MS Dynamics Student CRM
Flinders University

Adding Phone Call Activities

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October, 2020

Version 1.0

Contents

A Phone Call Activity enables the recording of a phone call and can be saved to the Contact or Case Record. The instructions below advise how to do this from the Navigation Menu and linked to the Contact / Case Record, Contact Record Timeline or Case Record Timeline.

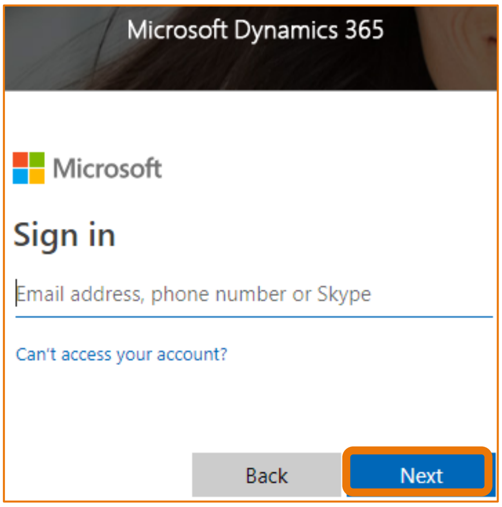
The Phone Call Activity form is exactly the same regardless of which of the three options are used.

Sign in to MS Dynamics Student CRM

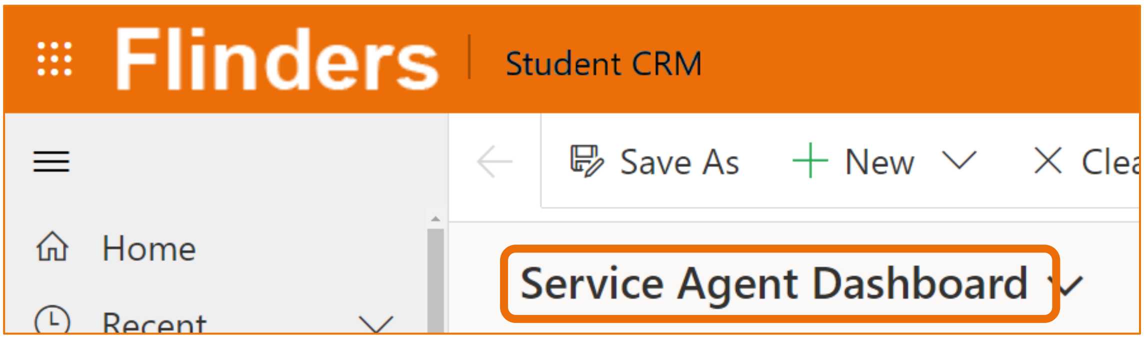
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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.

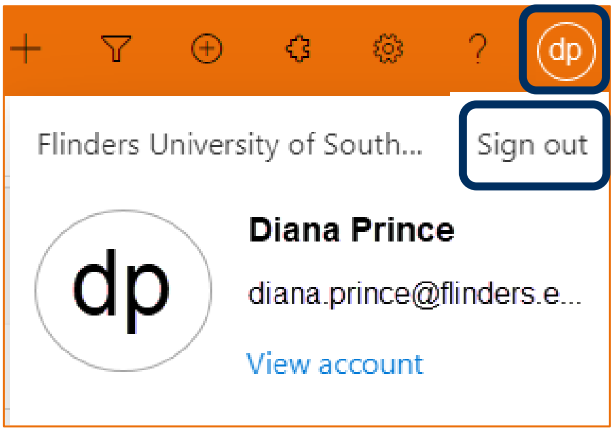


Sign Out of MS Dynamics Student CRM

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**.



