

Logging A Client Session

Logging a Session

After every mentoring meeting, log a Session. This is the heart of your work in the CRM: it builds the running record of the engagement and feeds the follow-up you send to attendees . Log it while the meeting is still fresh.

Where a session lives. A Session always belongs to an Engagement, so you create it from inside the engagement and it attaches there automatically.

Logging a session, step by step.

1. Open the appropriate **Engagement Details**. (See Section 2)
2. Open the **Sessions** panel, and press the “+” button to add a new session.
 1. The first screen shown is a summary screen. If you want to add more details, press the “Full Form” button to add additional information.
3. You should NOT enter a **Name**. It will be assigned automatically.
4. Set the session **Date Start** — the day you met.
5. Record **who attended** — the client employees who were present. See the next section, Adding Attendees to a Session, to add any co-mentors who joined you.
6. Write your **Session Notes** — what you covered, what was decided, and the progress since last time.
7. List the action items for next session in the **Next Steps** field— what the client will work on, and anything you'll prepare.
8. If you set a follow-on session enter the date in the **Next Session Date**.
9. Select **Save**.

The session is named automatically (date – engagement – mentor) and added to the engagement's **Sessions** panel, joining the history of your work together.

Your first session on an engagement? After saving, set the engagement **status** to **Active** — that moves it on from **Assigned** and marks the work as underway.

Why notes and action items matter. Good notes pull double duty — they give a coordinator or another mentor a clear picture if anyone ever needs to step in, and they become the summary you send to attendees right after the meeting (Section 4). Clear action items mean everyone leaves knowing what happens next.

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.

Details Sessions Documents History

Sessions

Name	Date Start ^	Status	Session Type
2025-05-22 Agape Session	May 22 00:00	Planned	In-Person
2025-05-15 - Agape Session	May 15 12:00	Held	Video Call

From the engagement's Sessions panel, select + to add a session.

Sessions > create

Save Cancel ...

Overview Engagement Info

Session Detail

Name	Date Start *	Duration
2026-06-17-Agape Session	06/14/20 23:30	1h
Session Type	Meeting Location Type	Status
Video Call	Other	Held

Location Details	Topics Covered

Description

Notes and Follow-Up

Session Notes

B *I* U **A**

Notes:

We discussed hiring a new marketing company to focus on Google AdWords.

Next Steps

B *I* U **A**

- Interview 2 new firms
- Get quotations for 6 months of AdWord Spend

Next Session Date/Time

Assigned User

Teams

The new Session form — date, your session notes, the next steps (action items), and the next session date.

Revision #6

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

Updated 2026-06-24 18:57:39 UTC by Admin