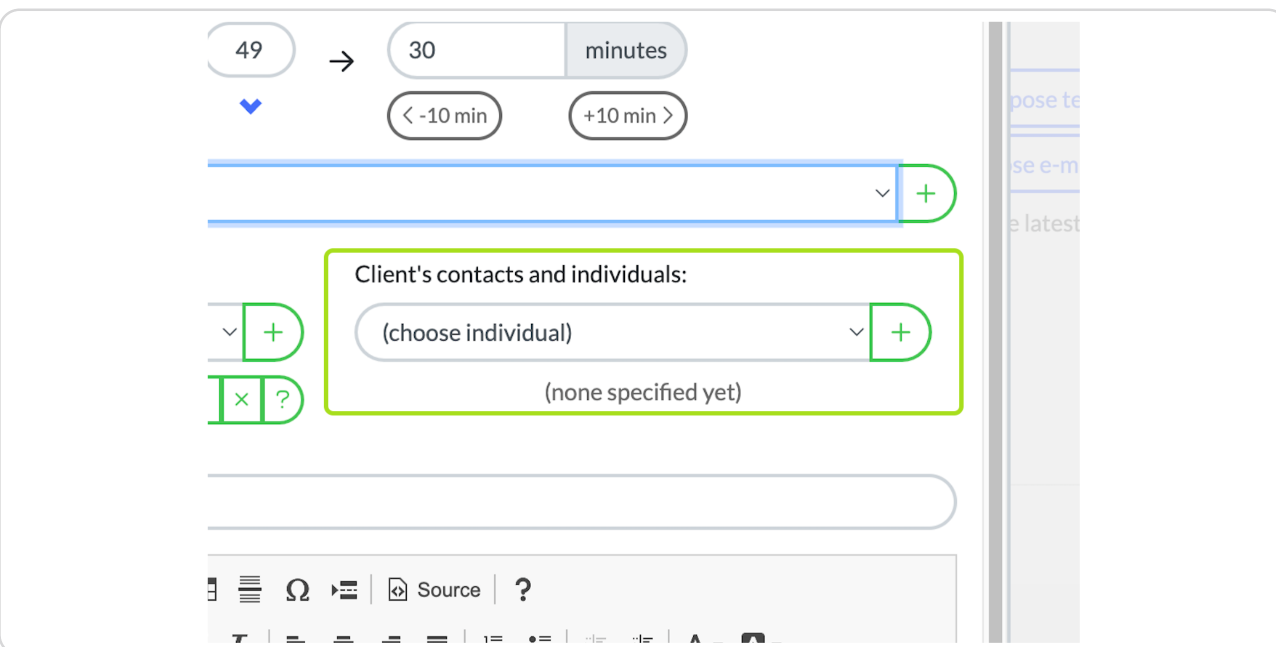
STEP 10

Click on Staff to record which staff members are in the call or meeting



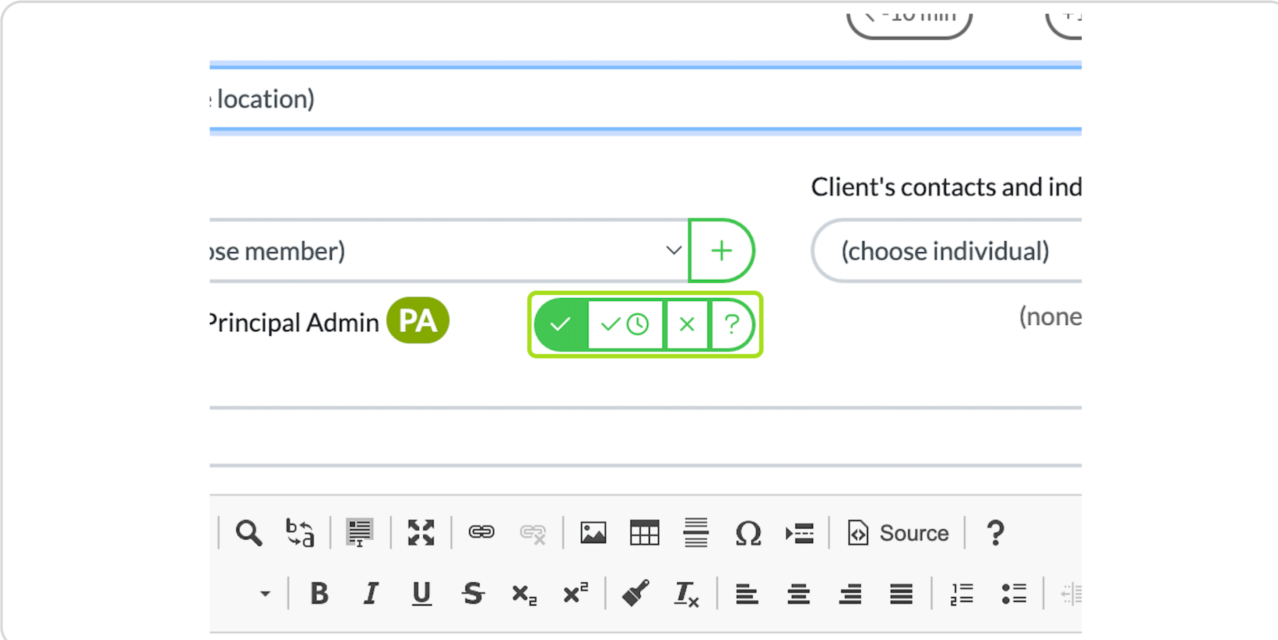
STEP 11

Click on Client's contacts and individuals