MS Dynamics Student CRM
Flinders University

Forwarding a Case from CRM

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Version 2.0

Contents

Forwarding Cases from CRM is helpful as not all Flinders University Staff use MS Dynamics Student CRM. The manner in which the Case is forwarded is by emailing the Case from CRM. The Email Activity is displayed on the Case Timeline. The Case remains in CRM. The Reply is received in the CRM Case.

Some reasons to forward a Case are:
- A student may have an IT query but it has been created as a CRM Case.
- Cases within CRM may need attention from specific Teams or Staff who do not use CRM.

A **new pop-out Email form** was installed In April, 2020 and enhanced in October, 2020. The following features are now included:

Email – formatting
- **Pop-out Email window** allows the viewing of the Case whilst composing as well as being able to minimise and maximise the Email form and navigate to another Activity, Record or Dashboard.
- **A Full screen** icon increases the size of the editing window.
- The Email automatically saves when clicking Insert Attachment.
- Information from Word and Excel can be **copied and pasted** into the Email and **formatting is kept**.
- A **picture** can be copied and pasted from Word into an Email.
- **Graphics** (for example an emoji) can be copied and pasted from Word or Excel into an Email and displayed in the Email Activity in the Timeline and Open Record.
- A **Chart** can be **copied and pasted** from Excel into an Email and displayed using Open Record.
- **Rich text editing** (formatting) is displayed in the Email Activity in the Timeline and Open Record.
- **Open Record** or **replying/forwarding** to an Email now displays the **Pop-out Email form**.

Email Attachments
- **More than one attachment** can be easily inserted into the Email, similar to Outlook.
- Before sending the Email, Attachments are displayed under the Subject.
- At present attached images and PDF files can be previewed before emailing. No need to download first.
- Removing attachments before sending is easier.

Insert Template
- **Email Templates** are now **previewed** before inserting into the Email with completed field codes displayed in the preview.
- The 4 **recently viewed Templates** are listed under **Email templates**, **Recently used**.
- The search is based on the content of the Template Title.
- It **is not** possible to sort on Template type or ‘Owner’ (Personal or Whole of Organisation).

Pictures in an Email

- A **picture** can be copied and pasted from Word into an Email.
- **Graphics** (for example an emoji) can be copied and pasted from Word or Excel into the Email and displayed in the Email Activity in the Timeline and Open Record.
- A picture from a CRM Email Activity can be copied and pasted (Ctrl+V) into another CRM Email Activity.

Note: If an email is sent to CRM with a picture inserted, the picture is not visible in the Timeline, Email Activity **BUT IS** after clicking **Open Record**.

Hyperlinks

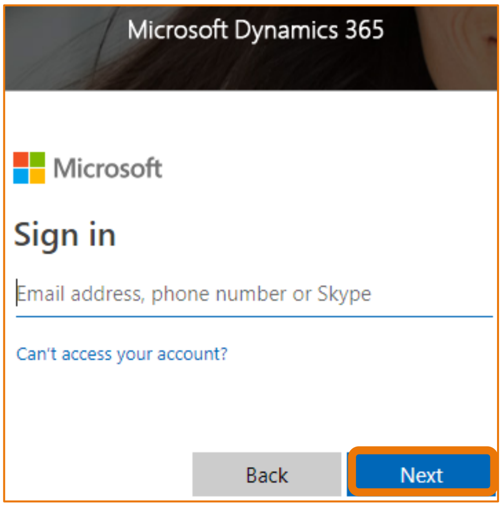
- A hyperlink can be inserted into the body of the email and can be in the form of text or a picture.

