MS Dynamics Student CRM

Flinders University

Adding Timeline Notes to a Contact and Case Record

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Version 4.0

Contents

Features of Timeline Notes 3
Sign in to MS Dynamics Student CRM 3
Sign Out of MS Dynamics Student CRM 4
Locate and select the Contact or Case Record 5
Add a Note 5
Reading the contents of a Note 7
Version Control 9

Adding a Note to the Contact Timeline or Case Timeline is useful to provide updates to MS Dynamics Student CRM Users. Follow your Team's Business Processes in regard to entering information into a Note.

A Timeline Note is not an Activity and therefore cannot be located when using Related, Activities. Refer to instructions in **CRM How to Guide Searching Contact and Case Timeline**.

Features of Timeline Notes

- A Note can be added to the Contact Timeline or Case Timeline.
- A Note is not an Activity and cannot be located using when using Related, Activities.
- **Rich Text Editing formatting** for the body of the Note is available by using **Ctrl** key or **Formatting ribbon** at the bottom of the Note.
- Formatting is only displayed when the Note is being edited or expanded in the Timeline enabling information to 'stand out' in the Timeline.
- A **hyperlink** can be inserted into the Note – for example to link to a website or SharePoint.
- A file can be **attached** to the Note.
- The instructions to add, view and a Note in both the Contact Timeline and Case Timeline are the same.
- Timeline searching searches in the subject and description/content of Activities and Notes.
- The word searched is highlighted in the results. Refer to the how to guide **CRM How to Guide Searching Contact and Case Timeline** for information about searching the Contact and Case Timelines.

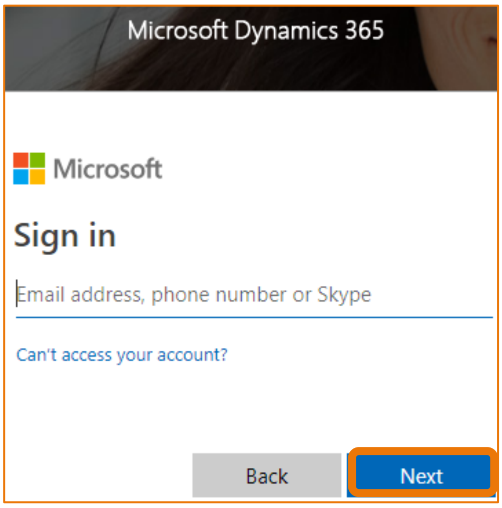
Sign in to MS Dynamics Student CRM

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.

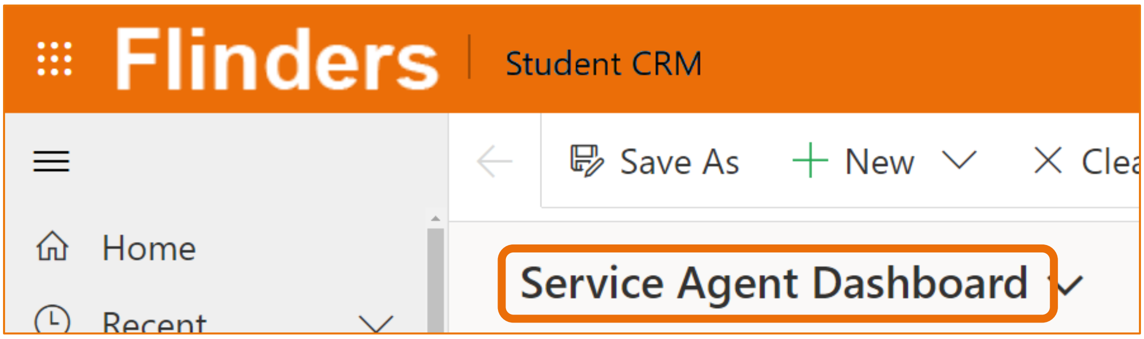
1. Locate Okta (flinders.okta.com) and click on MS Dynamic CRM as circled below.

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.

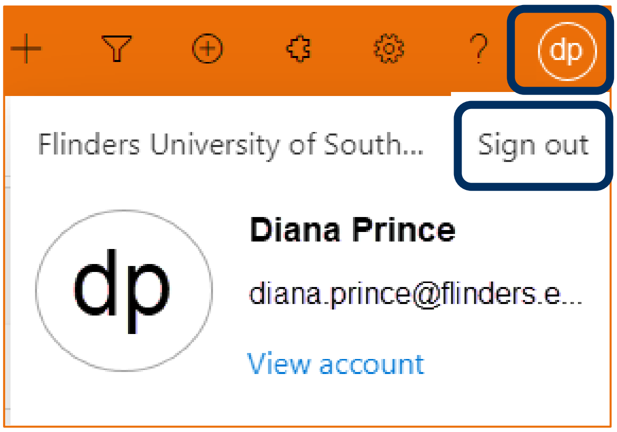


Sign Out of MS Dynamics Student CRM

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.

