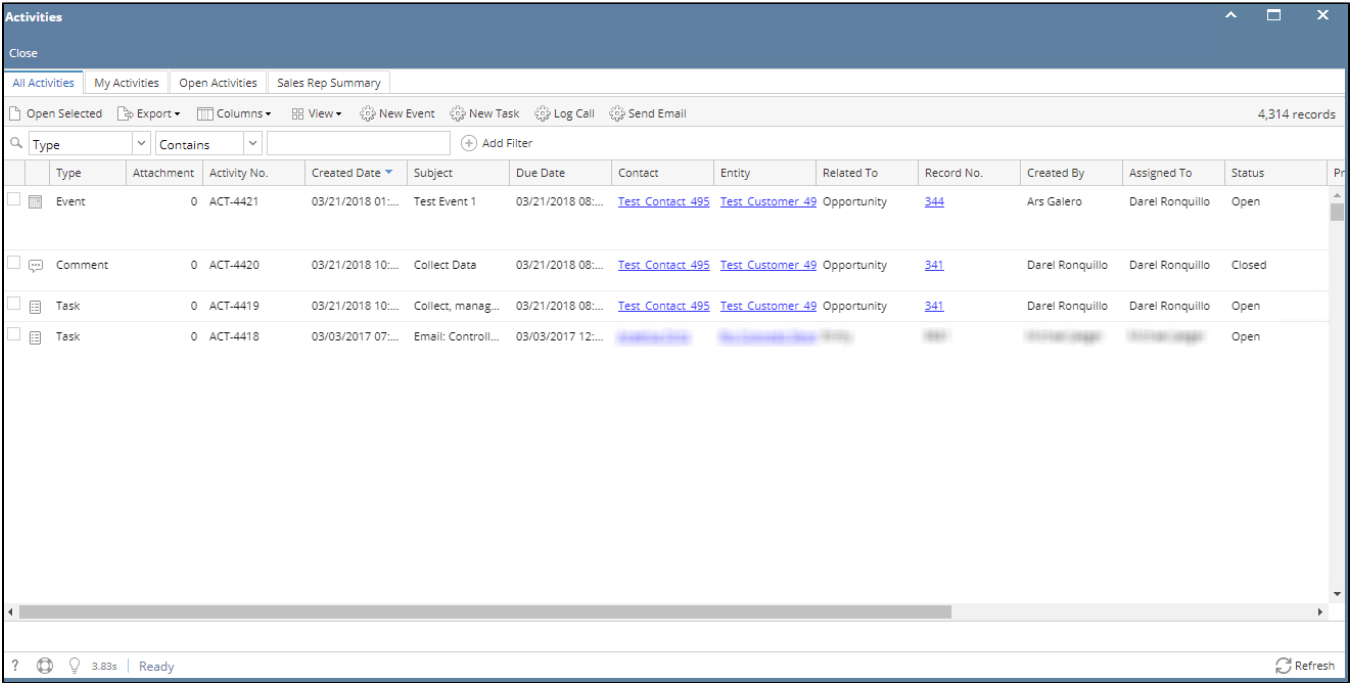
