MS Dynamics Student CRM
Flinders University

Email – Create and use Email Templates

Developed by Wendy James, Training Specialist

October, 2020

Version 1.0

Contents

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. The history of Emails sent and received are located in the Case Timeline and Contact 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.

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

In October, 2020 Microsoft improved the access to **Email Templates** as well as making the creating and editing of Templates more user friendly as the new / edit Template 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 Templates which are extremely useful for inserting standard information into an Email.

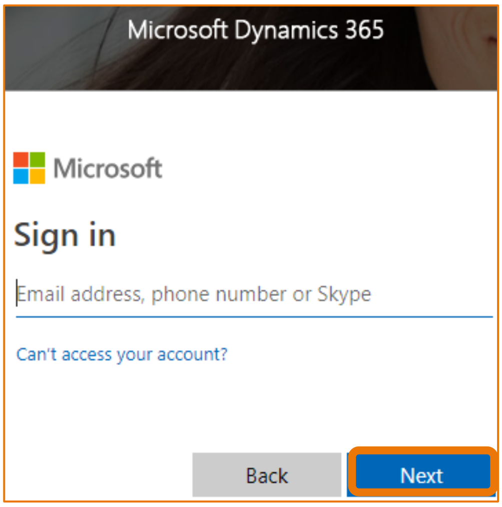
Hyperlinks, **Images**, **Tables** and **Attachments** can be included in the Template and described on Page 12.

Sign in to MS Dynamics Student CRM

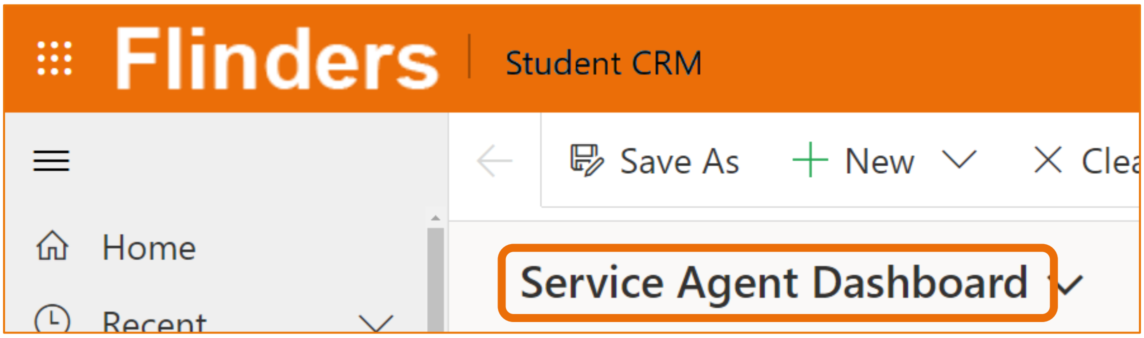
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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.

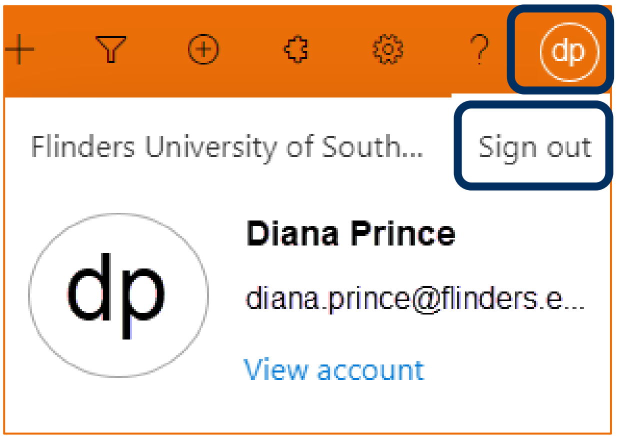


Sign Out of MS Dynamics Student CRM

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.

