

MS Dynamics Student CRM

Flinders University

Email – Create and use

Email Signatures

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Version 6.0

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Email is the primary form of communication from MS Dynamics Student CRM to Students as well as to Flinders University Staff who do not use MS Dynamics CRM. Emails sent from MS Dynamics Student CRM are formatted in enhanced, rich text editing which accommodates professional communication. The history of Emails sent and received is located in the Case Timeline.

A hyperlink can be inserted into the body of the email and can be in the form of text or a picture. More than one attachment can be included.

The default font in an Email Signature and an Email Activity is Segoe UI 9. This can be changed in the Email Signature. As three lines are automatically inserted in the Email Activity above the Email Signature, the delete key will need to be pressed three times to remove the Segoe UI 9 font formatting after creating the new Email Activity. Refer to **Change the Font**, Step 6 on Page 8 for instructions on how to change the default font in the Email Signature and therefore in the Email Activity.

Refer to the User Guide **CRM How to Guide Sending an Email to a Student including Attachment and Hyperlink** for instructions on how to create an Email Activity.

In October, 2020 Microsoft improved the access to **Email Signatures** as well as making the creating and editing of Signatures more user friendly as the new / edit Signature screen display is similar to an Email so as to see the true effect immediately.

The instructions below explain how to create, edit and use an Email Signature which are extremely useful for inserting standard information into an Email. A Signature can be set as default (automatically included in each Emails including new, reply, reply all or forward.

Sign in to MS Dynamics Student CRM

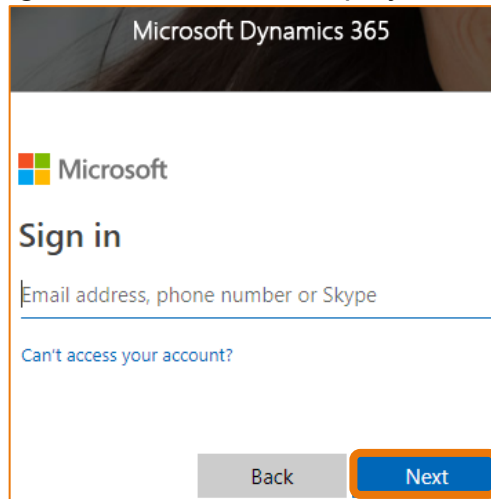
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

1. Locate [Okta](https://flinders.okta.com) (flinders.okta.com) and click on MS Dynamic CRM as circled below.

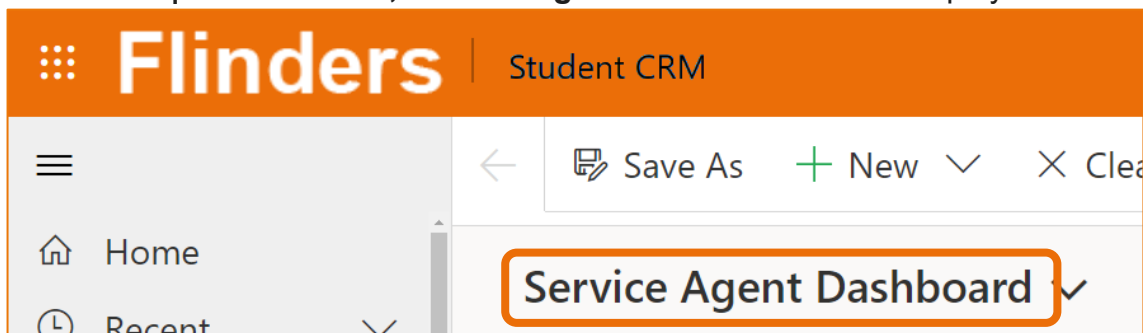


2. Sign into MS Dynamics Student CRM. Signing in for the first time will present the following screen.

- 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.



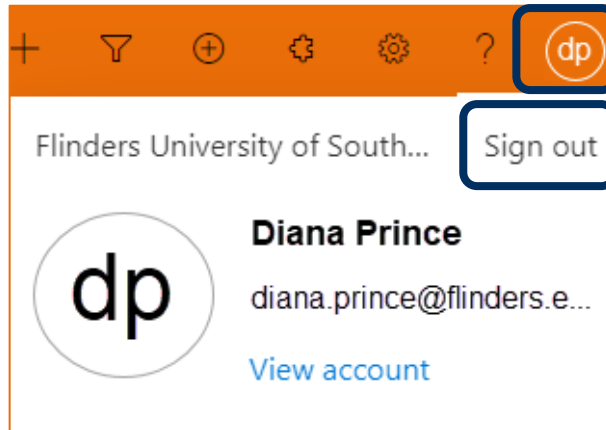
3. **Flinders CRM | Student CRM, Service Agent Dashboard** is now displayed.



