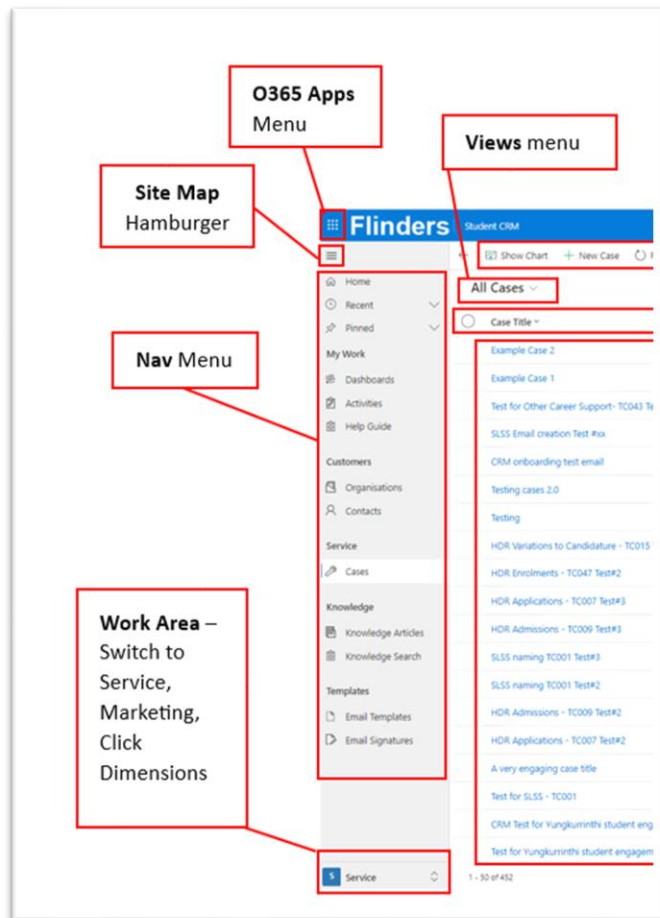
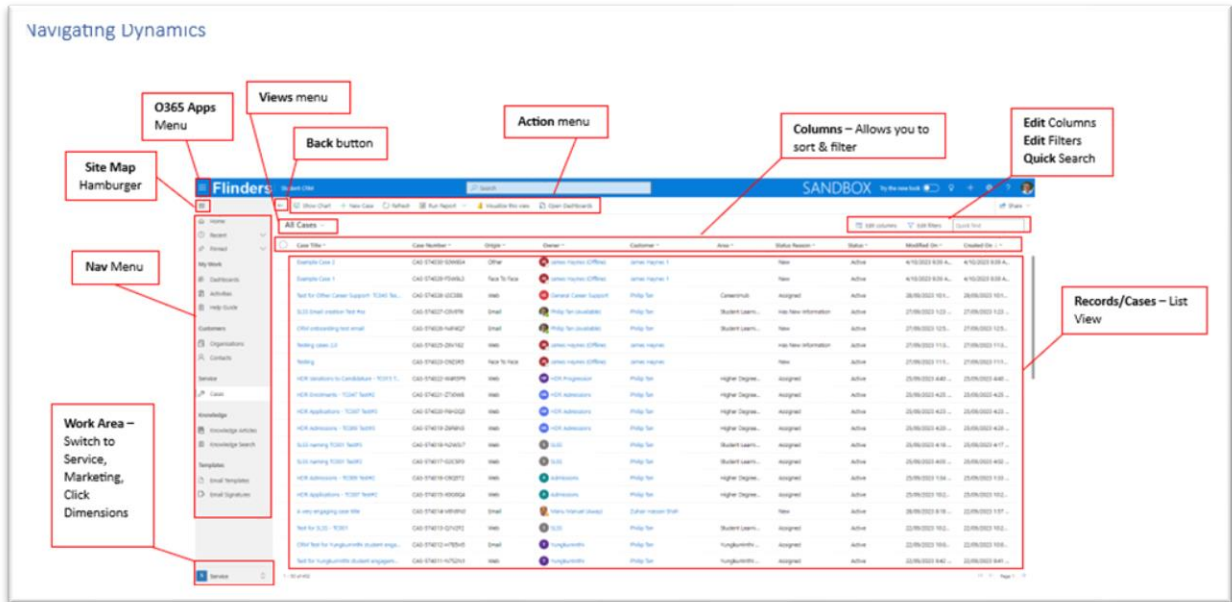