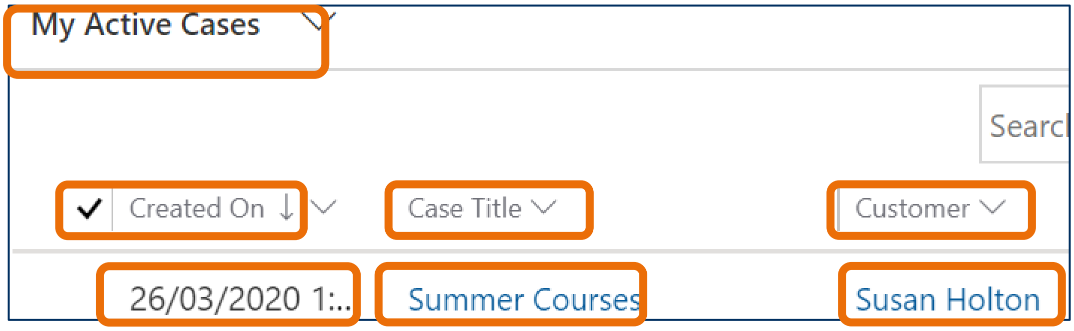
Locate and select the Contact or Case Record

The instructions to add, view and edit a Note in both the Contact Timeline and Case Timeline are the same.

The Contact Record and Case Record can be located from:

- The **Service Agent Dashboard**, **My Team's Active Cases.**
- The **Service Agent Dashboard**, **My Active Cases.**
- OR using the Search icon in the Navigation Menu.

1. Click on the **Customer** (Contact) name to open the Contact Record. **OR**
   Click on the **Case Title** to open the Case. **OR**
   Search for the Contact or Case Record.

