

Log Call

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)

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

3. To create call, click Log Call toolbar button. Call screen will appear:

Source: CRM

Subject: *

Contact:

Contact Email:

Start: 3/22/2018 8:00 AM

End: 3/22/2018 8:30 AM

Status: Closed

Category:

Company Loc:

Activity No:

Related To:

Record No:

Phone:

Mobile:

Entity Loc:

Show Time As:

Time Zone:

Local Time:

LOB:

Created By: Darel Ronquillo

Created: 3/22/2018

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.
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