

MS Dynamics Student CRM

Flinders University

Ping Statistics

How to View and Save

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Version 4.0

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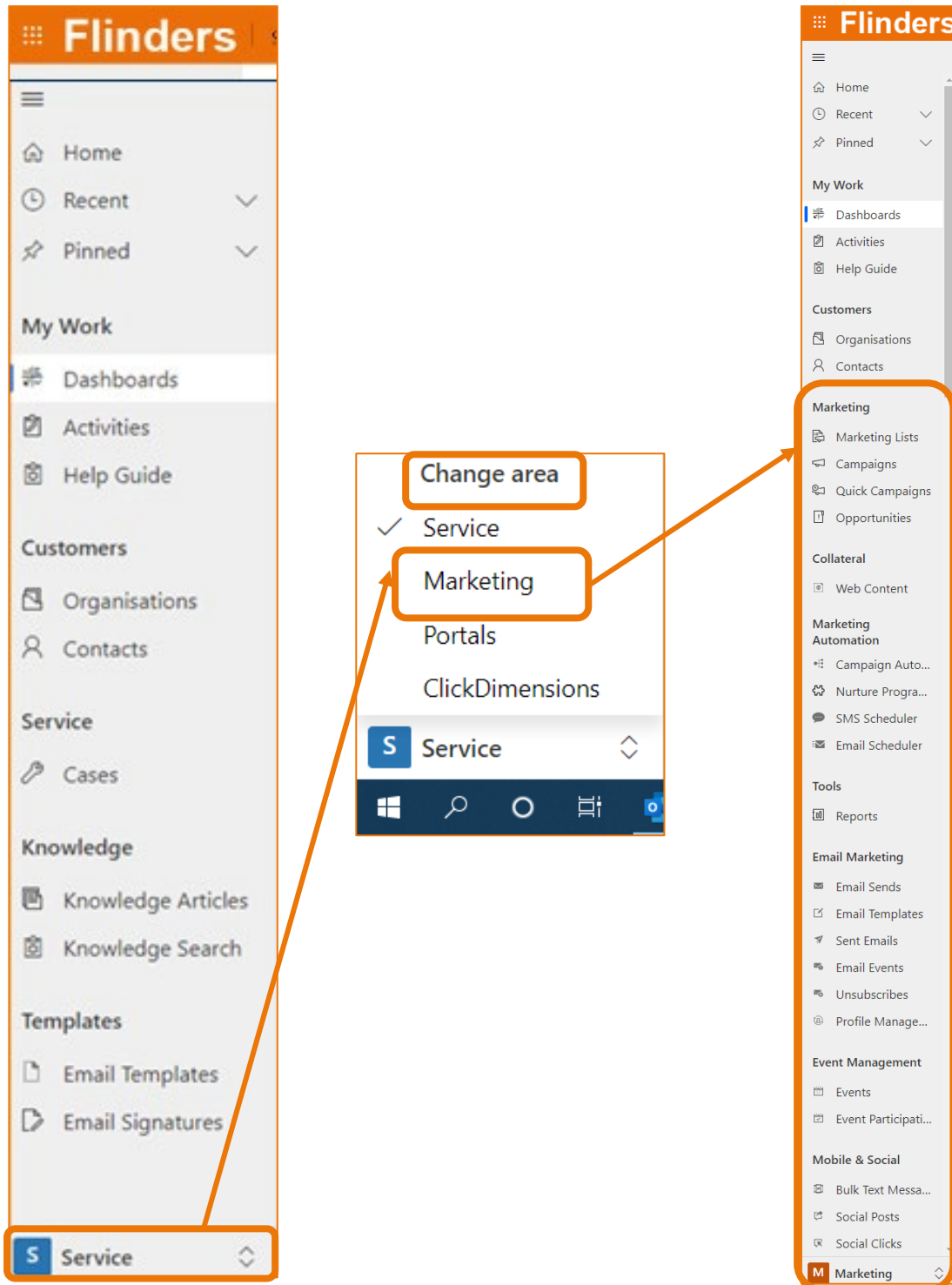
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Ping Statistics – How to View and Save