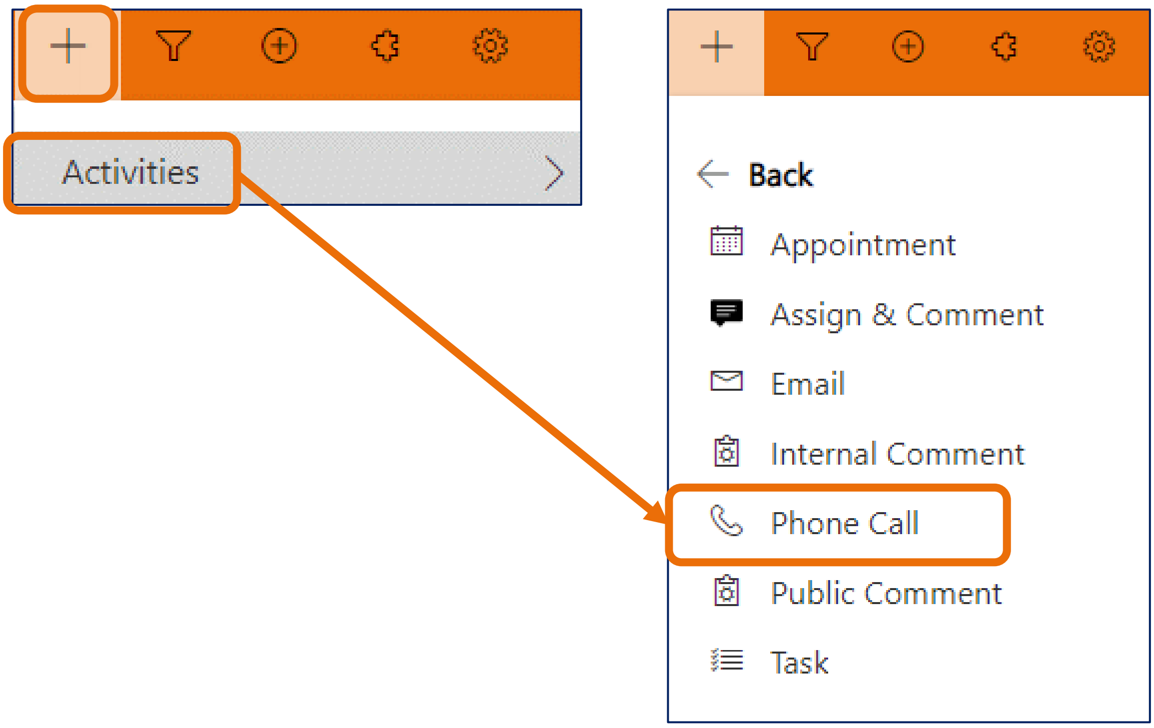
3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

Navigation Menu, New, Phone Call Activity

Phone call

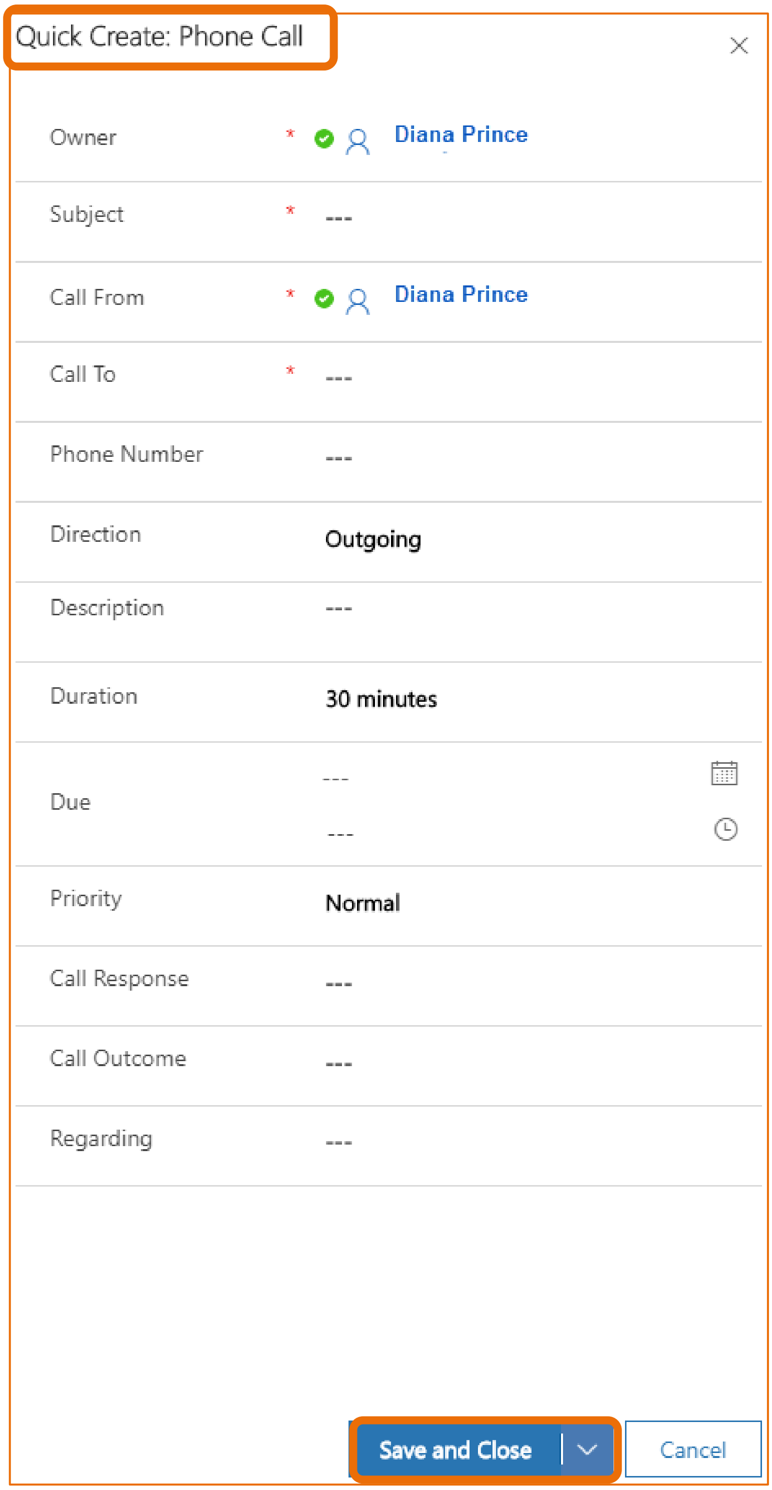
1. After or during the phone call, click on the click on  **New** icon on the right hand side Navigation Menu.

