



# Salesforce Training Guide

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MindJam

Welcome to the MindJam Salesforce Training Guide. This guide introduces the key information you need to use the Salesforce Community site to manage and run your mentoring sessions.

The guide is organised into clear sections. We recommend following them in chronological order, as each section builds on the previous one and will help you set up your account step by step.

If you prefer, a separate overview guide is also available. This allows you to explore the features in a more flexible way without following the step-by-step order.

# Table of Contents

## Getting Started

---

But Why?  
Switching Systems Mid-Month  
First Time Logging In  
How to Navigate the Community Site  
My Account

## What to Do First

---

What to Do First  
Update Your Games, Equipment and Preferences  
Availability

## Understanding the Difference

---

Understanding the Difference  
Using Calendar Events  
Wrap Up a Session

## Finding Your Mentees and Sessions

---

Finding Your Mentees and Sessions  
Accessing Your Mentees  
Accessing Your Sessions

## Other Sections

---

Recording an Absence  
How to Log a Support Ticket  
Dashboard

## Resources

---

Useful Links  
Terminology

## LEVEL 1

# But Why?

As MindJam has grown, the number of processes involved in mentoring has increased. This includes things like **mentee profiles, mentor notes, attendance, timesheets, session details,** and **availability.**

Right now, much of this sits across separate documents and systems in **Google Workspace.** Because these processes are not connected, information sometimes needs to be **updated in multiple places,** which can create extra work and make records harder to keep aligned.

**Schools and local authorities** are also placing greater expectations on how we manage **information,** maintain clear **records,** and provide reliable **audit trails.** Our current setup was not designed for this level of **scale.**

**Salesforce** brings these processes into **one connected system.** This helps keep information **consistent,** improves **visibility** across sessions, and reduces the need for **follow-up emails** and **manual updates** later.

We are **not moving away from Google Workspace entirely.** Tools like **Google Meet** and **historic notes** will still remain available.

**Watch the video guide:**

<https://www.youtube.com/watch?v=0knMU3Ypz3o>

## LEVEL 2

# Switching Systems Mid-Month

A short guide for moving from Google Sheets to Salesforce mid-month without affecting invoicing or payment.

## Overview

You will use two systems temporarily:

- **Google Sheets** (old)
- **Salesforce** (new)

**Goal:** make sure invoicing is correct.

## Step 1: Choose Your Move Date

You can choose this date.

Example: **18th of the month**

This is the date you start using **Salesforce only**.

## Step 2: Update Google Calendar

Go to your Google Calendar. Find all sessions on and from your move date onwards. For each event:

- Right-click the event
- Change colour to **Tomato (red)** or **Flamingo (pink)**
- When prompted, select **"This event and following events"**

This marks all future sessions as cancelled in the old system. But you will still be paid for all the previous sessions.

## Step 3: Update Your Timesheet (Google Sheets)

Open your timesheet. Go to the correct month, for example **April**. Click **"Sort Month"**.

This pulls in sessions from the **1st** up to the day before your move date.

Example: If I moved to the new system on the **18th**, my timesheet would pull in all events **1st to 17th**.

## Step 4: Generate Invoice

You can generate and send your invoice mid way through the month. Share it with **Dan**.

## Step 5: Start Using Salesforce

From your move date onwards, set up your calendar in Salesforce as normal. This will be covered soon.

## Important Rules

- **Do not** add past sessions into Salesforce
- Only add sessions from your move date onwards

Example: Moving on **18th** means only add sessions from **18th onwards**. Do not add anything from earlier in the month.

## If You Need Help

**Discord:** mindjamsam

**Email:** samhollandt@mindjam.org.uk

**Watch the video guide:**

<https://www.youtube.com/watch?v=HhPB2pGHbOc>

### LEVEL 3

## First Time Logging In to the Community Site

How to log in for the first time, reset your password, and access the Salesforce Community Site.

### Overview

To use the Community Site for the first time, you will first receive an email to your **MindJam email account**. This email will ask you to **reset your password**.

