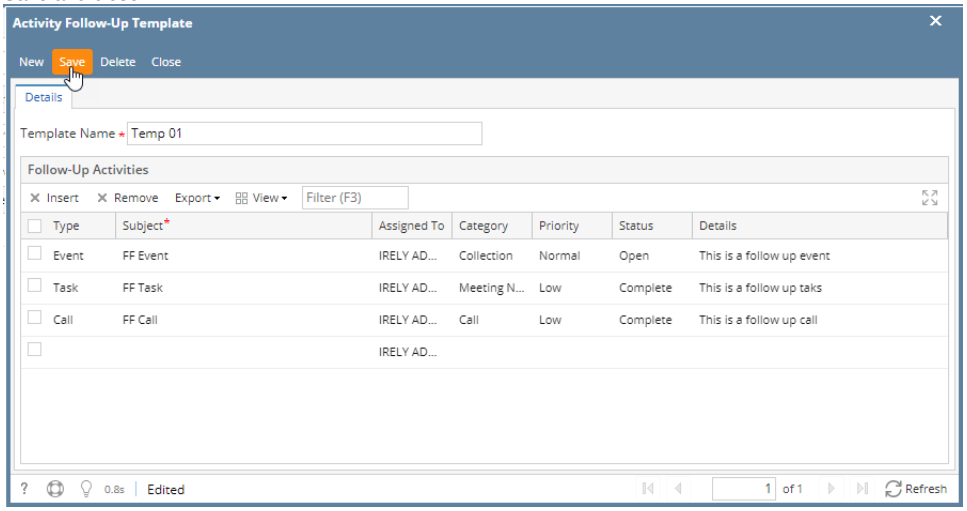
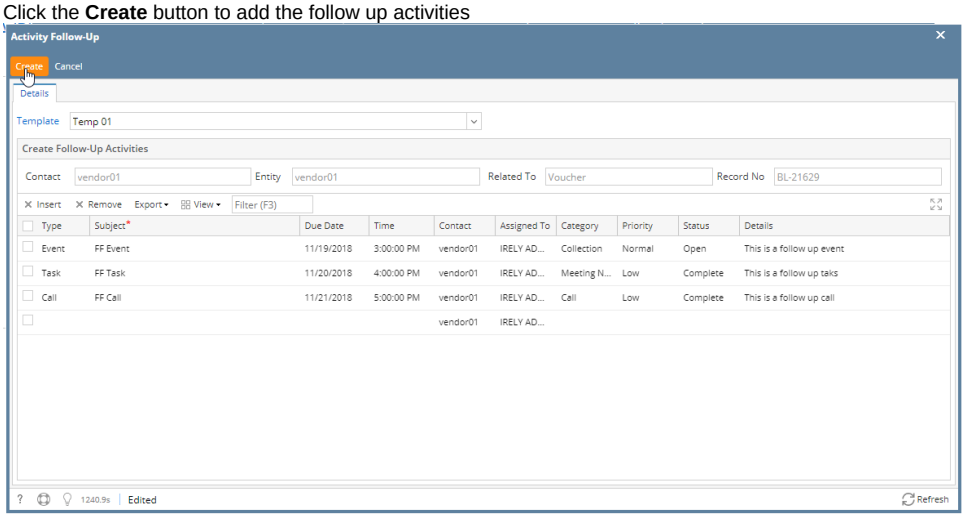
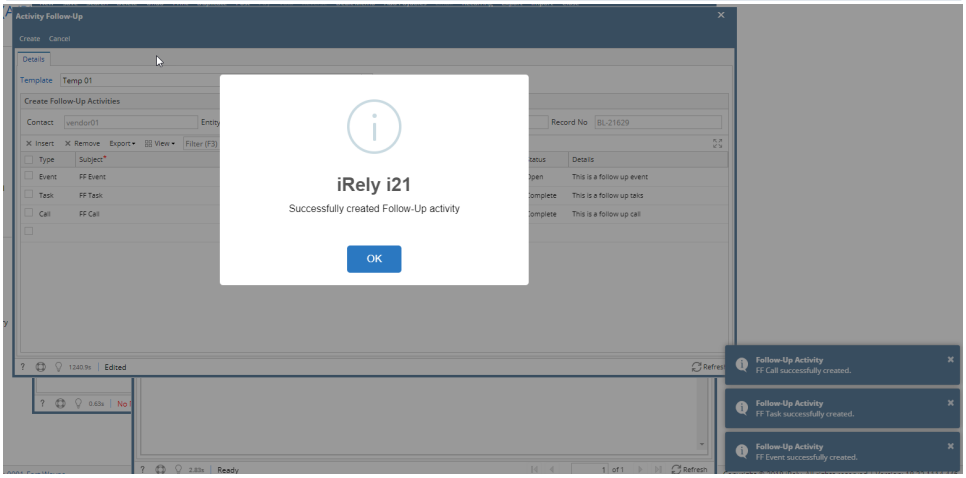
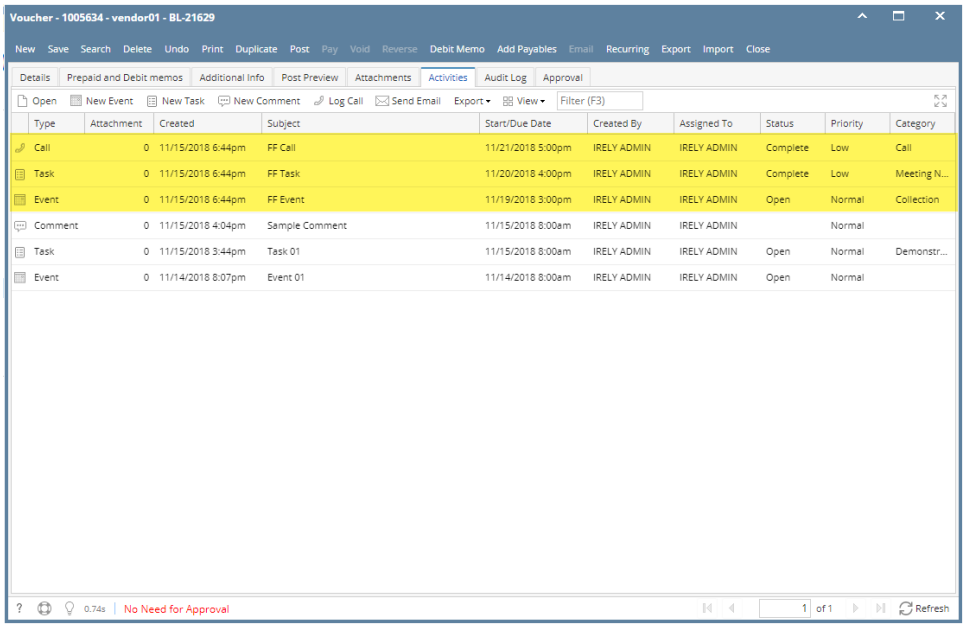
Activities - Follow-Up and Template

The Activity Follow-Up screen allows the user to quickly create several follow-up activities in a single screen. Here's how to create follow-up activities:

1. Open an existing Event/Task/Call record.
2. Click the **Follow-Up** button to open the **Activity Follow-Up** screen
3. Select a Template or create one by clicking on label hyperlink to open the **Activity Follow-Up Template** screen
    a. Enter the Template Name
    b. On the grid, select the Type, Subject, Category, Priority, Status, Details
    c. Save and close



4. Add the **Due Date** and **Time**

5. Click the **Create** button to add the follow up activities