

# 3.0 Activities & Timeline

## 3.1 Activities

Looking at the concept of Activities in a bit more detail. We are going to be discussing Emails, Tasks and Phone calls. We'll spend some time on the concept of '**Regarding**' and '**Due Dates**' and how we can leverage things like email templates. This module will touch on how all these fit together managing Student interactions.

#### 3.1.1 Activities – Regarding

When logging an activity in Dynamics 365, you will notice a field/Column called '**Regarding**'. The '**Regarding**' field is a bridge which connects your Activity to other records in the System such as a specific student contact or Case. By setting the regarding Field, you're providing context i.e. logging a phone call discussing a specific student enquiry or case, linking that phone call to the student's contact or record to ensure that everything is interconnected and easily referenced.

			ug cos columns y cos n	Lauck Inte
Activity Type ~	Activity Status V	Created By Y	Resarding v	Date Created ~
		-		
Email	Completed	👰 Philip Tan (Available)	SLSS Email creation Test Pick	27/00/2023 1:23 PM
	Actively Type ~ fimail	Activity Type = Activity Status = Email Completed	Activity Type * Activity Status * Created By * Email Completed @mails for jacabable	Activity Sper • Activity Status • Created By • Beginding • Email Completed @thip ton Jacobideg US3 level motion test exe

#### 3.2 Email

Logs emails sent or received. Can also be used to track email thread to help maintain continuity in conversations with students.

#### 3.2.1 Creating Emails

There are 2 methods - In 'My Activities' or via 'The Timeline'

Click on the Email button at the top of the screen.



This will take you to the Email form.

Note: The **From** will be defaulted to the <u>Askflinders@flinders.edu.au</u> address. This will ensure that any replies are received by that mailbox rather than any personal mailboxes. This will ensure that your email is not going to be cluttered up by student emails and if you're not available, others monitoring the mailbox will be able to respond to the emails.

The **To** field will be the person that you wish to send the email to (generally this is a student). You can search this field by email, name or FAN.



When searching using a FAN, you may come across these icons.

8	Indicates that this is a Person/Student record.
	Indicates that this is an Organisation/Account record.

- 1. To indicates the person/account that you want to send the email to.
- 2. **CC** (Carbon Copy) can be used to send the response to an external email address if required.
- 3. Bcc (Blind Carbon Copy) If you want to include a work colleague in the email transaction.
- 4. **Subject** the subject of the email transaction.
- 5. Attach File Allows you to attach a file to the email transaction.

د Close	🛯 Attach File	🛃 Insert

6. **Regarding** Field can be found at the bottom of your screen (You might need to scroll down) when creating the email transaction.

=	🗧 🖂 🏱 Send 📓 Save 🍟 Save & Close 🗍 Attach File 📓 Insert Template   🗸 🖙 Insert Signature 🖽 Insert Knowledge Art
A Home	S New Email - Unsaved
D Recent 🗸 🗸	Email - Enhanced Email ~
🖗 Pinned 🗸 🗸	Email
/ly Work	
8 Dashboards	From 🗋 askfinders@flinders.edu.au
2 Activities	
Help Guide	
lustomers	Cc 2
I Organisations	Bcc 3
R Contacts	Subject 4
	200jett <b>4</b>
iervice	
P Cases	ダ Segun UI ・ 9 ・ B / U ℓ・ δ・ = II + II II = = ゆ 0, メ x, → 回回 10 つ 0 友 II- ? @
Inowledge	Enter text.
Knowledge Articles	
Knowledge Search	
emplates	
Email remplates	
Email Signatures	
	6
	Regarding





Note: There has been an update when composing emails where you can now add alternate Email.

#### To do this, you'll need to be in Compose.

a) Click on the **Ellipsis** and select **Add Alternate Email**. This will Allow you to grab the secondary email address from the contact record and pastes it into the CC Field.

# **3.2.2** Email Templates

To create an email template, click on "Insert Template" at the top of the screen.

