MS Dynamics Student CRM
Flinders University

Sending an Email to a Student including Attachment and Hyperlink

Developed by Wendy James, Training Specialist

October, 2020

Version 4.0

Contents

Email is the primary form of communication from MS Dynamics Student CRM to Students. Emails sent from MS Dynamics Student CRM are formatted in enhanced, rich text editing. The history of Emails sent and received is located in the Contact Timeline and Case Timeline.

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**.

Changing the Font

- The default font in an Email Activity is Segoe UI 9 which can be changed.
- Refer instructions in **CRM How to Guide Create and Use Email Signatures** to change the default font in the Email Signature.

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

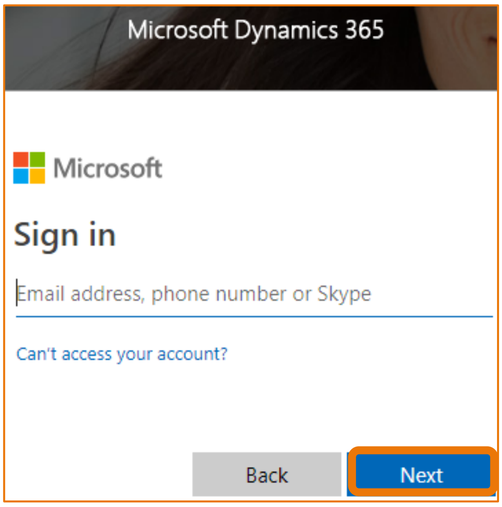
- A hyperlink can be inserted into the body of the email and can be in the form of text or a picture.

Sign in to MS Dynamics Student CRM

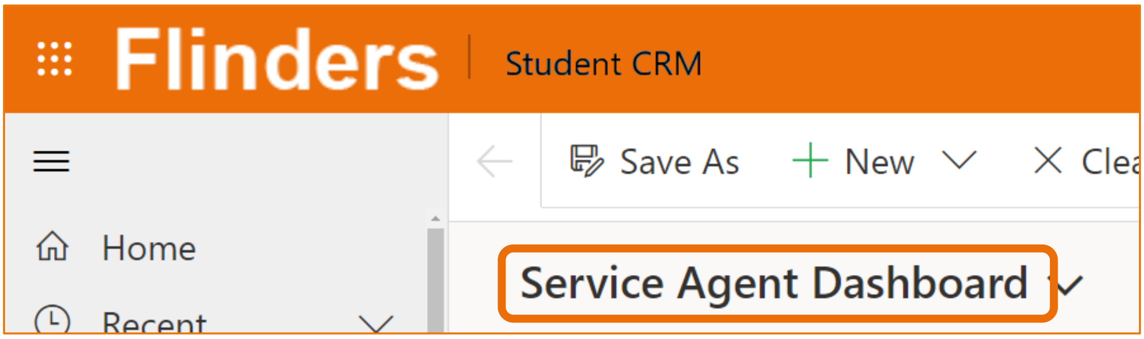
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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.

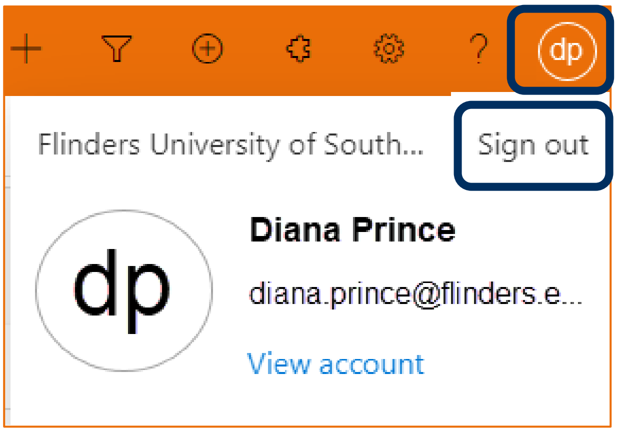


Sign Out of MS Dynamics Student CRM

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**.

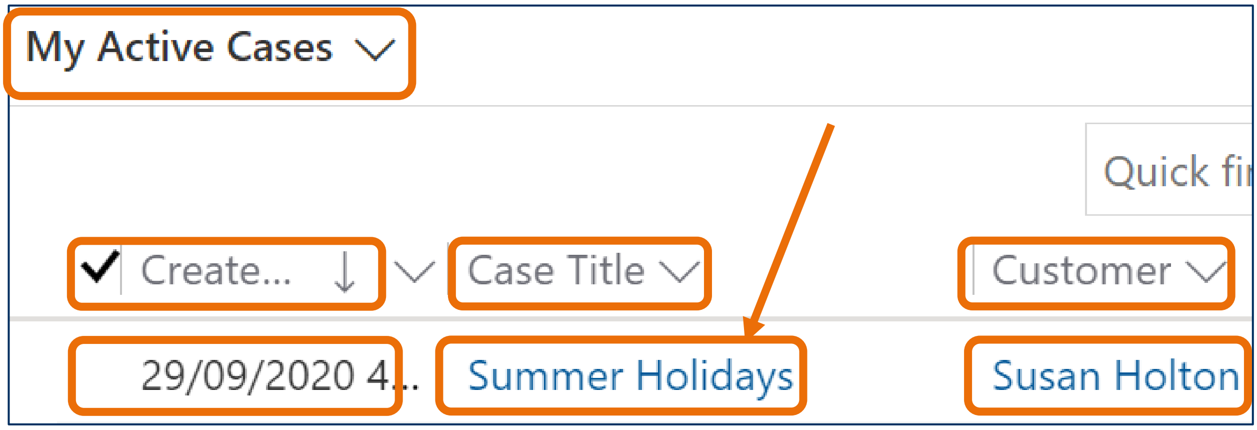


3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

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.