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.

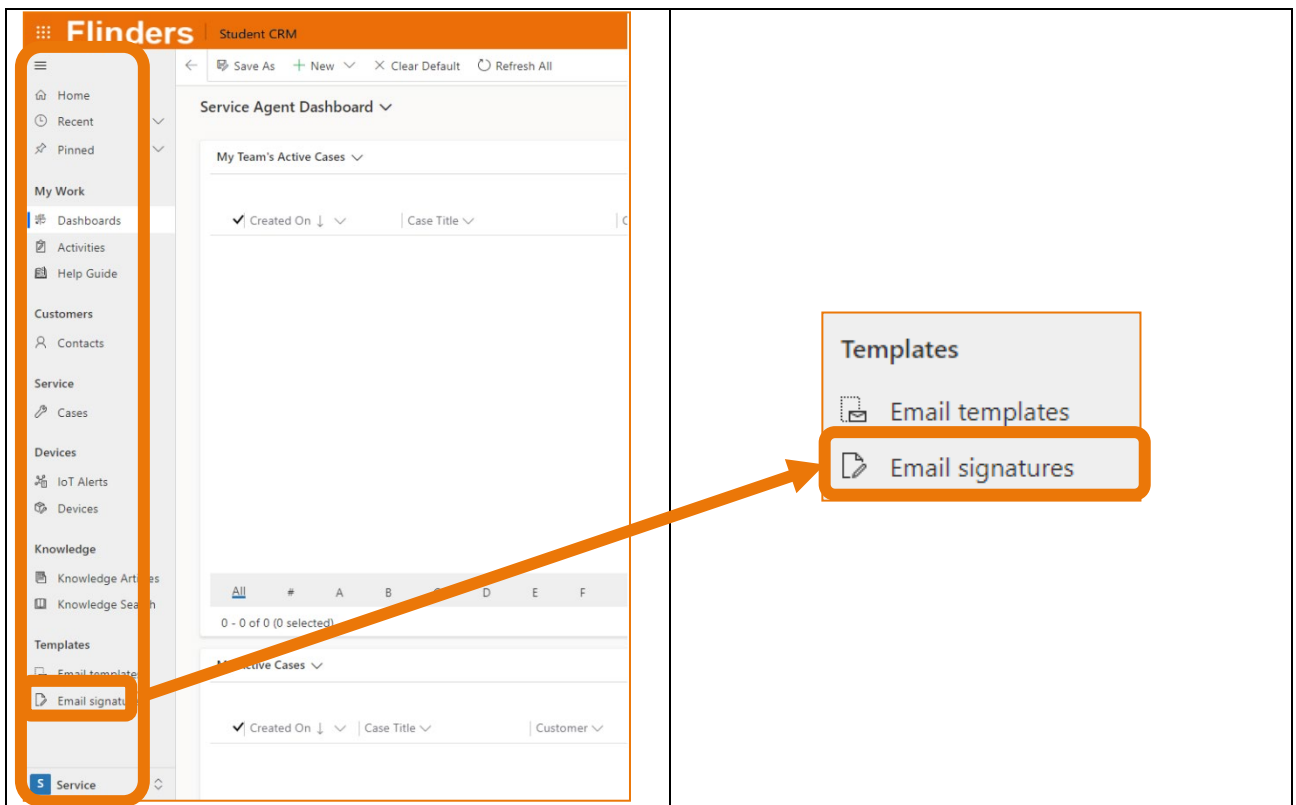
Create a New Email Signature

Email Signatures

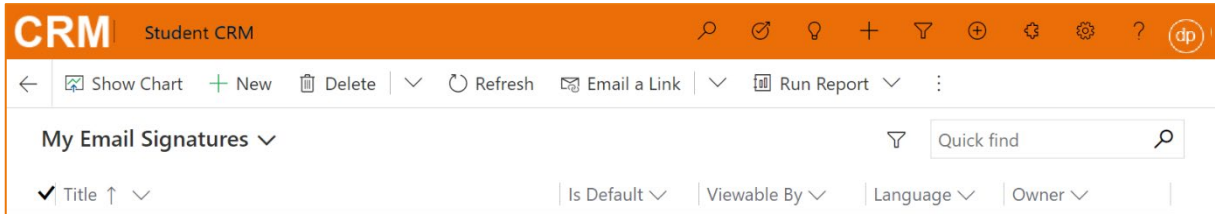
Email Signatures contain standard information which can be inserted appropriately into an Email sent to either a Student or a Flinders University Staff member who does not use CRM. Refer to Business Processes as to what information needs to be inserted in the Email Signature. When the Signature is inserted into the Email three lines are automatically placed before the first line of the Signature which are in the Segoe UI 9 font.

