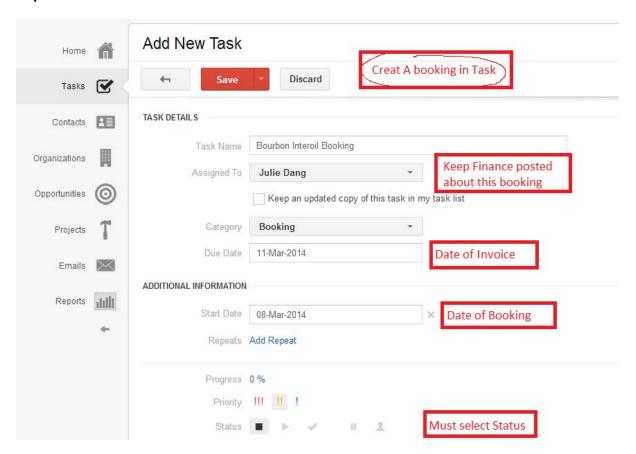
How to do a booking Entry in Insightly

Step 1:



1. Task Name: Full Company Name + Booking

2. Assigned to: Keep Finance and Operation informed about booking so to issue invoice and operation activities

3. Category: Select Booking status

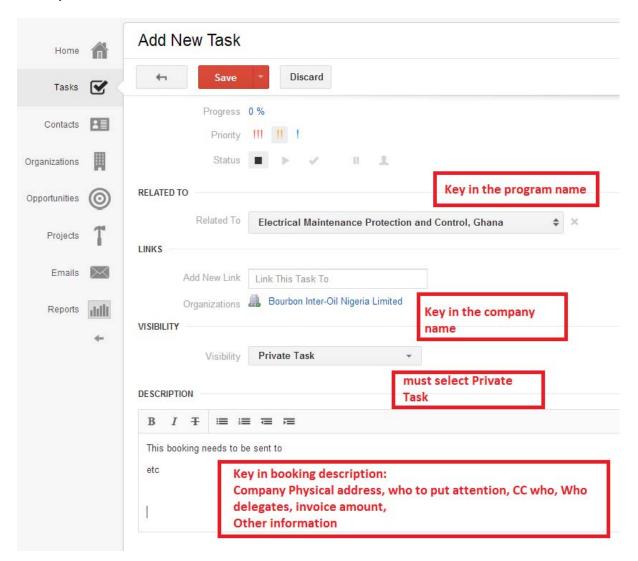
4. Due Date: This is date of Invoice expected to be issued

5. Start Date: This is date of booking(Date when registration form to be received)

6. Status: Sales person selects = in Process,

Finance once completed selects **Complete**

Step 2:



7. Related to: Key in the program name/ the program which deal belongs to

8. Add new link: Key in the company name which booking belongs to

9. Visibility: Private Task (Only available to Admin, and people Assigned to)

10. Description: Must provide complete content including following details;

Attention to:

Company Name:

Physical Address:

Attendees

Delegate invoice amount

Total invoice amount