### Change Password Email

Look out for the password reset email in your MindJam inbox.

#### Welcome to MindJam

Hi **Tom**,

Welcome to **MindJam!** To get started, please click the link below to access the MindJam community site and set up your profile:

[Click Here](#)

Username: [tom.hollandt@mindjam.org.uk](#)

**! Important !** When you log in for the first time, you will be asked to **change your password** to keep your account secure.

If you have any **issues logging in**, please email [samhollandt@mindjam.org.uk](mailto:samhollandt@mindjam.org.uk).

Thanks,

**The MindJam Team**

## Reset Your Password

After this, you can follow the link to the [Community Site](#).

You may be asked to set or reset your password again as part of the login process. When creating your password, we recommend using:

- a mix of letters and numbers
- special characters where possible
- a password you do not use anywhere else

If you use a [password manager](#), it is also recommended to save your password there.

## Log In to the Community Site

Once this is done, you can log in to the Community Site. It is also recommended to bookmark the Community Site URL, as this is the link you will use to access it going forward.

## Bookmark This URL

**Community Site URL:** <https://mindjam.my.site.com/Portal>

## LEVEL 4

# How to Navigate the Community Site

A guide to the main navigation areas in the Salesforce Community Site and what each section is for.

## Overview

When you log in to the Community Site, you will see a **navigation bar at the top of the page**. This is how you move around the system.



[Home](#)

[Appointment Management](#) ▾

[Support](#) ▾

[My Account](#) ▾

[Analytics](#) ▾

## Appointment Management

This section is for anything related to **sessions, mentees, and availability**.

### My Mentees

A list of your **mentees**.

[Open My Mentees](#)

### My Sessions

A list of your scheduled **sessions**.

You can change the list view to show things like **today's sessions** or **this week's sessions**.

[Open My Sessions](#)

### Manage Time Slots

This is where you add your **availability**. For example, if you are free from **9:00 to 10:00 on a Monday**, you can add that time slot here.

[Open Manage Time Slots](#)

### Absences

This section is **optional**. You can use it to record time away, such as holidays. **It does not email parents or carers**.

[Open Absences](#)

### Calendar View

This shows your **session** information in a **calendar** format instead of a list.

[Open Calendar View](#)

### Group Sessions

If you run **group sessions**, you can view them here. These are kept separate from one-to-one **sessions**.

[Open Group Sessions](#)

## Support

### Support Tickets

Use this to log a **support ticket** if you need help from a member of the team. This can be easier than using **Discord** or **email**.

[Open Support Tickets](#)

### Knowledge Base

This will replace the Wiki. You will be able to find **guidance, instructions,** and other useful information here.

[Open Knowledge Base](#)

## My Account

### My Account

This section is where you can update your **account** information, such as your **mobile number** or **personal email address**.

[Open My Account](#)

### My Invoices

This shows the **invoices** you create that are sent to the **finance team**.

It is mainly there for **record-keeping**.

## Analytics

### Dashboard

The **dashboard** shows useful information, such as:

- how much you have made in a month
- how many sessions you have
- how many sessions you have today

This area can be customised, so if there is information you would find useful, you can suggest it to **senior leadership**.

## Profile

### Profile

This is another place where you can update **profile** and **account details**.

You can also update your **profile picture** here. This is only visible to you and **senior leadership**.

## Extra Links on the Home Page

### Team Meeting Log

This contains previous team meeting emails. You can use it to go back and check old messages if needed.

### Available Mentees

This opens a separate Google Doc showing mentees who may be more difficult to assign. For example, they may have:

- very specific game interests
- particular equipment needs
- a need for a specific skill or match

It is worth checking this regularly if you are looking for additional mentees.



## Key Point

Use the navigation bar at the top of the Community Site to move between the main areas:

- Appointment Management
- Support
- My Account
- Analytics
- Profile

This should help you find what you need more quickly.

## Have a Look Around

Now that you know where everything is, take a few minutes to explore the Community Site on your own. Try these small tasks to get comfortable with the layout:

- Find your **mentee list** under Appointment Management
- Open the **Knowledge Base** and browse what is available
- Check your **My Account** section to make sure your details are correct

You do not need to change anything yet. The goal is simply to get familiar with where things are so it feels more natural when you need to use them.

