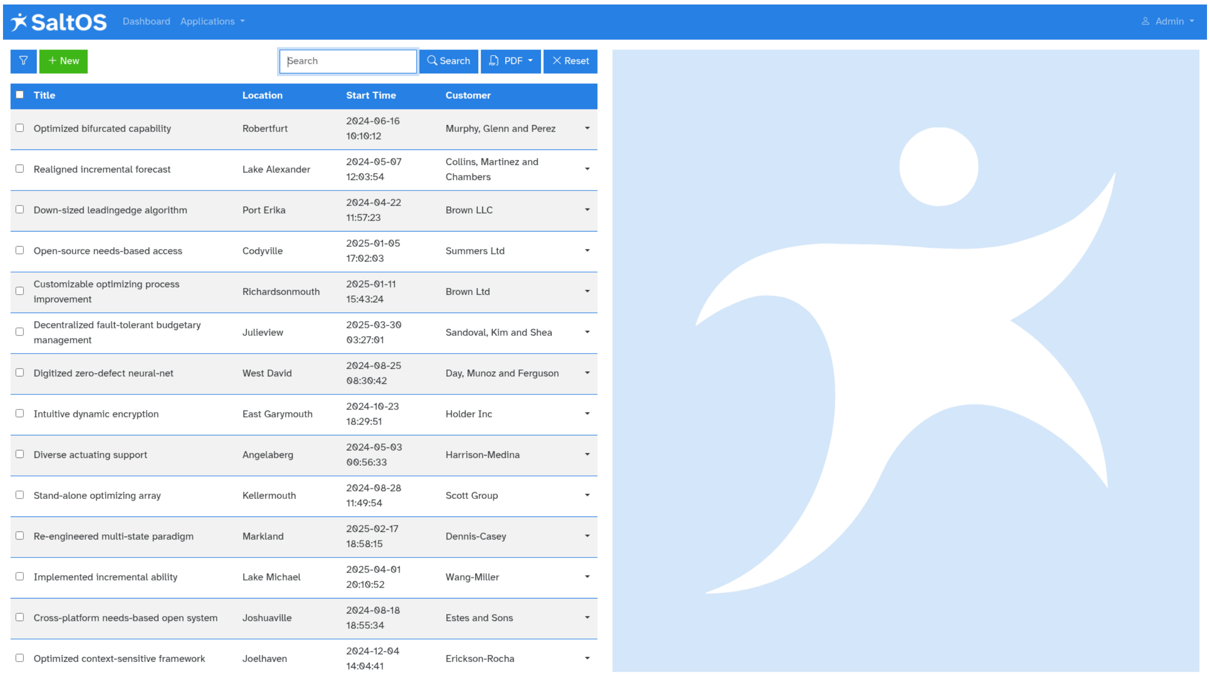
Meetings

Description

The Meetings application allows you to schedule, organize, and track meetings with leads, customers, or internal staff. It supports planning both face-to-face and online meetings, storing relevant details such as date, time, participants, notes, and status. This module is essential for keeping a history of client interactions, improving follow-up, and maintaining team coordination.

