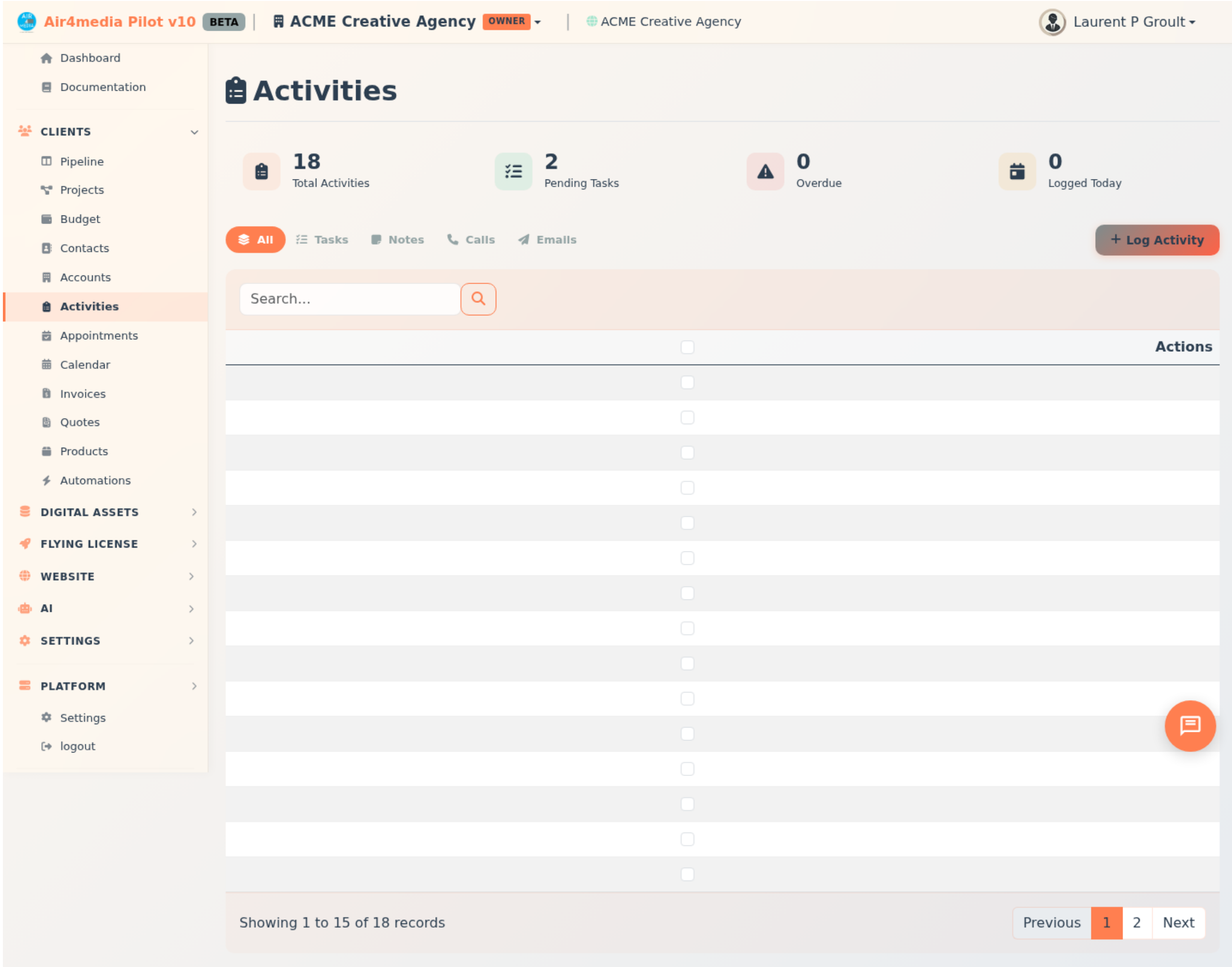

Activities

The Activities page is your central log for everything that happens with your clients — calls, emails, meetings, tasks, notes, and more. Use it to stay on top of follow-ups and keep a full history of your client interactions.

Key Features

- **Stats Overview**: Four at-a-glance counters show Total Activities, Pending Tasks, Overdue items, and activities Logged Today.
- **Quick Filters**: Instantly switch between All, Tasks, Notes, Calls, and Emails using the toolbar buttons.
- **Type & Status Filtering**: Use the Type and Status dropdowns in the list header to narrow results — filter by any activity type or by Pending vs. Completed.
- **Search**: Find any activity by searching its title or description.
- **Color-Coded Types**: Each activity type displays a distinct icon and color badge — purple for

calls, blue for emails, green for tasks, amber for meetings, and more.

- **Linked Records**: Each activity shows the Account, Contact, and/or Project it belongs to, plus a Related To column for system-generated items (quotes, contracts, invoices, forms, appointments).
- **Due Dates**: Tasks and follow-ups show a due date. Overdue dates are highlighted in red.
- **Mark Complete**: Mark any activity as done directly from the list row — no need to open a detail page.
- **Bulk Delete**: Select multiple activities and delete them all at once.

How to Use

Log a New Activity

1. Click **Log Activity** in the toolbar.
2. Choose a **Type**: Note, Call, Email Sent, Email Received, Meeting, Task, Follow-up, or Custom.
3. Enter a **Title** (required) and an optional **Description**.
4. Optionally link the activity to an **Account**, **Contact**, and/or **Project**.
5. For tasks or follow-ups, set a **Due Date**.
6. Click **Save**.

Filter and Search

- Use the **All / Tasks / Notes / Calls / Emails** buttons to quickly filter by category.
- Use the **Type** and **Status** dropdowns in the list header for more specific filtering.
- Type in the search box to find activities by title or description.

Mark an Activity Complete

- Click the **Complete** button on any activity row.
- The activity status updates to Completed and is removed from your overdue and pending counts.

Delete Activities

- To delete one activity, click the **Delete** button on its row.
- To delete several at once, check the boxes next to them and click **Delete Selected**.

Tips

- Check the **Overdue** stat card daily to make sure no follow-ups slip through.
- Activities are automatically logged by the system when you send quotes, contracts, or invoices, and when clients submit forms, book appointments, complete payments, or sign contracts — your history builds itself.
- Link activities to Accounts and Projects so the full timeline appears in those records too.