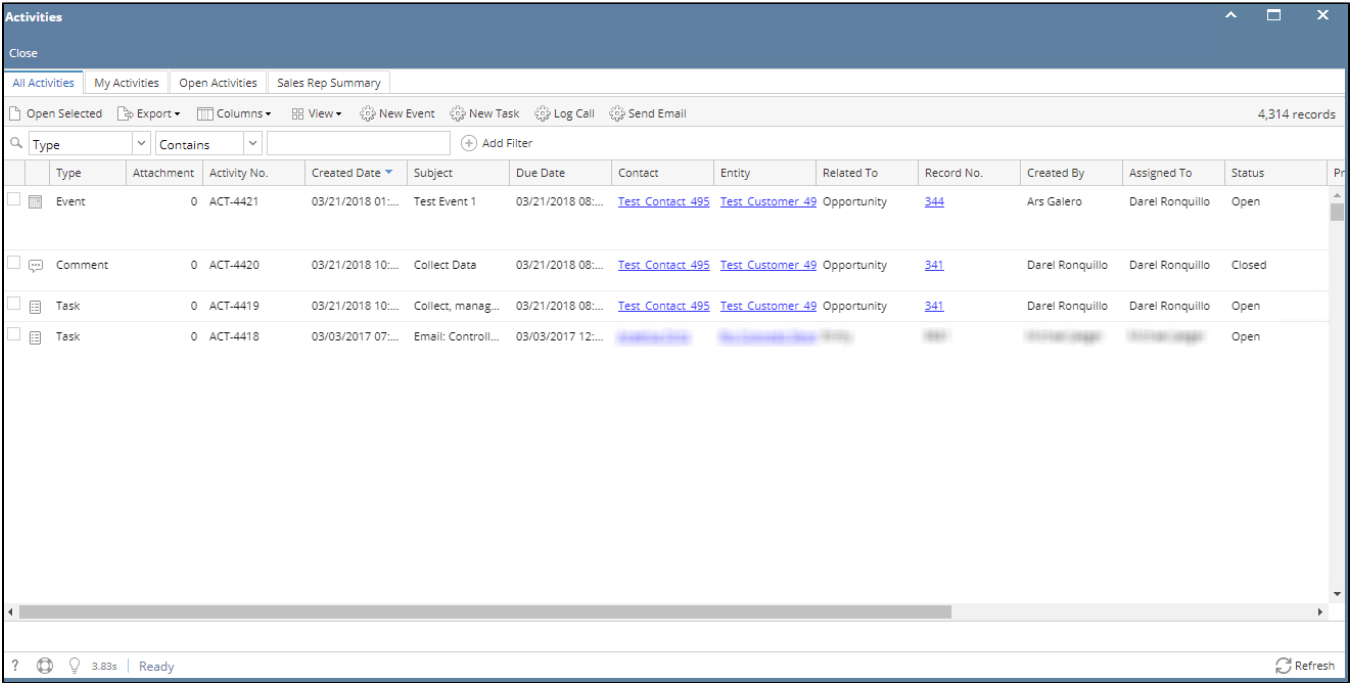
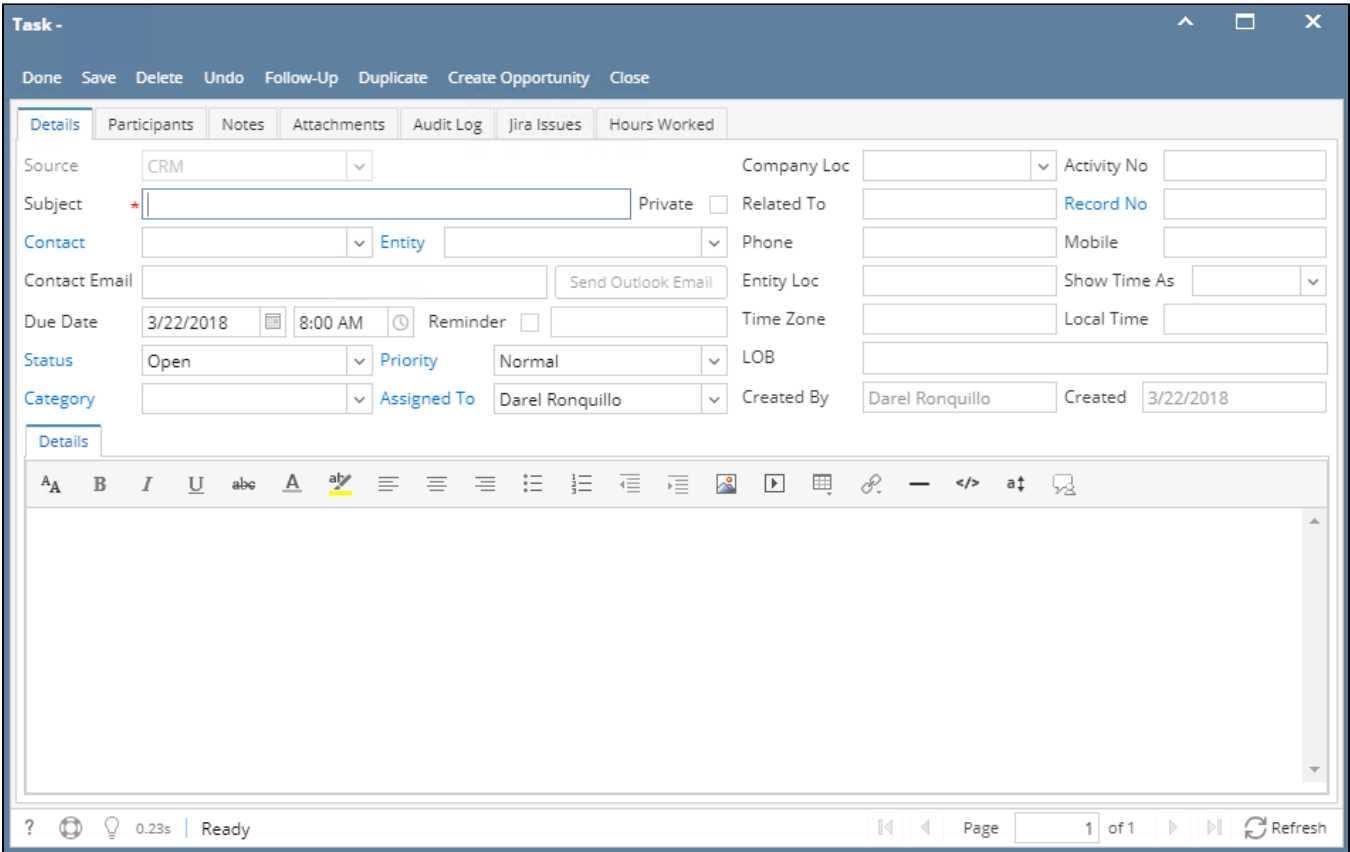


