CommunityPro Suite™

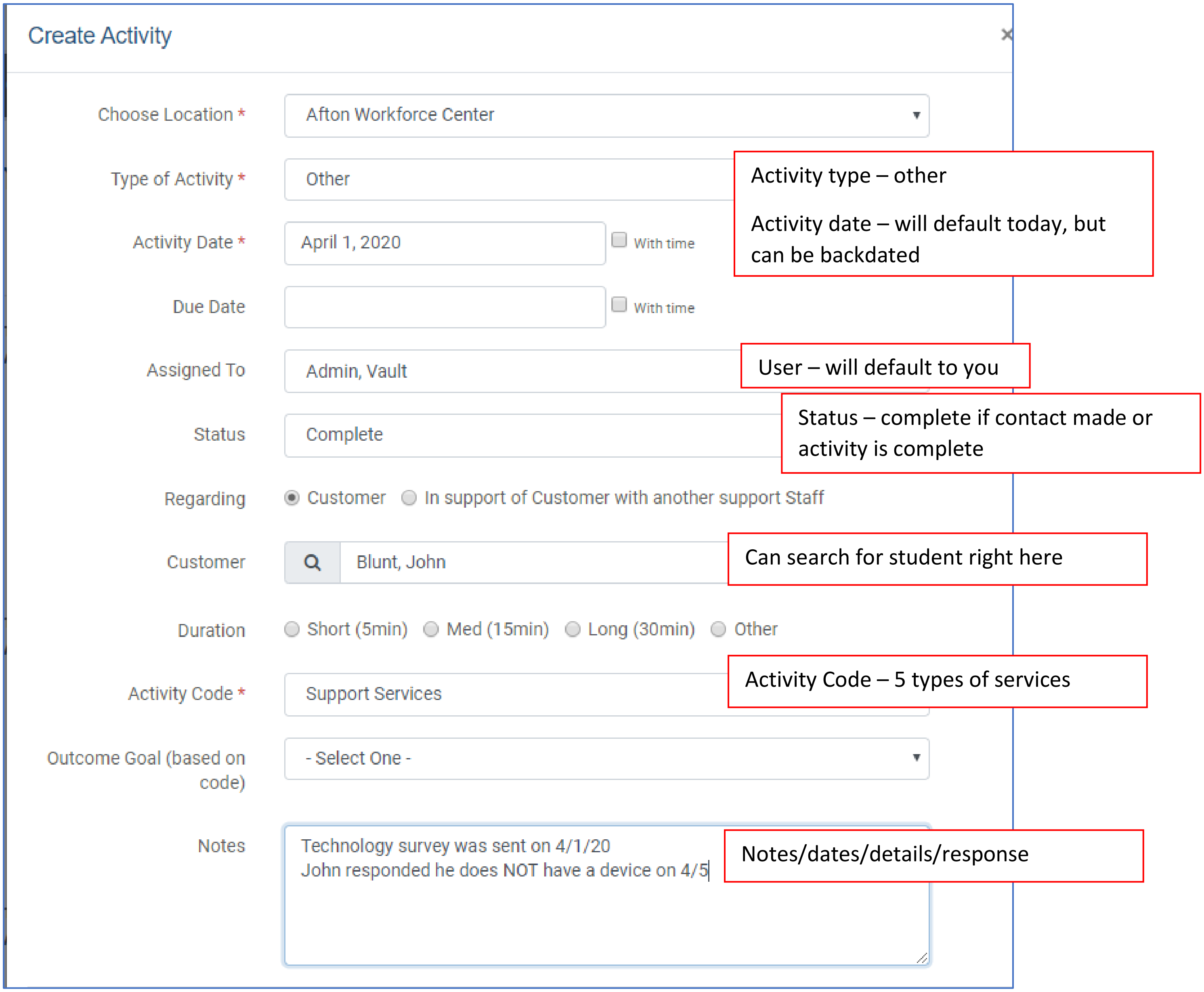
Activity Timeline

- Is chronology of to-dos, follow-ups, and deadlines
- User can view all activities (involving all students) they have upcoming, overdue, or completed by going to "My Activities" tab at the top of the menu bar
- User can view student specific activities by going to the Activity Timeline under the student avatar
- Filter can be used to narrow activities and activities can be edited, removed, deleted
- Activities will also be created from the AACTP (meeting and follow-ups) and Needs Inventory (referral follow-ups and meetings)
- Activities created from here will be used on *both* TS Reports

Steps:

1. Go to "My Activities" on the top menu bar
2. This will allow you to search for a student/customer within the activity form *and* it will track it on the student's timeline
3. Fill out the form (images and descriptions below)
4. Click "Save"

(Images with details below)



If you prefer to find the student first, go to "Customers" tab, find the student

Select student name

Select Activity Timeline from under the image and proceed with same steps outlined above.