

Save the Confirmation of Kick Off Call Meeting Time

Once the client emails confirmation of the kick off call meeting time, save the communication in Salesforce and on the XDrive

Save in Salesforce

1. Pull up the implementation project
2. Attach the confirmation email under the notes and attachments section

Save on the XDrive

1. Navigate to the New Client Folder
2. Select the Project Management folder
3. Attach the confirmation email in the Meeting Agenda folder