2. Click on **Activities** from the drop down menu and click on  **Phone Call**.



3. The **Quick Create: Phone Call** form is displayed.

   Complete all details as required. The mandatory fields are marked with an *. Some fields are described below.



Owner

The name of the Owner should be inserted automatically. Otherwise search for and insert the Staff member's name.

Subject

Type the subject of the phone call.

Call From

The name of the Staff member should be inserted automatically. Otherwise search for and insert the Staff member's name.

Call To

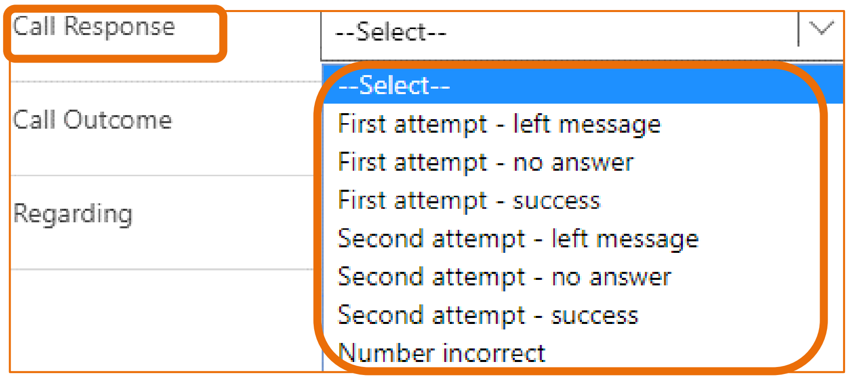
Search for and insert the Contact name. The Phone Call Activity will be displayed on this Contact Record's Timeline.

Description

Type any details regarding the phone call conversation.

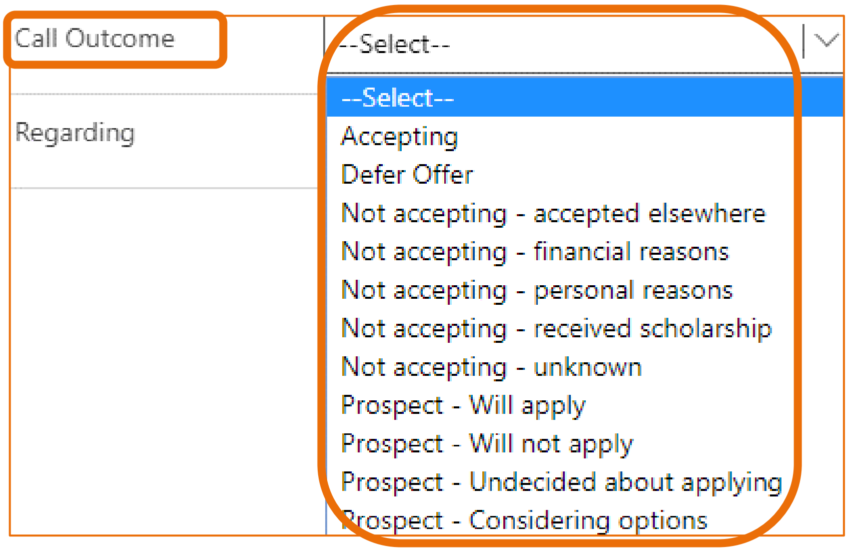
Call Response

Click in the area to the right of Call Response and select appropriately from the drop down menu.



Call Outcome.

Click in the area to the right of Call Outcome and select appropriately from the drop down menu.



