

1.0 Introduction

What is CRM? CRM Stands for **Customer Relationship Management**

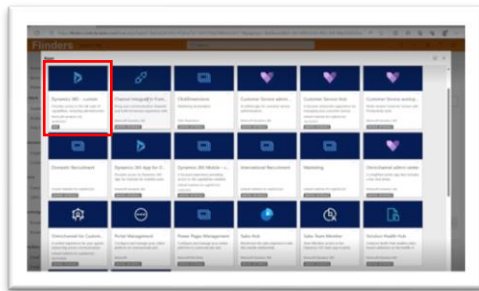
Dynamics CRM is a system that Flinders uses for managing meaningful interactions between Staff and students whether it is via phone calls, emails or support requests through the Ask Flinders portal.

1.1 CRM Onboarding – Accessing Dynamics 365

1.1.1- Via URL

How to Access Microsoft Dynamics CRM from your Browser

1. Open a Browser window e.g. Edge, Chrome, etc.
2. In the address bar, type in the URL - **Flinders.crm6.dynamics.com**
3. This will take you directly through to the Student CRM. Note: 1st time users will have a list of applications appear.

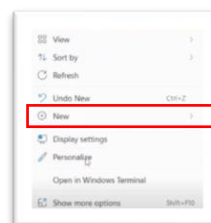


4. Scroll down the list till you find one that has “**Student CRM**” or **Dynamics 365**.
5. Click on this and you will then be able to access **Microsoft Dynamics CRM**
6. You can bookmark this by clicking on **CTRL+O** (add to favourites)
7. Simply click on the saved bookmark to access the site in future.

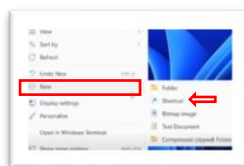
1.1.2 – Via Shortcut

How to create a shortcut on your desktop for access to Dynamics CRM

1. Copy the URL from the address bar of your browser.
2. Right click on your mouse anywhere on your desktop
3. You will get this window pop up appearing as such:



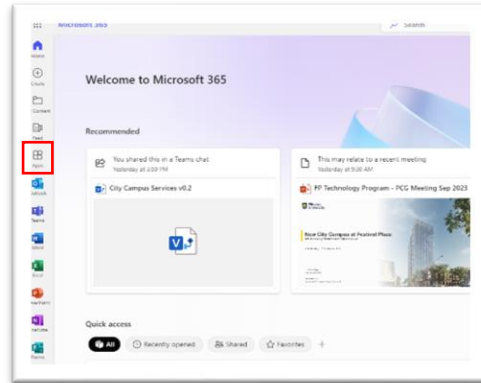
4. Select **New > Shortcut**



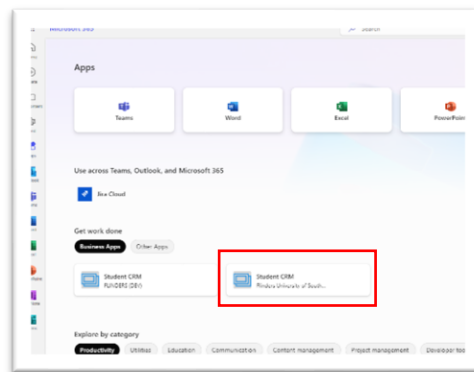
1.1.4 – Via Microsoft/Office 365

How to access Dynamics CRM via Office 365

1. Log in or Open your Flinders Office 365 (You can do this via OKTA) and click on Apps



2. Once you Click on Apps, in the 'Get work done' section, you should be able to find the icons for Student CRM under Business Apps as such:



3. Select and click on the icon that you want to use.
4. **End.** You should now be able to access **Dynamics CRM**.