MS Dynamics Student CRM
Flinders University

Assign & Comment a Case

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Version 2.0

Contents

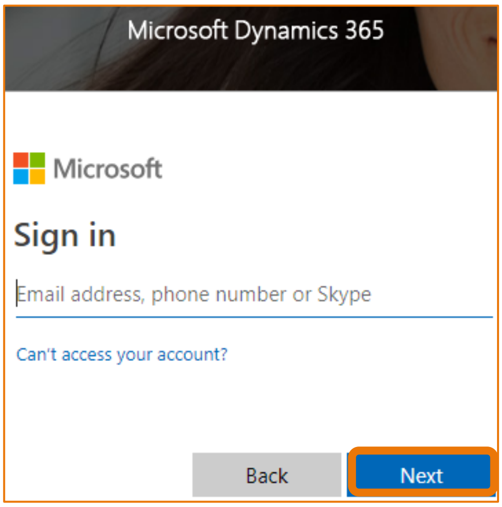
Assigning Cases to CRM queues is an essential function of Student Case management. This is how Cases are escalated to specialist areas, Teams, or specific CRM Users for action. In addition to Assigning to Teams the **Assign & Comment** function can be used to provide the assigned Team with additional information / Comment as well as an email by selecting the **Notify User** tick box. Follow Business Process as to whether the Notify User tick box is selected during this process.

Sign in to MS Dynamics Student CRM

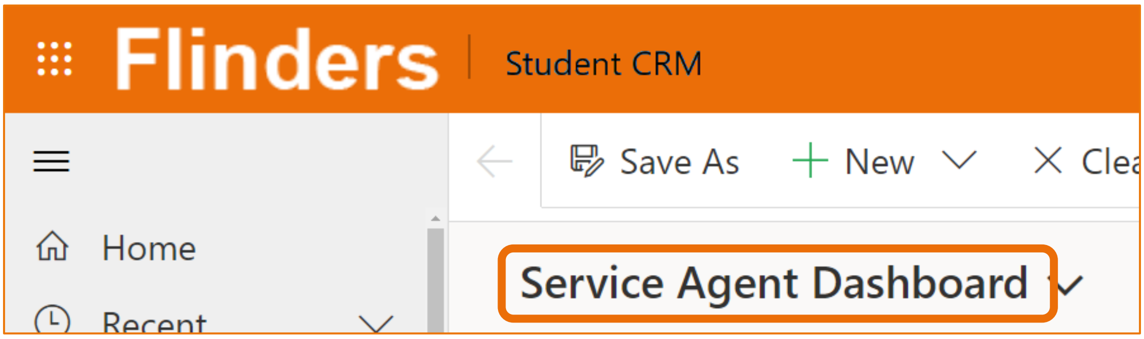
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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.

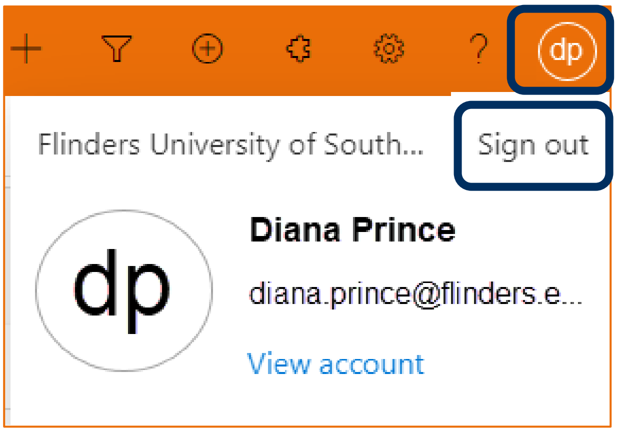


Sign Out of MS Dynamics Student CRM

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**.