### Watch the video guide:

<https://www.youtube.com/watch?v=qFCc1SIEaZ0>

# My Account

How to access your account page and update your details.

## How to Access My Account

To access **My Account**, use the top navigation bar:

- Click **My Account**
- Click **My Account** again

This will take you to your account page.

## What You Will See

When you first open this page, all of the sections may appear expanded. This can make the page look a bit busy at first, but most of the information is already filled in for you.

A lot of this information has been added from MindJam's existing records, so you will usually only need to update it if something has changed.

## What You Can Update

You can make changes to the following:

- Pronouns
- Description
- Work information
- Gamer tags
- Minecraft username
- Address

## Games and Equipment

Your **Games and Equipment** section can also be accessed from this page. This will be covered in a separate section.

## Key Point

Take a moment to check your details and make sure they are correct. If anything is missing or out of date, update it now so the system has the right information.

## Updating Your Profile Picture

To update your profile picture:

- Click your name or icon in the top-right corner
- Click **Profile**
- Click the camera icon on the profile picture
- Upload a new image (PNG, GIF, or JPEG)

## Other Profile Details

From the Profile page, you can also update other details. Click **Edit** on the section you want to change, update the fields, and click **Save**.

### Watch the video guide:

<https://www.youtube.com/watch?v=9T48j76vQ5Q>

## What to Do First

### Overview

Once you have logged in and explored the navigation, there are a couple of things to do before moving on.

### First Two Tasks

Before continuing with the rest of the guide, please complete the following two tasks:

- **Update your game preferences and equipment**
- **Set your availability** (Operating Hours)

### Why This Matters

These two tasks tell Salesforce what you support and when you are available. This is used to help with matching and scheduling, so it is important to keep this information up to date.

## LEVEL 5A

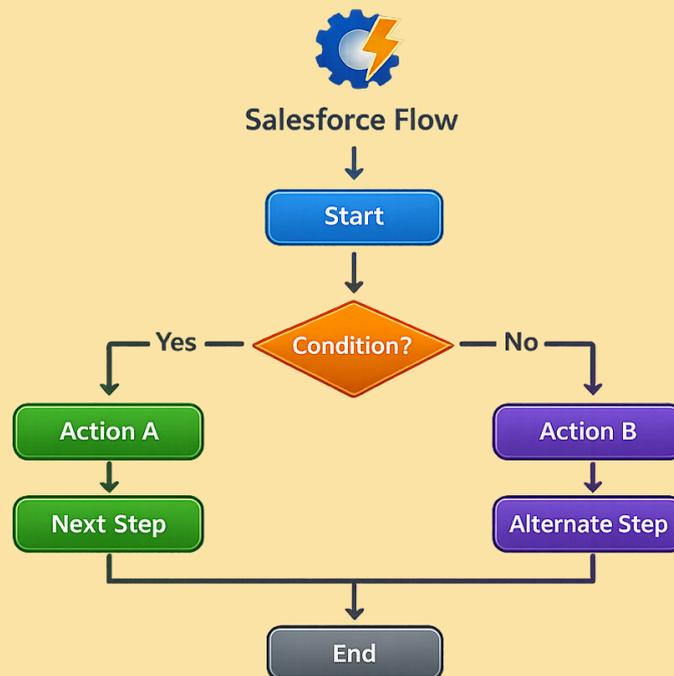
# Update Your Games, Equipment and Preferences

How to update the games, equipment, skills, and preferences linked to your mentor profile.

## How to Open the Form

You can open this form in two ways:

- **Option 1:** Go to **My Account** and click **Update Games and Equipment**
- **Option 2:** From the Home page, click **Update Preferences**



## What a Flow Means

A **Flow** is a step-by-step form that guides you through a series of questions. In this case, it covers your games, equipment, interests, skills, and preferences.