Sign in to MS Dynamics Student CRM

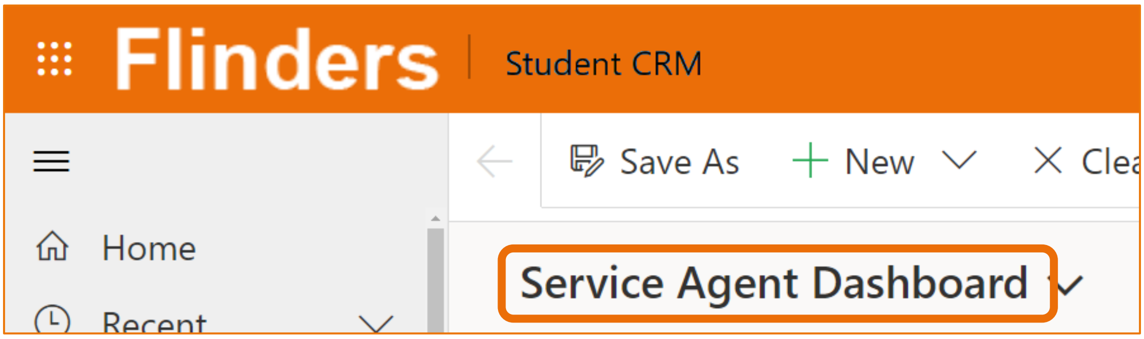
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

1. Locate Okta (flinders.okta.com) and click on MS Dynamic CRM as circled below.

2. Sign into MS Dynamics Student CRM. Signing in for the first time will present the following screen.
   - Type either your user name or FAN: firstname.lastname@flinders.edu.au OR fan@flinders.edu.au.
   - Click **Next** to sign in. The prompt '**taking you to your Organisation's page**' is displayed.
   - Thereafter, when signing in the FAN will be displayed and click **Next** to sign in.



3. **Flinders CRM | Student CRM, Service Agent Dashboard** is now displayed.

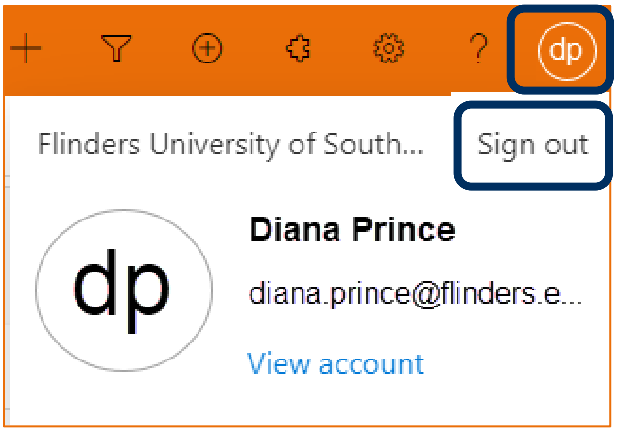


Sign Out of MS Dynamics Student CRM

After completing your work, it is a good idea to sign out of MS Dynamics Student CRM and also close the browser.

1. **Click your initials** in the **Navigation Pane**, top right hand corner.