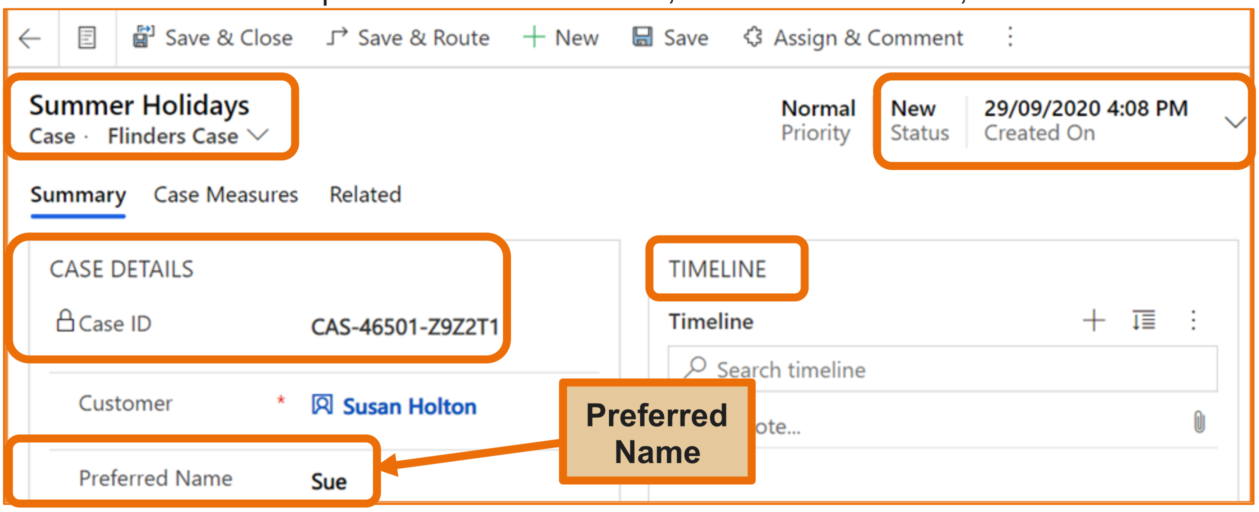
2. Click on the name of the **Case Title** to open the Case.



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.

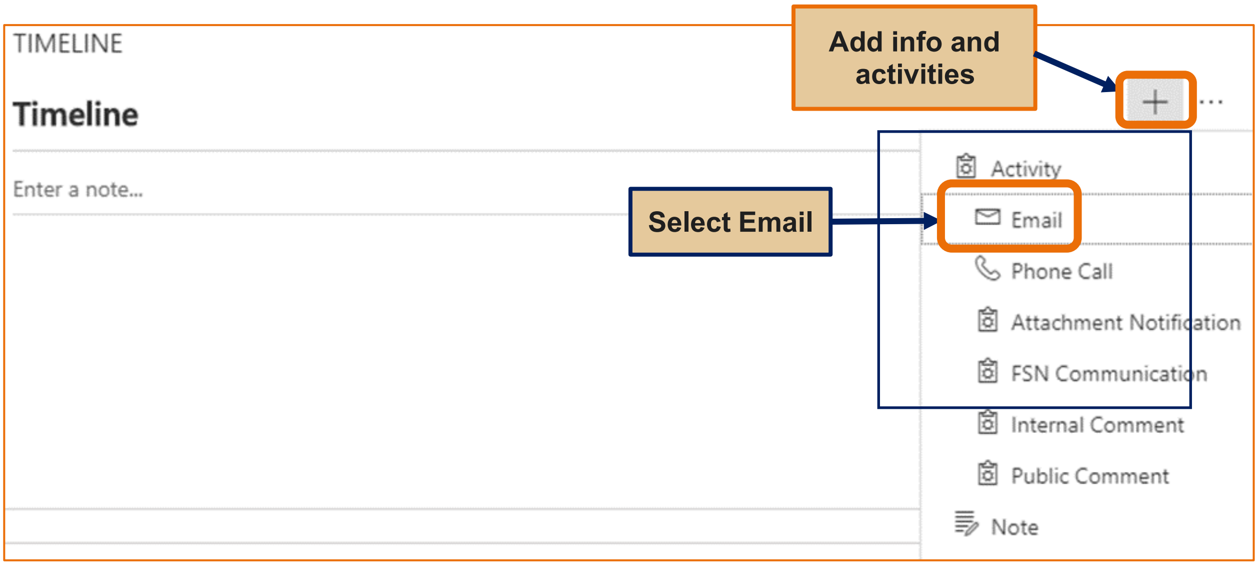
Preferred Name, Case Record

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.



Create and Send an Email

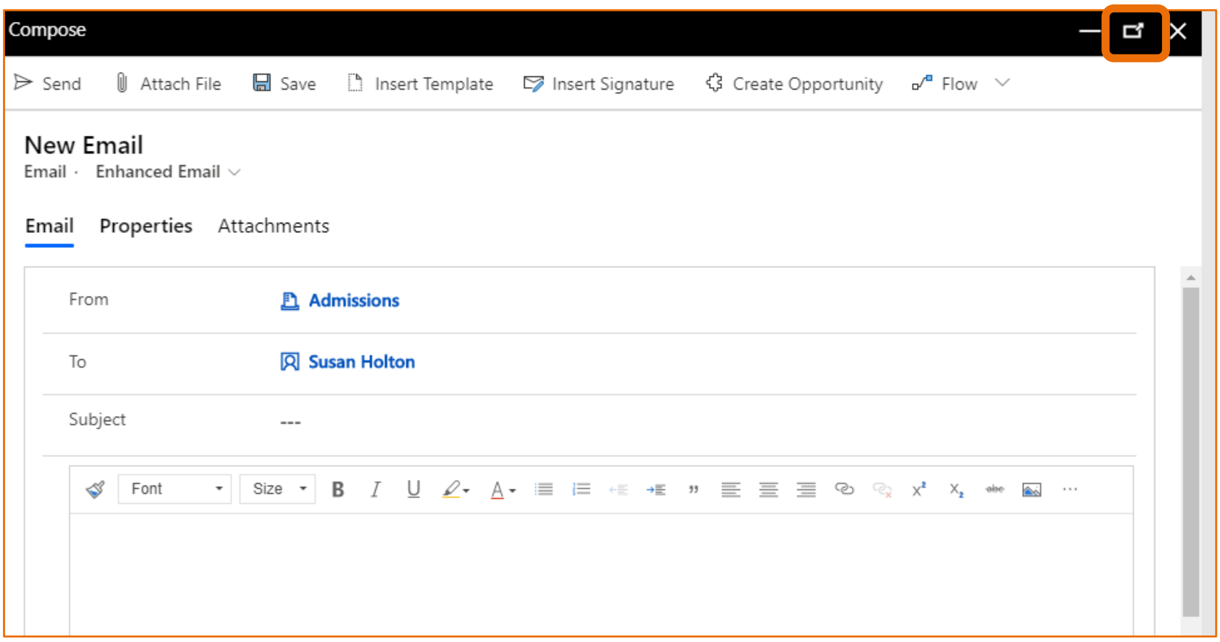
1. Click on the **+** (**Add info and activities**) in the Timeline, right hand side of the screen.



