# Timeline Information

Format the activity description as follows:

Line 1: [Object Name] [activity] [timeframe] [User]

Line 2: [Description]

Example:

Action created yesterday by Grant Taylor

Call Harris Baker and ask about proposal

Notes:

1. For timeframe in the past 7 days--Use relative references for today and yesterday, and use days of the week for the remaining 5 days. For example, if today is Wednesday, then:
   1. Wednesday = today
   2. Tuesday = yesterday
   3. Monday = Monday
   4. Sunday = Sunday
   5. Saturday = Saturday
   6. Friday = Friday
   7. Thursday = Thursday
2. For timeframe greater than 7 days—Use absolute dates.
3. For User—Omit the User’s name if the action was performed they current User. Include the User’s name if the action was performed by another User.

# Actions

## Action created

Action Description

Creation Date

## Action updated

Action Description

Modified Date

## Action completed

Action Description

Status

Status Date

# Attachments

## Attachment added

Attachment type icon

Attachment link

Attachment size

Date added

# Campaigns

## Campaign sent

Campaign name

Campaign sent date

## Campaign opened

Campaign name

Date opened

## Campaign link clicked

Campaign name

Campaign link text

Date clicked

# Emails

## Email sent

Email subject

Email send date

## Email opened

Email subject

Date opened

## Email link clicked

Email subject

Email link text

Date clicked

## Email reply

Email subject

Email reply date

# Forms

## Form submitted

Form name

Date submitted

# Meetings

## Meeting held (from integration)

Meeting title

Meeting description

Meeting date

# Notes

## Note created

Note description

Date created

## Note updated

Note description

Date updated

# Texts

## Text sent

Text

Date sent

## Text received

Text

Date received

# Tours

## Tour created

Tour details

Tour date

Community

Tour type

# Updates

## Contact created

Date created

## Contact updated

General

Date updated

## Contact details updated

Date updated

## Lifecycle updated

Lifecycle changed from [old value] to [new value]

Date updated

## Lead Source updated

New lead source

Date updated

## Relationship added

Contact added

Relationship

Date added

## Relationship removed

Contact removed

Relationship

Date removed

## Relationship changed

Contact

Relationship

Date updated

# Web visits

## Visited page

Page name

Page URL

Date visited