List view



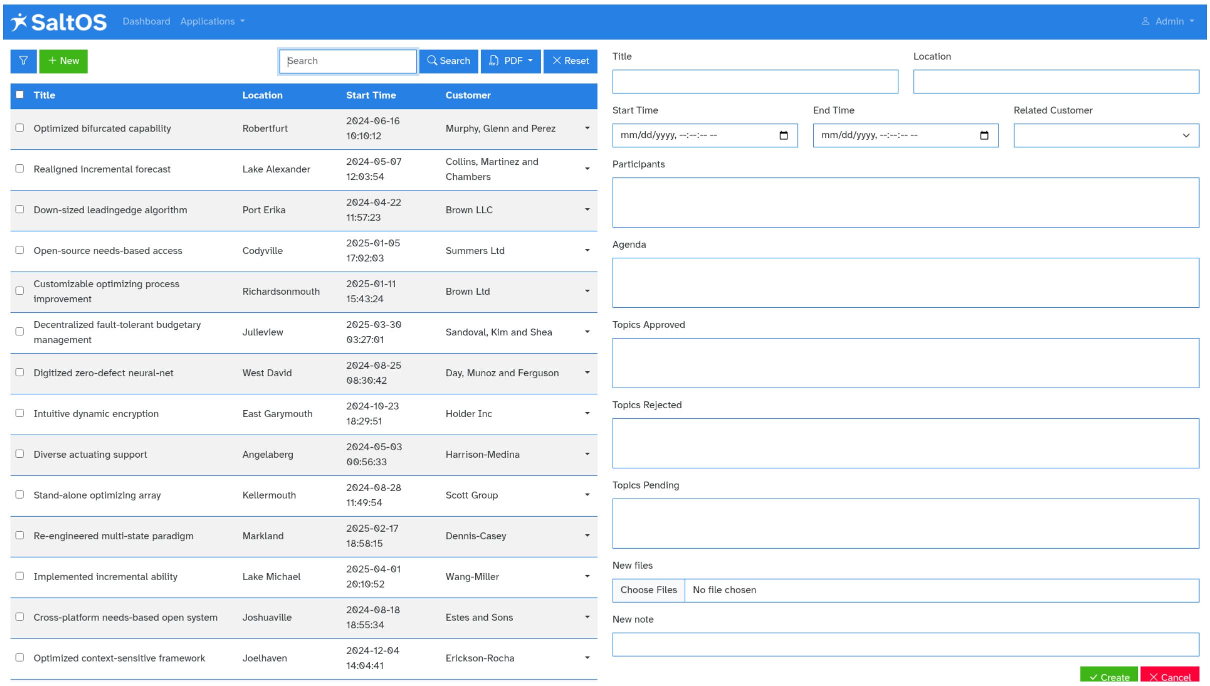
The following fields are displayed in the list view:

- Date: Scheduled date of the meeting.
- Time: Scheduled time for the meeting.
- Subject: Title or topic of the meeting.
- Customer: Participant or client associated with the meeting.
- Type: Classification of the meeting (e.g., call, on-site visit, video conference).
- Status: Current state of the meeting (e.g., Planned, Completed, Cancelled).
- Assigned To: Person responsible for attending or organizing the meeting.

