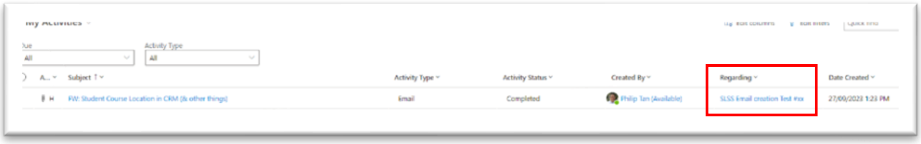
3.0 Activities & Timeline

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.



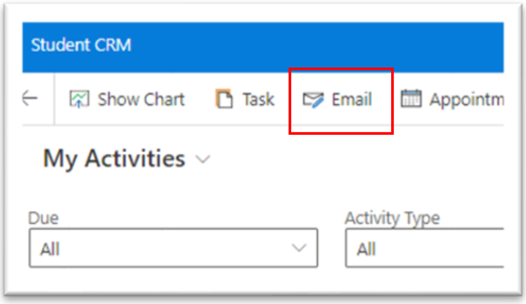
3.2 Email

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.

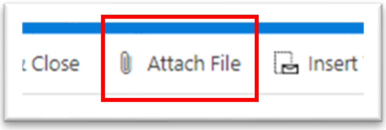
*Note: The **From** will be defaulted to the Askflinders@flinders.edu.au address. This will ensure that any replies are received by that mailbox rather than any personal mailboxes. This will ensure that your email is not going to be cluttered up by student emails and if you're not available, others monitoring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

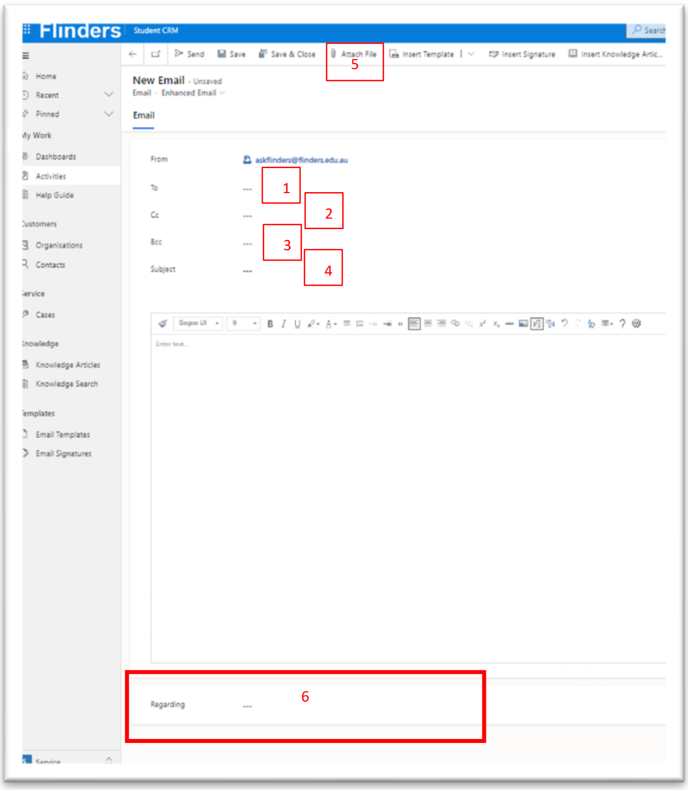
When searching using a FAN, you may come across these icons.

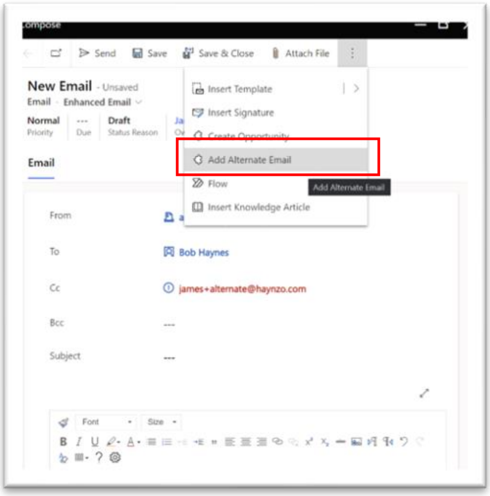
	Indicates that this is a Person/Student record.
	Indicates that this is an Organisation/Account record.

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.