2. Click on **Sign out**.

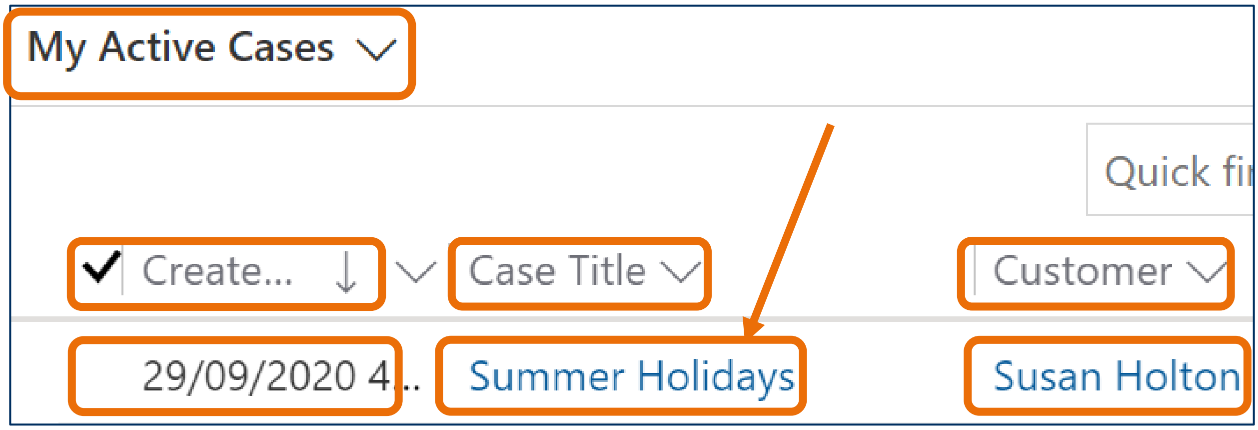


3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

Locate and select the Case from which the Email is to be sent

1. Ensure the correct view is displayed, for example **My Active Cases** or **My Team's Active Cases**.
   - **Created on** – the Date and time of the Case Creation is displayed.
   - **Case Title** – lists the names of the Cases.
   - **Customer** – Student's name.

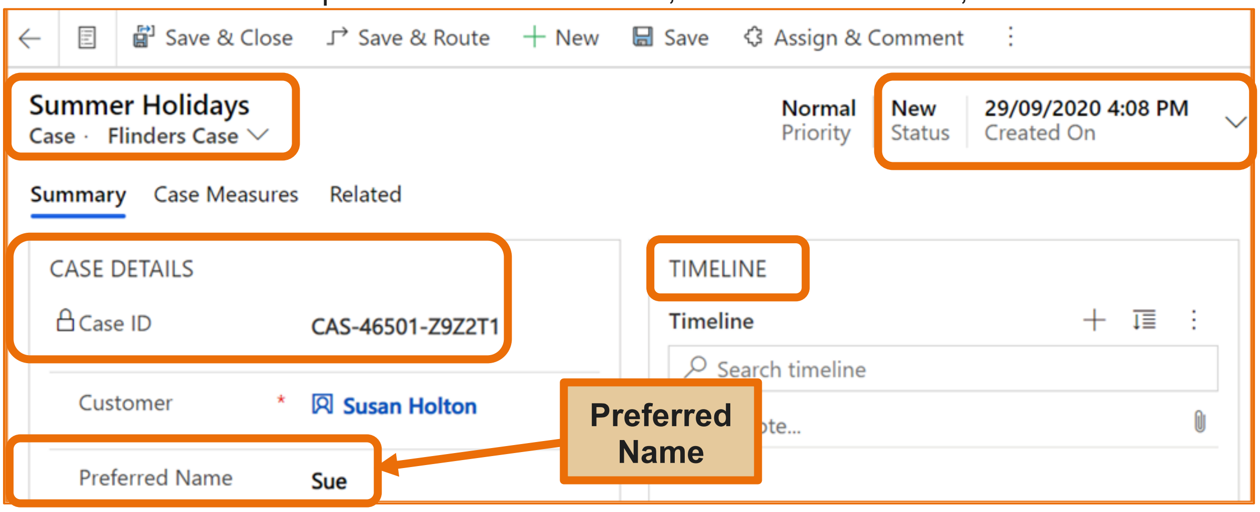
2. Click on the name of the **Case Title** to open the Case.



3. The Case is displayed.
   - **CASE Title** – is displayed in the top left hand corner of the Case screen.
   - **CASE DETAILS** – includes the Case ID which is automatically created when the Case is saved.
   - **TIMELINE** – displays all Activities.