to add who was attending form the client side



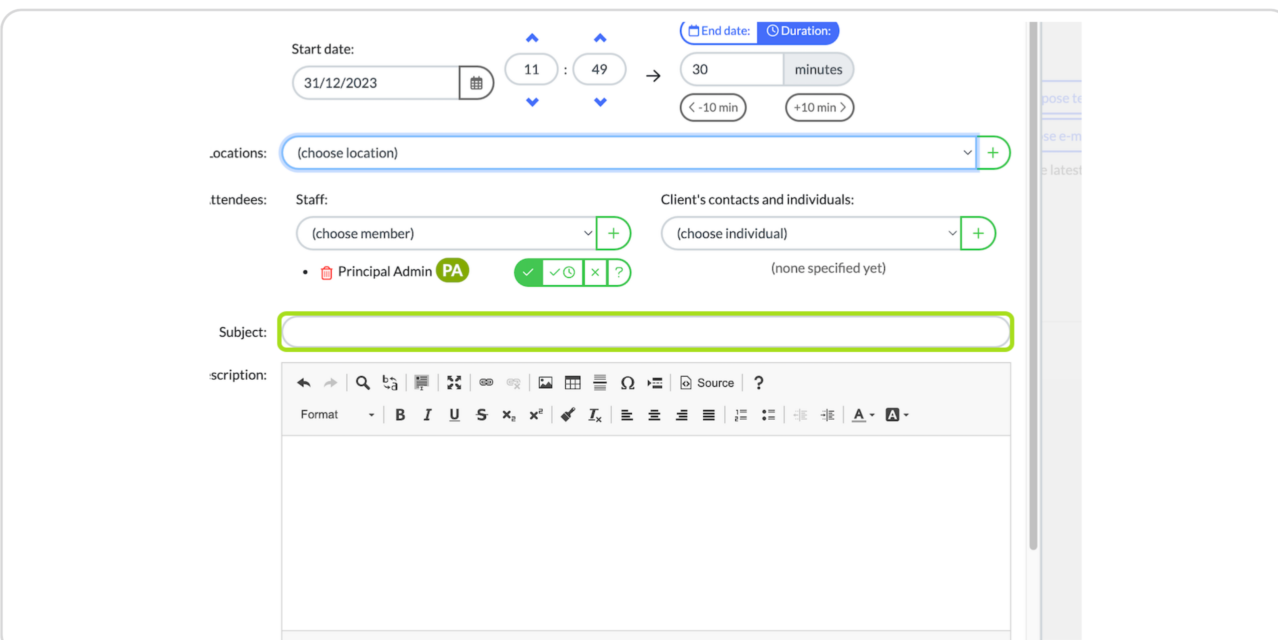
STEP 12

In the highligthted section you can record if the person atteneded, didnt attend or was late, if late by how long.