## Step 1: Add Your Games

Tick the games you have access to. Include titles like **Roblox**, **Fortnite**, **Minecraft Java**, and **Minecraft Bedrock**.

## Step 2: Add Your Equipment

Tick the equipment that is relevant to you.

## Step 3: Add Other Information

You may be asked for:

- Gender Identity
- Interests
- Other Games

## Step 4: Add Your Skills

Use the **dual list box** to select your skills. Move items from the available list to the selected list.

## Finish the Form

Click **Finish** to complete the flow.

## Keeping This Up to Date

Update your preferences whenever:

- you start using a new console
- you get a new game
- your equipment or skills change

### Watch the video guide:

<https://www.youtube.com/watch?v=fMMA673ZBf4>

## LEVEL 5B

# Availability

How to set and manage your availability using time slots.

## Overview

After updating your games and equipment, the next step is to set your **availability**. This tells the system when you are free to take sessions.

## Set Your Availability

Setting your availability helps MindJam match you with mentees. It is important to keep this accurate so that sessions can be scheduled at times that work for you.

## Example

If you work from **9:00 to 17:00** with a break from **13:00 to 14:00**, you would enter two time slots:

- **9:00 to 13:00**
- **14:00 to 17:00**

## How to Add a Time Slot

Follow these steps:

- Go to **Manage Time Slots**
- Click your name
- Click **New**
- Fill in the details (day, start time, end time)
- Click **Save**

## Using the Example

For a Monday schedule of 9:00 to 17:00 with a break:

- Add a time slot for Monday, **9:00 to 13:00**
- Add a time slot for Monday, **14:00 to 17:00**

## Updating Later

You can **edit**, **delete**, or **clone** time slots as needed.

## Optional Alternative

You could add a full-day slot and use **Personal Time** calendar events as blockers. However, this method is riskier because it is less clear.

## Important

The calendar blocker method can be risky. Using separate time slots is clearer and more reliable.

### Watch the video guide:

<https://www.youtube.com/watch?v=6yZe3z4dh2Y>

## LEVEL 6

# Understanding the Difference

The difference between Mentee Profiles, Calendar Events, and Service Appointments.

## Overview

There are three important types of records in Salesforce. Understanding the difference between them will help you use the system more confidently.

## Mentee Profile

This is the main record for a young person. It contains their details, funding information, games, equipment, and referral form. You can view this information, but you do not usually need to change it.

## Calendar Events

A calendar event is a session in the calendar. It includes the **date, time, who it is with**, and the **type of session**. Creating a calendar event schedules a session but does not confirm attendance.

## Service Appointments

A Service Appointment is where you confirm attendance, complete the wrap-up, add notes, and update the session status. This is the record that matters for invoicing and payment.

## Simple Way to Remember

- **Profile** = information about the mentee
- **Calendar Event** = when and who
- **Service Appointment** = what happened

## Key Point

Use the **Profile** for reading mentee details. Use **Calendar Events** for moving or scheduling sessions. Use **Service Appointments** for wrapping up after a session.

**Watch the video guide:**

[https://www.youtube.com/watch?v=UAxlOz68\\_mg](https://www.youtube.com/watch?v=UAxlOz68_mg)

## LEVEL 6A

# Using Calendar Events

How to create, view, and manage calendar events and bookings for mentoring sessions.

## Overview

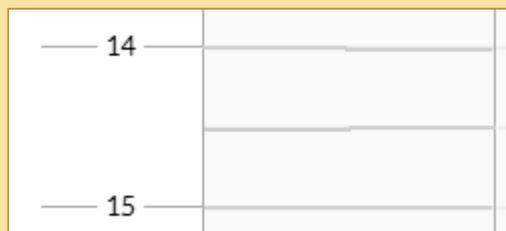
The Salesforce calendar works a little differently from Google Calendar. Some parts may feel less familiar at first, but once you know where to click, it becomes much easier to use. For example:

- to move an event, you edit the event details rather than dragging and dropping it
- event status is shown using a small coloured square in the title, rather than changing the colour of the full event

## How to Add a Calendar Event

Each hour in the calendar is split into two sections:

- click the top half if the session starts on the hour
- click the bottom half if the session starts at half past



This will open a flow where you can enter the event details.