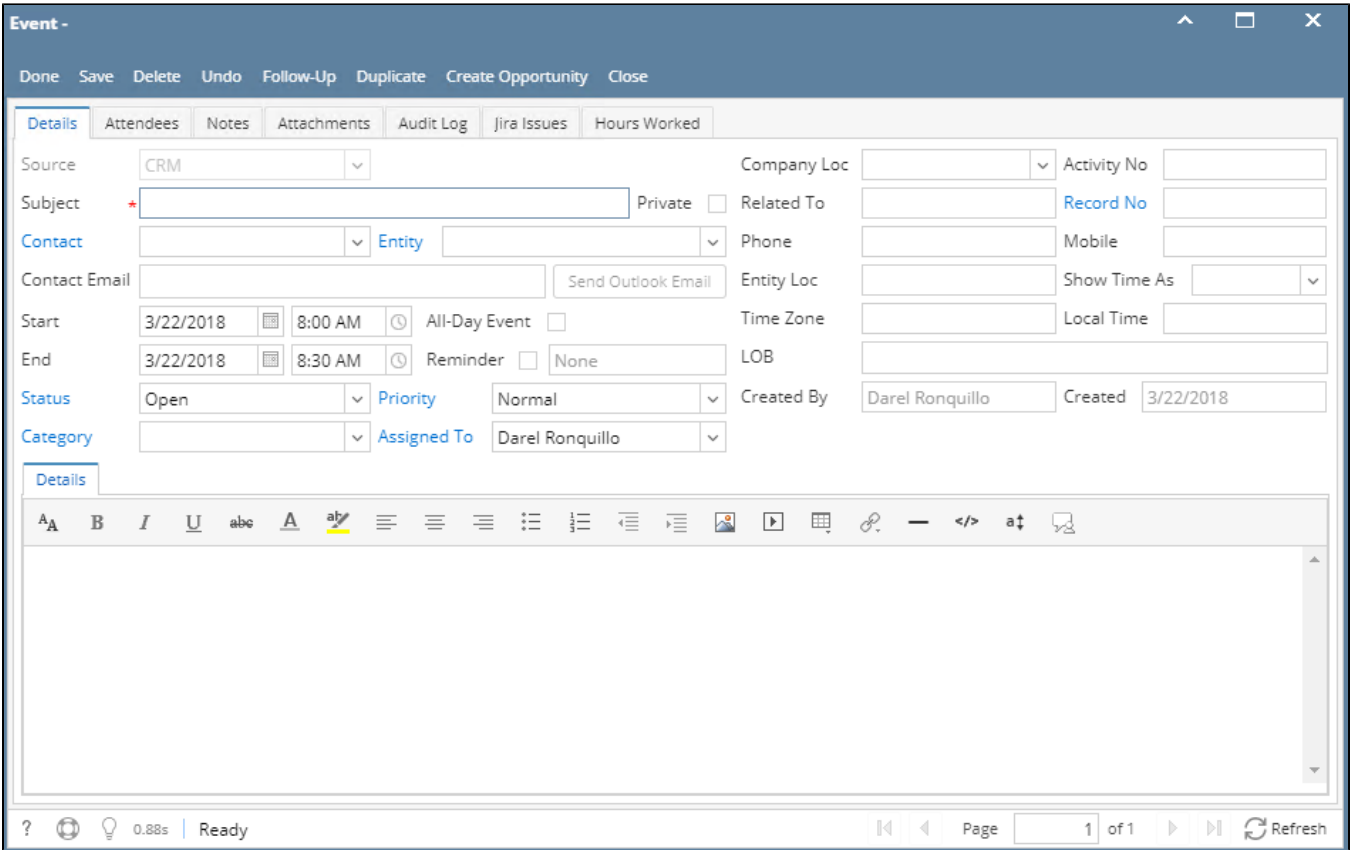


