

Create New Task

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)

The screenshot shows the 'Activities' window with a 'Close' button at the top left. Below the title bar are four tabs: 'All Activities', 'My Activities', 'Open Activities', and 'Sales Rep Summary'. A toolbar contains icons for 'Open Selected', 'Export', 'Columns', 'View', 'New Event', 'New Task', 'Log Call', and 'Send Email'. A search bar with 'Type' and 'Contains' dropdowns and an 'Add Filter' button is present. The main area displays a table with 4,314 records. The table has columns: Type, Attachment, Activity No., Created Date, Subject, Due Date, Contact, Entity, Related To, Record No., Created By, Assigned To, and Status. The first four rows are visible:

Type	Attachment	Activity No.	Created Date	Subject	Due Date	Contact	Entity	Related To	Record No.	Created By	Assigned To	Status
Event	0	ACT-4421	03/21/2018 01:...	Test Event 1	03/21/2018 08:...	Test Contact 495	Test Customer 49	Opportunity	344	Ars Galero	Darel Ronquillo	Open
Comment	0	ACT-4420	03/21/2018 10:...	Collect Data	03/21/2018 08:...	Test Contact 495	Test Customer 49	Opportunity	341	Darel Ronquillo	Darel Ronquillo	Closed
Task	0	ACT-4419	03/21/2018 10:...	Collect, manag...	03/21/2018 08:...	Test Contact 495	Test Customer 49	Opportunity	341	Darel Ronquillo	Darel Ronquillo	Open
Task	0	ACT-4418	03/03/2017 07:...	Email: Controll...	03/03/2017 12:...	Test Contact 495	Test Customer 49	Opportunity	341	Darel Ronquillo	Darel Ronquillo	Open

The status bar at the bottom shows a search icon, a lightbulb icon, '3.83s', 'Ready', and a 'Refresh' button.

3. To create task, click **New Task** toolbar button. Task screen will appear:

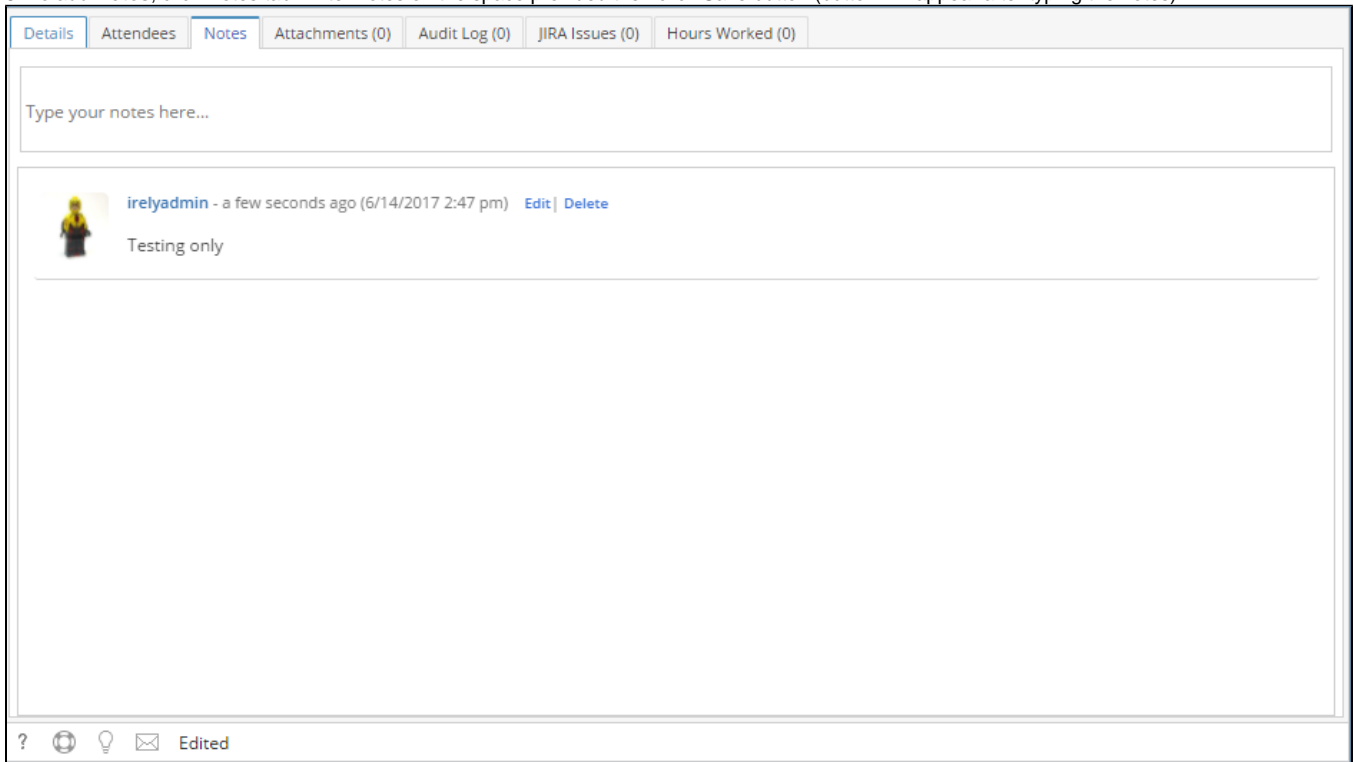
The screenshot shows the 'Task -' window with a title bar and a toolbar containing 'Done', 'Save', 'Delete', 'Undo', 'Follow-Up', 'Duplicate', 'Create Opportunity', and 'Close'. Below the toolbar are tabs: 'Details', 'Participants', 'Notes', 'Attachments', 'Audit Log', 'Jira Issues', and 'Hours Worked'. The 'Details' tab is active, showing a form with the following fields:

- Source: CRM (dropdown)
- Subject: * (text input)
- Contact: (dropdown)
- Contact Email: (text input)
- Due Date: 3/22/2018 (calendar icon)
- Status: Open (dropdown)
- Category: (dropdown)
- Company Loc: (dropdown)
- Activity No: (text input)
- Private: ☐
- Related To: (text input)
- Entity: (dropdown)
- Phone: (text input)
- Mobile: (text input)
- Entity Loc: (text input)
- Show Time As: (dropdown)
- Time Zone: (text input)
- Local Time: (text input)
- Priority: Normal (dropdown)
- LOB: (text input)
- Assigned To: Darel Ronquillo (dropdown)
- Created By: Darel Ronquillo (text input)
- Created: 3/22/2018 (text input)

Below the form is a rich text editor with a toolbar containing various formatting and editing icons. The status bar at the bottom shows a search icon, a lightbulb icon, '0.23s', 'Ready', 'Page 1 of 1', and a 'Refresh' button.

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

5. User can change the Due 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.
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 tabs: Details, Attendees, Notes (selected), Attachments (0), Audit Log (0), JIRA Issues (0), and Hours Worked (0). Below the tabs is a large text area with the placeholder text "Type your notes here...". Below this text area is a list of notes. The first note is from a user named "irelyadmin" (indicated by a small yellow robot icon) and is dated "a few seconds ago (6/14/2017 2:47 pm)". The note text is "Testing only". To the right of the note text are links for "Edit" and "Delete". Below the list of notes is a large empty text area for adding new notes. 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