Flinders	Student CRM		<u>م</u>	Search			
=	← 🗗 🖻 Send 🖬 S	Save 🛱 Save & Close	🔋 Attach File	🗟 Insert Template	$\sim$	🖙 Insert Signature	Insert Knowledge Artic
<ul> <li>G Home</li> <li>G Recent ∨</li> </ul>	New Email - Unsaved Email - Enhanced Email $\sim$						
x <sup>2</sup> Pinned ∨ My Work	Email						
₩ Dashboards	From	A askflinders@flinder	s.edu.au				
Activities							
🕅 Help Guide	10						
Customers	Cc						
Organisations	Bcc						
0							

A pop-up will appear and you can search from the list of existing templates. If you do pick one from the list, it will provide you with a preview of what the template is going to look like. Alternatively, you can create your own.

anguage · English	Select a template from the list to see a preview.	
P Search templates		
Recently used		
<ul> <li>Thank you for registering with us Contact</li> </ul>		
0 105R Email Signature		
<ul> <li>FI - (Nursing) Prex. Tertiary Study in Nursing - UG nursing Pre-Reg + Credit transfer User</li> </ul>		
All templates (A-Z)		
<ul> <li>[Greeting &amp; signature] reply to "applied" students</li> <li>User</li> </ul>		
105R Doctor of Medicine     Email Signature		

You can always add data to an existing template if the data has not been automatically populated.

1



Once you have selected the template, click on "**Save**" and set a "**due date**" which will allow you to review your email before sending.

	← C* ▷ Send 🖬 Sev	📲 Save & Oase 🔘 Refresh 🔍 Oreck Access 👔 Attach File 🔚 Insert Template   🗠 🖏 Insert Signature 🛽	2 Process V Q Create Opports	nity 📱 Convert To 🗸	: df Shan
Home	Thank you for register	ing with us - Sand		Normal Draft	James Haynes
Recent ~	Email - Enhanced Email ~				
Pinned V	Email Related ~			Priority	Normal
Work				Due	- I 0
Dashboards	From	A Flinders Default Queue		🛱 Status Reason	October 2023
Activities					Su Mo Tu We Th Fr Si
Help Guide	10	R James Haynes		Owner	
	a	iames+exampledNavnos.com			
stomers					15 16 17 18 19 20 21
Organisations	Bec				22 23 24 25 26 27 2
Contacts	Subject	Thank you for registering with us			29 30 31 1 2 3 4
wice					
Cases			Select	E Select All 12 Sort	+ New Allachment :
SSPS Cases	<ul> <li>Emalpog</li> <li>No</li> <li>114,278</li> </ul>	1 Phonealigng 1 Inkgrag 1 No 101,764 90,100			
owledge					
Knowledge Articles					
Knowledge Search		* # 7 見 2· h· = = = 回目目のたメス = 範囲取りたあ目・2 ⊕			
	Dear Haynes ,				
ngilates	Thank you for registering with	ii. We now have the following registration information on file:			
Email Templates	Name James Haytes Street Address No-Address Pr	ward			
Email Signatures	City. State or Province				

When the due date is due, you can then review the email and if you're happy with the contents, click on "**Send**" and this will then change the Activity Status of your case to "**Completed**".

Note: Once a record has the Activity status as "Completed", you cannot edit the email any longer.

# 3.2.3 Phone Calls

Logs both incoming and Outgoing calls. Details like duration, Participants and key discussion points can be recorded.

To start click on the Phone Call icon at the top of your screen.

🖽 Appointment 🕓 Phone Call 🗏 Let	ter

Once you clicked on the Phone Call icon, the screen should open up as such:

Subject 1			
Call From 2	* 💏 Philip Tan (Available)		
Call To 3			
Phone Number	* 4	C Direction 5 Outgoing	
Call Response	6	Call Outcome 7	
Description			
8	]		



Complete the following Fields –

- 1. Subject This can be the title of your phone call
- 2. Call From This will be You as it is linked to your username
- 3. Call To Enter the name of the student or person that you are calling. You can search through the records or contacts.
- 4. Phone Number Enter the phone number that you have dialled.
- 5. Direction Incoming or Outgoing call. Default will be Outgoing.
- 6. Call response Self-explanatory. This will be a log of the amount of attempts to contact the person.
- 7. Call Outcome Recording of the outcome of the call.
- 8. Description What the reason and outcome of the call was.
- 9. Regarding See section <u>3.1.1 Activities Regarding</u>
- 10. If the phone call has happened or after the fact, mark it as "**Mark Complete**" otherwise the phone call will sit in your Activity List!

Again, as in **Emails** you can schedule for the phone calls to occur on a particular date and they will show up on your activity list.

1. To select the due date, click on the down arrow next to your name.



2. You will then be able to select the *Due date* and *time*:



# 3.3 Tasks

Tasks are versatile and capture actions or reminders. Think of tasks as your dynamic to-do list e.g. if you're 'Delivering a flash drive to a colleague on the other side of campus', you can log it as a task.