Pop-out New Email Form

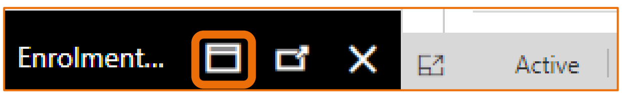
Maximise the Email Form

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.



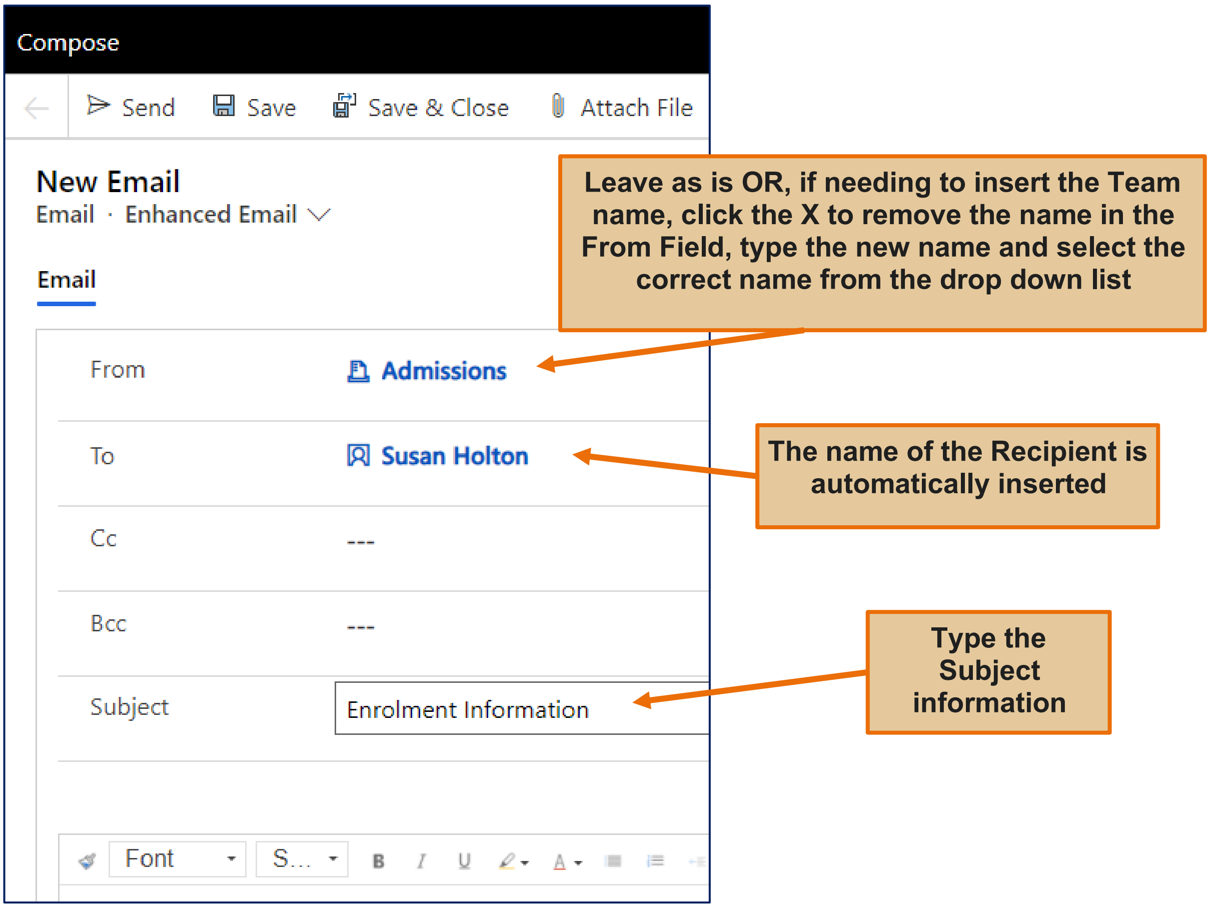
Minimise the Email Form

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.



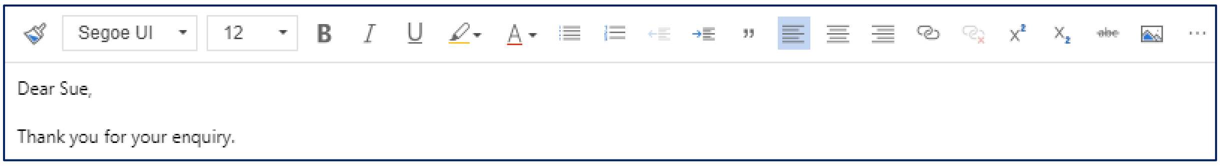
Sent From Address, To Address and Subject

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

4. 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.

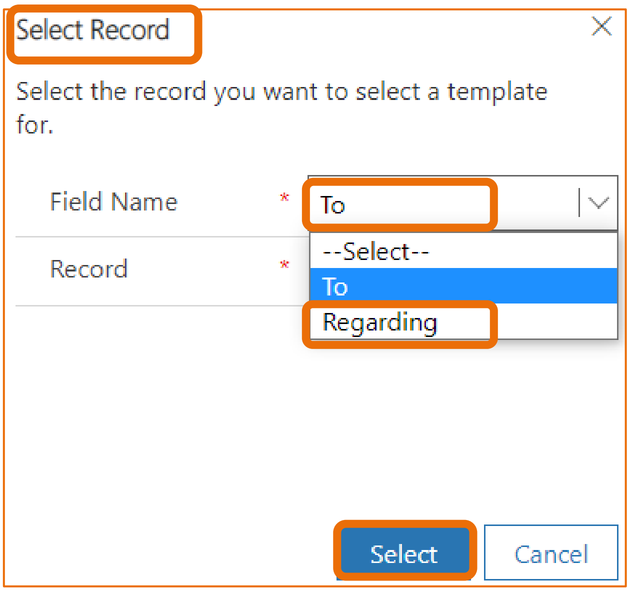
Any information already typed in the Subject field will be overwritten by the Template Subject information but with a warning.

