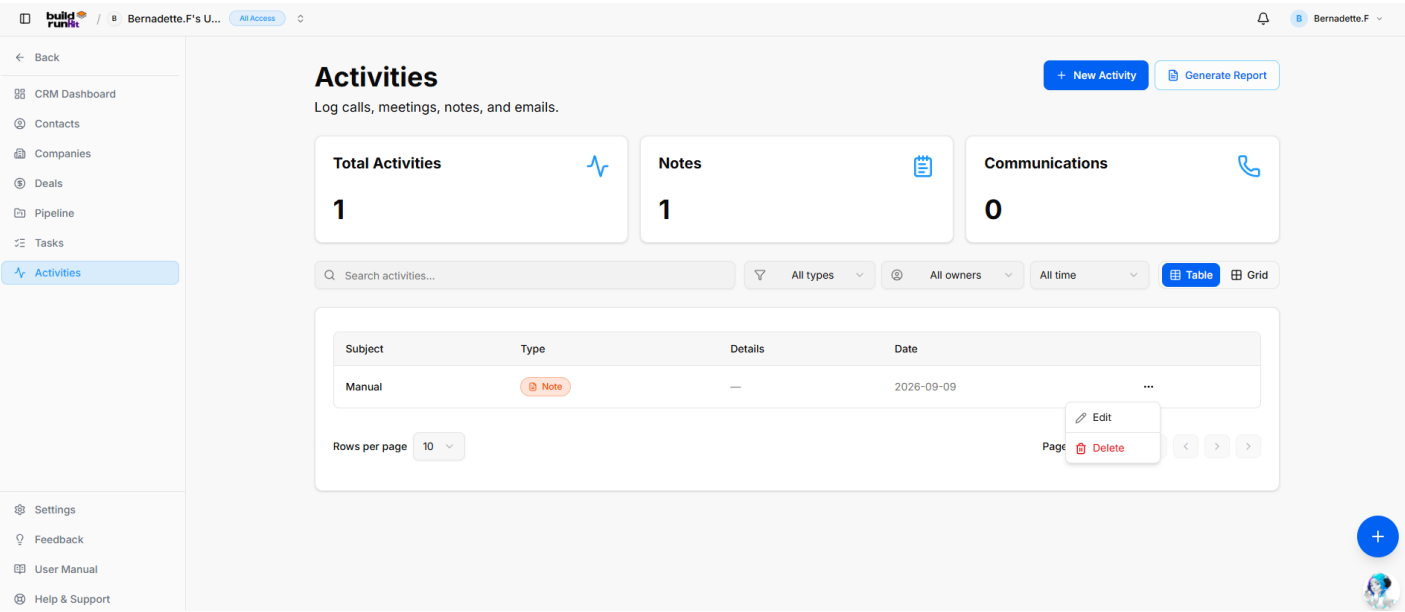


BuildRunKit CRM: Activities Sub-Section

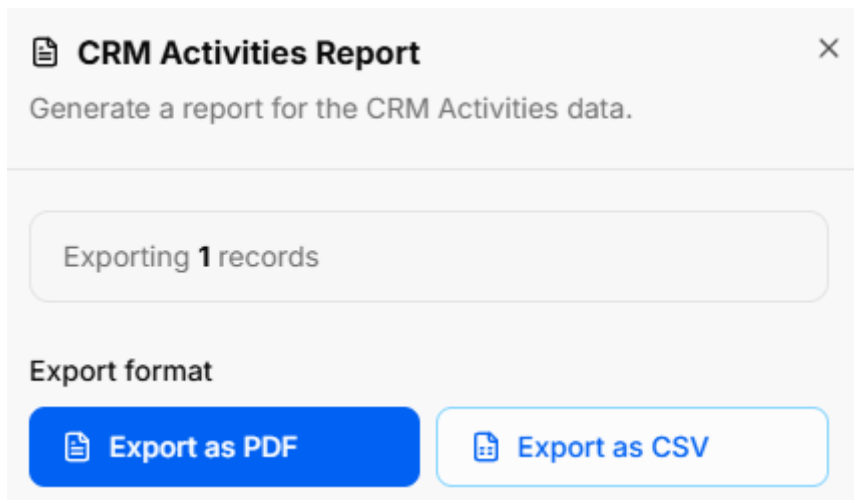
BuildRunKit CRM: Activities Sub-Section



The **Activities** sub-section tracks client interactions, including logged calls, meetings, internal notes, and email records.

Header & Action Buttons

- **+ New Activity:** Opens the activity logging modal.
- **Generate Report:** Opens the **CRM Activities Report** export window:
 - **Export Count:** Displays total targeted activity records (e.g., *Exporting 1 records*).
 - **Export Format Options:** Exports data instantly using **Export as PDF** or **Export as CSV**.



Activity Summary Metrics Top KPI cards display cumulative interaction counts:

- **Total Activities:** Counts all registered logs across categories.
- **Notes:** Displays total standalone internal notes.
- **Communications:** Tracks direct client interactions, such as calls, meetings, and emails.

Directory Controls & Search Bar

- **Search activities...:** Text input to filter logs by subject or keyword.
- **All types Dropdown:** Filters activities by log category (e.g., Note, Call, Meeting, Email).
- **All owners Dropdown:** Filters entries by assigned workspace team member.
- **All time Dropdown:** Filters records by specific date ranges.
- **View Switches:** Toggles between **Table** (list view) and **Grid** (card view) layouts.
- **Rows per page & Pagination:** Controls visible row density and steps through multi-page logs.

Activities Table Data Columns

- **Subject:** The headline title describing the logged interaction.
- **Type:** Visual badge categorizing the entry type (e.g., *Note*).
- **Details:** Brief text preview or full summary of the activity.
- **Date:** The logged completion date (formatted as YYYY-MM-DD).
- **Row Actions Menu (⋮):** Quick management options for individual entries:
 - **Edit:** Opens the setup editor to update activity details, subjects, or dates.
 - **Delete:** Removes the record from the activity log.

BuildRunKit CRM: Logging a New Activity

New Activity

×

Subject *

Type

Note

▼

Date

Pick a date

📅

Contact

Select a contact

↕

Deal

Select a contact first

↕

Task

Select a task

↕

Owner

No owner

▼

Description

✎

Cancel

Save

Clicking the + **New Activity** button opens a setup modal to log interactions and record updates:

- **Subject** *: Required text field to enter the activity headline or topic.
- **Type**: Dropdown selector to classify the activity (*Note, Call, Email, or Meeting*).
- **Date**: Date picker input to log when the interaction occurred.
- **Contact**: Dropdown menu to link the activity to a specific client record.
- **Deal**: Dropdown menu to associate the entry with a specific sales opportunity (requires selecting a contact first).
- **Task**: Dropdown menu to associate the activity with a related task item.

- **Owner:** Dropdown selector to assign activity logging responsibility to a team member in your workspace.
 - **Description:** Multi-line text field for detailed meeting notes, email copies, or interaction summaries.
 - **Modal Actions:** Click **Cancel** to discard or **Save** to log the activity record.
-

Revision #2

Created 2026-05-14 13:17:56 UTC by Bernadette F

Updated 2026-09-09 10:28:44 UTC by Bernadette F