General

• The ability for a user to log contacts with a student within the Mapworks platform.

Navigation

• Make sure that the user is properly logged into the Skyfactor Mapworks platform.

• Search for a student by any available method (Search, Dashboard, Groups, etc.)
• Select the student and the Student Profile page will load
• The user can select to make a referral, book an appointment, or log a contact directly from this profile page.
Log a Contact

- User selects the “Log a Contact” button

This will bring up the activity window

- User enters the relevant details regarding the contact and selects a sharing option
  - Private – Only the user who created the contact can view the details
  - Public – Allows any staff member with the appropriate permissions to view the contact for the selected student
  - Team – User can select one or multiple teams whom can view the contact. (NOTE: Only members within a team that have permissions to view the student will be allowed to view the contact details)
• Once the user has completed the details and clicks the “Create a Contact” button, the contact is saved and a confirmation message will appear.
• The user is returned to the student profile from which the contact was made.

**View Contacts**

To view all contacts for a particular student the user can click on the total number of contacts listed for that specific student.
• Clicking this will list all contacts for this student at the bottom of the page

Alternative method for logging contacts

While viewing the activity stream for a student the user can enter an activity including contacts by selecting the “Add New Activity” button.
• User clicks the “Add New Activity” button
• The activity window opens
• The user selects the type of activity from the tabs on the left side of the window
• User completes details and saves progress
• Upon saving a confirmation message will be displayed and the user will be returned to the student profile from which they initiated the activity