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

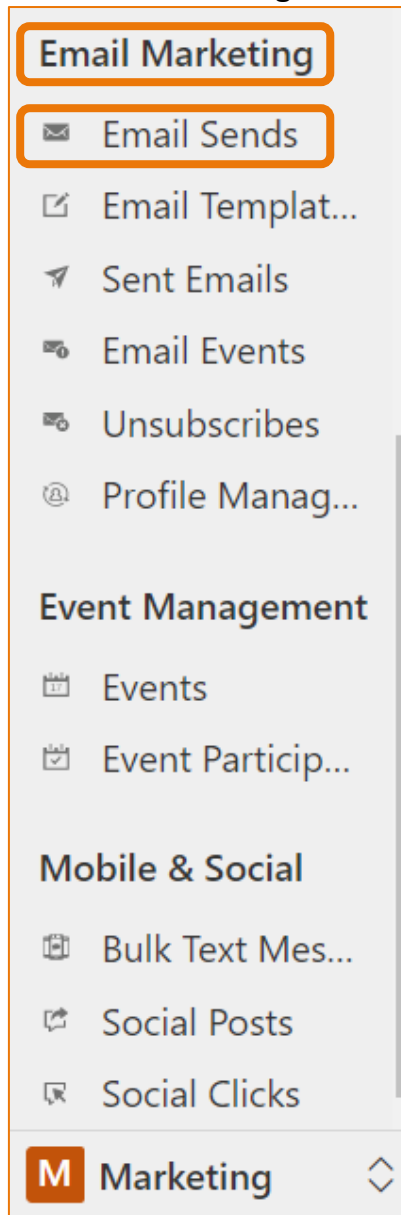
Marketing Area

1. **Change area:** Click **Service** in the **Change area** (bottom of the Navigation Pane).
2. The Change area menu pops up. Click on **Marketing**.
3. The options in the Navigation Pane will change to reflect the Marketing area.

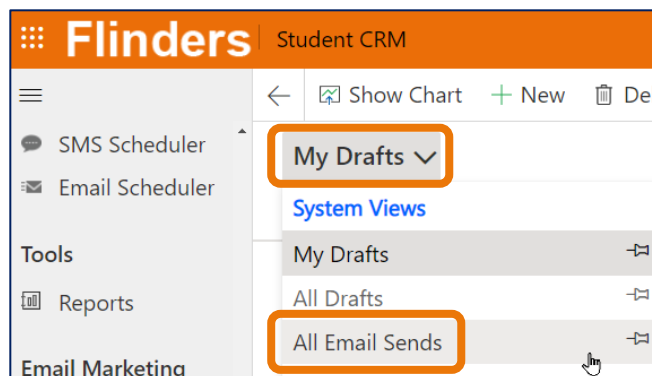


Locate the Email which was sent.

1. In the Navigation Pane, under **Email Marketing** click on **Email Sends**.

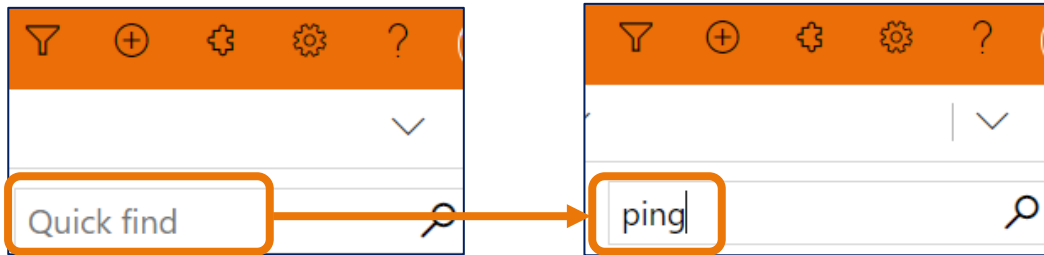


2. The **My Drafts** View is displayed. Click the drop down arrow and click on **All Email Sends**. Note – if there are two occurrences of All Email Sends, click on the first occurrence.



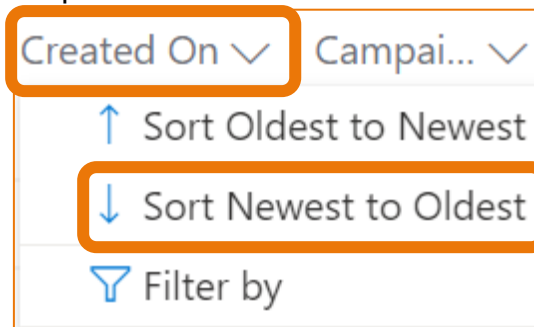
Search for the Ping Email

- The Ping Email needs to be located using **Search**. Click in the **Search for records** in the top right hand corner of the screen and type ***ping** (or the name of the email).
- Press **Enter** or click the **magnifying glass**.

