

1. Search Field will always be there for you to search anything.

The screenshot shows the E*Assist Advisor interface for 'Syndicated Capital'. The search field is highlighted with a red box and labeled 'Search'. A callout box points to the search field with the text: 'Search any individual you want by typing your name here and pressing GO.' The search results show a list of individuals with columns for Name, CRD, OSJ, and Rep ID. Below the list are two tables showing due days for groups and tasks.

Due Days	Groups	Tasks
Overdue	0	0
Today - Next 7	0	0
Beyond Next 7	1	4

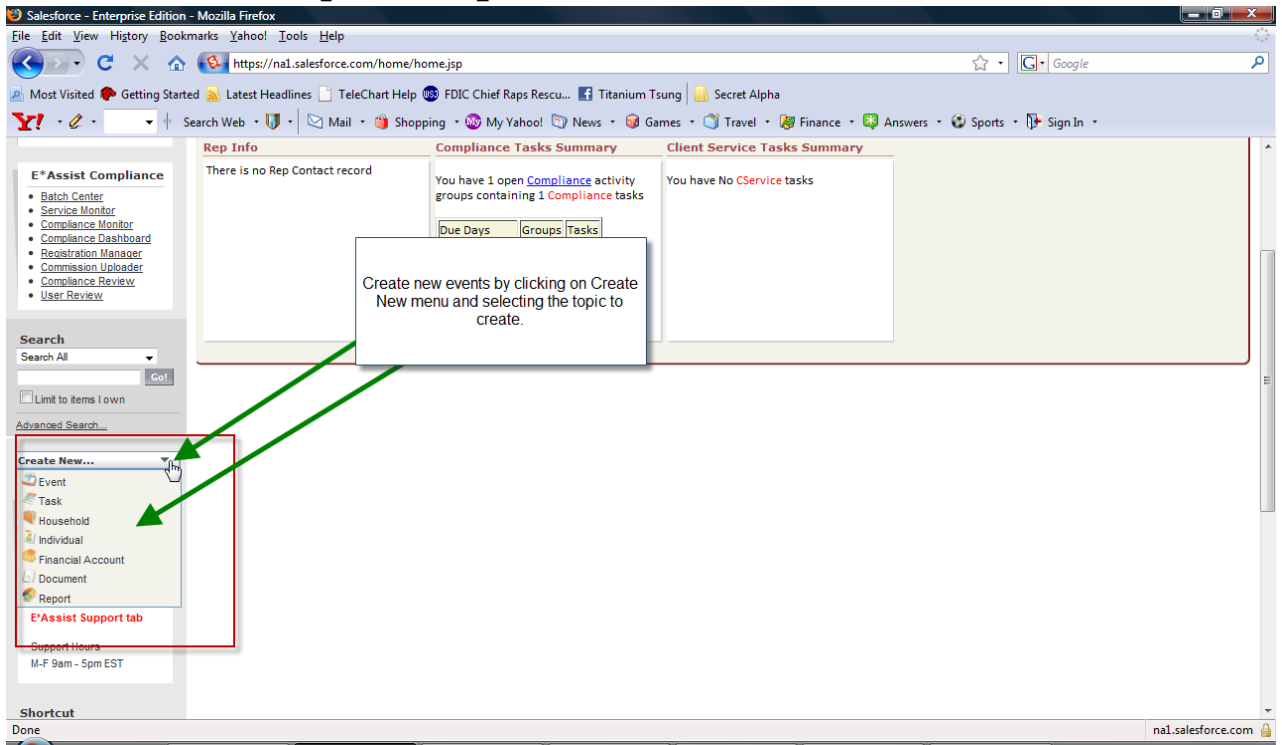
Due Days	Groups	Tasks
Overdue	0	0
Today - Next 7	0	0
Beyond Next 7	2	8

2. You can also Search other categories by clicking on the Search and select the desired Topic.

The screenshot shows the E*Assist Advisor interface for 'Syndicated Capital'. The search dropdown menu is open, showing a list of categories. A callout box points to the dropdown menu with the text: 'You can also Decide which Topic to Search. Simply select the type and search accordingly.' The search results show a list of individuals with columns for Name, CRD, OSJ, and Rep ID. Below the list are two tables showing due days for groups and tasks.

Due Days	Groups	Tasks
Overdue	0	0
Today - Next 7	0	0
Beyond Next 7	1	1

3. Below the Search box there is the Create New box. By clicking on this drop down menu you can create an array of topics.



4. We will first get into creating events. After selecting the Event topic from the Create New drop down menu.

The screenshot shows the 'Event Edit' page in the E*Assist system. The page is titled 'Calendar New Event' and 'Event Edit'. The main form contains the following fields and sections:

- Assigned To:** Admin User (circled in red)
- Name:** Individual
- Phone:**
- Email:**
- Related To:** Opportunity
- Private:**
- Event Status:** --None--
- Location:**
- Start:** 12/16/2008 12:00 PM (circled in red)
- End:** 12/16/2008 1:00 PM (circled in red)
- All Day Event:**
- Type:** --None--
- Show Time As:** Busy

Annotations on the page include:

- 'Create New Event Page' pointing to the 'Event Edit' tab.
- 'Press Save to create' pointing to the 'Save' button.
- 'Fields you must fill.' pointing to the 'Admin User', 'Start', and 'End' fields.

The sidebar contains various navigation options such as 'E*Assist Advisor', 'E*Assist Compliance', 'Search', 'Messages and Alerts', 'Shortcut', and 'Recent Items'. The bottom of the page shows a calendar view for Tuesday, December 16, 2008, with a table of invitees.

This is the Event Edit page. Add the appropriate to the indicated fields and press save to create the event. The created event will automatically be updated to your calendar.