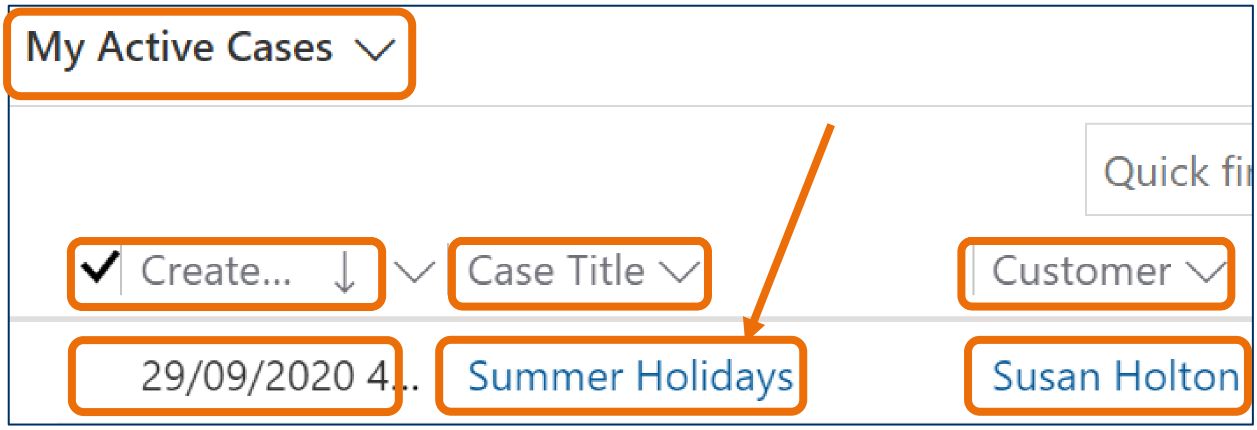


3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

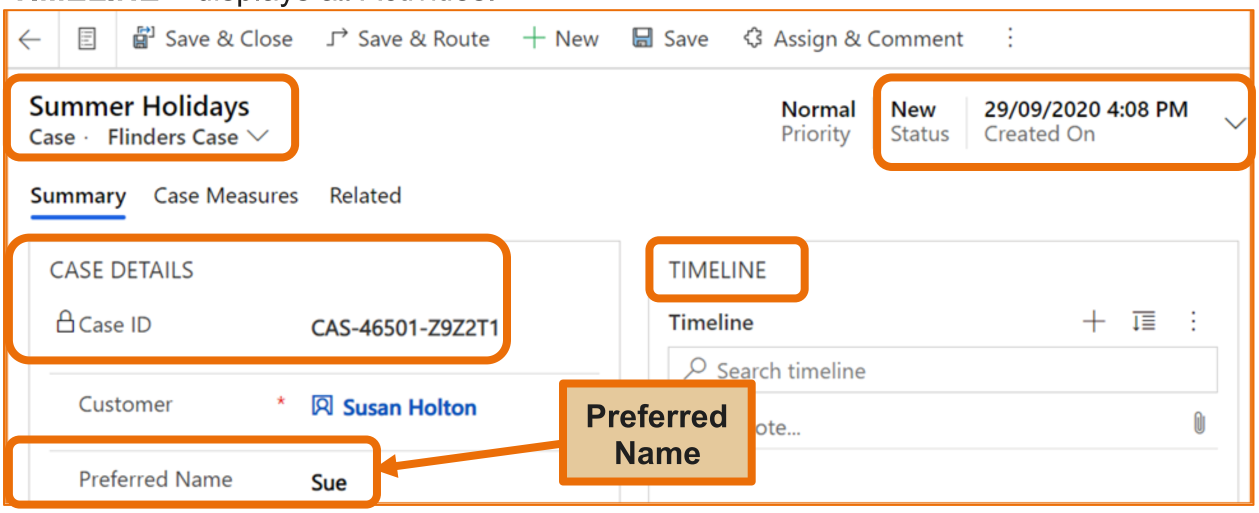
Locate and select the Case to be assigned

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.

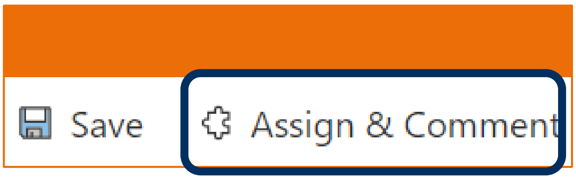


3. The Case is displayed.
   - **CASE Title** – is displayed in the top left hand corner of the Case screen.
   - **CASE DETAILS** – includes the Case ID which is automatically created when the Case is saved.
4. **TIMELINE** – displays all Activities.