1. Click on  **Insert Template** in the Email Menu.

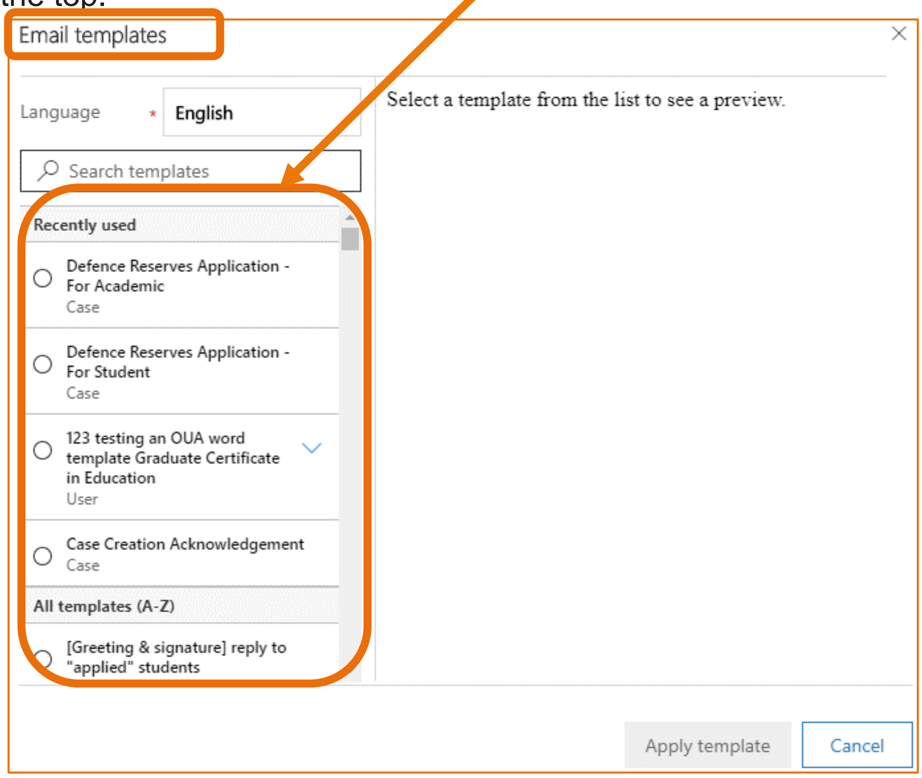
2. If the Email To field contains an email address the **Select Record** window is displayed. (Clicking Select from here will only display the Email Template Type User.)
   Click on **To** and a menu drops down.

3. Click on **Regarding** from the drop down list.

4. Click  **Select**.



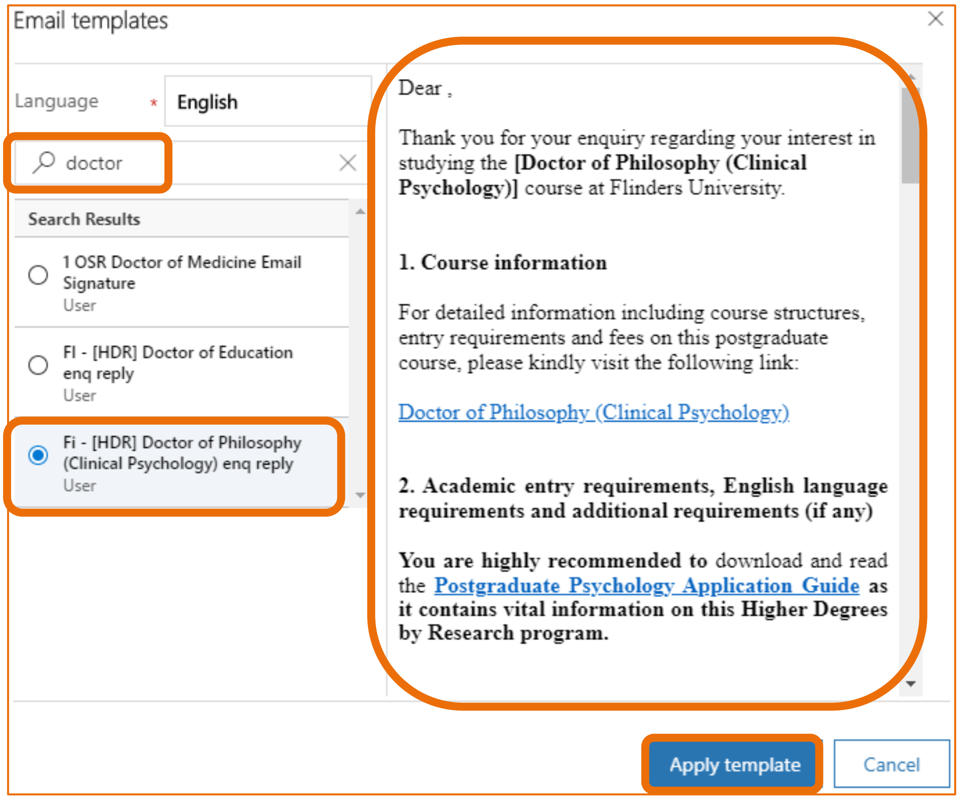
5. The **Email Templates** window is displayed with the 4 most recently used Templates displayed at the top.



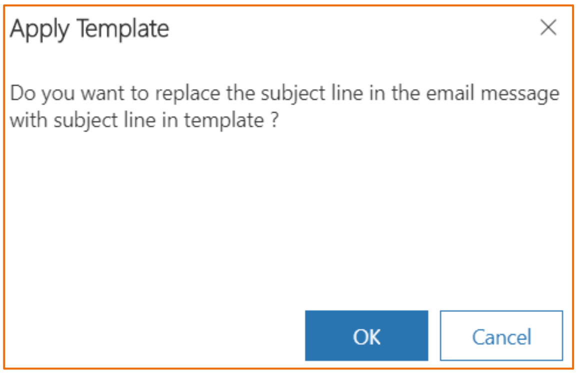
6. Click in the **Search Template** field and type some of the letters included in the Template name. The example below is doctor and displays the Templates with doctor included in the name.

