


## How to do a booking Entry in Insightly

### Step 1:

The screenshot shows the 'Add New Task' form in Insightly. The left sidebar contains navigation links: Home, Tasks (selected), Contacts, Organizations, Opportunities, Projects, Emails, and Reports. The main form area is titled 'Add New Task' and includes a 'Save' button and a 'Discard' button. A red box highlights the 'Save' button with the text 'Creat A booking in Task'. Below the title, the 'TASK DETAILS' section includes fields for 'Task Name' (Bourbon Interoil Booking), 'Assigned To' (Julie Dang), 'Category' (Booking), and 'Due Date' (11-Mar-2014). A red box highlights the 'Assigned To' field with the text 'Keep Finance posted about this booking'. Below these fields is a checkbox labeled 'Keep an updated copy of this task in my task list'. The 'ADDITIONAL INFORMATION' section includes a 'Start Date' field (08-Mar-2014) and a 'Repeats' section with an 'Add Repeat' link. A red box highlights the 'Start Date' field with the text 'Date of Booking'. At the bottom, there are sections for 'Progress' (0%), 'Priority' (High), and 'Status' (In Progress). A red box highlights the 'Status' section with the text 'Must select Status'.

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:

The screenshot shows the 'Add New Task' form in a software application. The left sidebar contains navigation links: Home, Tasks (selected), Contacts, Organizations, Opportunities, Projects, Emails, and Reports. The main form area includes the following sections:

- Progress:** 0 %
- Priority:** Three exclamation marks (!!!)
- Status:** A dropdown menu with options: a black square, a play button, a checkmark, a pause button, and a person icon.
- RELATED TO:** A dropdown menu showing 'Electrical Maintenance Protection and Control, Ghana'. A red box with the text 'Key in the program name' points to this field.
- LINKS:** A section with 'Add New Link' and 'Link This Task To' buttons. Below it, 'Organizations' shows 'Bourbon Inter-Oil Nigeria Limited'. A red box with the text 'Key in the company name' points to this field.
- VISIBILITY:** A dropdown menu showing 'Private Task'. A red box with the text 'must select Private Task' points to this field.
- DESCRIPTION:** A text area with a rich text editor toolbar (Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent). The text 'This booking needs to be sent to' and 'etc' is entered. A red box with the text 'Key in booking description: Company Physical address, who to put attention, CC who, Who delegates, invoice amount, Other information' points to this field.

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| 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