

# Finding Your Engagements

## 2. Finding Your Engagements

*Two ways to reach your work.* There are two routes to the engagements you're working on, and both show the same list:

- From your **home page** (the **Mentor Dashboard**), the **My Active Engagements** dashlet lists your current engagements.
- From the **left-hand menu**, open **Engagements** for the same list.

Either way, you get the engagements you're assigned to — whether you're the primary mentor or a co-mentor.

*Opening an engagement.* Select an engagement's name to open it. (For a refresher on reading a record — its panels, tabs, and Stream — see "Finding and Reading Information" in the Introduction.)

*What an engagement shows you.* Each engagement gathers the whole mentoring relationship in one place:

- the **client company** you're helping;
- the **people you're mentoring** — the client's employees named on the engagement;
- your **co-mentors**, if any;
- the engagement's **status** and **meeting cadence**;
- the **Sessions** logged so far, which build the history of your work together.

*Two kinds of engagements.* Your list holds two kinds:

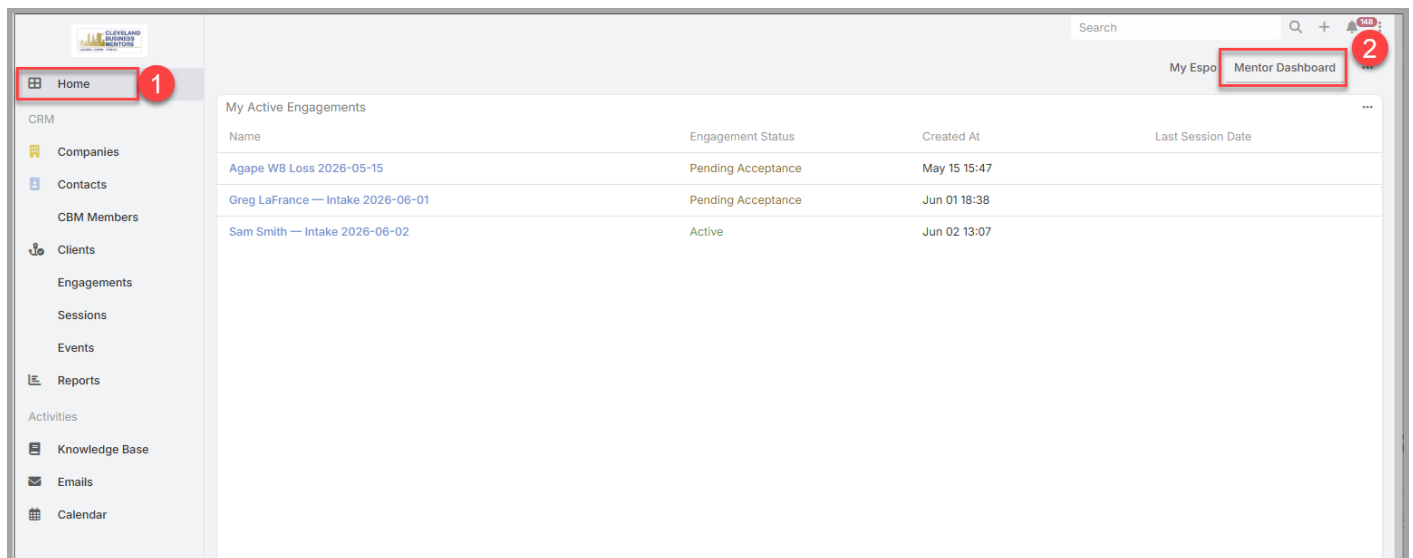
- **Existing engagements** — the ones you're already working on.
- **Pending Acceptance engagements** — new assignments the system has given you, waiting on your decision. They appear right in your engagements list, marked **Pending Acceptance**, so a new one is easy to spot.

