MS Dynamics Student CRM
Flinders University

Create a Case

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October, 2020
Version 1.0

Contents

A Case can be created in MS Dynamics Student CRM on behalf of a Student who makes an enquiry over the phone or in person. The best process is to search for and select Student's Contact record and then create a Case. It is important to search first to ensure the correct Contact is selected as in our large University community some people share the same name.

In May, 2019 **Preferred Name** was placed in a more prominent location (beneath the Customer field) on the saved Case Record as well as when creating an Email (right hand side of the screen). This enables the Staff member to more easily locate and use the Student's Preferred Name. The Student is responsible for updating their details in Student Two which is copied into MS Dynamics Student CRM nightly. Refer to Business Processes in regard to using the Preferred Name when needed. Reference in this User Guide to **Case Record, Preferred Name** is located on Page 8.

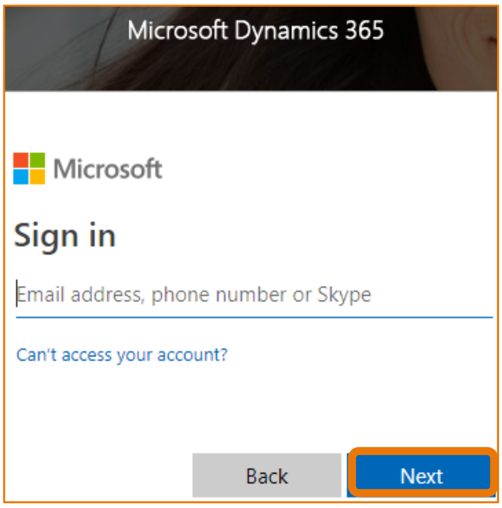
If you wish to include Preferred Name as a field name in an Email Template refer to the User Guide - **CRM How to Guide Create and Use Email Templates**.

Sign in to MS Dynamics Student CRM

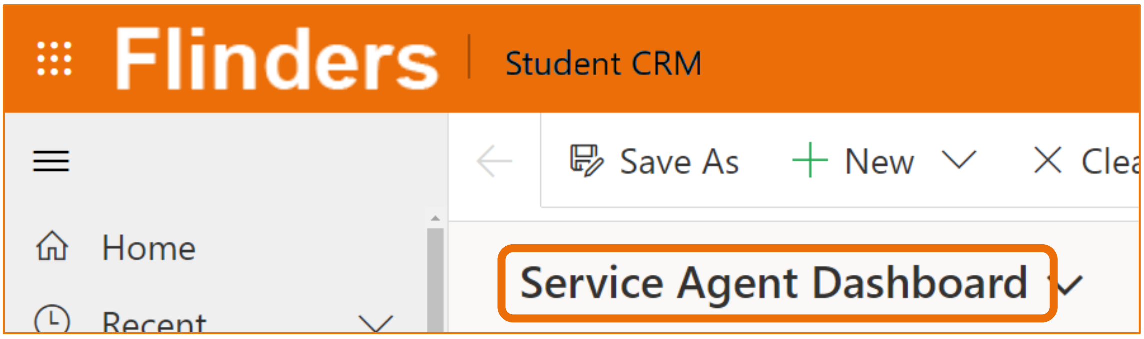
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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.

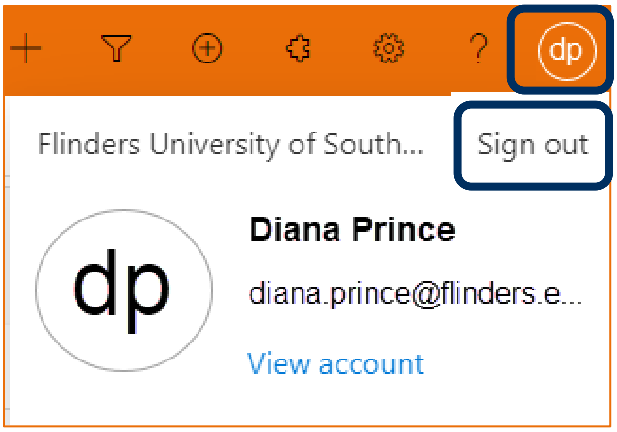


Sign Out of MS Dynamics Student CRM

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.

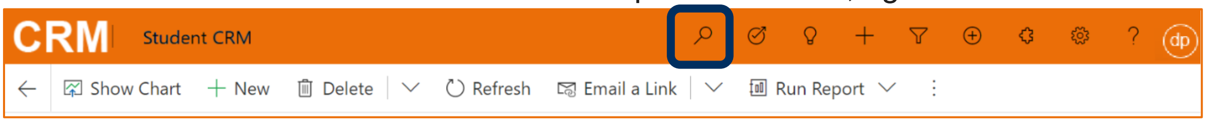
2. Click on **Sign out**.



