

Client Training HQ

Adding or Removing Activities from a Process

If you have Immigration Case Management (ICM) Administrative privileges, you can customize process activities.

Adding Activities to a Process

1. Click your **username** displayed in the top right.
2. Select **Administrative Settings** from the drop-down menu.
3. Hover your cursor over the **Processes** tab.
4. Select **Activities** from the drop-down menu.
Note: The Firm's Activities display on the left, and the Process Activities display on the right.
5. From **Process Activities**, select the process to be customized from the **Process** drop-down menu.
6. To associate specific activities to the selected process, select the activity from the Firm's Activities column (hold down **Ctrl** to select multiple activities).
7. Once all desired activities are selected, click the **Use Firm Activity ->** button to add the activities to the process.
8. If needed, use the up/down arrows to sort the activities and click **Update Sort Order** to save the changes.

Removing Activities from a Process

Note: Activities marked as **LLX Mandatory-M** cannot be deleted from a process.

1. Click your **username** displayed in the top right.
2. Select **Administrative Settings** from the drop-down menu.
3. Hover your cursor over the **Processes** tab.
4. Select **Activities** from the drop-down menu.
Note: The Firm's Activities display on the left, and the Process Activities display on the right.
5. From **Process Activities**, select the process to be customized from the **Process** drop-down menu.
6. To remove specific activities from the selected process, select the activity from the Process Activities column (hold down **Ctrl** to select multiple activities).
7. Click **Delete Process Activity** to remove the activities from the process.

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.