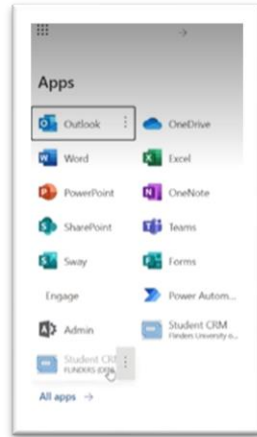
2.0 Navigating Dynamics

2.1 Site Map & Elements



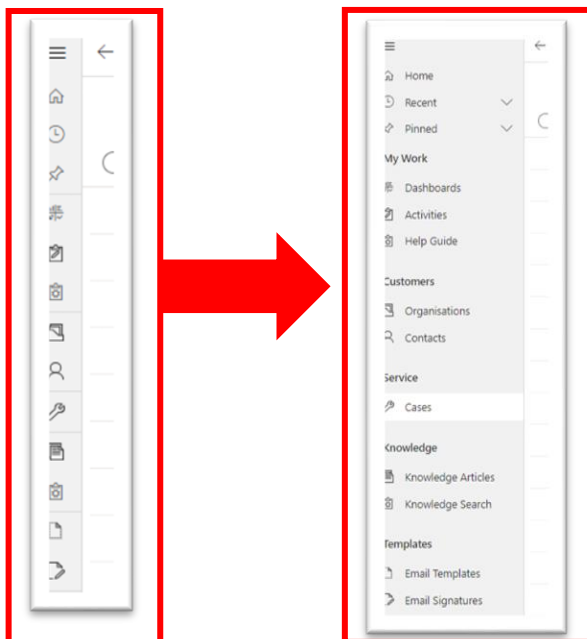
2.1.1 O365 Apps (Waffle) Menu

Clicking on this would allow you to access your Microsoft Office apps e.g. Outlook, Student CRM, etc. If you click on All apps, this will show you the full range of office apps that your Flinders account has a license for.



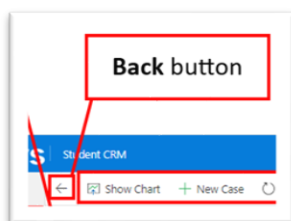
2.1.2 Site Map Hamburger

Allows you to expand your site map Navigation menu.