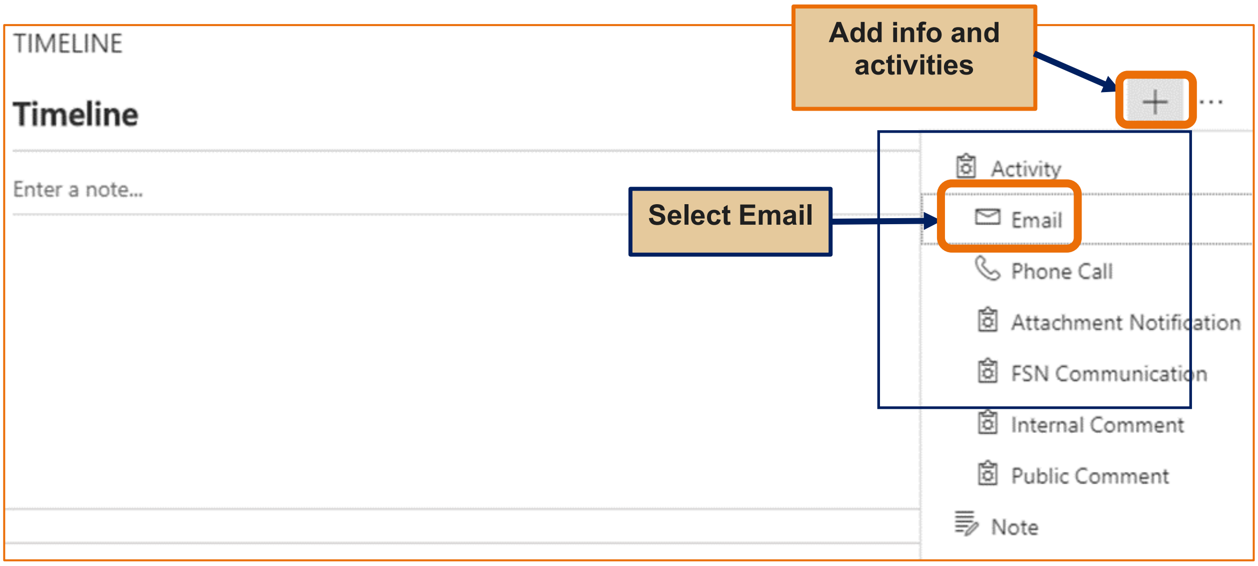
Preferred Name, Case Record

4. If the Student has updated their details in Student Two and added a **Preferred Name**, it will be visible at the top of the CASE DETAILS, beneath **Customer**, as circled below.



Forward the Case using CRM Email – Create the Email

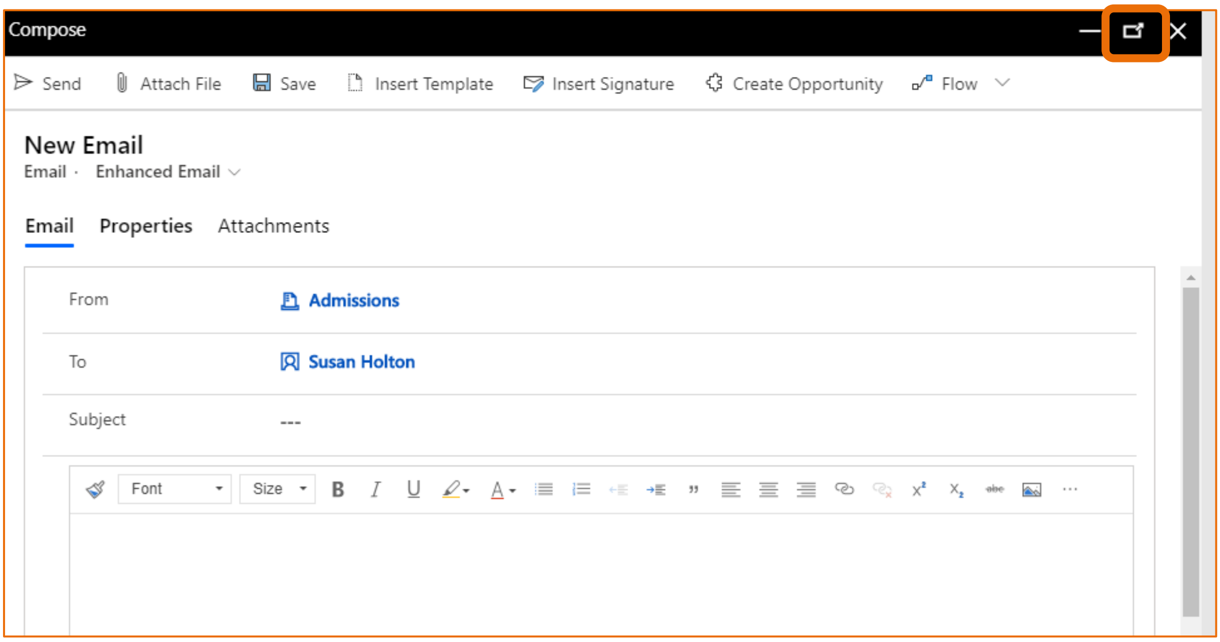
1. Click on the **+** (**Add info and activities**) in the Timeline, right hand side of the screen.