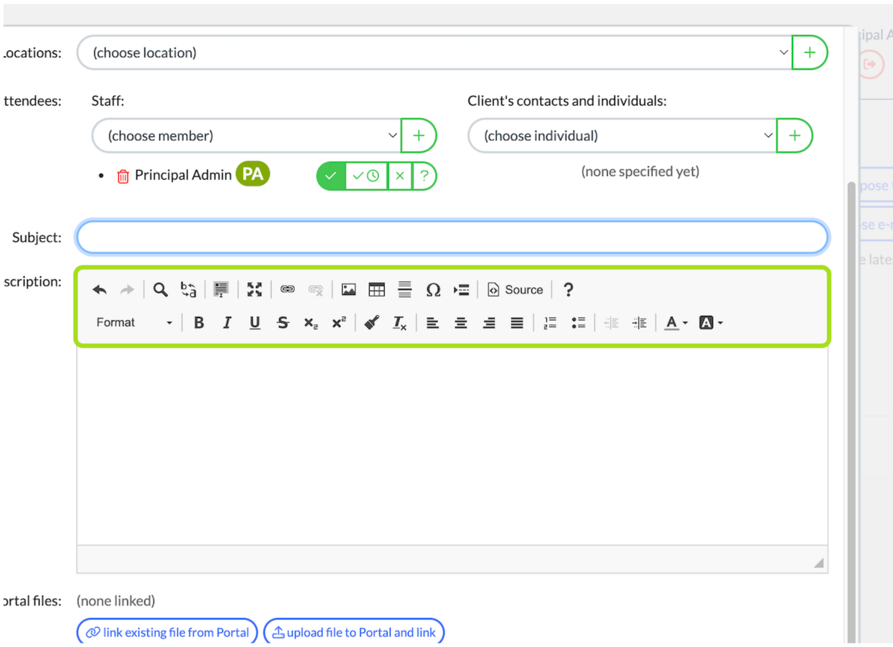
STEP 13

Click on Subject and enter subject of the neeting or call



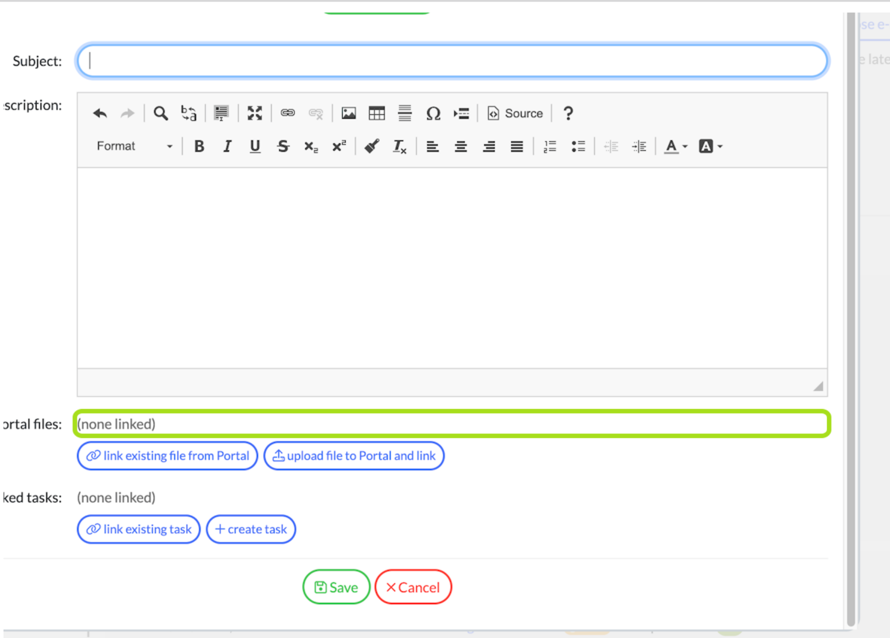
STEP 14

Click on description to add details, minutes agenda etc to the record



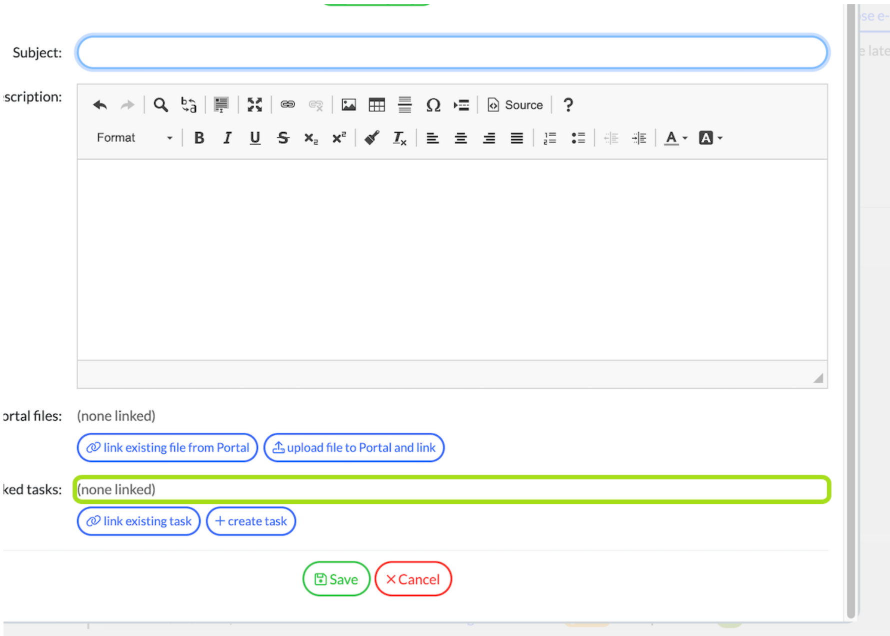
STEP 15