## Event Details

### Event Name

This can be anything you choose. We recommend using the mentee's full name so it is easy to find later.

### Description

If you are using Google Meet, you can paste the meeting link here.

**Google Meet new meeting URL:** <https://meet.new/>

## Type

You will see a list of event types. Here is what each one means:

### Mentoring and Other Paid Work

- **MindJam Mentoring:** Normal sessions at your hourly rate.
- **Other Paid Work:** Work that is not mentoring, paid at your hourly rate.

### Group Sessions

- **Adventure Guild:** D&D (Dungeons and Dragons) sessions.
- **Group Session:** Standard group sessions.

### Fixed Rate Meetings (£40)

- **Meeting (Charged):** Formal meetings you can charge for.
- **Official Meeting:** Meetings that can be charged.
- **Report (Charged):** Formal reports that you can charge for.

### Non-Chargeable / Internal

- **Report:** Reports that are not charged.
- **Parent/Carer Meeting:** Initial meetings (not charged).
- **Personal Time:** Used for blockers or reminders (not billed).

### Types to Ignore

- **BlockJam Counselling**
- **Counselling**
- **Training** (may be removed)

## Mentee Field

This field links the event to a specific mentee. When you click into the **Mentee Field** you will see a drop down of all your mentees. If your mentee does not appear, click **Enter** on your keyboard. This will open a window with all your mentees.

If the event is for a mentoring session or other work connected to a young person, make sure you select the correct mentee here. If no mentee is added, the system will not know who the event is for.

If you are creating a **Personal Time** event or another event not linked to a young person, such as **Other Paid Work**, you do not need to add a mentee.

### **Session Group**

If this is a group session, use the **Session Group** field instead of selecting an individual mentee.

### **Start Time and End Time**

Enter the time the event starts and ends.

### **Repeat and Other Fields**

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#### **Repeat**

If the session repeats, you can choose how often:

- weekly
- monthly
- yearly

If needed, you can also add an end date for the series.

#### **Related To and System Information**

You can ignore these fields. **Please do not change them.**

Once everything is complete, click **Save**.

### **Important**

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When an event is created, the system also creates a **Service Appointment** in the background. This can take up to **40 seconds**. If you do not see the Service Appointment straight away, it is usually best to wait a moment and check again.

### **After the Event Has Been Created**

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When you click on a calendar event, you will see some useful links and options.

#### **Service Appointment**

Use this when you need to:

- complete the wrap up

- confirm attendance
- update the session status

### **Edit or More Details**

Use this when you need to:

- change the time
- change the date
- update other event details
- delete the event

If you need to move a session, open the event and edit the start or end date and time. If the change only applies once, choose **this event**. If the change applies to the full repeating series, choose **the series**.

### **Deleting an Event**

To delete an event, open it and use the **Delete Series** option.

Despite the name, this does more than one thing. You will then be asked whether you want to delete:

- just this event
- or this event and the following series

So even though the button says **Delete Series**, you can still choose to remove only one event.

### **Understanding the Coloured Square**

Each calendar event includes a small square in the title. This will automatically update based on the wrap up, or if the session is cancelled. This shows the session's current status.

**NEW**

#### **Draft**

A placeholder for a Parent/Carer meeting added by the assigning team.



#### **Scheduled**

A future session that is confirmed but has not yet taken place.

**Completed**

A successful session where the mentee attended and the wrap-up is finished.

**Cancelled**

A session cancelled within the official policy. No charge to the parent/carer.

**Admin Required**

A wrapped-up session that is missing funding contact details. The MindJam Finance Team will sort this for you.

**Late Notice Cancellation**

A cancellation outside the official policy. The parent/carer will be charged.

**Did Not Attend**

The mentee did not show up for the session. The parent/carer will be charged.

**Watch the video guide:**

<https://www.youtube.com/watch?v=DrtSBTkWnXg>

## LEVEL 6B

# Wrap Up a Session

How to complete a session record after it has taken place.

