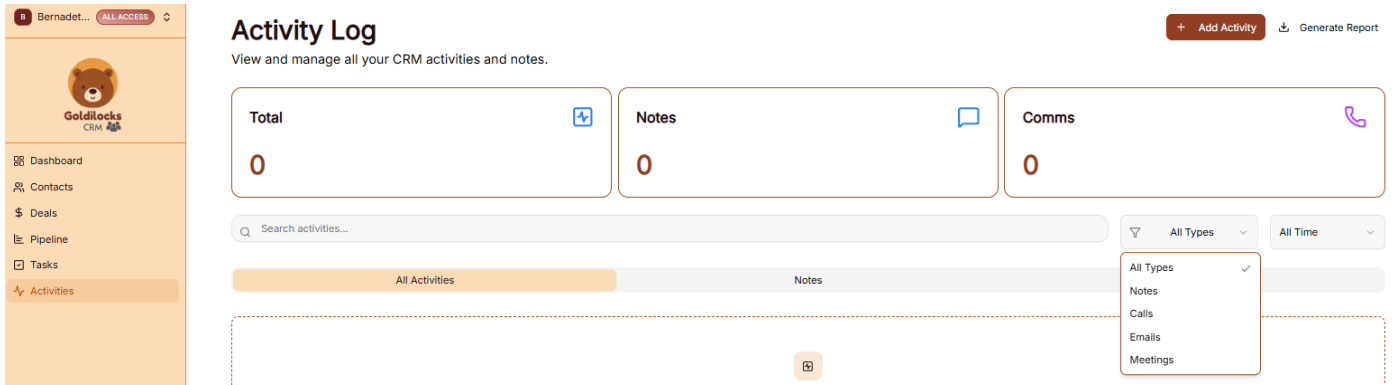


# Goldilocks CRM: Activities

## Goldilocks CRM: Activities



The Activities module provides a chronological log of every interaction and system update within your workspace, ensuring you have a complete history of your engagement with contacts and deals.

## Activities Dashboard Overview

The main dashboard helps you track the volume and type of interactions across your team:

- Total Activities: The overall count of all logged interactions.
- Calls: Specifically tracks the number of phone interactions recorded.
- Notes: Displays the count of text-based updates or internal memos saved.
- Emails: Tracks the number of email communications logged in the system.
- Meetings: Shows the total number of scheduled or completed appointments.

## Managing the Activity Log

Use the following tools to organize your history and find specific records:

- Search Bar: Quickly find specific interactions by searching for keywords within the notes or activity titles.
- Filtering: Use the All Types and All Owners dropdown menus to narrow the log down to specific interaction categories or team members.
- Activity List: Each entry in the list displays the interaction type (e.g., Call), a brief summary (e.g., "Follow up on GoldilocksCRM activities import"), and a timestamp of when

it occurred.

## How to Add an Activity

**Add Activity** ✕

**Activity Details**

Activity Type  
Note

Activity Date & Time  
May 14th, 2026 03:19:00 PM

Subject \*  
Enter activity subject

Note  
Enter your note...  
0 / 3000

**Link to Records**

Optional link this activity to specific contacts, deals, or tasks

Contact  
Search contacts (type at least 2 letters)...  
Type at least 2 letters to search contacts

Deal  
No deals available. Add deals first to link them to activities.

Task  
No tasks available. Add tasks first to link them to activities.

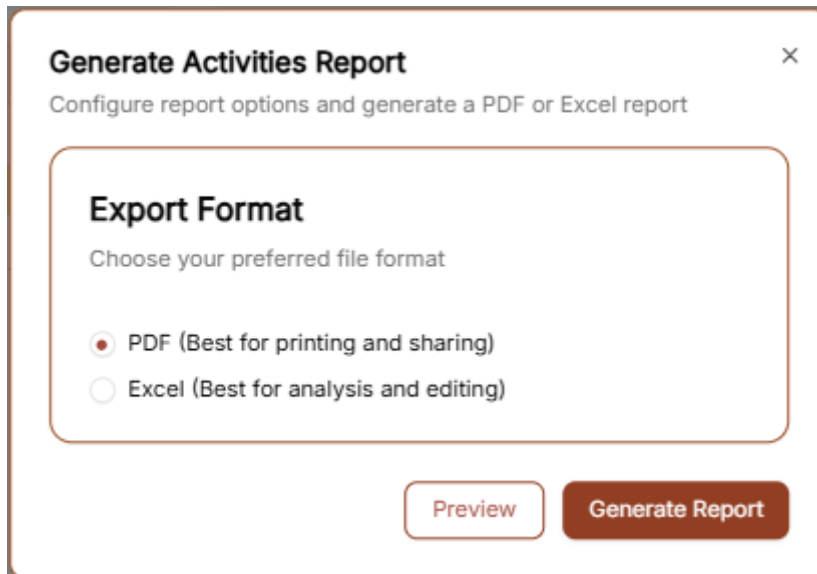
Cancel Add Note

To manually record a new interaction, click the brown + Add Activity button at the top right. This opens a configuration window:

- Activity Title: Enter a brief name for the interaction.
- Activity Type: Use the dropdown to categorize the entry (e.g., Call, Meeting, Email, or Note).
- Date & Time: Set the exact timing of when the activity took place.
- Notes: Add detailed context or specific outcomes from the interaction.
- Connections: Link the activity to a specific Contact or Deal to ensure it appears in their respective histories.
- Add Activity: Click the brown button at the bottom right to save the record.

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# Generate Report



**Generate Activities Report** ×

Configure report options and generate a PDF or Excel report

**Export Format**

Choose your preferred file format

PDF (Best for printing and sharing)

Excel (Best for analysis and editing)

[Preview](#) [Generate Report](#)

To export your interaction history, click the Generate Report link in the top right corner.

- Export Format: Select between PDF for a clean visual log or Excel for detailed data review.
- Action: Choose Preview to see the layout or Generate Report to download the final file.

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