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

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

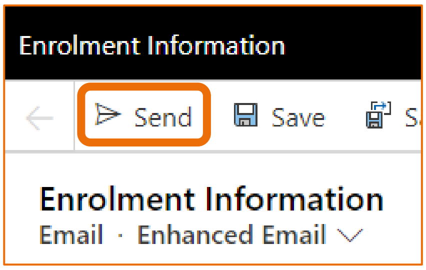


Note: When a template is inserted it could replace any text in the Subject field **and also** add to the content of the Email, as per the prompt below. Clicking **OK** overwrites the subject information and adds to any existing Email content; clicking **Cancel** leaves the subject information as is and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



Send the Email

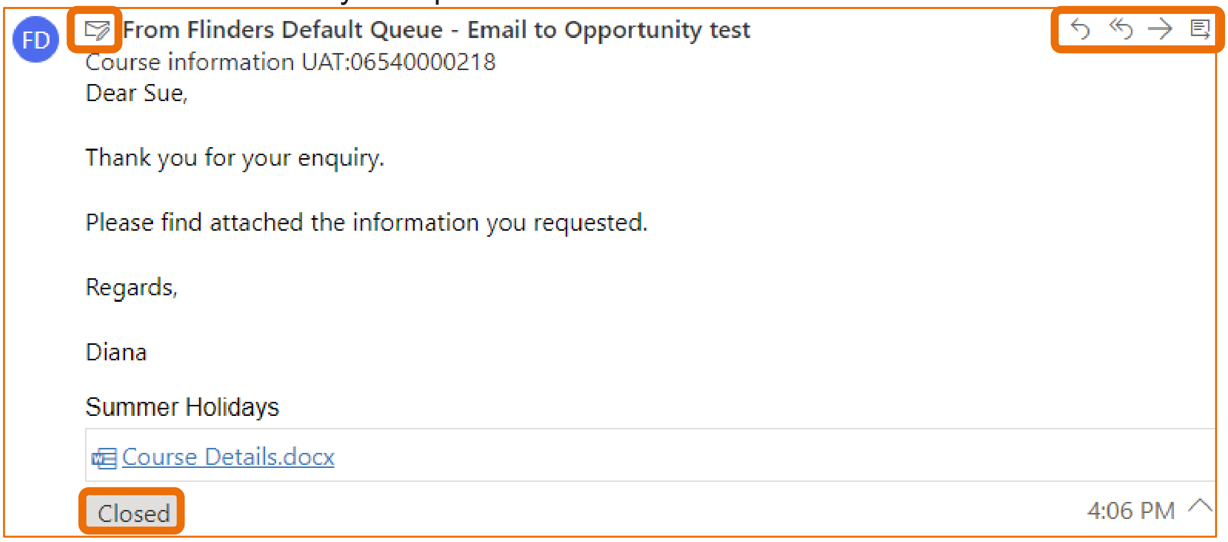
1. Click  **Send** in the Email Menu, top left hand corner of the screen. The Case Timeline is displayed. The screen may need to be refreshed by clicking the  **Refresh** icon in either the Navigation Menu or the Case Timeline.



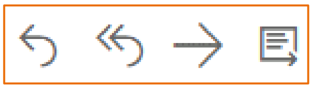
Case Timeline, Email Activity

- 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.

Send an Email with an Attachment

Attach a Document

A document can be attached to the Email sent from MS Dynamics Student CRM. The Email automatically saves after clicking on Add attachment.

1. Refer to and complete Steps 1 to 4, **Create and Send an Email** starting on Page 7 to create the email but it is not sent immediately.

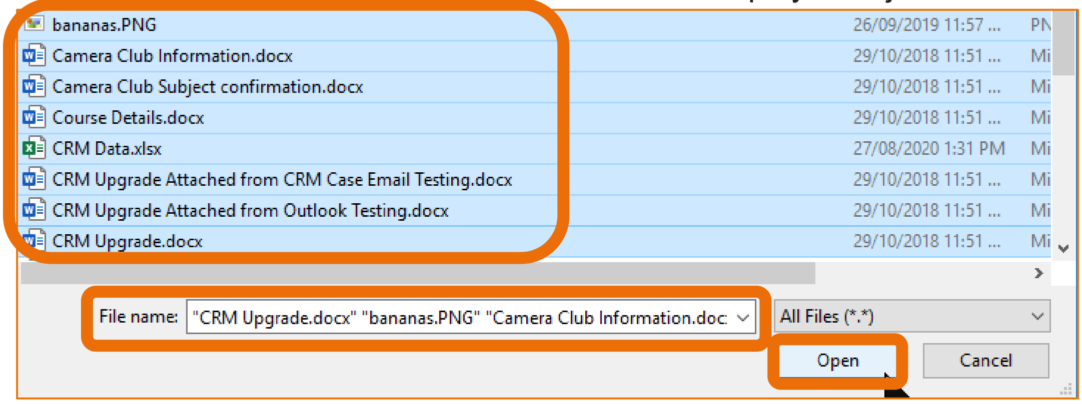
2. Click on 

in the Menu Bar, left hand side. If the Email has not been saved the **Save email** window is displayed.

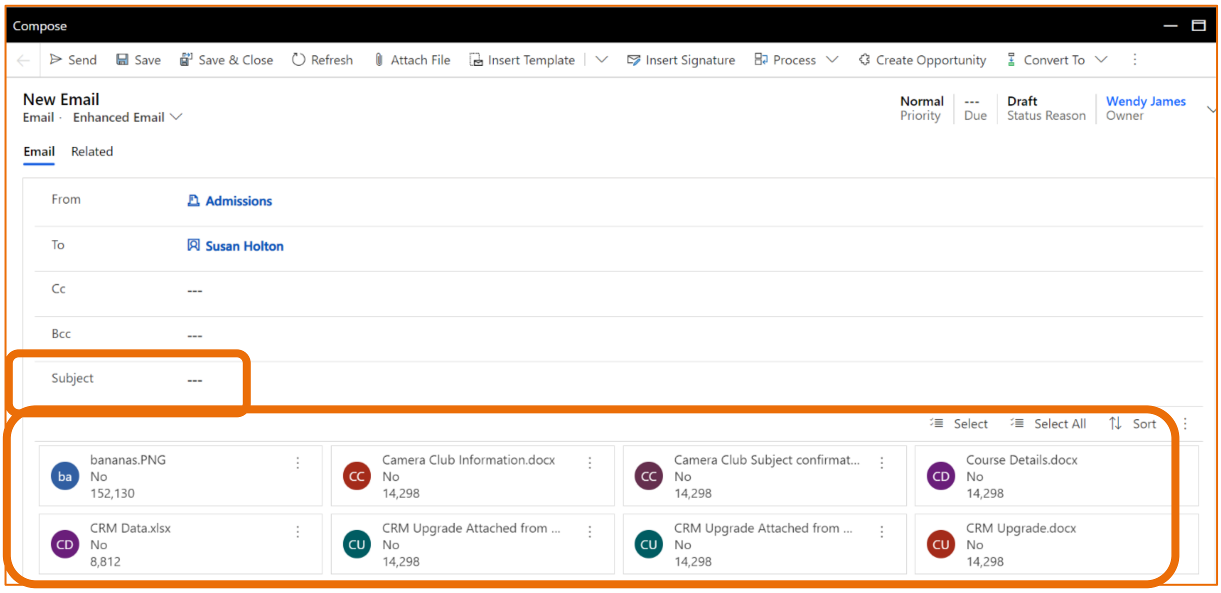
3. The Email automatically saves.