*Accepting or declining a new assignment.* New engagements are assigned to mentors automatically, so from time to time a **Pending Acceptance** engagement will turn up in your list. When one does:

1. Open it and review the client and the work against your **focus and expertise areas** — is it a good fit?
1. If it is, **accept** it by setting the engagement **status** to **Assigned** (you've taken it on, but haven't contacted the client yet).
1. If it isn't, **decline** it by setting the status to **Assignment Declined**.

Once you accept, the engagement is yours. After your first meeting — when you log that first session — set the status to **Active** to show the work is underway (Section 3).

*Get oriented before each session.* Before you meet, it's worth opening the engagement to review the client, your notes from last time, and the action items you set — so you pick up right where you left off. The next sections cover logging the session and following up.



The screenshot shows the Mentor Dashboard interface. On the left is a navigation sidebar with a 'Home' button highlighted by a red box and the number '1'. The main content area is titled 'My Active Engagements' and contains a table with the following data:

Name	Engagement Status	Created At	Last Session Date
<a href="#">Agape W8 Loss 2026-05-15</a>	Pending Acceptance	May 15 15:47	
<a href="#">Greg LaFrance — Intake 2026-06-01</a>	Pending Acceptance	Jun 01 18:38	
<a href="#">Sam Smith — Intake 2026-06-02</a>	Active	Jun 02 13:07	

In the top right corner of the dashboard, the 'Mentor Dashboard' button is highlighted by a red box and the number '2'.

*Your My Active Engagements dashlet on the Mentor Dashboard, showing Pending Acceptance and Active engagements together. Click the Engagement Name to view the details.*

Edit

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Overview Closure Info

## Lifecycle and Status

Name	Engagement Start Date
Agape W8 Loss 2026-05-15	None
Engagement Status	Meeting Cadence
Pending Acceptance	Weekly
Hold End Date	Assigned Mentor
None	Douglas Bower

## Mentoring Context

Mentoring Focus Areas  
Education

Mentoring Needs Description  
Help us figure out marketing

## Session Analytics

Total Sessions	Total Sessions (Last 30 Days)	Last Session Date	Total Session Hours
11	None	None	None
Next Session Date/Time			
Jun 08 12:00			

## Notes

## Engagement Notes

**B. Modest showcase.** Same as A, plus a small header block at the top of the dialog body containing: the app wordmark "CRMBuilder v2" in *font.size.heading\_2* (22px), *font.weight.semibold*, *color.neutral.900*, with a short tagline below in *font.size.small*, *color.neutral.500* (e.g., "Methodology-aware CRM implementation tooling"). The metadata table renders below the header. Visually marks the About dialog as a slight identity moment without overdoing it. Modest visual interest; no logo/illustration.

**C. Full showcase with brand mark.** Same as B, plus a custom-rendered brand mark (an SVG drawn from Lucide-style strokes, or a small custom mark) at the top of the header block, ~48×48px, in *color.accent.default*. The dialog becomes a deliberate identity moment — what someone screenshots when they say "this is CRMBuilder v2." Requires authoring a brand mark, which is in scope for the styling pass but adds a small design subtask.

## Assigned Users

CC CiCi Caver  
DB Douglas Bower  
SR Sharon Rose

## Teams

None

## Created

May 15 15:47 · Admin

## Modified

Jun 11 19:56 · Douglas Bower

## Followers

Douglas Bower, CiCi Caver, Sharon Rose

Details Sessions Documents History

## Engagement Contacts

Name	Company	Email	Phone	Account Title
Sheila Marszal	Agape W8Loss	sheila@agapew8loss....		
James Koran	Agape W8Loss	james@agapew8loss....	+1 216-903-2...	

## Additional Mentors

Name

Cici Caver

An opened engagement Details Screen — its status and assigned mentor/users, the client's focus areas, the Engagement Contacts, and any additional (co-)mentors.

## Revision #1

Created 2026-06-17 21:00:48 UTC by Admin

Updated 2026-06-17 21:02:06 UTC by Admin