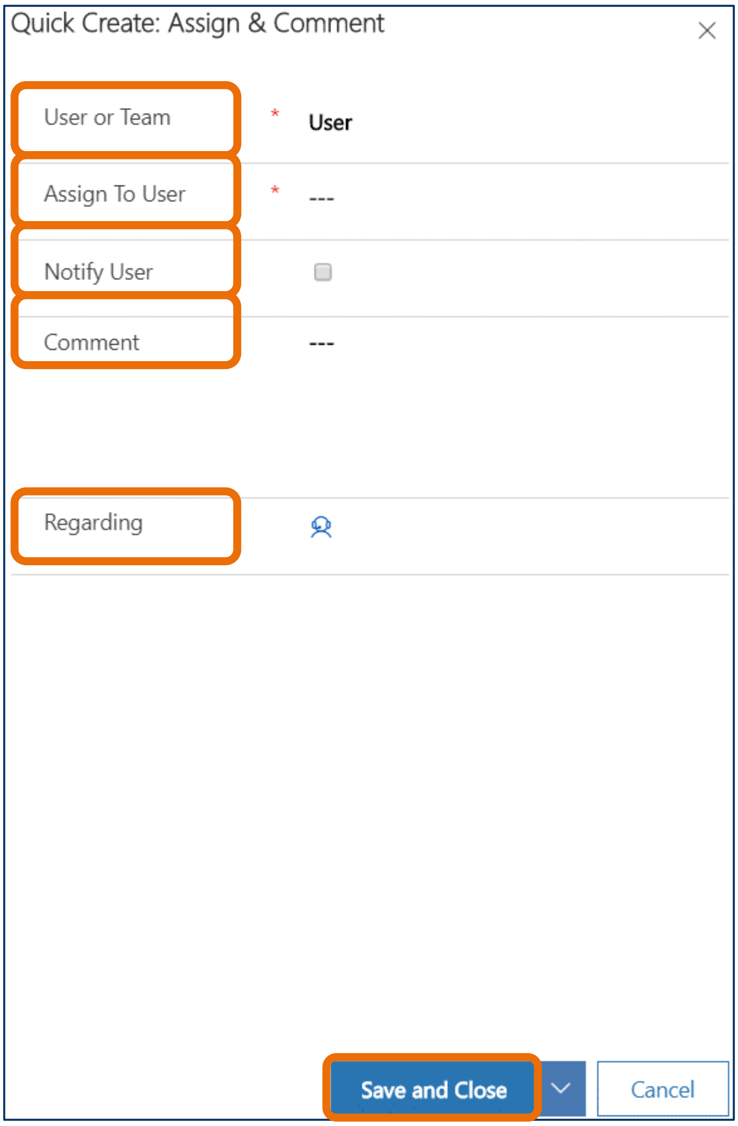


Assign & Comment

3. Click on **Assign & Comment** located beneath the Navigation Menu.



4. The **Quick Create: Assign & Comment** pane will be displayed on the right hand side of the screen.
    - **User or Team** –a User or a Team will be assigned the Case.
    - **Assign to User** (**or Team**) – the User's name or Team's name.
    - **Notify User** – tick and the User or Team will receive an email. Follow Business Process as to whether this is selected.
    - **Comment** – helpful to inform the new and any new Assignees. It is an **Internal Comment**.
    - **Regarding** – leave as is – it will autofill with the Case Title.
    - **Save** – saves the process, closes the Quick Create: Assign & Comment pane.



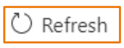
User or Team: Click on **User** to toggle to **Team**.

Assign to User/Team: Click in the search area. (**Look for User/Team**) and type the first name and, if needed, the surname or name of the Team. A list of User/Teams matching the name will be displayed. Click to select the User/Team.

Notify User: Tick the tick box if an email is to be sent to the User or Team assigned. Follow Business Process as to whether this is selected.

Comment: Typing a comment is helpful for the User or Team assigned. This comment is Internal and is not visible to the Student.
Regarding: Leave as is – it will autofill with the Case Title.

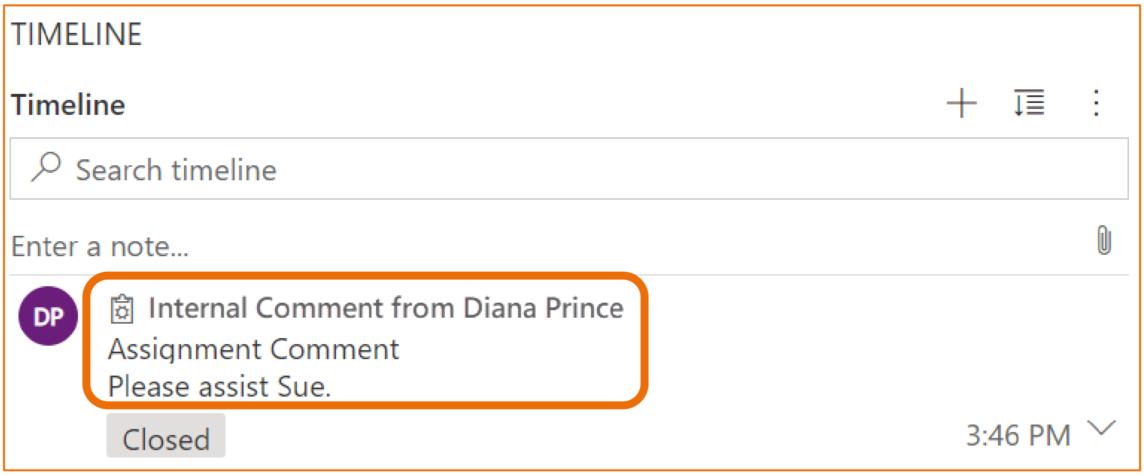
Save and Close: Click to save and close the Quick Create: Assign & Comment pane. The Case is still displayed on the screen. Click on Refresh beneath the Navigation Pane to view the update to the Timeline. If the Notify User tick box was selected the Assignee will receive an email advising they or the Team have been assigned the Case.

5. Click the 

Refresh icon in the Navigation Menu to update the Case Timeline.

Activity, Internal Comment

6. The Assign & Comment will appear in the Case **Timeline** as an Activity, Internal Comment.



7. The Case will appear in the User's **My Active Cases** or if assigned to a Team in the **Team's My Team's Active Cases**.

8. If **Notify User** is ticked the new Assignee (User or Team) will receive an email with the details of the Case.

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	Redefined the definition; rewording on Step 5, Page 7. Uploaded to Flo.
5.0	December, 2018	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	March, 2019	Updated for the April Upgrade. Uploaded to FLO.
7.0	October, 2019	Updated for October Upgrade. Page 6 – Refresh the Browser added. Uploaded to FLO.
8.0	April, 2020	Updated for the April Upgrade. Uploaded to FLO.
9.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
1.0	October, 2020	Updated for the October Upgrade. Uploaded to FLO.
2.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.