Regarding

If the Phone Call Activity is regarding a Case, click adjacent to Regarding, search for and select the Case Title. The Phone Call Activity will be displayed in both the Contact and Case Timeline.

Save and Close

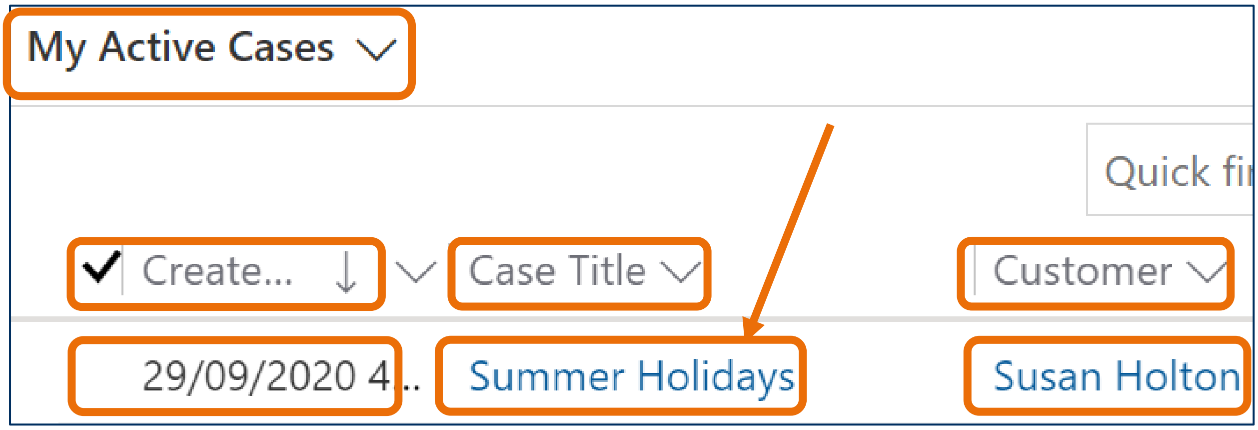
4. Click  **Save and Close** in the bottom right hand corner of the Phone Call form.
   The Phone call activity is now displayed in the Contact Record, Timeline.

Case Record, Create a Phone Activity

Locate and select the Case from which the Comment is to be added

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.

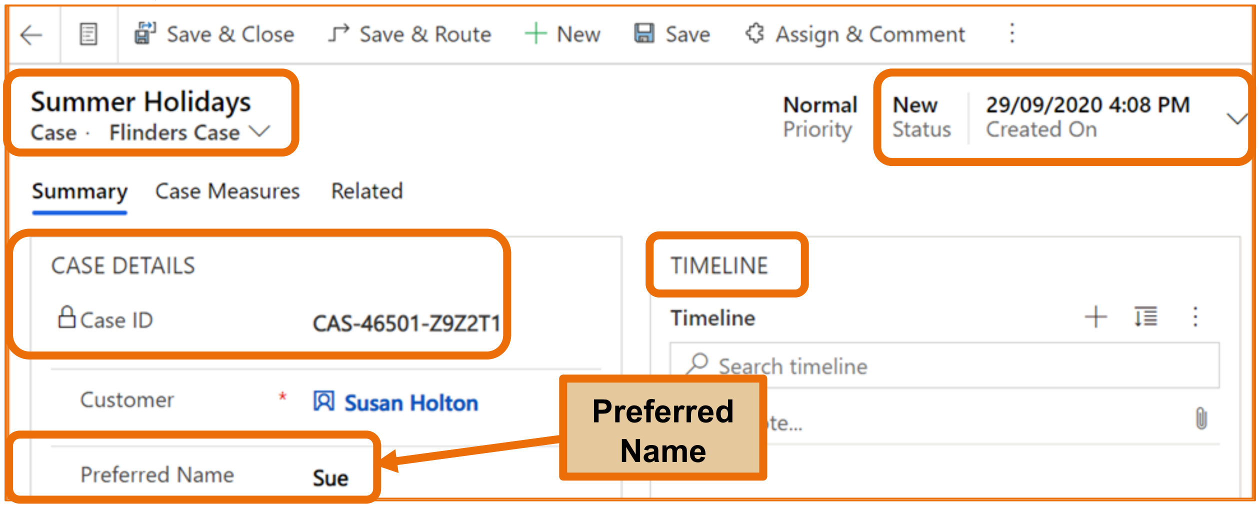
2. Click on the name of the **Case Title** to open the Case.



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.