The option to use the  Cog symbol in the top right hand corner of the Navigation Menu is still available but as of October, 2020 Microsoft provided access to Email Signatures in the Navigation Pane.


1. Click on **Email Signatures** at the bottom of the Navigation Pane, left hand side of the screen.




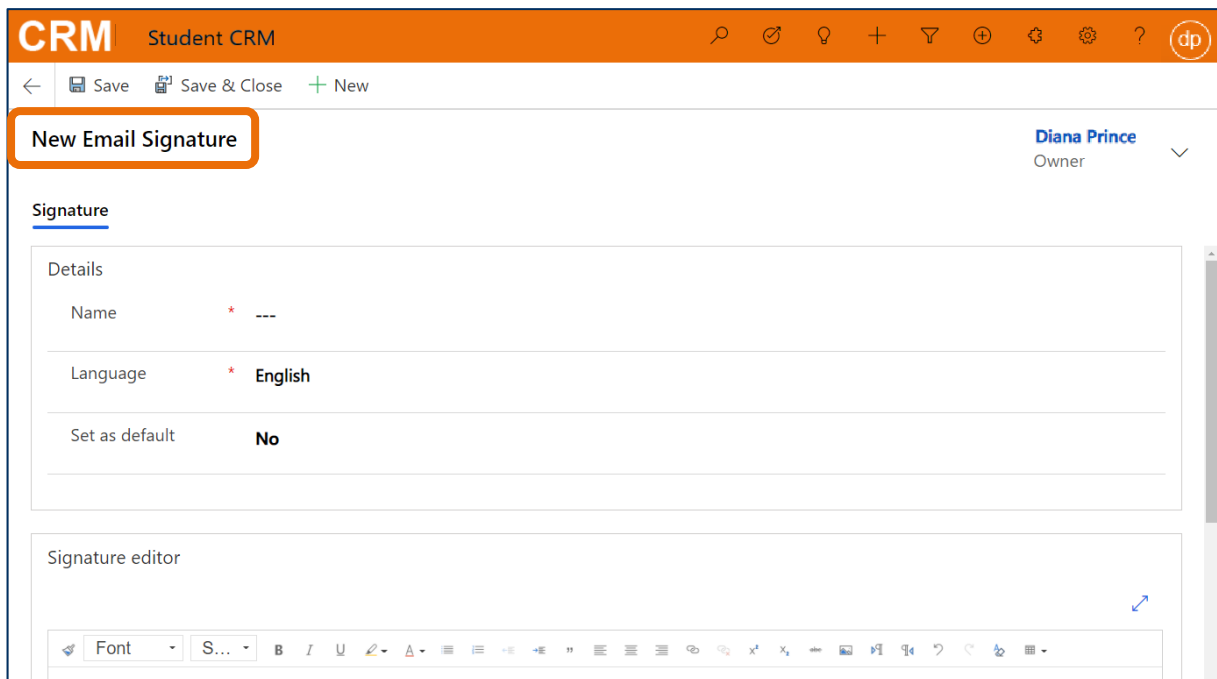
2. My Email Signatures System View is displayed.



Create a new Signature

Note that the Email Signature can be saved at any time by clicking  **Save** in the Menu Bar. This is helpful so as not to accidentally lose any information.

1. Click on  **New** in the Menu Bar, the left hand side of the screen.
2. The **Email Signature: New Email Signature** window is displayed.



Name

3. Click adjacent to **Name** and type the appropriate information. This is the name of your signature and is displayed as the **Title** in Email Signatures System View as well as when manually inserting an Email Signatures into the Email.

Set as default

4. Click adjacent to **Set as default** to change the option to **Yes** ensuring the Signature is automatically inserted into every Email sent.

Signature Content

5. Click in the text area beneath **Signature editor**.


Change the Font

6. Press the space bar three times and press the enter key three times.
7. Type Ctrl+A to select all.
8. Select the font and size to your desired choice. Refer to Business Processes as to the appropriate font and size.
9. Type Ctrl+End to deselect and move the cursor to the end. The font may change to Segoe UI 9 which will be changed when the Signature information is formatted, Step 11 below.
10. Type and format the information to be included in the Signature. When the Signature is inserted into the Email approximately three lines are automatically placed before the first line of the Signature which will be in Segoe UI 9 font and need to be deleted.

Format the Signature information

11. Select the Signature information and in the Formatting Toolbar click and select from the font, colour and size icons. Refer to Business Processes as to what information needs to be inserted in the Email Signature, the font and colour.