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

Search for the Contact

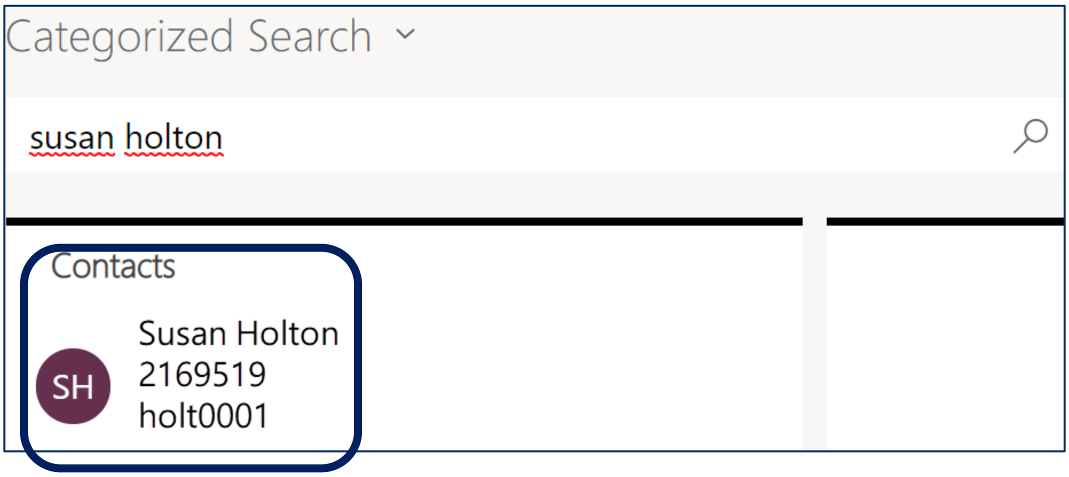
1. Click on the **Search** icon located at the top of the screen, right hand side.



2. Click in the search area, type the name to be searched and press the **Enter** key or click the search icon.
   Note:
   - If the person being searched is a Student – **type their Student Number or FAN**.
   - If the person being searched is **NOT** yet a Student – **type their first name and last name or email address**.
   - **Filter with:** – select **Contact** from the list if too many results are displayed.

Select the Contact Record

3. Check the details displayed in the search results to ensure the correct person is to be selected.
   Click on the tile to open the Contact record. The Contact will open together with **CONTACT INFORMATION**, any **Timeline** details, **RECENT CASES (LAST 3 YEARS)**, **COURSES**, **OPPORTUNITIES** and **SANCTIONS**.

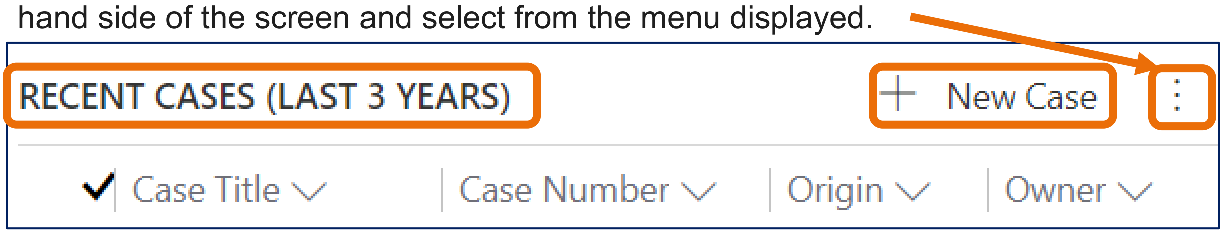


Create a Case

1. Right hand side of the screen, **RECENT CASES (LAST 3 YEARS)** section, click on

   + Add New Case

   Note: If the browser zoom is greater than 125% click on the **ellipsis** (⋮) in the, right hand side of the screen and select from the menu displayed.



2. The **Quick Create: Case** window will be displayed. Some of the field definitions are described below together with a picture of the Quick Create: Case form and explanations of all fields.

   The fields marked with * an **asterisk** are mandatory.

