SureClose – Add Activity Log Entry

Add Activity Log Entry

Most Activity Log entries are recorded to the Activity Log when you select the **Record this message/document/task to the Activity Log** check box that displays when sending a message, scheduling/completing a document or task. However, you can manually add an entry to the Activity Log from the Activity Log page.

Steps

1. On the navigation pane, click **Files**. Recent Files open at the top of the navigation pane.
2. From **Recent Files**, click the file you want to work with. If needed, search for the file.
3. With the file selected, click **Activity Log**.
4. Click **Add**.
5. Under **New Activity Log Entry**, complete these fields:
   - **Activity Type** – select the type of entry you want to add.
   - **Subject** – type a subject line to display that describes the activity.
   - **Notes** – type any notes you want to associate with the entry.
6. Under **Log Entry Permissions**, assign activity permissions for each party shown using the selection list.

- **Viewable to all parties with access to this file** – select to allow all parties on the file to view the log entry.
- **Full Control** – (default for team members) select if the party can edit or delete the log entry.
- **No Access** – (default for guests) select if the part cannot view the log entry.
- **View** – select if the party can view the log entry.
- **Edit** – select if the party can edit the log entry.

7. When finished, click **Save**.

Notes:

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New Activity Log Entry   * **Required Fields**

Activity Type: *   <Select an Activity Type> ▾

Subject: *   [   ]

Notes: [   ]

Log Entry Permissions

☐ Viewable to all parties with access to this file

DeMora, Sam :   Full Control ▾   Lockey, Beedie :   Full Control ▾
(Seller)   (Lender)

Hennessy, Pam :   No Access ▾   Pam, Lisa :   No Access ▾
(Site Admin)   (Buyer/Borrower)

Hilton, Mr. Scott :   Full Control ▾   Schnieder, Fred :   Full Control ▾
(Site Admin)   (Buyer/Borrower)

[SAVE]   [ADD ANOTHER]   [CANCEL]