

DY102.4.1.1 - Creating Activities - Types



This document will delve into the commonly used activity types in Dynamics that can be created from the Timeline. We will primarily focus on the activities that can be generated from the Organisations record, so you might notice variations in activities you can create elsewhere.



Appointment

Appointments offer a convenient way to create calendar events, whether for your own Outlook Calendar or someone else's.

After creating an appointment, a corresponding email will be generated and sent to the recipients. This email includes a calendar attachment that they can easily add to their own calendar.

The appointment will also be automatically added to your calendar, ensuring that you stay up-to-date with all your engagements.



Email

This activity simulates the email procedure within Outlook and closely resembles the Outlook screen.

The main difference with Dynamics is that the "To" field is restricted to the linked contacts in the organization. However, you can still CC other contacts outside of the organization.

Additionally, you can attach documents to your emails.



Phone Call

The Phone Call activity is versatile because it allows you to monitor both incoming and outgoing calls. This feature can be helpful when arranging a phone call in advance or taking note of a call that has recently occurred.

However, it's important to note that planning a future phone call using this activity does not add a reminder in your calendar. To do so, you would need to create an appointment.



Task

Tasks serve as a practical way to document actions that arise from meetings or specific actions that you intend to undertake on behalf of the Licensed Organisation. You can also set up tasks for other individuals and easily assign the tasks to them. Later in this course, we will discuss how to assign activities, including tasks, to others.



Event Attendance

This document is used to record when the Licensed Organization (LO) has participated in an event that was hosted by the DofE.

It is important to note that this document is solely used for documenting when the LO has taken part in an event hosted by the DofE. It should not be used to record when the DofE visits the LO, as such engagements should be documented as appointments instead.



Note

Notes allow us to add important information to a record in Dynamics. This could include a copy of an email that was not previously tracked, or key points from a meeting.

It's important to create a note only when the information adds value to the record.



Task: Practice

Please take some time to explore and use all the different types of activities from the Timeline.

Rest assured, while you're in the testing site (identified by the orange banner at the top), there's no risk of causing any unintended changes or issues.



For further Dynamics guides, make sure to check out the Digital Systems page on the hub.

This page can also be used to access an array of other learning material.

For further help, reach out to systemstraining@dofe.org