Pop-out New Email Form

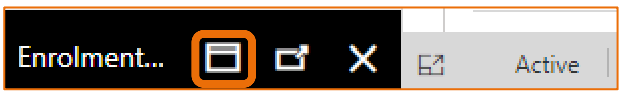
Maximise the Email Form

2. The **New Email Compose** form is displayed in the bottom right hand corner of the screen. Click the  maximise button to maximise the form.



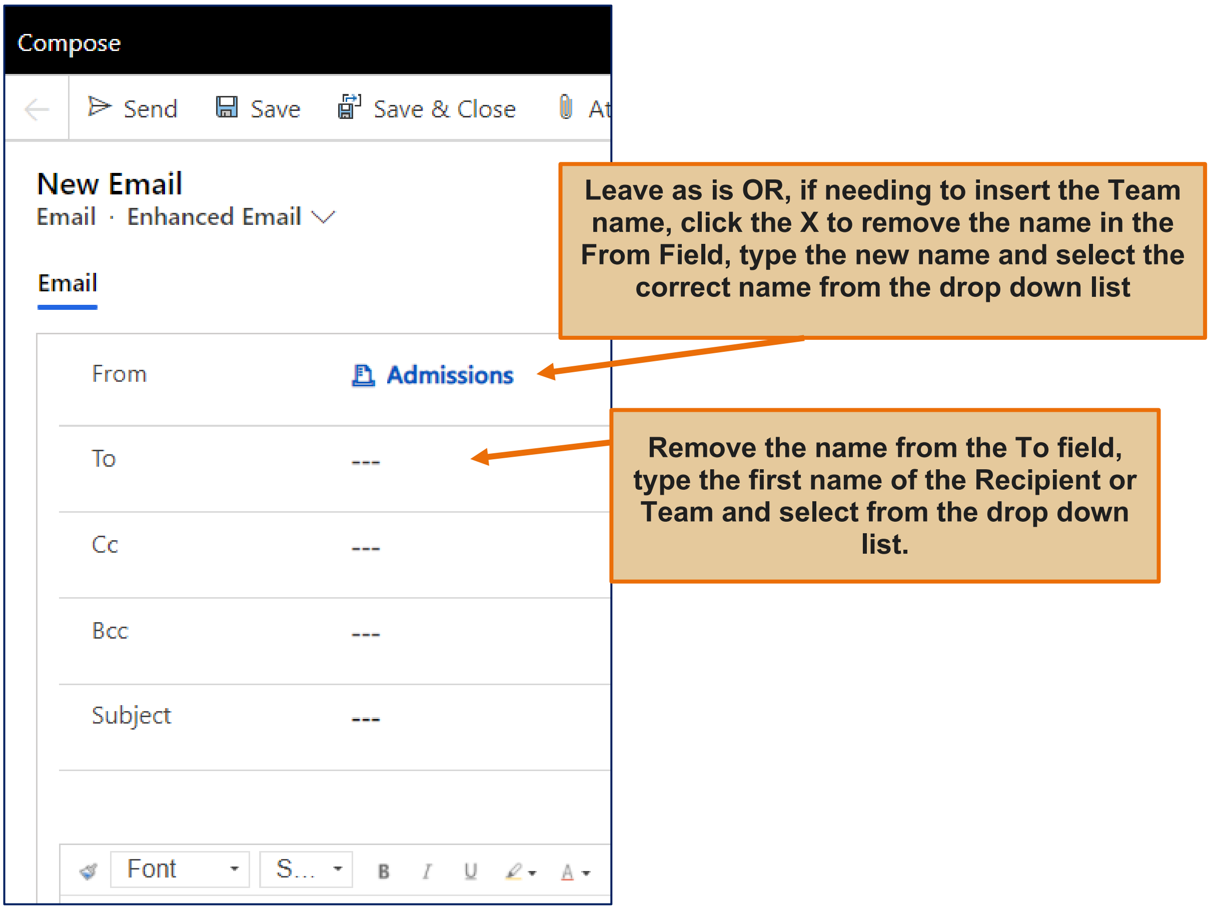
Minimise the Email Form

Click the  **minimise** icon to minimise the Email form. This is displayed in the bottom left hand corner of the screen. This enables viewing other Activities and information in the Contact or Case record or navigating to another record or Dashboard. It would be best to save before minimising. Click the **maximise** icon to maximise the screen.



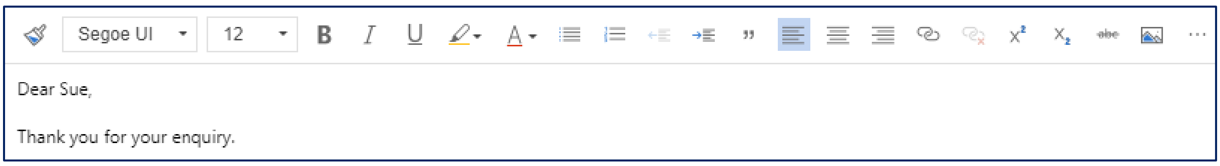
Sent From Address, To Address and Subject

3. Depending upon which User or Team sends the email, the name in the **From**: field will remain as is OR be replaced with a Team name. Refer to Business Processes.