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





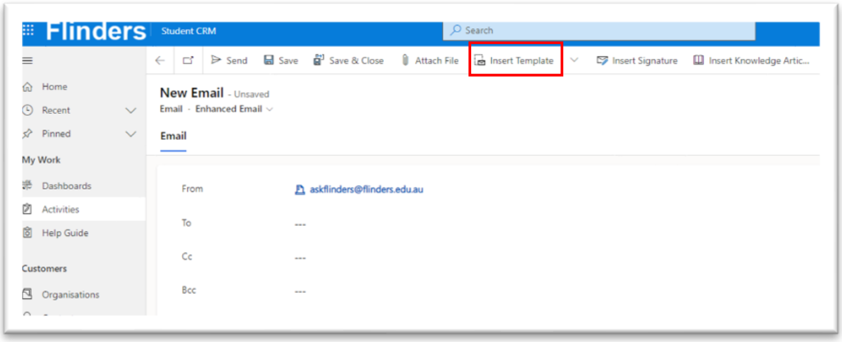
Note: There has been an update when composing emails where you can now add alternate Email.

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

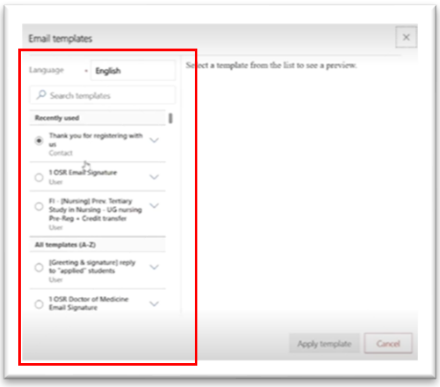
a) Click on the **Ellipsis** and select **Add Alternate Email**. This will Allow you to grab the secondary email address from the contact record and pastes it into the CC Field.

3.2.2 Email Templates

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

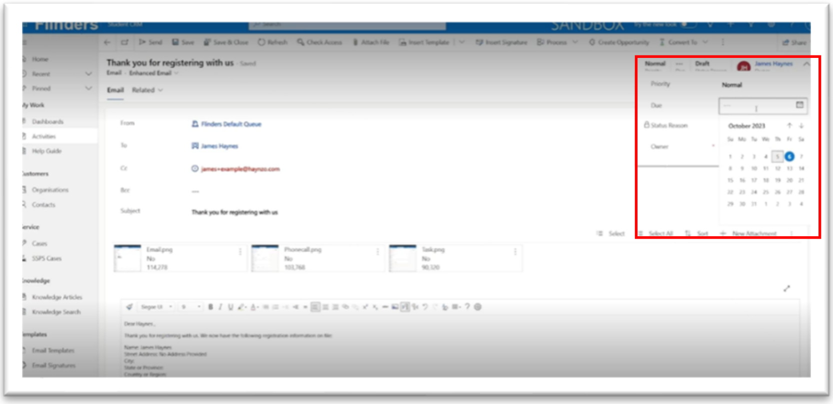


A pop-up will appear and you can search from the list of existing templates. If you do pick one from the list, it will provide you with a preview of what the template is going to look like. Alternatively, you can create your own.



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

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



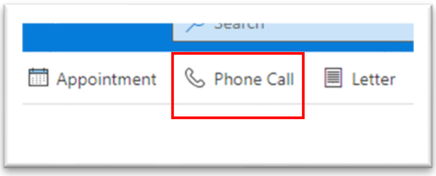
When the due date is due, you can then review the email and if you’re happy with the contents, click on “**Send**” and this will then change the Activity Status of your case to “**Completed**”.