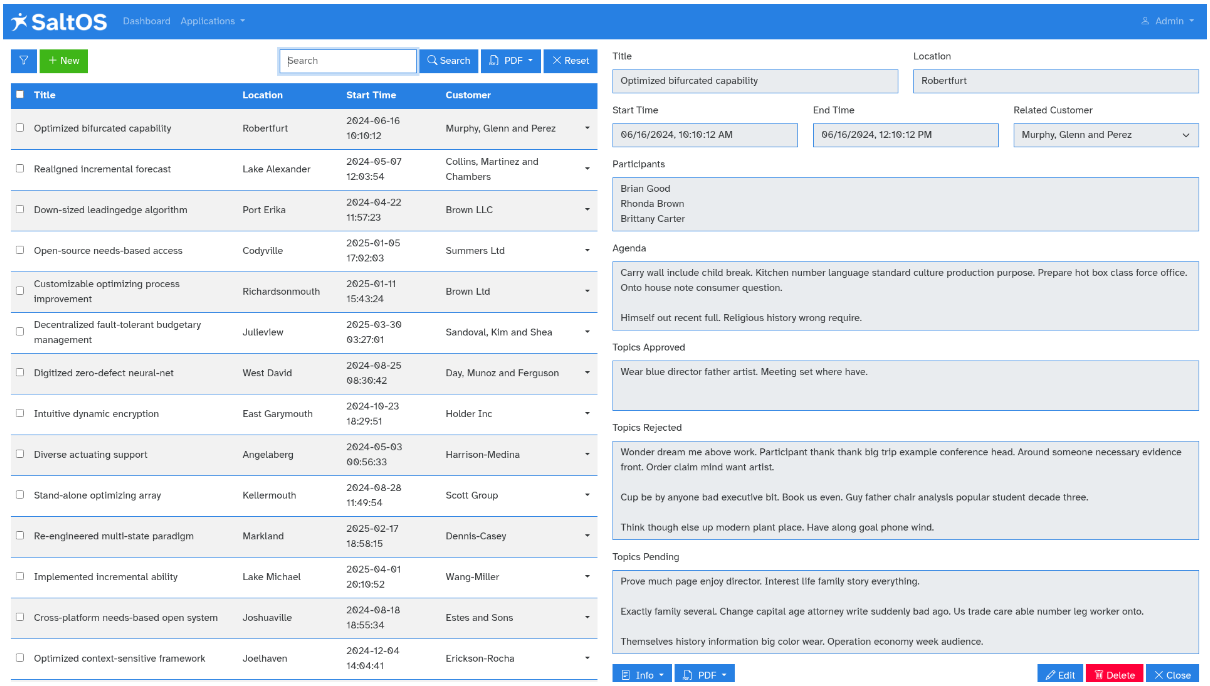
Form view

This view is used for creating, editing or viewing a meeting entry.

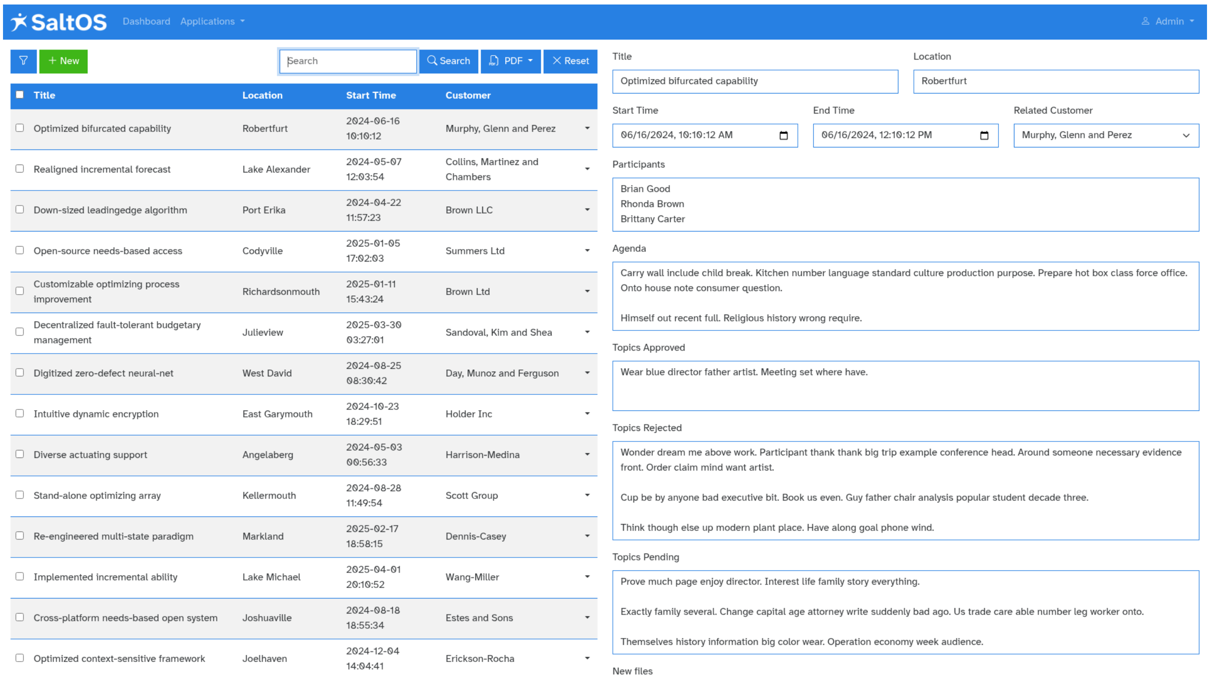
In **create** mode, a new meeting is scheduled.



In **view** mode, details are shown read-only for reference or audit.



In **edit** mode, the meeting details can be modified if needed.



The form includes the following fields:

- Date: Day the meeting is planned to occur.
- Time: Scheduled time (optional if the meeting is full-day).
- Subject: Brief title or summary of the meeting.
- Customer: Linked participant or external contact.
- Type: Meeting format or category.
- Status: Progress state of the meeting (e.g., Confirmed, Done).
- Assigned To: Internal user or employee leading the meeting.
- Location: Physical address or virtual link for the meeting.
- Notes: Additional observations or meeting agenda.
- Files: Attachments such as reports, presentations, or confirmations.

Delete

Meetings can be deleted from the list view if created in error or no longer relevant.

Records are usually kept for historical traceability unless explicit removal is needed.