To start, click on the Task icon at the top of your screen as such:





Once you clicked on the **Task** icon, the screen should open up as such:

← □	5 届 Save ✓ Mark Complete 🛱 Save & Close				
New Ta	sk - Unsaved			Normal Open Priority Due Activity Status	Marine Philip Tan Cover 4
TASK					
Subje	a • 1				
Descript	ion				
	2				
Rega	ding 3	~			

Complete the following Fields -

- 1. **Subject** This can be the title of your task.
- 2. Description What are you going to do?
- 3. Regarding Link to the person relating to the task
- 4. Due Date Click on the down arrow to schedule a Due date & Time
- 5. *Save, Mark Complete* or *Save & Close* Click *Save* or *Save & Close* for the activity to show on your list or *mark complete* if you don't want this to show on your activities list.

#### 3.4 The Timeline

The 'Timeline' in Dynamics 365 serves as a central hub that chronologically captures all interactions and activities associated with a specific record. Whether it's emails, phone calls, notes, or appointments, the timeline presents them in a streamlined, sequential manner. This allows users to quickly grasp the history and context of interactions without having to navigate through different sections. It's like a diary of all communications and actions for a particular contact, case, or any other entity in the system.

Timacro	4 et Elsan Als	in a fi Class of New A Ores on chart		and Distance f		:
		AMERICOME THEM AS OPENING CAR	Lo become - x comets ( - Lo charge rass		Caroc Access De Lances	
Home	James Haynes	S - Saved			The Realistic Contraction Description	0 ISN Context
Recent V	Contact - Flinders	Contact ~			For category Press	a ran contact interfer of partitions
Pinned V	Summary Recruitment	Fields Behavioural Characteristics De	ails Related $\vee$			
Work						
Dashboards	CONTACT INFORMATION		Timeline	+ V II :	ECENT CASES (LAST 3 YEARS)	+ New Case
Activities	A FAN		, P Search timeline		Case Title ~ Case Number ~ Orig	in - Owner -
Help Guide		-	Enter a note	9	Proto Test #1 CAS (20100, VSS ) Mile	h m 1070 Adminutes
	First Name	James	V Recent			
tomers	Last Name	Havnes	Modified on Add AM			
Organisations			Task modified by: A Philip Tan Active	2 ~ 5 8		
Contacts	Preferred Given Name		Test Task			
vice	Staff Member	No	Hest task 1		1-1 of 1	$Id \ \leftarrow \ Page1 \ \rightarrow \ Id$
			view more		l.	
Cases	Student Status	Prospect	(D) Modified on: 9/10/2023 10:58 PM		CURRENT	D. Beforeb
wledge	Preferred Course Title		Email from: D Flinders Default Queue - Email to	5 V E	00000	C Hender
Knowledge Articles	Ideal Red Courses		Opportunity test		Cours 1 ~ Course Title (Course Av ~ Cour	rse Status 🐃 College (Co 🐃
Knowledge Search	Location (Latest)		Case * Portal Test #1 * is created. CRM:05420000	857		
	A Student ID		Dear James Haynes Thanks for contacting Ask FI	inders for ass	No data available	
plates			View more	~		
Email Templates	Birthday	🖻	Case: @ Porta sest #1	~		
Email Signatures	Grades					
	CHEVE PLANE				0-000	ri 🤄 Page 1 🤫
	Home Phone				OBBORTUNITIES	D Referation 1



# 3.4.1 Timeline – Activity, Email and Task Creation

In the Timeline Column, click on the **+** icon which can be found at the top.

Timeline	+	7	Ţ≣	÷
ho Search timeline				
🖉 Enter a note				0
✓ Recent				
PT Modified on: 4:44 AM	<u>ج</u>	$\checkmark$		Ē

Once you have clicked on it, a list will appear:



Select from the list whether it'll be Email, Phone Call or Task.

If it's an **Email**, the **To** and the **Regarding** field will populate automatically with the recipient's details for you.

For a **Phone Call**, The *Call to* and *Regarding* fields will populate automatically with the recipient's details for you.

Then it's simply a matter of filling in the fields and you're done!

Owner		🕐 Philip Tan (Available)	
Subject	1		
Call From	1	👰 Philip Tan (Available)	
Call To	1	🕅 James Haynes	
Phone Number	1		
Direction		Outgoing	
Description			
Duration		30 minutes	~
Due			Ē
		***	C
Priority		Normal	
Call Response			
Call Outcome			
Regarding		🖸 James Haynes	