



Adding Phone Calls

MS Dynamics Student CRM Flinders University

Adding Phone Call Activities

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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: <u>firstname.lastname@flinders.edu.au</u> OR <u>fan@flinders.edu.au</u>.
 - 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 He New icon on the right hand side Navigation Menu.
- 2. Click on **Activities** from the drop down menu and click on Shone 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.

Quick Create: Phone	Call	×
Owner	* 🧿 🔉 Diana Prince	
Subject	*	
Call From	* 🥝 🔉 Diana Prince	
Call To	×	
Phone Number		
Direction	Outgoing	
Description		
Duration	30 minutes	
Due		Ē
Priority	Normal	
Call Response		
Call Outcome		
Regarding		
	Save and Close \mid \checkmark	Cancel

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 Response		Select	$ $ \vee
		Select	
Call Outcome		First attempt - left message	
		First attempt - no answer	
Regarding		First attempt - success	
		Second attempt - left message	
		Second attempt - no answer	
		Second attempt - success	
		Number incorrect	

Call Outcome.

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

Call Outcome	Select	\sim
	Select	
Regarding	Accepting	
	Defer Offer	
	Not accepting - accepted elsewhere	
	Not accepting - financial reasons	
	Not accepting - personal reasons	
	Not accepting - received scholarship	
	Not accepting - unknown	
	Prospect - Will apply	
	Prospect - Will not apply	
	Prospect - Undecided about applying	
	Prospect - Considering options	

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 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.

\leftarrow		🛱 Save & C	lose 」→ Save & Rout	e + New	日 Save	谷 Assign &	Comment	:	
Sι Ca	imme se · F	er Holidays linders Case	~)			Normal Priority	New Status	29/09/2020 4:08 Created On	3 PM 🗸
Su	mmar	y Case Meas	sures Related						
	CASE [DETAILS			TIMELI	NE			
	合Case	e ID	CAS-46501-Z9Z2	T1	Timelir	ne		+ 1	1 :
-	Cus	tomer	* 🛛 Susan Holton			arch timeline			
					Name	te			0
	Pref	erred Name	Sue						

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.