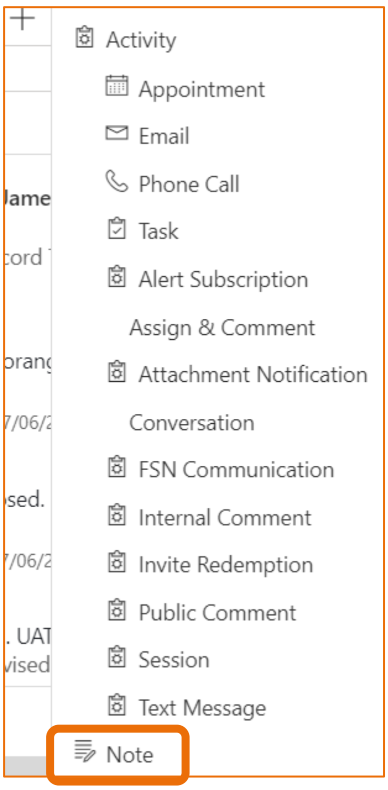


2. The Contact or Case Record is displayed.

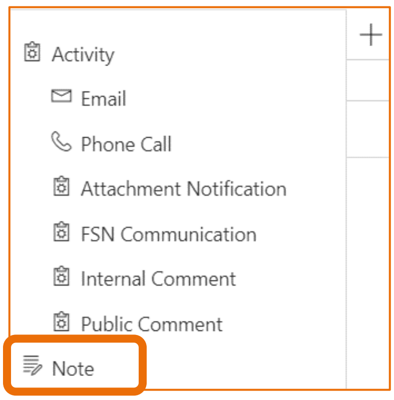
Add a Note

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

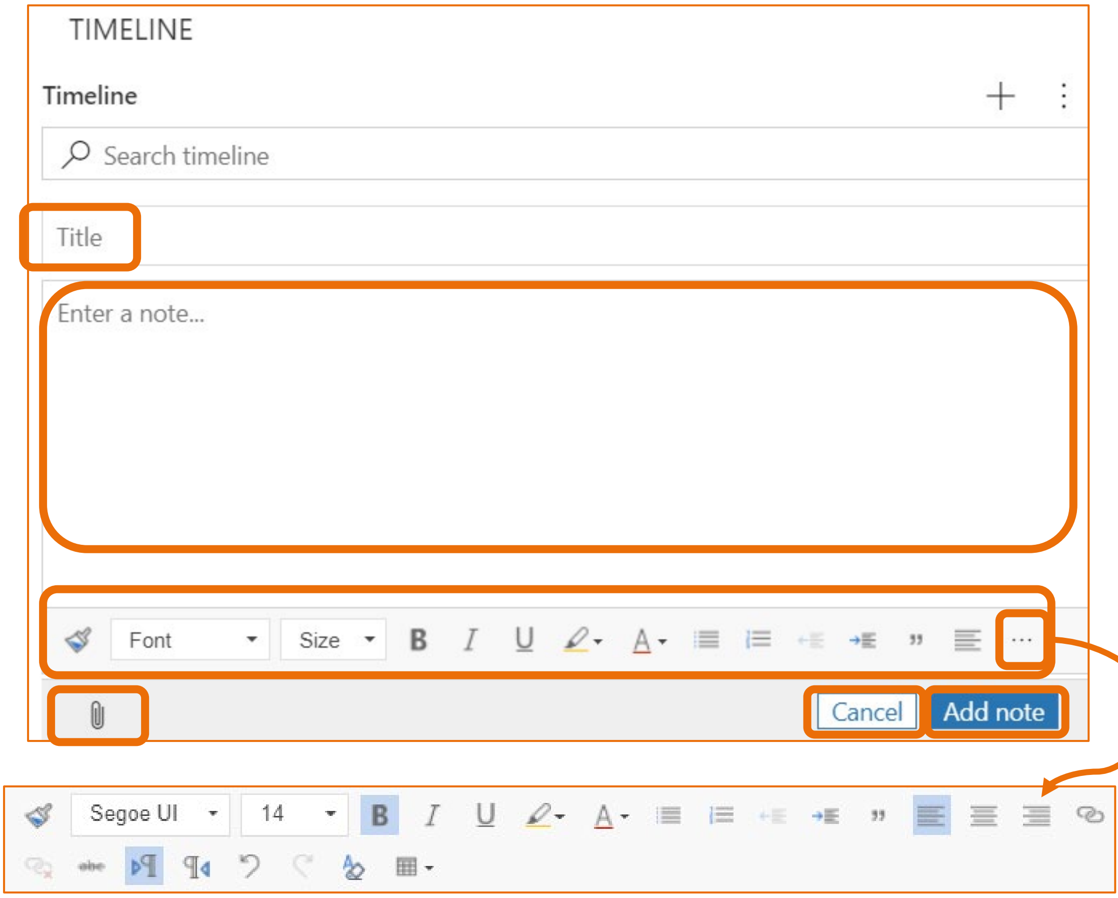
Contact Record



Case Record



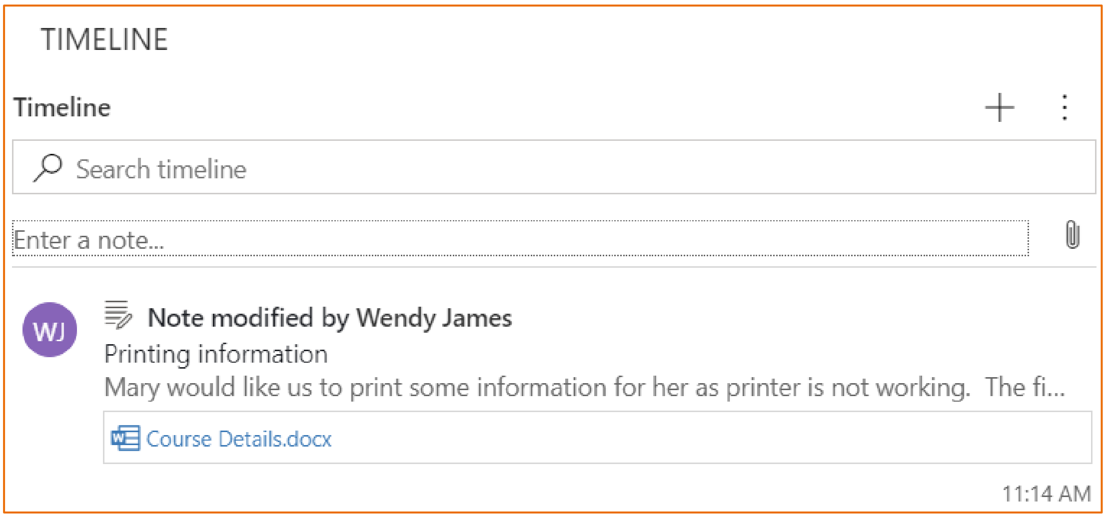
3. The blank Timeline form is displayed. Features and Timeline search are as below.
   Title: Text cannot be formatted. Text can be searched.
   Enter a note: The contents of the Note. Text can be formatted. Text can be searched.
   Formatting bar: Icons used to format the contents of the Note. Click the ellipses (…) to display more icons, including the hyperlink.
   Add an Attachment **:** Files can be attached to the Note. Attachments cannot be searched.
   Cancel: Do not save the Note.
   Add note: The note is saved to the Timeline.