    - **From:** Leave as is OR click the **X** adjacent to the name in the **From** field. Type the beginning of the name to be inserted and select the correct name from the drop down list.
    - **To:** The Student's name and therefore email address should be in the To field.
    - **Subject:** Type the appropriate information for the Subject.



Email Contents

1. Click in the body of the email and type the message.



Insert an Email Template

Instead of typing the Subject and Email Contents message, a Template can be inserted. Any existing information in these fields may be overwritten and a prompt is provided to ask if this is to be accepted.

Any information already typed in the Subject field will be overwritten by the Template Subject information but with a warning.

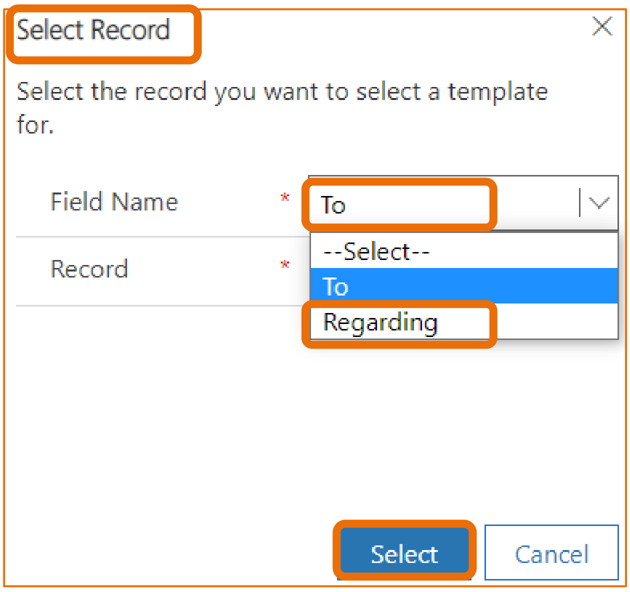
1. Click on 

Insert Template in the Email Menu.