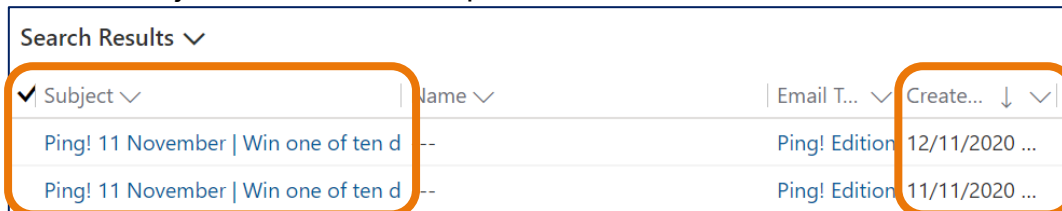


Open the Email

- Click on the **Created On** field and click on **Sort Newest to Oldest** to sort in date order, most recent email at the top.



- Click on the Subject of the Email to open the Email.

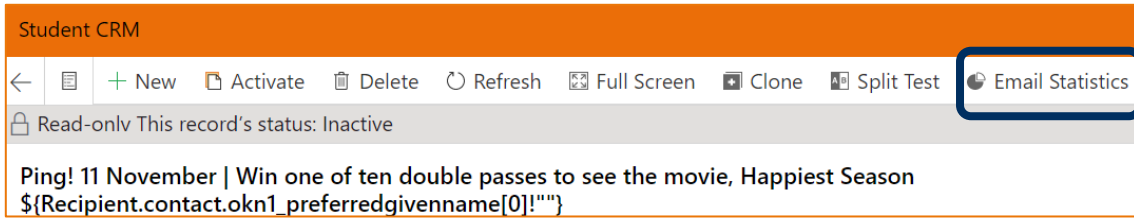


Overview Report – Email Statistics

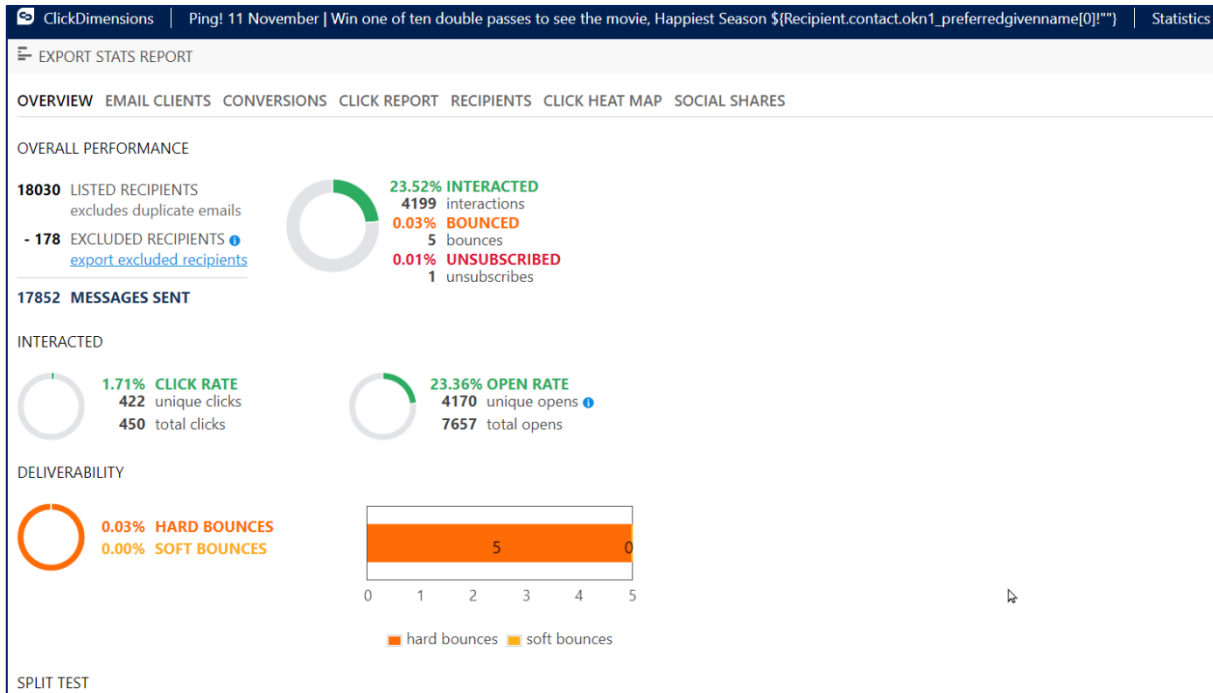
The **Email Statistics** provides an overall performance/view of the Email. There are 2 ways to navigate to the statistics – one via the Email menu bar and as below.