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

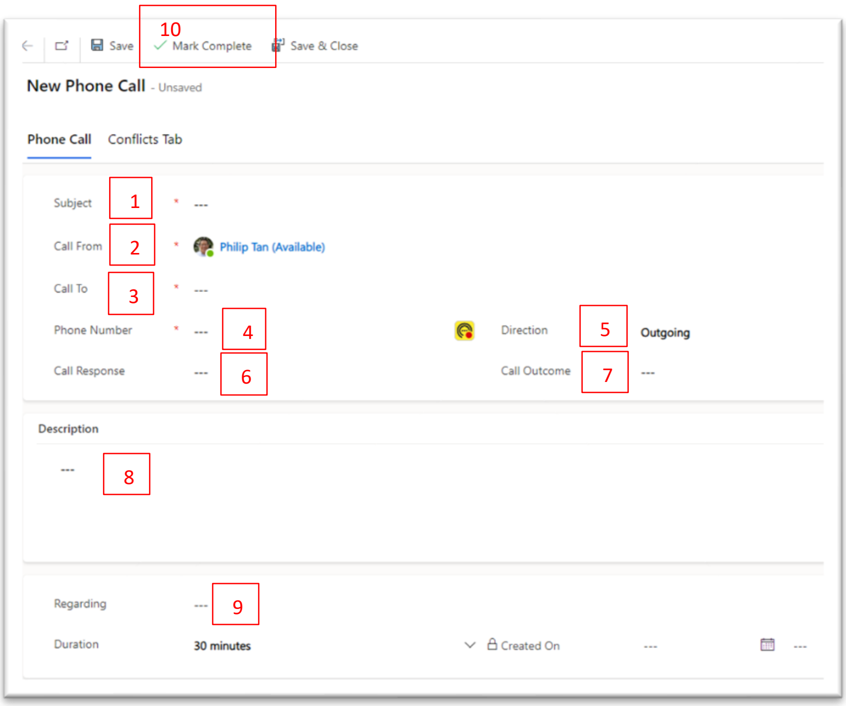
3.2.3 Phone Calls

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.



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

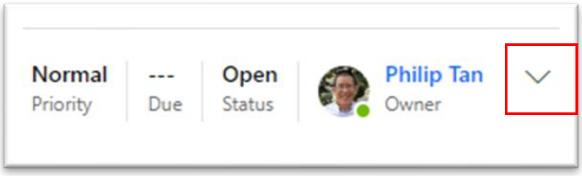


Complete the following Fields –

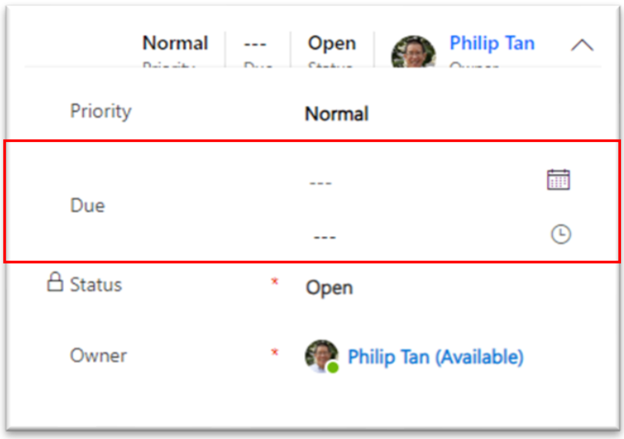
1. Subject – This can be the title of your phone call
2. Call From – This will be You as it is linked to your username
3. Call To – Enter the name of the student or person that you are calling. You can search through the records or contacts.
4. Phone Number – Enter the phone number that you have dialled.
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 *3.1.1 Activities – Regarding*
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.



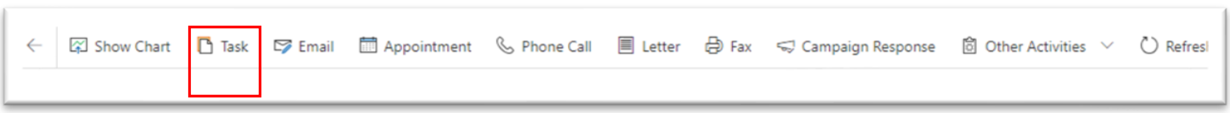
2. You will then be able to select the *Due date* and *time*:



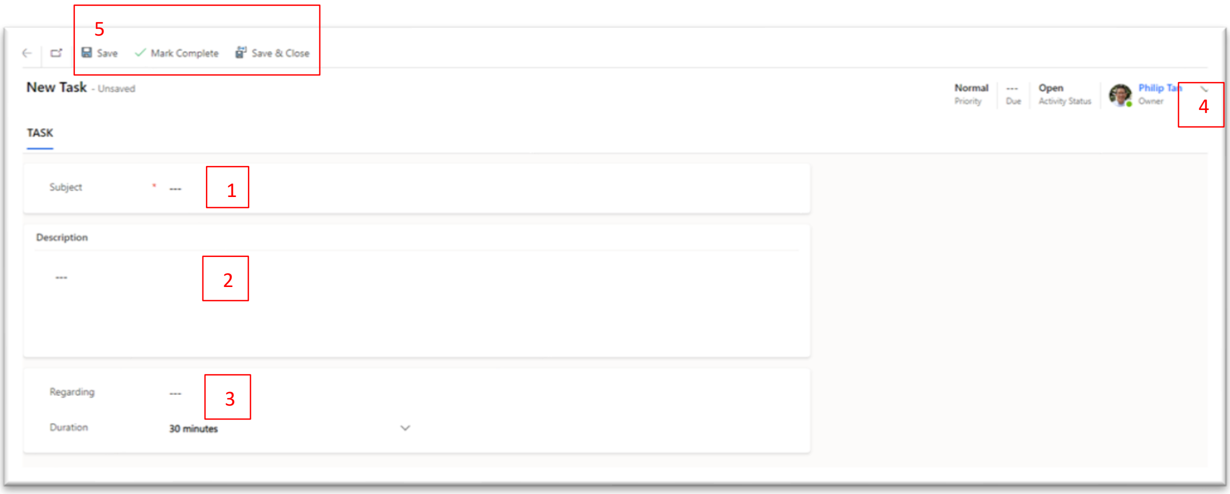
3.3 Tasks

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:

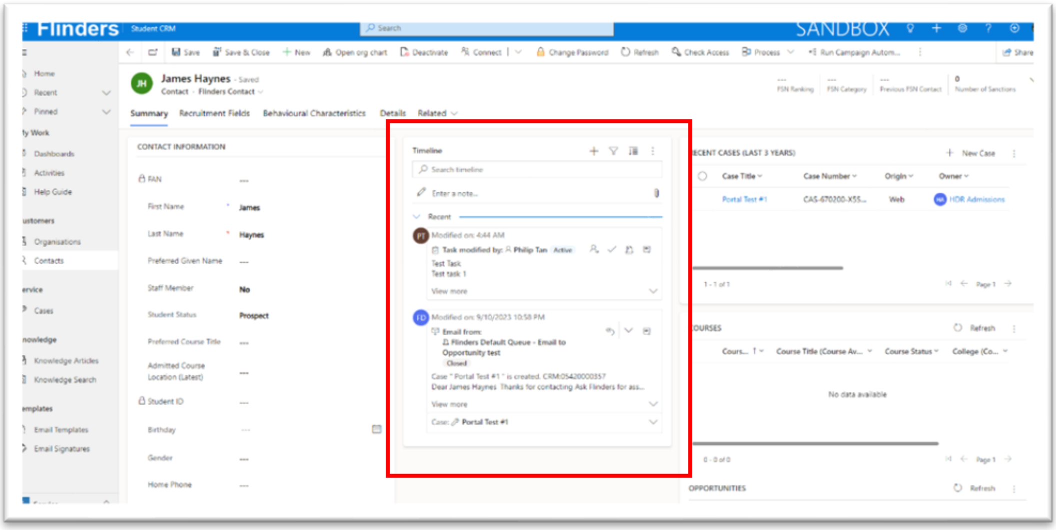


Complete the following Fields –

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.

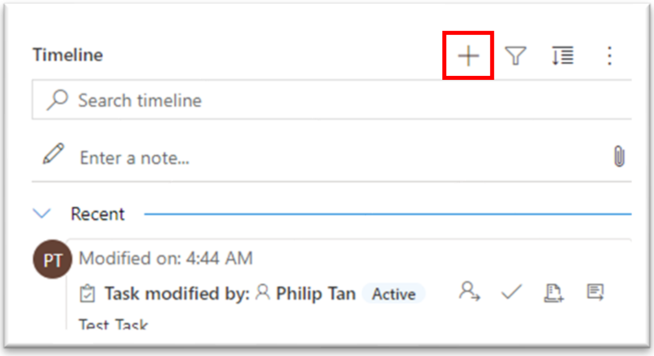
3.4 The Timeline

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.

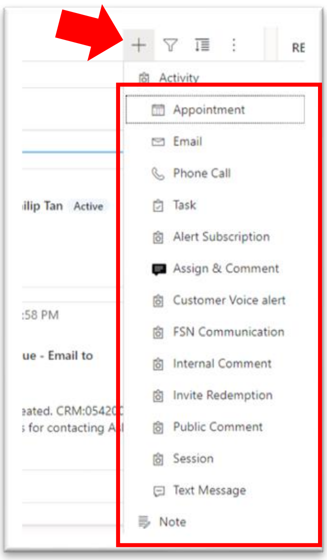


3.4.1 Timeline – Activity, Email and Task Creation

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



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!