4. The **Open** window is displayed.

5. Click on the file to be attached OR hold down the Ctrl Key and click the files to be attached OR if adjacent to each other, click the first file, hold down the Shift Key and click the last file to be attached to select all.
The selected files are covered in blue and their names displayed adjacent to **File name:**

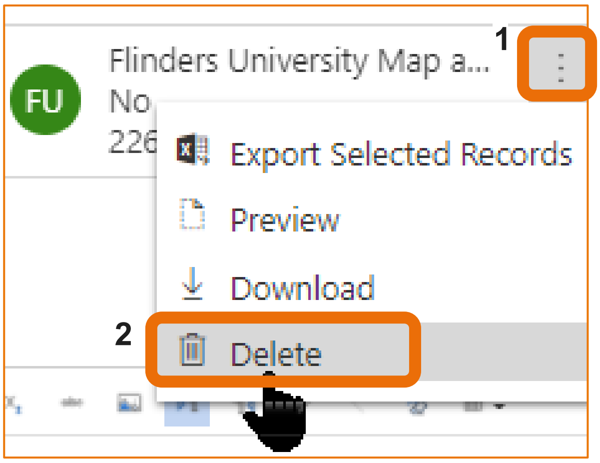


6. Click Open in the bottom right hand corner of the Open window.
7. The attached files are displayed beneath the Subject line.



Remove an Attachment

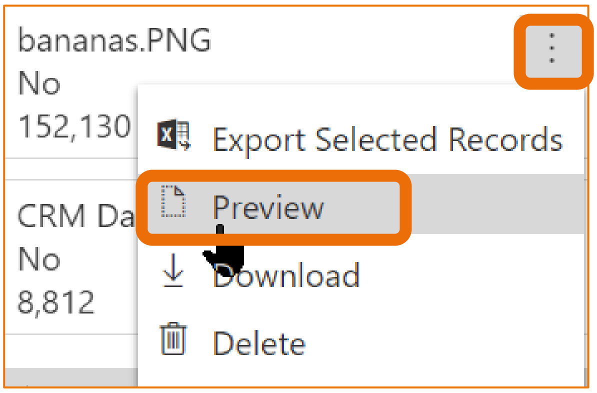
1. If a file is attached in error, click the **elipses** adjacent to the attached file.
2. Menu drops down.
3. Click on **Delete**.



View the attached file before sending

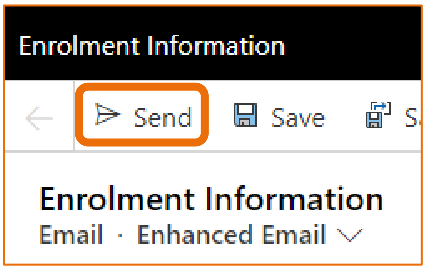
At present attached images and PDF files can be previewed before emailing or downloading.

1. Click the **elipses** adjacent to the attached file.
2. Menu drops down.
3. Click on **Preview**. Click the X of the preview to close.

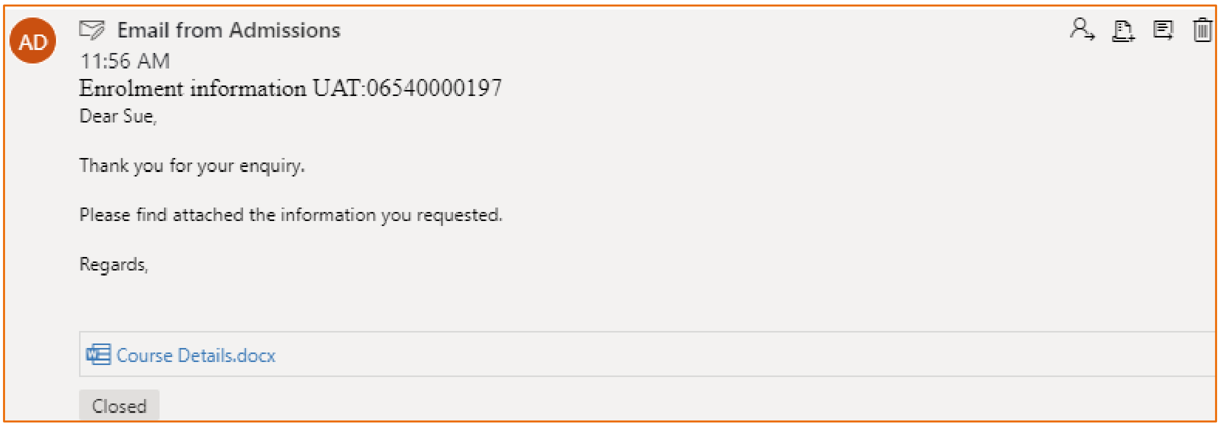


Send the Email with Attachment

1. Click Send **Send** in the Email Menu, top left hand corner of the screen. The Case Timeline is displayed. The screen may need to be refreshed.

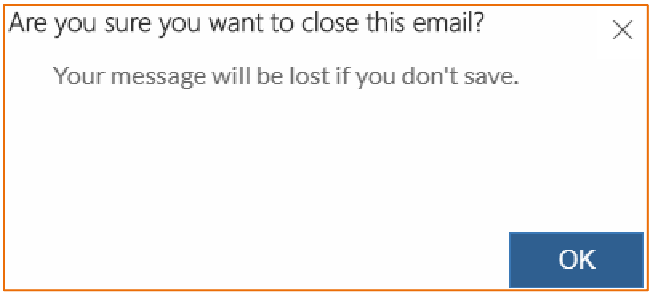


1.
2. The Case is now displayed.
   The Email Activity is displayed in the Timeline.
   Click on the email to view the contents in the Timeline.



Exiting the Email without Saving

1. If the Email was created in error and does not need to be saved, click the **X** in the top right hand corner of the window.
2. The **Are you sure you want to close this email?** window is displayed.



3. Click **OK**. The Email will **not** be saved as a Draft in the Timeline.

Note: If you clicked the **X** in error, as per step 1 above, and the above prompt is displayed, click the **X** to the right of **Are you sure you want to close this email?** to return to your Email.

Exit the Email with Save & Close – Draft Email

Saving and not sending the Email will create a **Draft Email** in the Contact/Case Timeline.

