Create New Event

1. From CRM module, click Activities.

2. Activities search screen will appear, there will be 4 tabs (All Activities, My Activities, Open Activities and Sales Rep Summary)

Activit	ies											^ □	×
Close													
All Act	ivities M	y Activities Open Activiti	es Sales Rep Summary										
🗋 Ор	en Selected	🕞 Export 👻 🥅 Colun	nns • 🔠 View • 🖓 🖓 New	Event 🖓 New Ta	ask 🌐 Log Call	୍ଦ୍ୱିତ Send Email						4,31	4 records
Q, Ty	rpe	✓ Contains	~	+ Add	Filter								
	Туре	Attachment Activity	No. Created Date 🔻	Subject	Due Date	Contact	Entity	Related To	Record No.	Created By	Assigned To	Status	1
0	Event	0 ACT-44	21 03/21/2018 01:	Test Event 1	03/21/2018 08:	Test Contact 495	Test Customer 49	Opportunity	<u>344</u>	Ars Galero	Darel Ronquillo	Open	
	Commen	t 0 ACT-44	20 03/21/2018 10:	Collect Data	03/21/2018 08:	Test Contact 495	Test Customer 49	Opportunity	<u>341</u>	Darel Ronquillo	Darel Ronquillo	Closed	
	Task	0 ACT-44	19 03/21/2018 10:	Collect, manag	03/21/2018 08:	Test Contact 495	Test Customer 49	Opportunity	<u>341</u>	Darel Ronquillo	Darel Ronquillo	Open	
	Task	0 ACT-44	18 03/03/2017 07	Email: Controll	03/03/2017 12:			(844)		http://pgr	Transpage	Open	
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3. To create an event, click **New Event** toolbar button. Event screen will appear:

	ndees Notes Attachments Audit Log Jira Issues Hours Worked			
rce	CRM V	Company Loc	~	Activity No
ect *	Private	Related To		Record No
tact	✓ Entity ✓	Phone		Mobile
tact Email	Send Outlook Email	Entity Loc		Show Time As
t	3/22/2018 🗐 8:00 AM 🕓 All-Day Event	Time Zone		Local Time
	3/22/2018 🗐 8:30 AM 🕓 Reminder 🗌 None	LOB		
us	Open v Priority Normal v	Created By	Darel Ronquillo	Created 3/22/2018
gory	✓ Assigned To Darel Ronquillo ✓			
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A B	<i>I</i> <u>U</u> ebe <u>A</u> <u>*</u> <u>¥</u> ≡ ≡ ≡ ∷ ≒ ≡ ⊡	1	<i>₽.</i> — a‡	

5. User can change the Start and End date/time.

6. User can select Entity, Contact, Company Location, Status, Priority, Category, Assigned To and Show Time As from their respective drop downs.

7. To add Attendees, click Attendees tab. In Attendees tab, click Insert button. Attendees screen will appear, select attendees then click Select toolbar button.

Attendees				^	×
Select Refresh Report - Close					
Attendees					
맘 View Q Filter (F3) 599 re	cord(s)				
Name	Email	Phone No.	Mobile No.		
IRELY ADMIN	darel.ronquillo@irely.com				*
Jan Buff	jan.ruff@indy.com				
Peter E. Schmidt	Pete Schmidt@iRely.com				
Cody Harris	cody hamis@indy.com				
Brian Kay	brian.kay@inely.com				
Matt Waterski	Matt.Waterski@inely.com				
Willia Nize	Mike Noe@inely.com				
George Olivey	george airrey@irely.com	773-613-0245	1 773-613-0244		
Michael New	milia.noe@inely.com				
Pata Schmidt	Pete Schmidt@iffely.com				
Wai Chen	weichen@inely.com				
Kirls Bulleter	kris.rshner@inely.com				
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To add	Notes, clie	ck Notes	tab. Enter notes	on the space	provided then	click Save button (button will appear after typing the notes).
Details	Attendees	Notes	Attachments (0)	Audit Log (0)	JIRA Issues (0)	Hours Worked (0)
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	irelyadı	nin - a few	/ seconds ago (6/14/	2017 2:47 pm)	Edit Delete	
1	Testing	only				
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9. To add Attachments, click Attachments tab. Click Add Item button then select attachment to be added.

10. To add JIRA Issue, click JIRA Issues tab. Click Add Existing JIRA button to add an existing issue and click Create Issue button to create new JIRA issue.

11. To add Hours Worked, click Hours Worked tab.Click New Hours Worked button then provide the other details.

12. Click Save or Done toolbar button to save the activity.

*text - denotes required field to create an activity