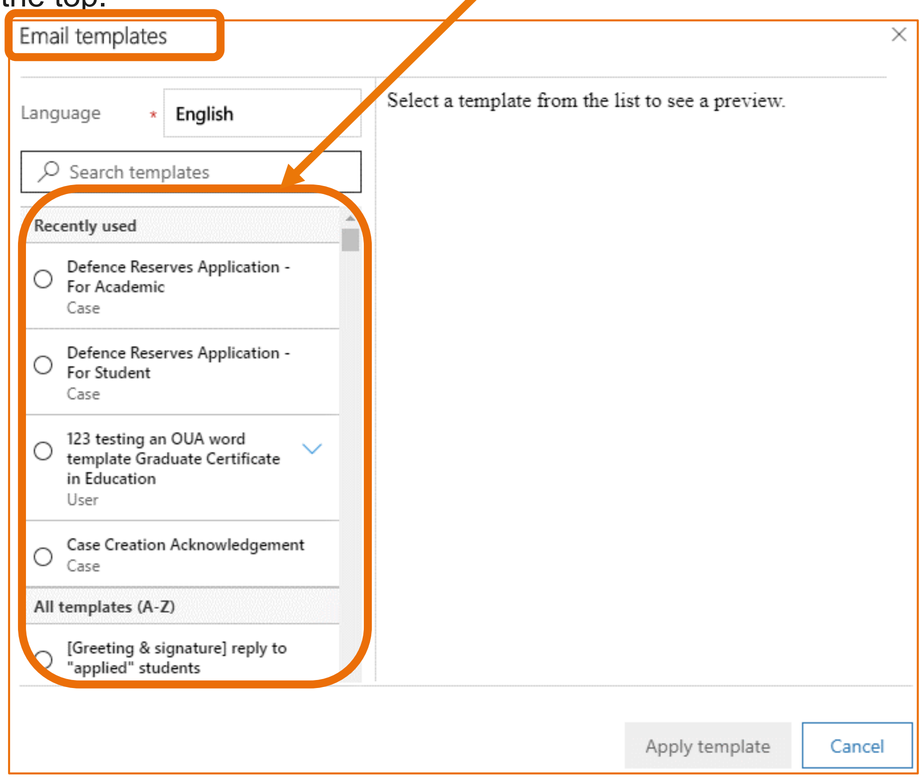
2. If the Email To field contains an email address the **Select Record** window is displayed. (Clicking Select from here will only display the Email Template Type User.)
   Click on **To** and a menu drops down.
3. Click on **Regarding** from the drop down list.

4. Click 

Select.