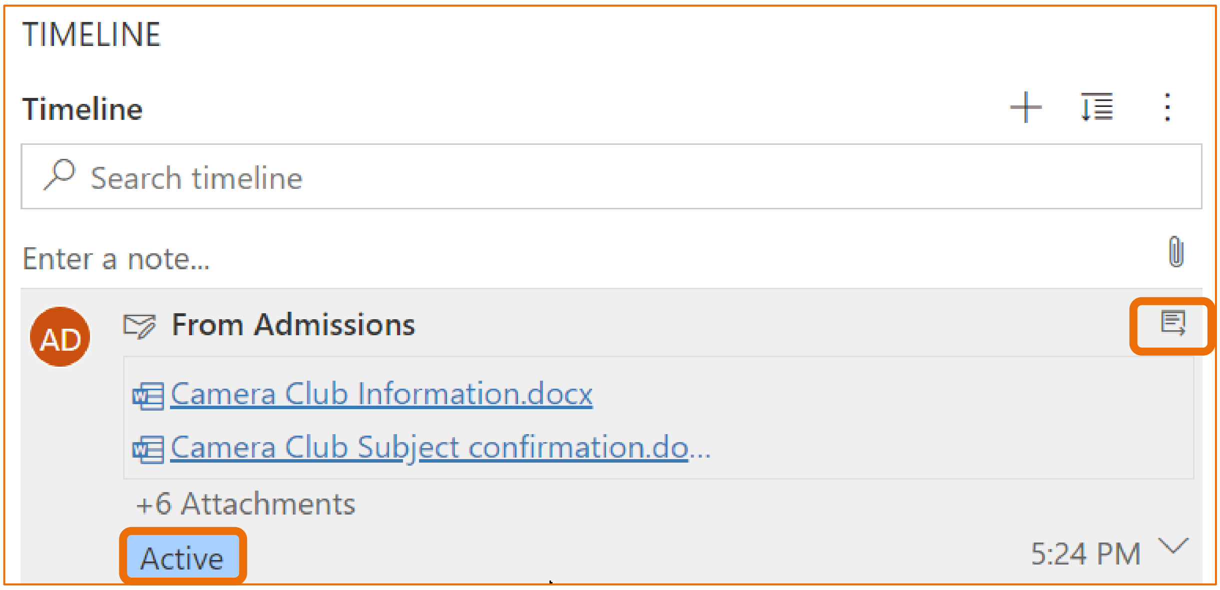
1. Click on 

Save & Close in the Email Menu Bar.

2. The Email will save and close and is displayed in the Contact/Case Timeline. The 

Refresh icon in either the Navigation Menu or the Case Timeline.

3. The Draft Email is distinguished by only having the **Open Record** icon on the right hand side of the Email Activity and **Active** icon at the bottom of the Activity, as circled below.



4. Click the **Open Record** to continue working on the Email.

Note: If the Email Activity needs to be deleted please log a ServiceOne ticket requesting this.

Insert a Hyperlink as Text or Picture

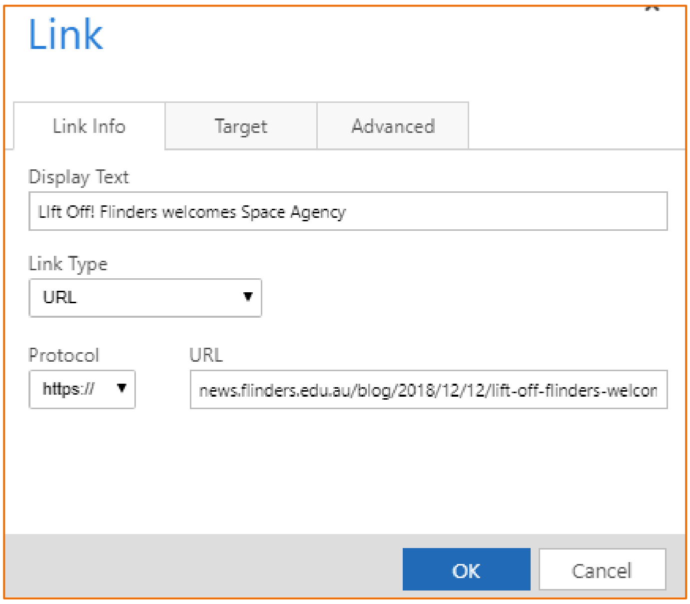
If needed, a hyperlink can be inserted as text or a picture in the body of the email. Ensure the Web Page in the link is accessible to the Student.

Text Hyperlink

Using a hyperlink in an email is helpful to send a link to a Student instead of attaching a file. These instructions explain how to insert text which if formatted as a hyperlink. Ensure the Web Page in the link is accessible to the Student.

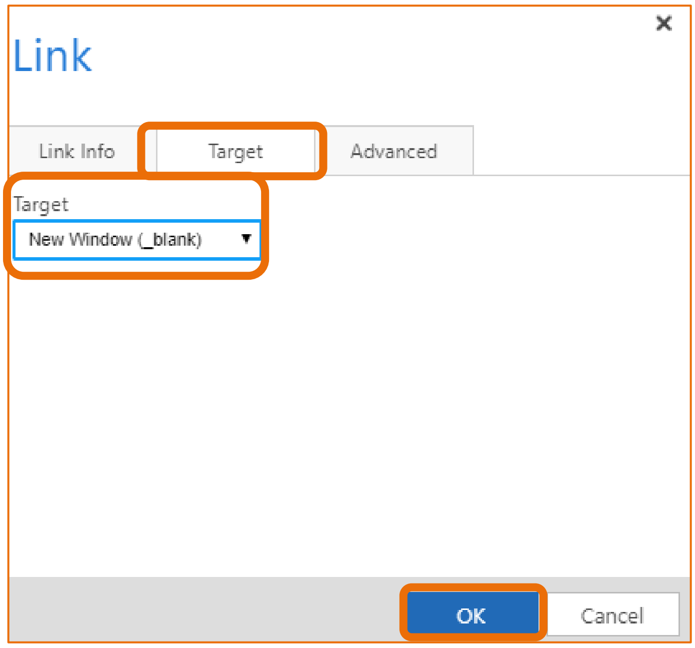
1. Refer to the instructions **Create and Send an Email** starting on Page 7 to create the Email.
2. Click Save **Save** in the top left hand corner of the Email Ribbon avoid loss of information if navigating away from the email, for example in step 6 below.
3. Position the cursor where the hyperlink is to be inserted.
4. Click on the **link** icon (resembles a chain) in the Email formatting ribbon. The **Link** command window is display, **Link Info** tab.