## Overview

Wrapping up a session confirms what happened. This is an important step because it triggers attendance records, supports invoicing, and ensures you get paid.

## How to Wrap Up

Open the **Service Appointment** (the SA link on the calendar event). Click **Wrap Up Session**.

## Funding Type

Choose whether the session is **Funded** or **Self-funded**. If you are unsure, check with the Finance team.

## Why This Matters

Wrapping up a session:

- confirms the session took place
- sends attendance emails
- supports invoicing and payment

**No wrap-up = no pay.**

## Cancel a Session

To cancel a session, open the Service Appointment. Click **Cancel Session** and add a reason.

## If Something is Missing

If information is missing during the wrap-up, you can click **Next** to skip that step. Use the **Admin Details** box to explain what is missing.

## Pre-written Messages You Can Use

"This mentee is self funded but there is no self funded contact..."

"This mentee is funded but there is no funded contact..."

## After Submitting

The Service Appointment will update and the session will be marked as complete.

### Watch the video guide:

<https://www.youtube.com/watch?v=aXAd8FRa784>

## Finding Your Mentees and Sessions

### Overview

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There are two main things you will need to find regularly: your **mentees** and your **sessions**.

### Your Mentees

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These are the young people assigned to you. You can view their profiles, check their details, and manage your caseload.

### Your Sessions

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These are the appointments and events linked to your work. You can check dates, times, access Service Appointments, and complete wrap-ups.

## LEVEL 7A

# Accessing Your Mentees

How to view your mentee list, open profiles, accept or reject referrals, and off-board mentees.

## Overview

Go to **Appointment Management** then **My Mentees**.

## What You Can See

You will see the mentee name and start date.

## Opening a Profile

Click a mentee's name to open their full profile.

## Viewing the Form Submission

You can see the original referral form from within the mentee profile.

## Accept or Reject

At the top right of a mentee profile you will see **Accept** and **Reject** buttons.

## What Accepting and Rejecting Means

After reviewing the referral form and having a parent meeting:

- **Accept** adds the mentee to your caseload
- **Reject** returns the mentee to the assigning team

## Off-Boarding

To off-board a mentee, select a **reason** and **end date**. The mentee will be removed from your list.

## Important

Check your mentee list regularly for discrepancies. Off-board mentees who are no longer with you. Contact [assigning@mindjam.org.uk](mailto:assigning@mindjam.org.uk) if a mentee is missing from your list.

## LEVEL 7B

# Accessing Your Sessions

How to find, filter, and use session list views.

## Overview

Go to **Appointment Management** then **Sessions**.

## Session List Views

Click the dropdown arrow next to **Recently Viewed** to see available list views.

## Why List Views Are Useful

List views let you see only the sessions that are relevant to you. For example: today's sessions, sessions needing wrap-up, or new mentees.

## Useful Views

### Requiring Confirmation New Mentee

Use this view to track which mentees need your accept or reject decision.

### Requiring Wrap Up Today

Shows sessions that need to be completed today.

### Other Views

There may be other views available. These may change over time.

## Opening a Session

Click the SA link to open a session and access or wrap up the record.

## Key Point

Use views to track what needs your attention and to stay on top of your workload.

## LEVEL 8

# Recording an Absence (Illness and Holiday)

How to record time away so the team can see you are unavailable.

## Overview

Recording an absence lets the team see that you are away. It does **not** automatically cancel your sessions.

## How to Add an Absence

Follow these steps:

- Go to **Appointment Management** then **Absences**
- Click **New**
- Fill in the details
- Click **Save**

## What It Is Used For

This is mainly so Senior Leadership can see that you are unavailable.

## Useful Tip

Pin the **My Absences** view for quicker access.

## Key Point

Record your absence in the system, but remember to **cancel your sessions separately**.

## LEVEL 10

# How to Log a Support Ticket

How to contact Senior Leadership or departments using the support ticket system.

## Overview

Use Support Tickets to contact Senior Leadership or specific departments within MindJam.