- View the Email.

- Click on **Email Statistics** in the menu bar at the top of the screen.



- A new browser tab opens with the following information displayed.



Save the Overview Report – Stats Report

- Click on **EXPORT STATS REPORT** in the top of left hand corner the screen.



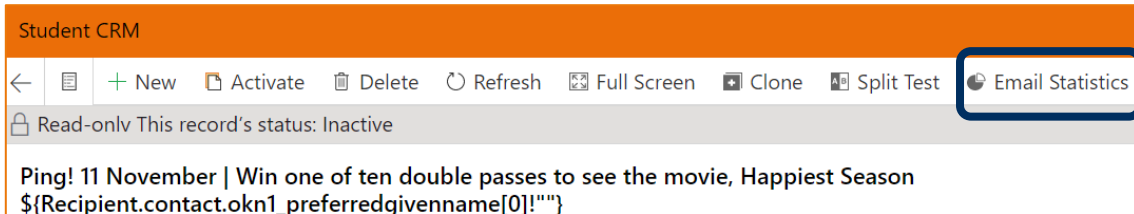
- The pdf file is created with the name of the Email. Open and save the pdf.
- Navigate back to the Email.

Click Report

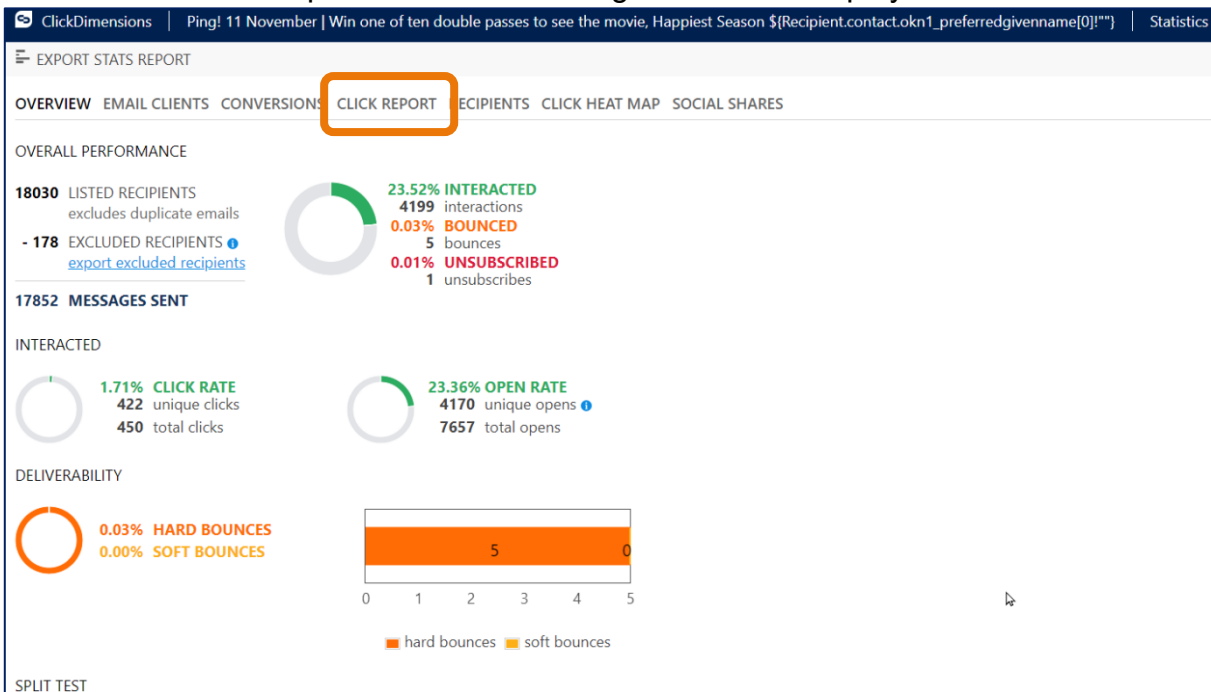
The **Click Report** displays a list of all the URLs clicked on in the email.