5. Type the information beneath **Display Text**. This is what the Student will see and click in the email.
6. Beneath **URL** type the URL or copy and paste from the website. This is the link embedded in the text displayed which the Student will click.



7. Click on the **Target** tab.

8. Click on the area beneath Target and select **New Window (_blank)**, depending how the web site is to open.



9. Click **OK**. The text typed in step 5 above is displayed in the Email.

Picture Hyperlink

Using a hyperlink in an email is helpful to send a link to a Student instead of attaching a file. These instructions explain how to copy and paste a picture and format this picture as the hyperlink. Ensure the Web Page in the link is accessible to the Student.

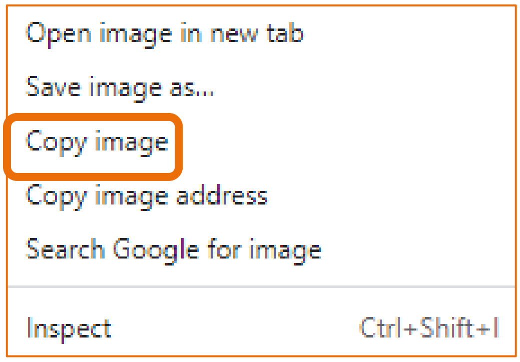
Copy the image to be pasted into the CRM Email

1. Refer to the instructions **Create and Send an Email** on Pages 7 and **Error! Bookmark not defined.** to create the Email.

2. Click 

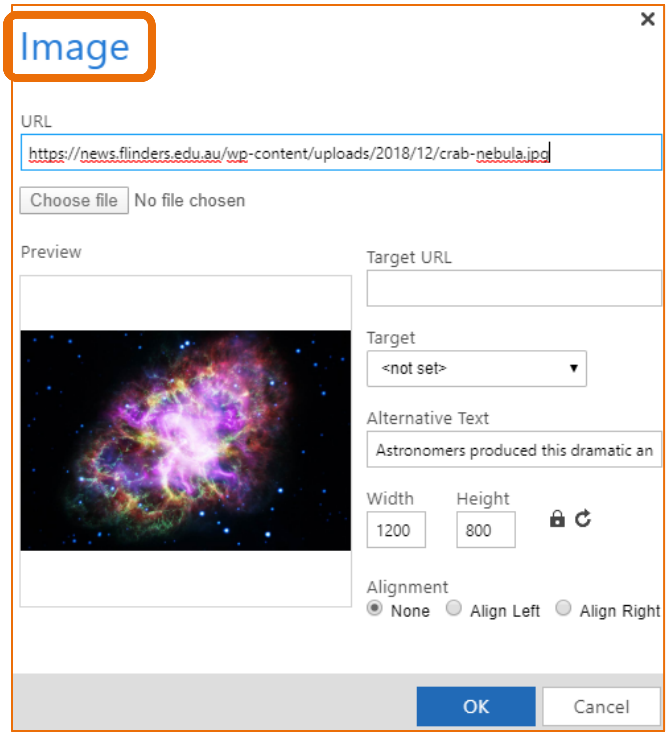
Save in the top left hand corner of the Email Ribbon avoid loss of information if navigating away from the Email, for example in step 3 below.

3. Locate the picture on the Web Page to be linked, right mouse click on the picture to be copied and left mouse click on **Copy image**.



4. Switch to the CRM Email message, position the cursor where the hyperlink is to be inserted.
   Paste (Ctrl+v) the picture into the body of the CRM Email.

5. Click on the picture to select it and click on the **picture** icon in the formatting ribbon. The **Image** window is displayed (or double click the picture).

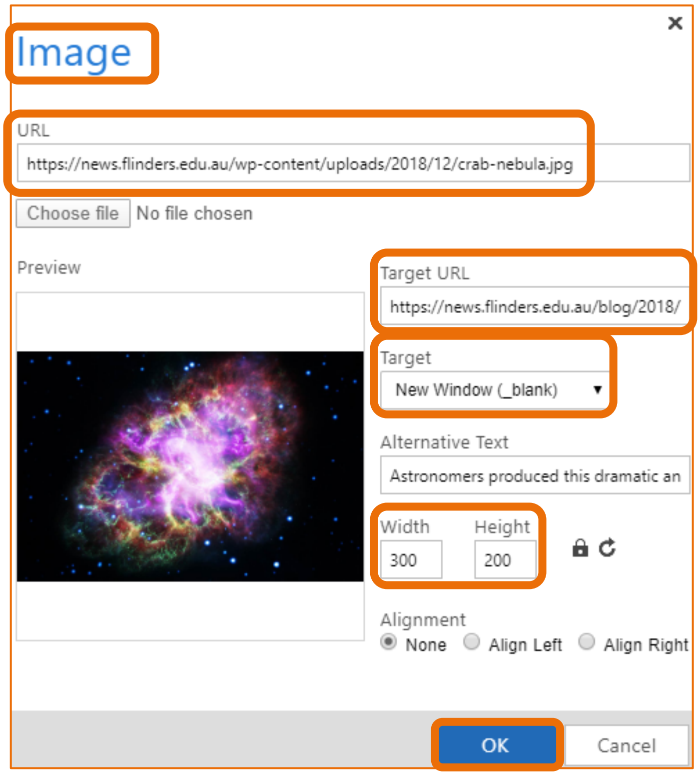


6. **URL, Link** tab –leave the URL inserted here.

7. **Width and Height** – click beneath **Width** and type **300**.
   Press the **Tab** key and the **Height** field will automatically be filled.

8. **Target URL** – copy and paste the URL where the picture was copied.

9. **Target**– click on the area beneath Target and select **New Window (_blank)**, depending how the web site is to open.



10. Click **OK** at the bottom of the Image Properties window.

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.
4.0	November, 2018	Included instructions on inserting a hyperlink and renamed the document appropriately. Uploaded to FLO.
5.0	December, 2018	Included information on inserting a picture hyperlink. 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'.
6.0	February, 2019	Added instructions on how to insert an Email Template.
7.0	March, 2019	Updated for the April Upgrade. Uploaded to FLO.
8.0	May, 2019	Preferred Name information inserted. Uploaded to FLO.
9.0	October, 2019	Updated to reflect changes made in the October, 2019 upgrade. Uploaded to FLO
1.0	April, 2020	Updated for the April Upgrade. Uploaded to FLO.
2.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
3.0	October, 2020	Updated for the October Upgrade. Uploaded to FLO.
4.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.