Save and Close

12. Click on the  **Save & Close** **Save & Close** Menu Bar.
The Email signature is displayed in the System View.

Edit a Signature

1. Follow steps 1 and 2, **Email Signatures** on Page 6 of these notes.
2. Click on the Title of the Signature to be edited. The name of the Signature is displayed in the left hand corner of the window.
3. Edit appropriately.

Save and Close

4. Click on the  **Save & Close** **Save & Close** Menu Bar.
The Email signature is displayed in the System View.

Using the Email Signature in a MS Dynamics Student CRM Email

Regardless of which of the methods below is used to insert the Signature:

1. Press the delete key three times to remove the three lines of Segoe UI 9 font.
2. The font and size will then be the one selected in **Change the Font**, Step 6 on Page 8.

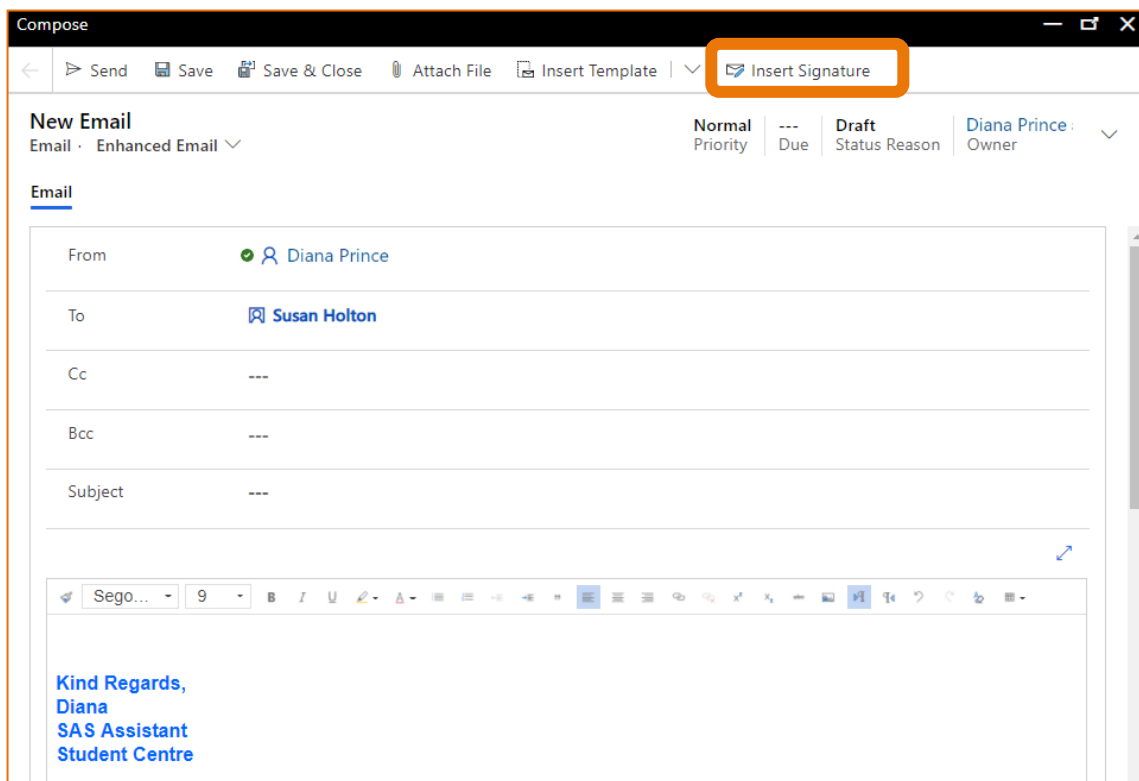
Set as Default Signature

If the Signature is **Set as Default** any Emails created, including reply, reply all and forward, from MS Dynamics Student CRM will automatically insert the Signature in new Emails, as shown below.

Manually inserting a Signature

If manually inserting the Email Signature, click on  **Insert Signature** in the Email Menu Bar, click to insert your Email Signature.

Refer to the User Guide **CRM How to Guide Sending an Email to a Student including Attachment and Hyperlink** for these instructions as well as how to send an Email from MS Dynamics CRM.



Version Control

Version Number	Version Date	Changes
1.0	May, 2019	Original Notes
1.0	May, 2019	Uploaded to FLO.
2.0	October, 2019	Updated for October Upgrade. No changes made. Uploaded to FLO.
3.0	April, 2020	Updated for the April Upgrade. Uploaded to FLO.
4.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
5.0	October, 2020	Updated for the October Upgrade. Uploaded to FLO.
6.0	October, 2020	Included information to Change the Font on Page 8 to avoid Segoe UI 9 in the new Email Activity. Updated for the Unified User Interface. Uploaded to FLO.