1. View the Email.

2. Click on **Email Statistics** **Email Statistics** in the menu bar at the top of the screen.



3. A new browser tab opens with the following information displayed.



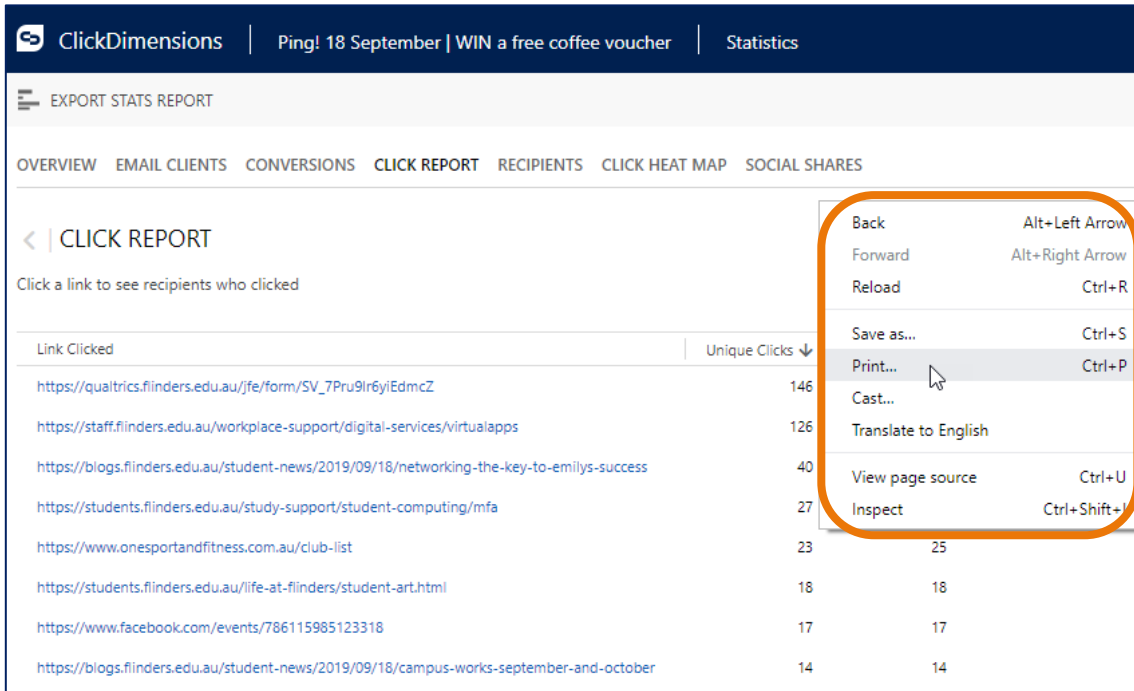
4. Click on **CLICK REPORT** **CLICK REPORT** at the top of the screen. The **CLICK REPORT** is displayed. Click twice on the **Unique clicks** field to sort the number of clicks in order, greatest number at the top.

The screenshot shows the 'CLICK REPORT' table with the following data:

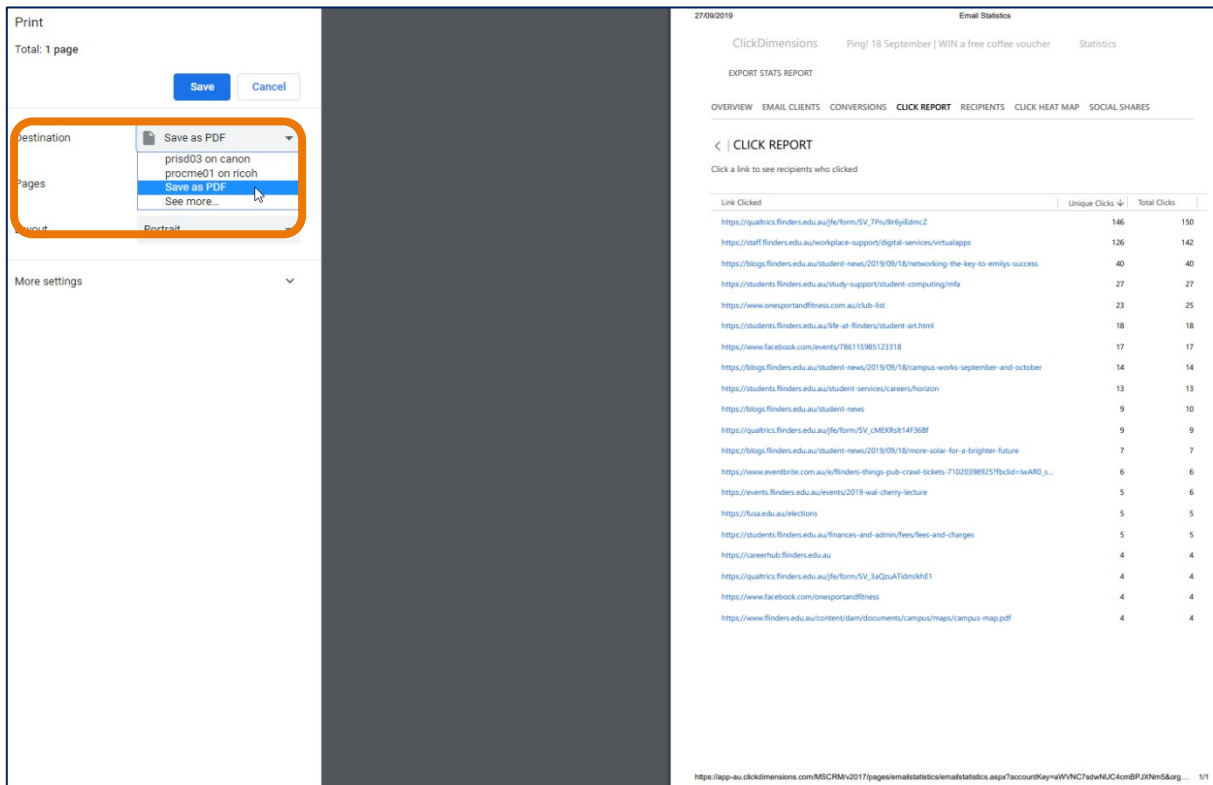
Link Clicked	Unique Clicks	Total Clicks
http://www.flinders.edu.au/international-students/services/orientation/invitation-only-event-boo...	1	1
http://www.flinders.edu.au/international-students/study-at-flinders/study-abroad-exchange/flind...	2	2
http://www.onesportandfitness.com.au/wp-content/uploads/2019/05/Starting-a-Sporting-Club.pdf	2	2

Save the Click Report

5. Right mouse click on a blank area of the screen and left mouse click on **Print...**



6. The Print screen is displayed. Click the drop down arrow adjacent to Destination and click on **Save as PDF**.

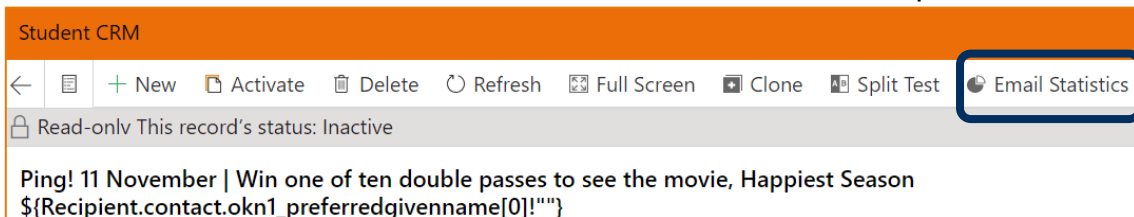


7. Click **Save** (above **Save as PDF**). The **Save As** window is displayed. Name appropriately and click Save in the bottom right hand corner of the Save As window.
8. Close the Browser tab and return to the Email.