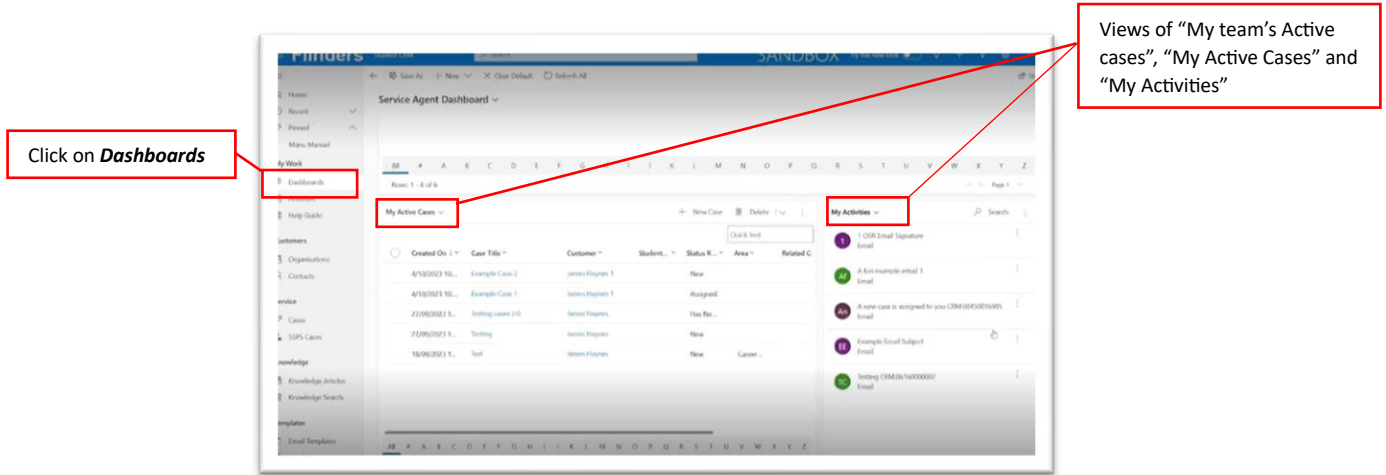
2.1.3 Back Button

Allows you to go Back to the previous screen or menu



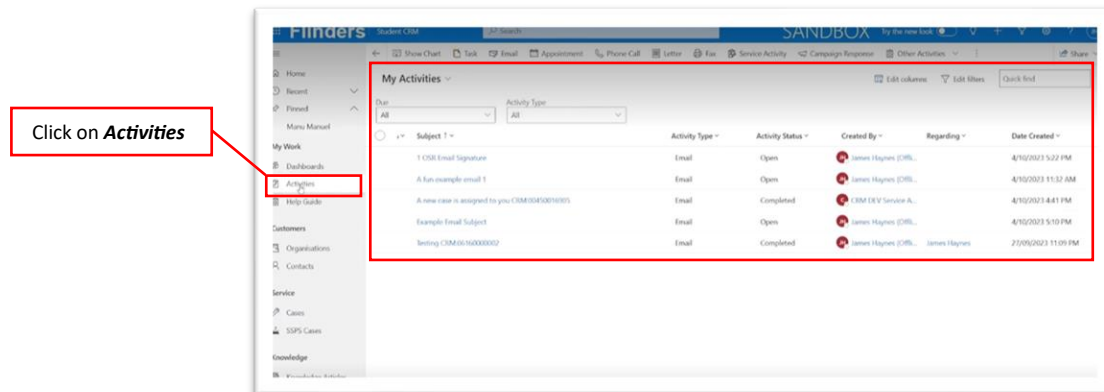
2.1.4 Dashboards

These offer snapshots of vital data with key views of that data including things such as “My team’s Active cases”, “My Active Cases” and “My Activities”.



2.1.5 Activities

These help you capture ongoing tasks and manage communications between faculty and students for the most part we will be making use exclusively of email and phone calls. These are going to be the ones that we will be focussing on.



2.1.6 Customers – Organisations

This will in every case interchange with the word account. These are Businesses or other educational institutions that Flinders might interacted with and is not really relevant with what we would use the CRM for.

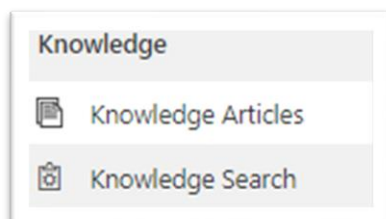
2.1.7 Customers – Contacts

Contacts = Students. It’s easier to think that contacts are the student or staff interactions which have been recorded. You can use the search function bar to look them up via their FAN.

2.1.8 Service – Cases

Cases are issues that have gone further than just a phone call or email. These are generally actions which require a little bit more detail and we will convert these into cases and track any interactions related to that specific issue on that case directly.

2.2 Knowledge



2.2.1 Knowledge Articles

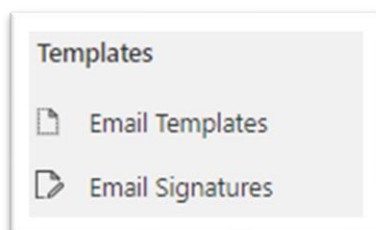
Displays the current CRM Knowledge Articles, usually displays My Active Articles. This will default to “My Active Articles” and you will need to change this view. You can use the ‘Quick search’ function bar to search for articles, but this is not the ideal way to do so. Recommendation is to use – (see 3.2) Knowledge Search.

2.2.2 Knowledge Search

Enables searching for a Knowledge Article.

2.3 Templates

These are for standardising communications from the Dynamics CRM.



2.3.1 Email Templates

Displays the current email templates and allows the creation of new email templates. You can search for an existing template.

2.3.2 Email Signatures

Allows us to add a personalised touch to the footer of any emails that we send ourselves.