4. Complete the information as described in Step 3 above.

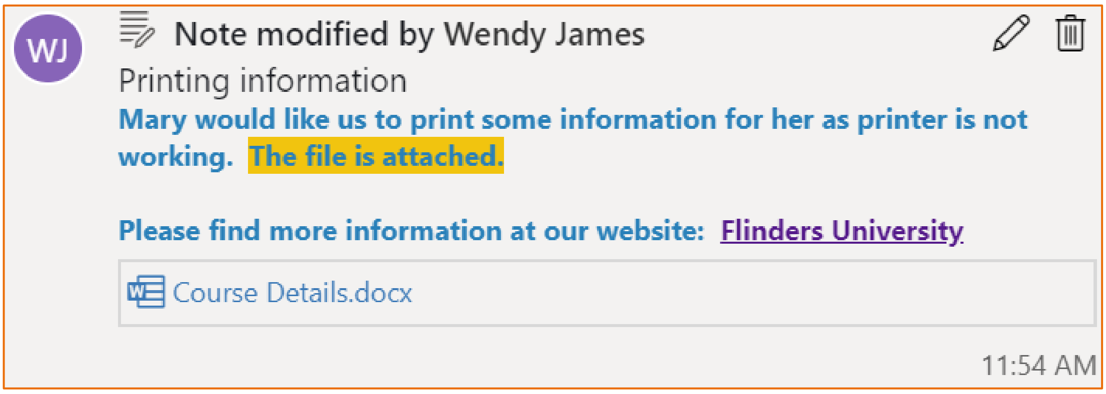
5. Click **Add note** 

to save and add the Note to the Contact Timeline or Case Record Timeline.



Reading the contents of a Note

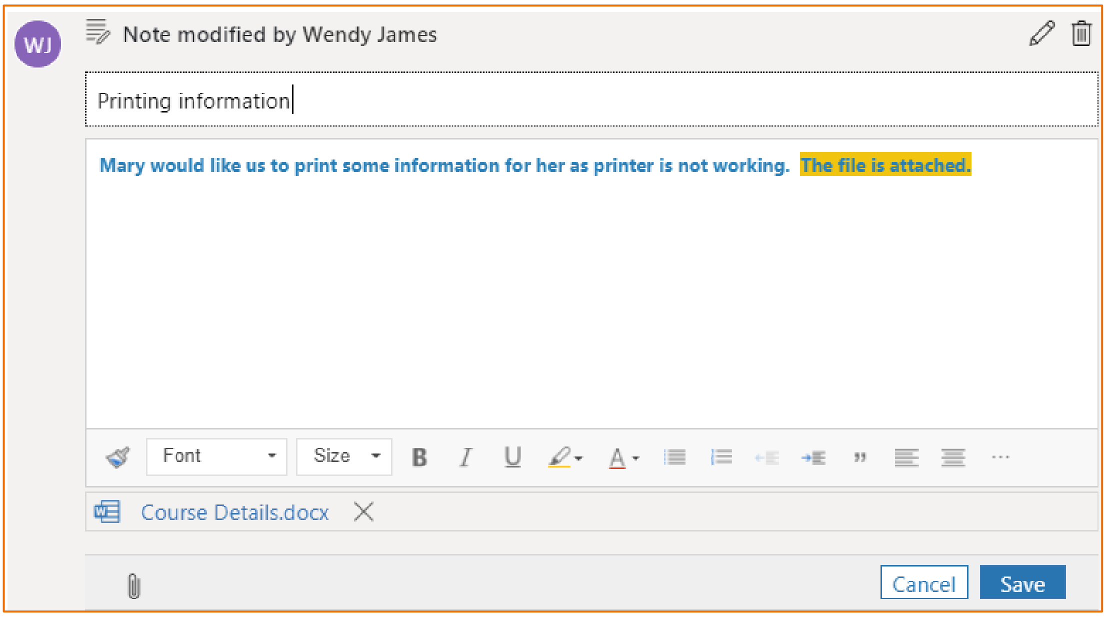
1. Click on the Note to expand the contents in the Timeline.
   Information included in this view are:



- **Avatar** 

of the Owner (left hand side). This is the Owner's initials.
- The **Subject**.
- The **Owner** of the Note.
- **Edit note**  icon. Click the **Edit note** icon to expand the contents of the Note and modify. Click Cancel to exit or Save to save and close. Follow Business Processes as to how and when a Note is edited.
- **Formatted Note details**.
- **Hyperlink text**: Flinders University.

- **Attached file name:** Course Details.docx.
- The **date/time of creation**.



Version Control

Version Number	Version Date	Changes
1.0	June, 2020	Original Notes
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, including the reference to searching the Contact and Case Timelines. Uploaded to FLO.
4.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.