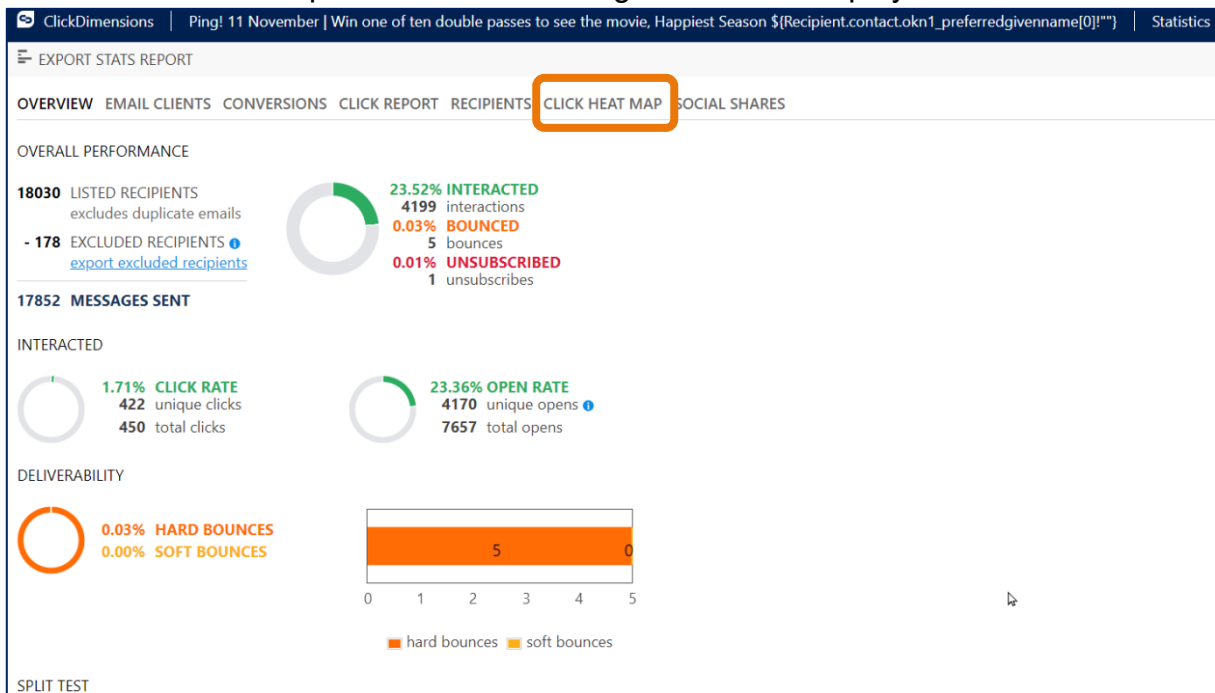
Heat Map

The Heat Map displays how many people clicked on links in the email.

1. View the Email.
2. Click on  **Email Statistics** in the menu bar at the top of the screen.



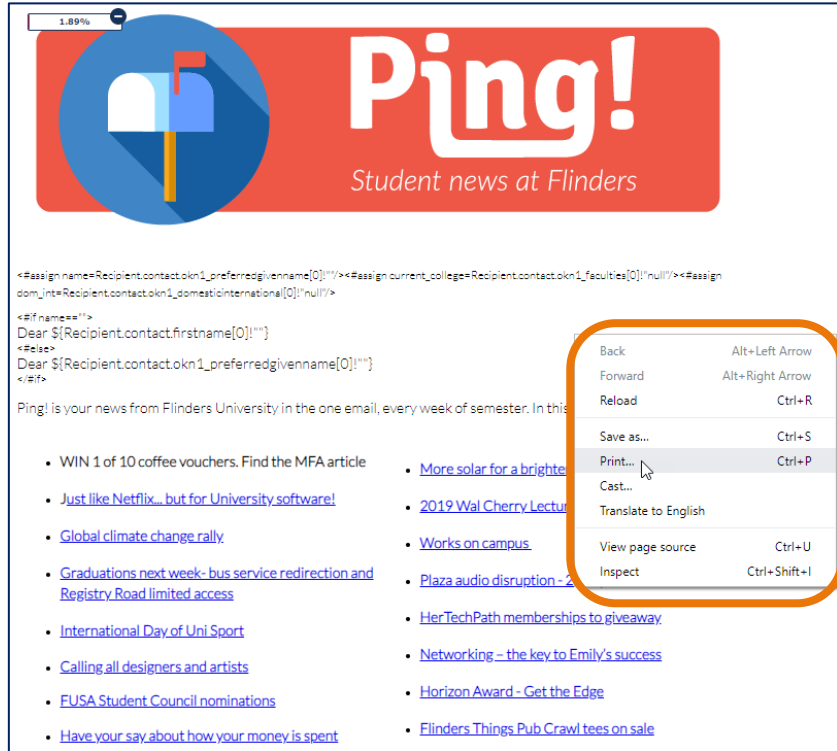
3. A new browser tab opens with the following information displayed.