**Important:** Do not use support tickets for safeguarding concerns. Use the safeguarding form instead:

<https://forms.gle/z5gaV3zXVATUjDHJ7>

## How to Raise a Ticket

Go to **Support** then **Support Tickets** then **Raise a Case**.

## Filling in the Form

### Case Category

- Finance
- Provision
- SEND
- General Advice

### Priority

- **High:** Needs response within 24 hours
- **Medium:** Important but not urgent
- **Low:** General enquiry

### Subject

Write a short, clear title for your ticket.

### Description

Add a brief explanation of the issue or request. Then click **Next**.

## Checking Your Ticket

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Click **My Cases** to view your ticket and its status.

## Replies and Updates

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You will receive an email notification when there is an update. You can also check the **Chatter** section on the ticket for replies.

### Watch the video guide:

<https://www.youtube.com/watch?v=0AIFsROS2BY>

LEVEL 11

## Dashboard

This section is currently under development. A new module is being constructed. Stand by for further transmissions.

# Useful Links

## Community Site

- [Community Site Home](#) - Log in to the Salesforce Community Site
- [My Account](#) - View and update your account details
- [Knowledge Base](#) - Browse help and guidance articles

## Mentees and Sessions

- [My Mentees](#) - View your assigned mentees
- [My Sessions](#) - Manage your sessions
- [Group Sessions](#) - View group session records
- [Calendar View](#) - See your schedule

## Availability and Absences

- [Manage Time Slots](#) - Set your availability
- [Absences](#) - Record illness or holiday

## Preferences

- [Update Games and Equipment](#) - Update your profile preferences

## Support

- [Support Home / Raise a Case](#) - Submit or view support tickets
- [Safeguarding Form](#) - Report safeguarding concerns

## Security

- [NCSC Password Manager Guide](#) - Cyber security advice

# Terminology

## General Salesforce Terms

**Flow:** A guided, step-by-step process within Salesforce. Used for tasks like updating your games and equipment.

**Service Appointment:** A record representing a scheduled mentoring session. Used for wrap-up, attendance, and invoicing.

**Event:** A calendar entry for a scheduled session. Contains date, time, type, and mentee details.

**Profile:** Your personal account area containing your details, preferences, and settings.

**Dashboard:** A visual summary page showing useful metrics about your sessions and work.

**Report:** A list or summary of data that can be viewed and filtered.

**List Views:** Filtered views of records displayed in a table format. You can save different filters and column layouts.

## Session Statuses and Calendar Indicators



### Draft

A placeholder for a Parent/Carer meeting added by the assigning team.



### Scheduled

A confirmed future session that has not yet taken place.



### Completed (Attended)

A session where the mentee attended and the wrap-up is done.



### Did Not Attend

The mentee did not show up for the session.



### Late Notice Cancellation

Cancelled outside the official policy. Parent/carers will be charged.



### Cancelled

Cancelled within the official cancellation policy.



### **Admin Required**

Missing funding details. Finance team will resolve.

## **Event Types**

### **Mentoring and Other Paid Work**

- **MindJam Mentoring:** Normal sessions at your hourly rate
- **Other Paid Work:** Non-mentoring work paid at hourly rate

### **Group Sessions**

- **Adventure Guild D&D:** Dungeons and Dragons sessions
- **Group Session:** Standard group sessions

### **Fixed Rate Meetings (£40)**

- **Meeting (Charged):** Formal chargeable meetings
- **Official Meeting:** Chargeable meetings
- **Report (Charged):** Formal chargeable reports

### **Non-Chargeable / Internal**

- **Report:** Non-charged reports
- **Parent/Carer Meeting:** Initial meetings (not charged)
- **Personal Time:** Blockers or reminders (not billed)

### **Types to Ignore**

- BlockJam Counselling
- Counselling
- Training (may be removed)

## **Wrapping Up**

**Definition:** Completing a session record after it takes place.

**Process:** Select status, add notes, confirm details.

**Importance:** Used for attendance tracking, invoicing, and payment.