Create New Task

- 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)

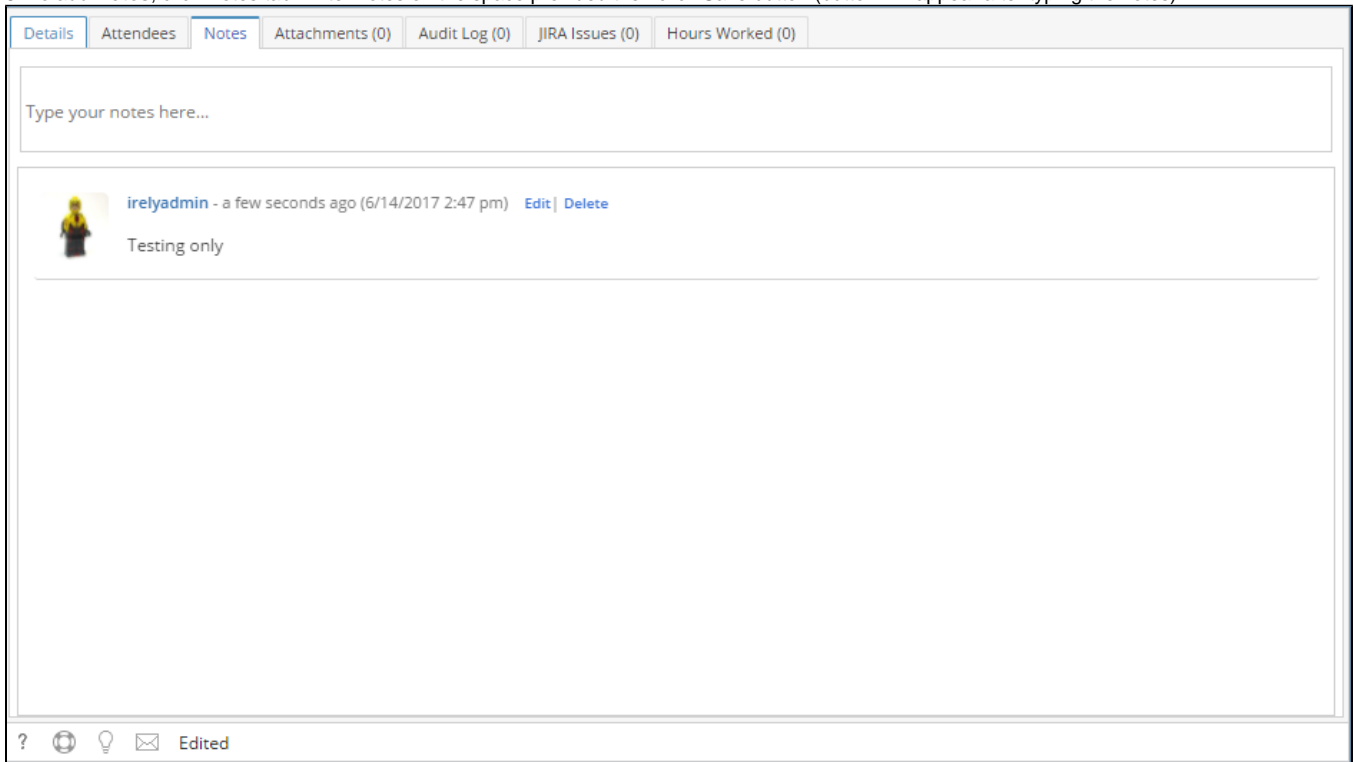


- 3. To create task, click **New Task** toolbar button. Task screen will appear:



- 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).



The screenshot shows a web application interface with a tabbed menu at the top. The tabs are: Details, Attendees, Notes (which is the active tab), 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 two links: "Edit" and "Delete". At the bottom of the interface is a toolbar with icons for help (?), a globe, a lightbulb, an envelope, and the word "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