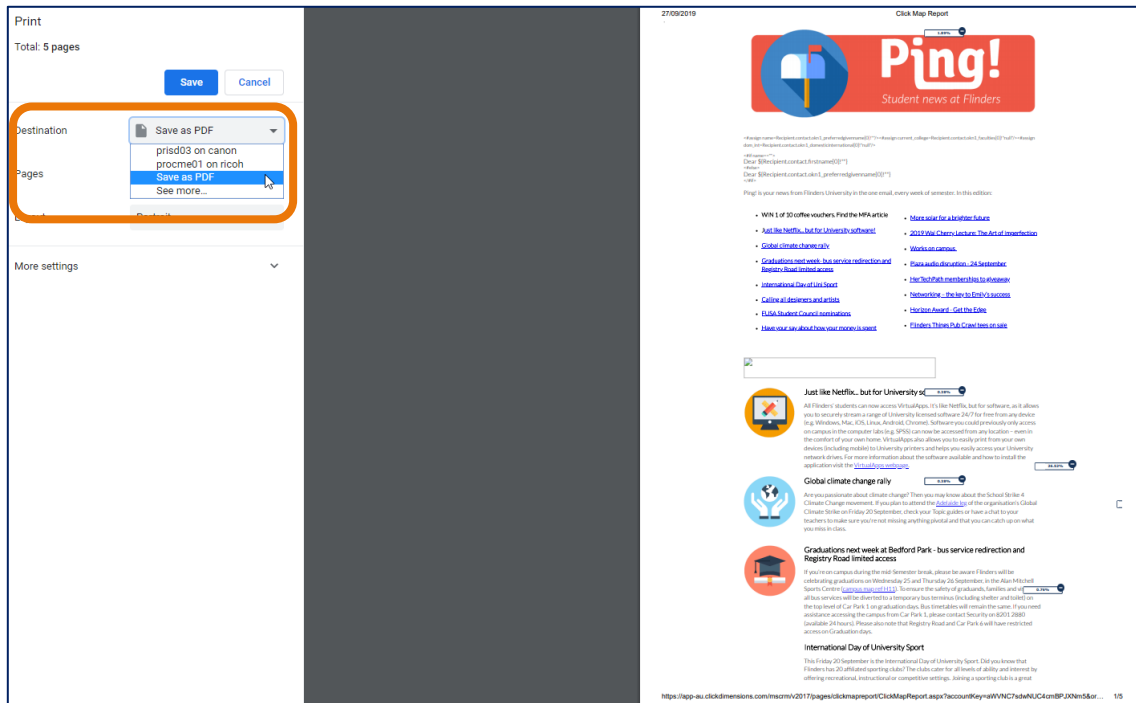
1. Click on  **CLICK HEAT MAP** in the menu bar at the top of the screen.

Save the Heat Map Report

2. Right mouse click on a blank area of the screen and left mouse click on **Print...**



3. The Print screen is displayed. Click the drop down arrow adjacent to Destination and click on **Save as PDF**.



4. Click **Save** (above **Save as PDF**). The **Save As** window is displayed. Name appropriately and click **Save** in the bottom right hand corner of the **Save As** window.

5. Close the Browser windows.

Version Control

Version Number	Version Date	Changes
1.0	September, 2019	Original Notes. Uploaded to FLO.
2.0	October, 2019	Updated for October Upgrade. No changes made. Uploaded to FLO.
3.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
4.0	October, 2020	Upgraded for Unified User Interface. Uploaded to FLO.