5. The **Email Templates** window is displayed with the 4 most recently used Templates displayed at the top.

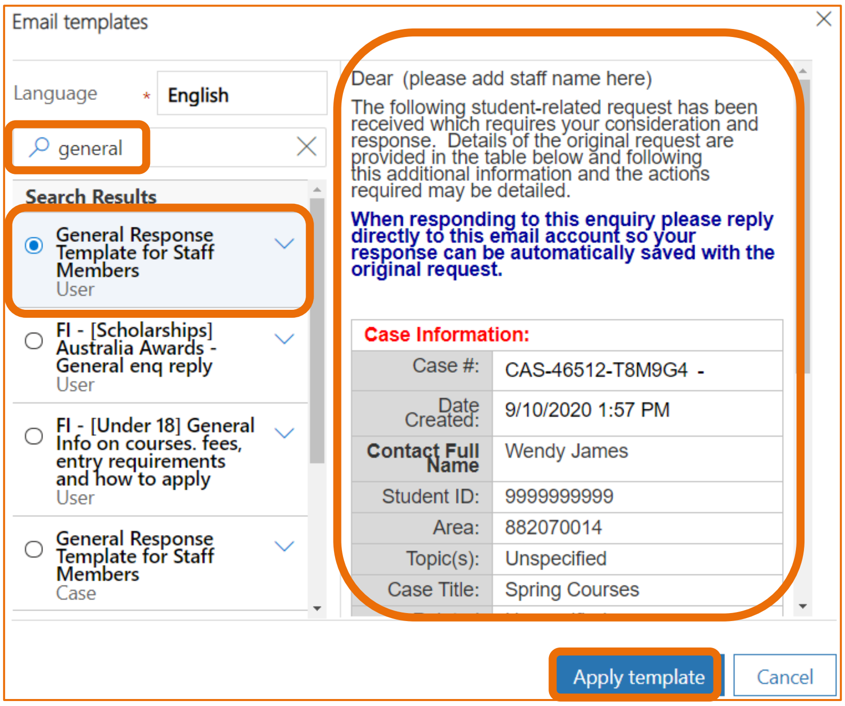


6. Click in the **Search Template** field and type some of the letters included in the Template name. The example below is **general** and displays the Templates with general included in the name.

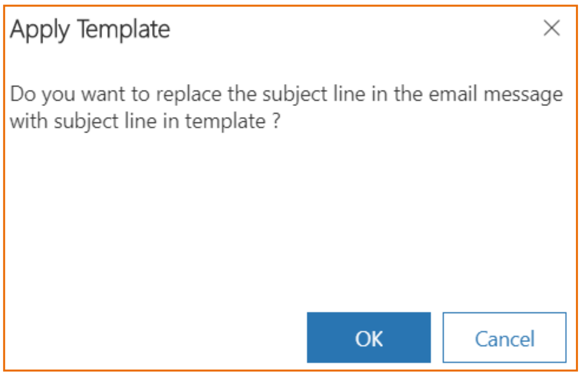
7. Click on the Template and a preview is displayed on the right hand side of the Email templates window.

8. Click on the Template and a preview is displayed on the right hand side of the Email templates window.

9. Click on Apply template **Apply template** and the contents is inserted into the New Email form.

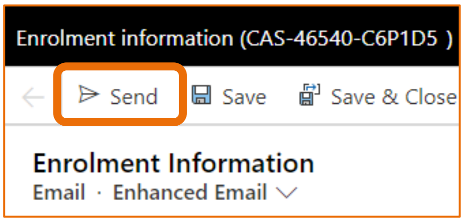


Note: When a template is inserted it could replace any text in the Subject field **and also** add to the content of the Email, as per the prompt below. Clicking **OK** overwrites the information, clicking **Cancel** reverts to the Email Activity contents.



Send the Email

1. Click **Send** in the Email Menu, top left hand corner of the screen. The Case Timeline is displayed. The screen may need to be refreshed by clicking the **Refresh** icon in either the Navigation Menu or the Case Timeline.

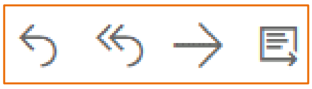


Case Timeline, Email Activity

- The Email Activity is displayed in the Timeline. The icon and **Closed** icon represent the Email has been sent. The Reply, Reply all, forward and Open Record icons are displayed on the right hand side of the Email Activity.

- Click on the Email Activity to expand and view the contents of the email in the Timeline.

- Resting the mouse on the Email Activity displays the Reply, Reply All, Forward and Open Record icons.



- Click on these icons to achieve the purpose.

Version Control

Version Number	Version Date	Changes
	2017	Original Notes
2.0	October, 2018	MS Dynamics Student CRM Updated pictures as per the new version. Need to select Customer Service Hub from the Navigation Pane.
3.0	November, 2018	Uploaded to iEnrol.
3.0	November, 2018	Uploaded to Flo.
4.0	December, 2018	Updated the assystNET link in the footer to reflect the new assyst form named 'I have a problem or request with MS Dynamics Student CRM'.
5.0	March, 2019	Updated for the April Upgrade. Uploaded to FLO.
6.0	May, 2019	Preferred Name information inserted. Uploaded to FLO.
7.0	October, 2019	Updated to reflect changes made in the October, 2019 upgrade. Uploaded to FLO
8.0	April, 2020	Updated for the April Upgrade. Uploaded to FLO.
9.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
1.0	October, 2020	Updated for the October Upgrade. Uploaded to FLO.
2.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.