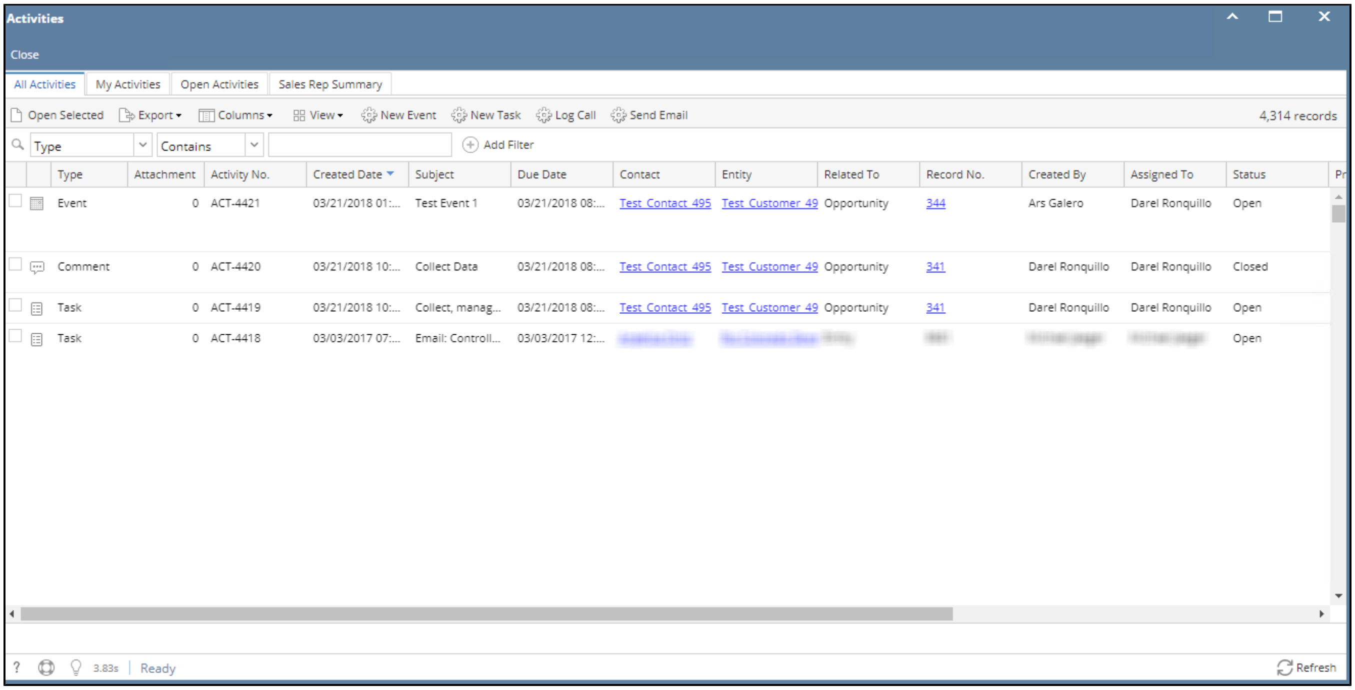
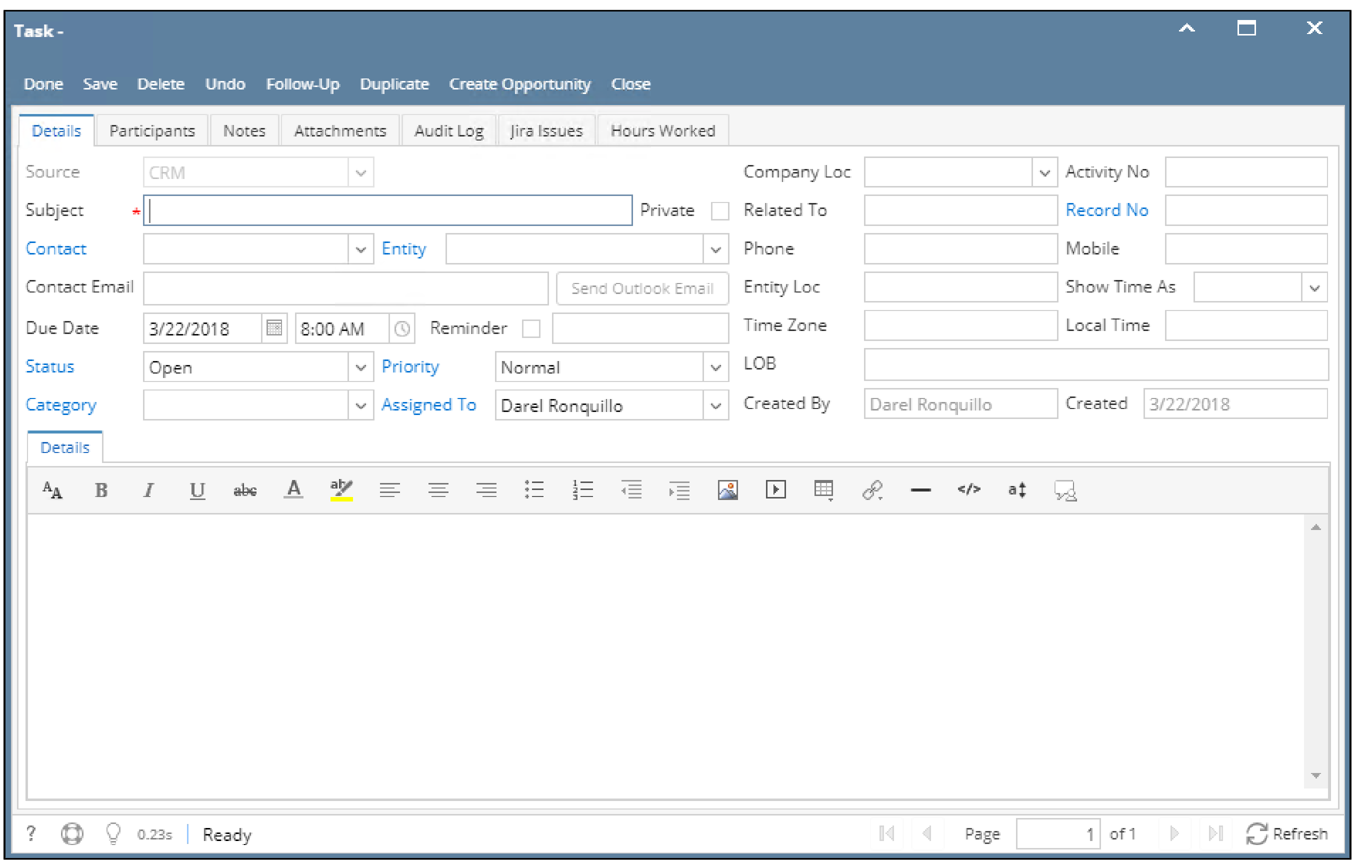
Create New Task

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)



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



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).

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