

Step 1: On the opportunity tab when you open a record under activity you will see an option for log a call click on it .

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards

Opportunity **Burlington Textiles Weaving Plant Generator** Start timer

Activity Details Chatter

New Task **Log a Call** New Event Email

Subject
Call

Comments

Name
Search Contacts...

Related To
Burlington Textiles Weaving Plant Generator

Save

Step 2: Once you click on it you will have to fill in all the details like subject, comments, names, related to etc. Here I am putting a comment as logging a call and the subject is auto generated after that click on save.

Activity Details Chatter

New Task **Log a Call** New Event Email

Subject
Call

Comments
logging a call

Name
Andy Young

Related To
Burlington Textiles Weaving Plant Generator

Save

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

Step 3: Now if you want to create an event you can click on the new event option.

ActivityDetailsChatter

New TaskLog a CallNew EventEmail

New Event

Subject

* Start

DateAug 9, 2021Time7:00 AM

* End

DateAug 9, 2021Time8:00 AM

All-Day Event

Name

Step 4: Once you click on a new event option you will be directed to the next page where you will have to fill in all the details like subject, start date, end date etc. here I am putting subject as Discussion on Opp , dates are filled by default now I am putting location as Test location and click on save. Once you click on save on the next page you will see your event is created.

✓✓✓✓✓✓✓✓

ActivityDetailsChatter

New TaskLog a CallNew EventEmail

Set up an event...Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

discussion on Opp

You have an upcoming event

7:00 AM | Today

Follow up

You have an upcoming task with Andy Young

May 31

View More