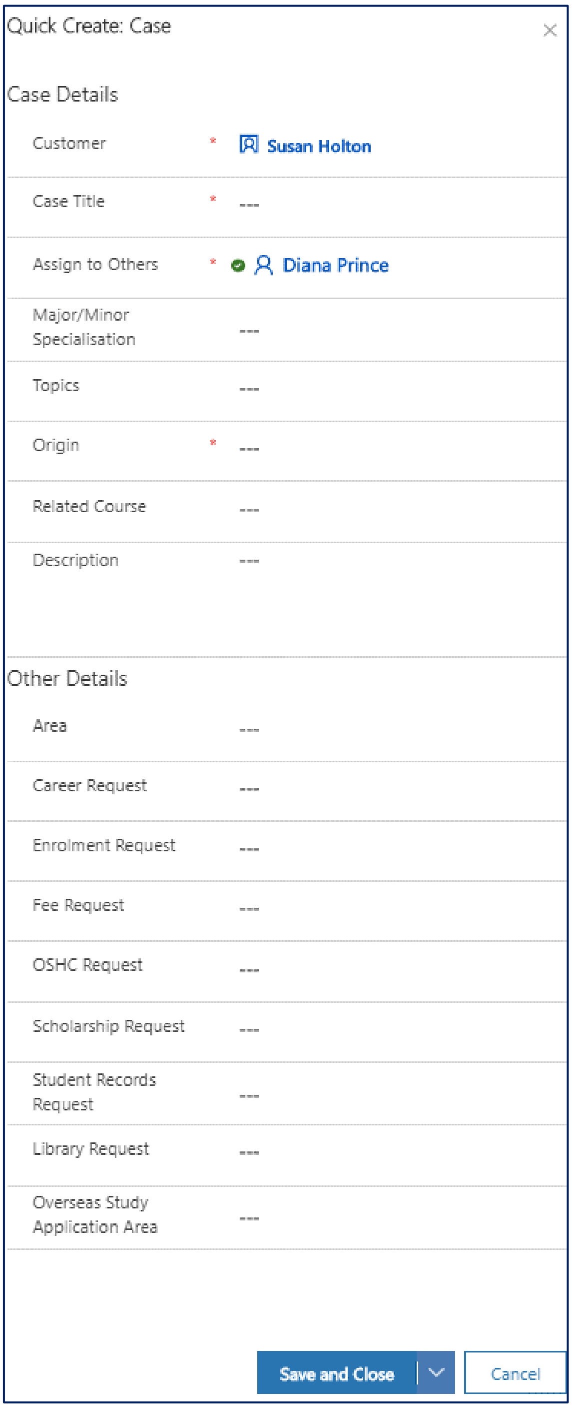
   The other fields are optional so follow Business Process when completing this form.

   Press the **Tab** key to move to the next field or **Shift** and **Tab** to move to the previous field.

   Click **Save and Close** when completed.

   Started a new Case in error? Click **Cancel** in the bottom right hand corner of the screen adjacent to **Save and Close** and then **Discard changes** to close the pane.

   - **Customer** – the name of the Customer is auto-filled.
   - **Case Title** – a clear, concise and relevant name which explains the issue of the Case, for example Leave of absence or Late Enrolment.
   - **Assign to Others** – this will default to the creator of the Case but can be reassigned now or at a later stage. Refer to the User Guide – CRM How to Guide Assign and Comment a Case for instructions.
   - **Origin** – select from the drop down list.
   - **Description** – describe the Student's enquiry concisely but informatively so as to assist the Student. More detail is better, though if assigning the Case to another Team or Staff Member. Use correct University Terminology.
   - Complete the rest of the fields in the **Case Details**, providing as much information as possible.
   - **Other Details** – complete the fields in **Other Details** if the information is known.



Case Details
Case Title: A clear, concise and relevant name which explains the issue of the Case, for example Leave of absence or Pre-requisite waiver.

Assign to Others: This will default to the creator of the Case. Reassign – click on the **X** next to the name to remove it, type the name (or part) of the person, team of queue and click on the correct name **OR** click the search icon, locate and select the correct name.

Major / minor specialisation: A free text field. An example – type the name of the specialisation which is useful if assigning to that area.

Topics: A free text field. Type information if the Case is related to a specific topic. For example, the Topic Code.

Origin: How the enquiry was made. Select an option from the drop down menu. Web and email enquiries automatically create a new Case.

Related Course: Type the course or press Enter to browse and select.

Description: Describe the Student's enquiry concisely but informatively so as to assist the Student. More detail is better, though if assigning the Case to another Team or Staff Member. Use correct University Terminology.

Other Details
Area: Select the correct option from the drop down menu to specify the type of enquiry.

Career Request: Leave blank as not used.

Enrolment Request: IF applicable, select the correct option from the drop down menu.

Fee Request: IF applicable, select the correct option from the drop down menu.

OSHC Request: IF applicable, select the correct option from the drop down menu.