Click on link documents to save documents to the meeting record



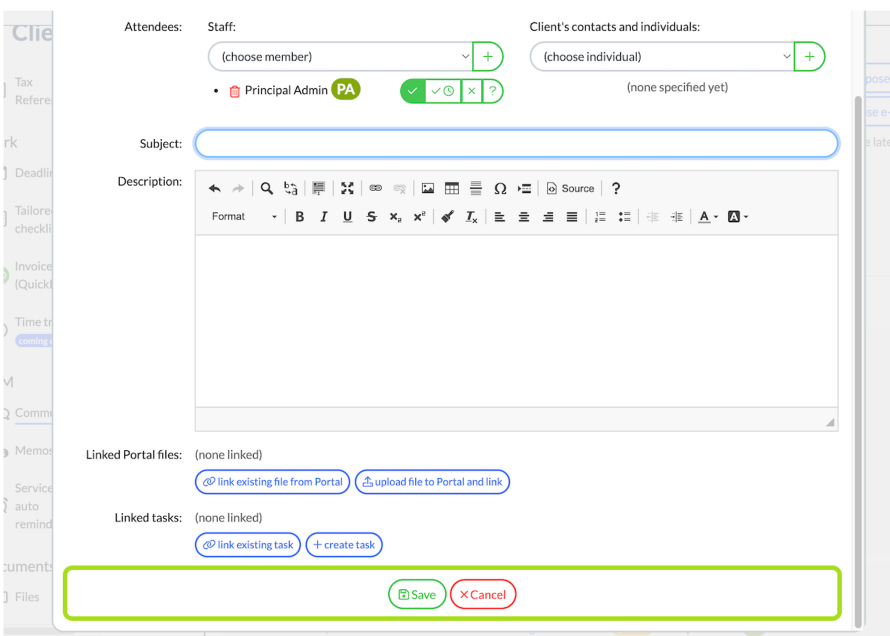
STEP 16

Click on link or create task to create tasks of the back of this meeting or call



STEP 17

Click on Save to record the meeting



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