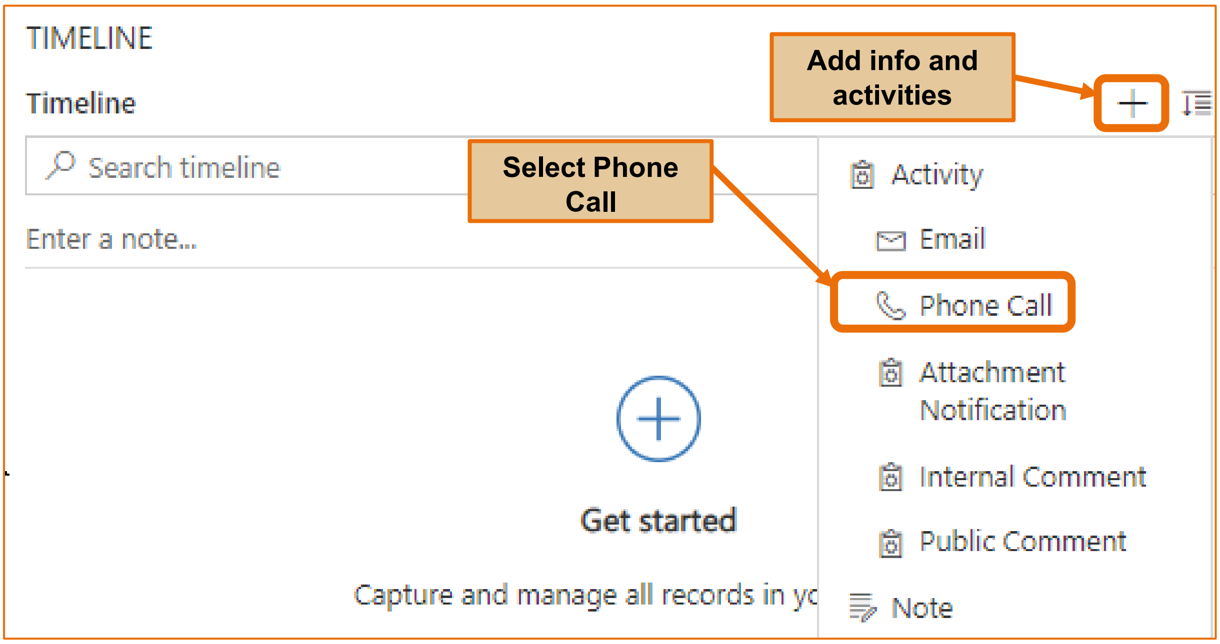
Preferred Name, Case Record

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.



Add a Phone Call Activity to a Case

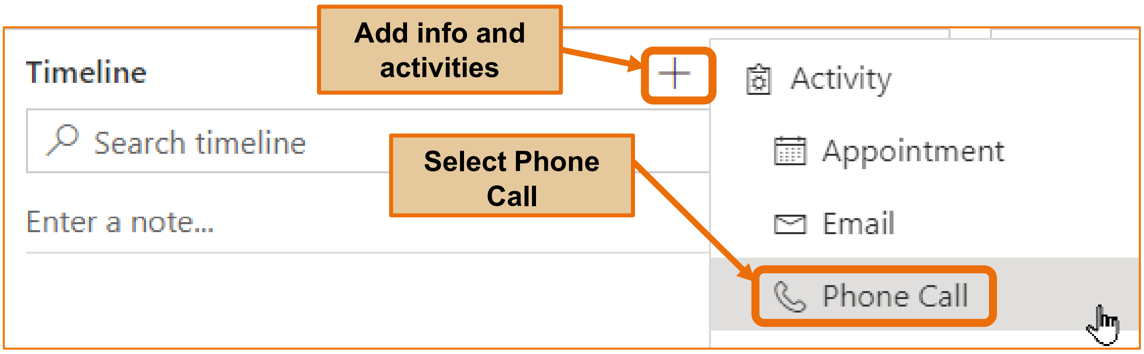
1. Click on the **+** (**Add info and activities**) in the Timeline, right hand side of the screen.
2. Select **Phone Call**.



3. Refer to instructions **Navigation Menu, New, Phone Call Activity**, starting Step 3 on Page 5 to complete the details.

Add a Phone Call Activity to a Contact Record

1. Search for an open the Contact Record.
2. Click on the **+** (**Add info and activities**) in the Timeline, right hand side of the screen.
3. Select **Phone Call**.



4. Refer to instructions **Navigation Menu, New, Phone Call Activity**, starting Step 3 on Page 5 to complete the details.

Version Control

Version Number	Version Date	Changes
1.0	October, 2020	Original Notes. Uploaded to FLO.