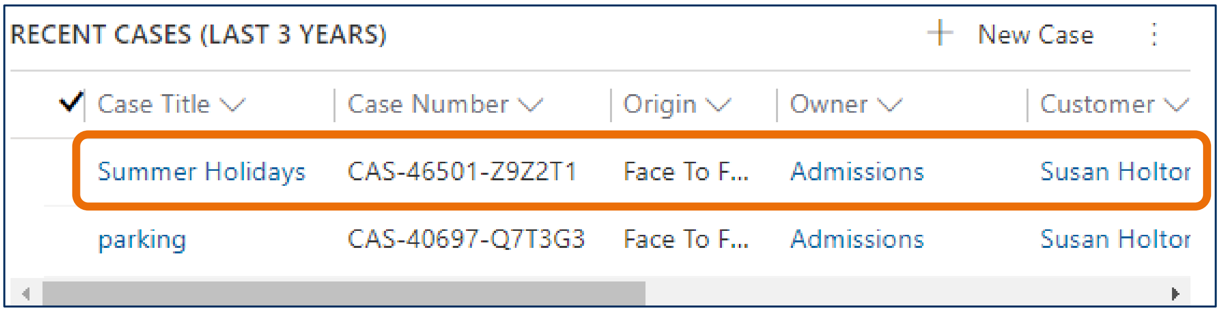
Scholarship Request: IF applicable, select the correct option from the drop down menu.

Student Records Request: IF applicable, select the correct option from the drop down menu. This is generally used by Flinders Connect / International Centre).

Library Request: IF applicable, select the correct option from the drop down menu. Usually only used by Library or Flinders Connect.

4. Click **Save and Close** in the bottom right hand corner OR if needing to create another Case for this Customer, click the drop down arrow and then **Save & Create New** as shown below.

5. The Case is now visible in the **RECENT CASES (LAST 3 YEARS)** section of the Contact Record. A few of the field names are visible from this view. Scroll to the right to view all details.

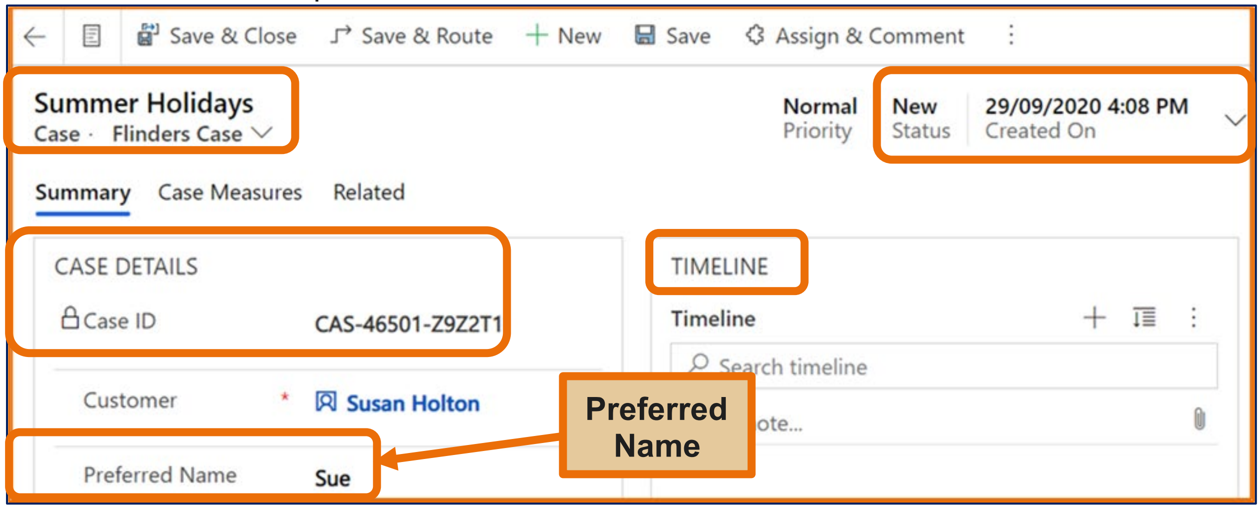


View and Edit a Case

6. Click on the Case Title name. The Case is displayed including **CASE DETAILS**, **TIMELINE** and **CUSTOMER DETAILS** (located beneath the CASE DETAILS).

Case Record, Preferred Name

7. 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.



8. If changes are made click **Save** in the bottom right hand corner of the screen or in the Menu Bar at the top of the screen.

Version Control

Version Number	Version Date	Changes
1.0	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.
3.0	November, 2018	Uploaded to FLO
4.0	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’.
5.0	March, 2019	Updated for the April Upgrade. Uploaded to FLO.
6.0	May, 2019	Preferred Name information inserted. Uploaded to FLO.
7.0	October, 2019	Updated to reflect changes made in the October, 2019 upgrade. 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 Unified User Interface. Uploaded to FLO.