Create New Event

- 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)



- 3. To create an event, click **New Event** toolbar button. Event screen will appear:



- 4. Enter value for ***Subject**.

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

View

Filter (F3)

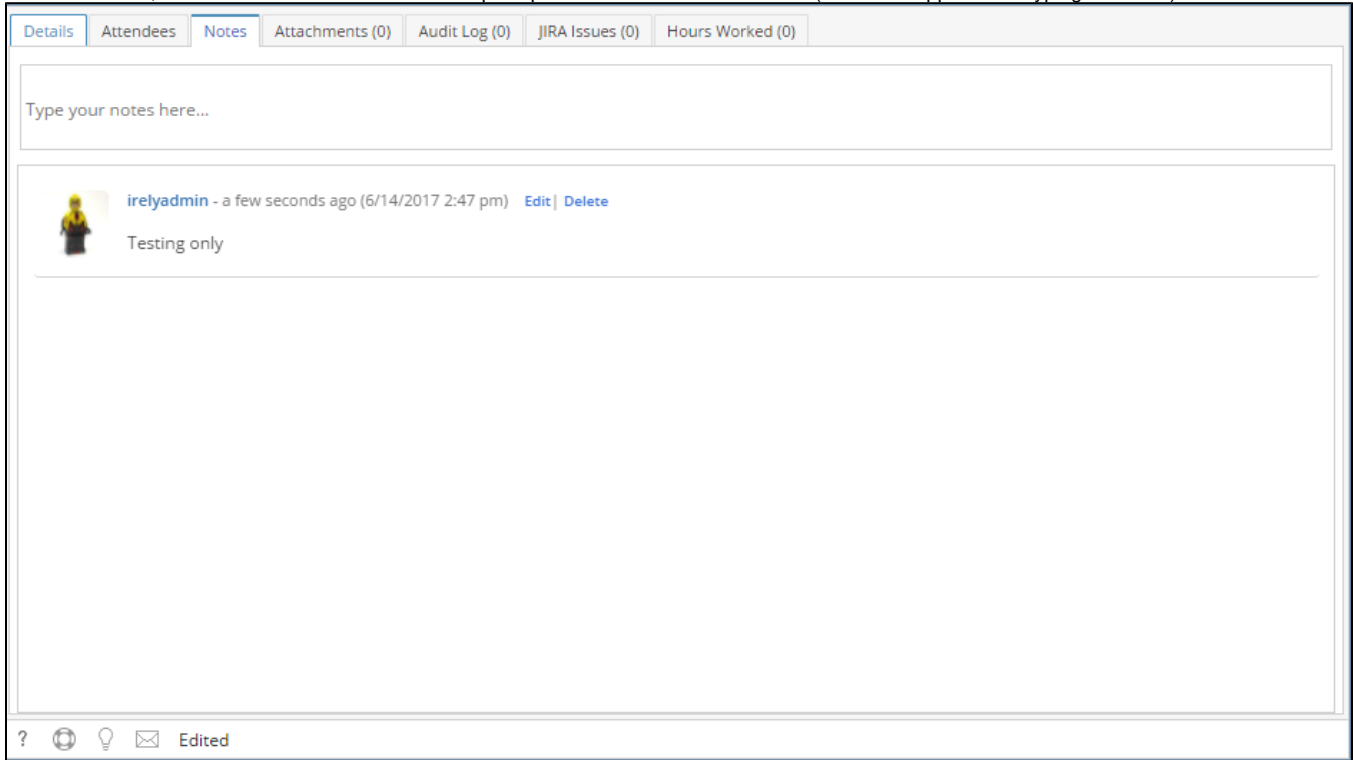
599 record(s)

	Name	Email	Phone No.	Mobile No.
<input type="checkbox"/>	IRELY ADMIN	darel.ronquillo@irely.com		
<input type="checkbox"/>	Jan Ruff	jan.ruff@irely.com		
<input type="checkbox"/>	Peter E. Schmidt	Peter.Schmidt@irely.com		
<input type="checkbox"/>	Cody Harris	cody.harris@irely.com		
<input type="checkbox"/>	Brian Kay	brian.kay@irely.com		
<input type="checkbox"/>	Wes Wetinski	Wes.Wetinski@irely.com		
<input type="checkbox"/>	Mike Rose	Mike.Rose@irely.com		
<input type="checkbox"/>	George Olney	george.olney@irely.com	775.419.6245	1 775.419.6246
<input type="checkbox"/>	Michael Rose	mike.rose@irely.com		
<input type="checkbox"/>	Peter Schmidt	Peter.Schmidt@irely.com		
<input type="checkbox"/>	Wes Chen	wes.chen@irely.com		
<input type="checkbox"/>	Kris Rohrer	kris.rohrer@irely.com		
<input type="checkbox"/>	Jackie Reed	jackie.reed@irely.com		

?

Ready

8. To add **Notes**, click Notes tab. Enter notes on the space provided then click Save button (button will appear after typing the notes).



The screenshot shows a web application interface with a top navigation bar containing several tabs: 'Details', 'Attendees', 'Notes' (which is currently selected), 'Attachments (0)', 'Audit Log (0)', 'JIRA Issues (0)', and 'Hours Worked (0)'. Below the tabs is a large text input area with the placeholder text 'Type your notes here...'. Underneath this input area, there is a user profile section for 'irelyadmin' with a small avatar icon, a timestamp 'a few seconds ago (6/14/2017 2:47 pm)', and links for 'Edit' and 'Delete'. The note content is 'Testing only'. At the bottom of the interface is a toolbar with icons for help, undo, redo, and email, followed by the text 'Edited'.

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