View and Open an Email Template

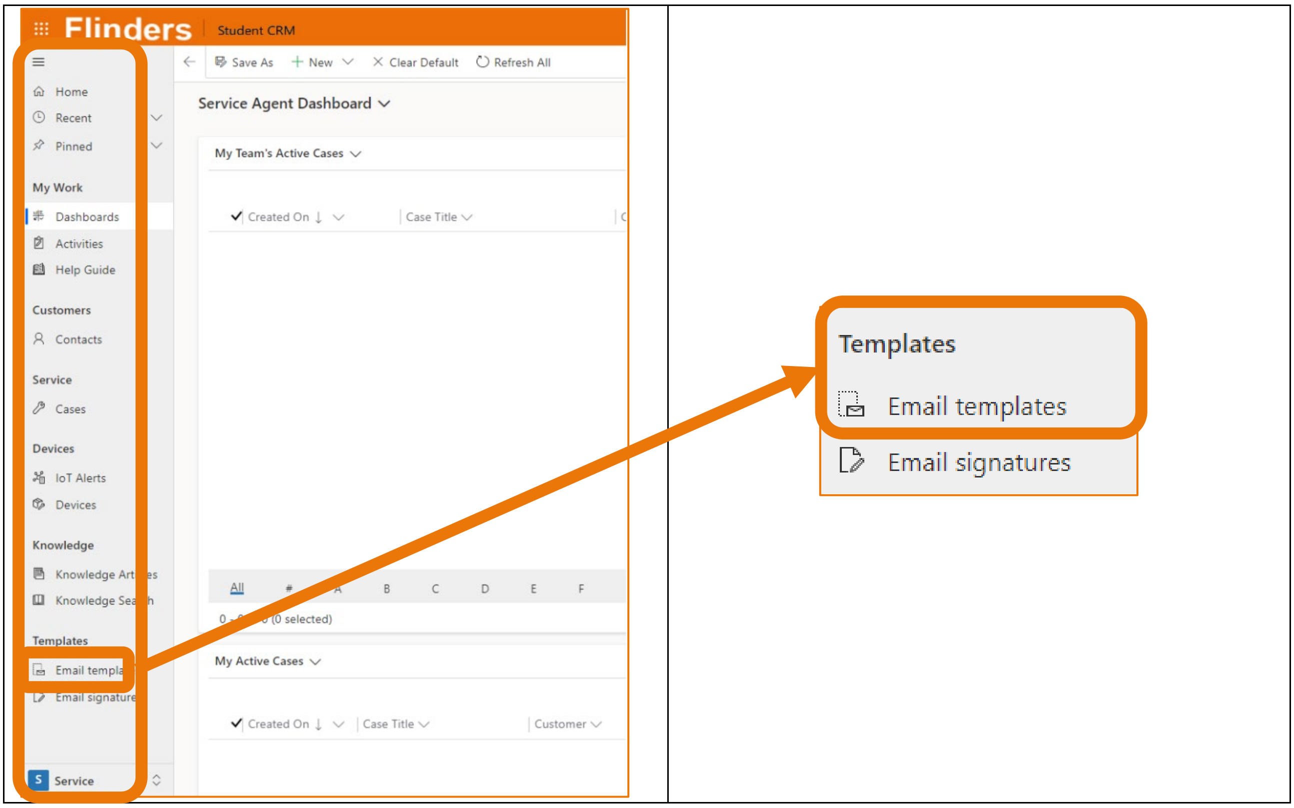
Templates

- Email Templates contain standard information which can be inserted appropriately into an Email sent to either to a Student or a Flinders University Staff member who does not use CRM.
- Template System View allows viewing by **Category**.
- Permission level **Individual** – only seen, edited and used by the creator.
- Permission level **Organisation** – seen, edited and used by any Flinders University Staff member who uses MS Dynamics CRM.
- An existing Email Template can be duplicated by Starting with Existing Template. Refer to **Start with existing template**Error! Reference source not found. on Page 16.
- Click in the **Search Template** field and type some of the letters included in the Template name / title displays Templates with this information.

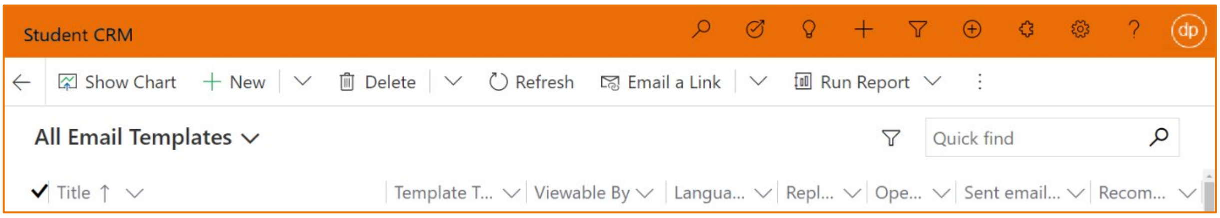
View existing Email Templates

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 Templates in the Navigation Pane.

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



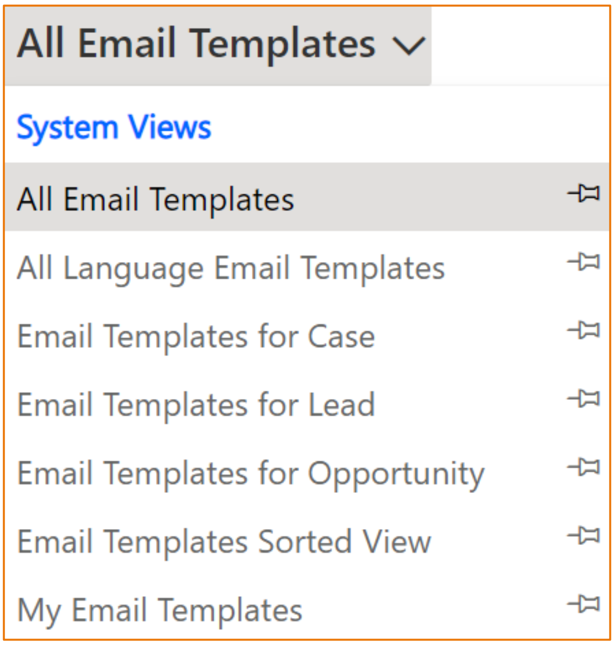
2. **My Email Templates** System View is displayed.



Email Template System Views

3. Click on **My Email Templates** System View. The different System Views are displayed. Click to the select appropriately.

   Click the **Pin** icon to pin the System View making it the default view.



Open an Email Template

4. Click on the name of the template to open it and view the contents.

   If editing a template, click Save **Save** as you work and then Save & Close **Save and Close** Menu Bar.

   If viewing, click the **Go Back** arrow beneath Flinders CRM to exit without saving.

Create a New Email Template

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

A Template can be created using a blank Template form (
Start with blank template on Page 8) or using an existing Template Form (**Start with existing template** on Page 16). Both instructions are described below.

Permission level

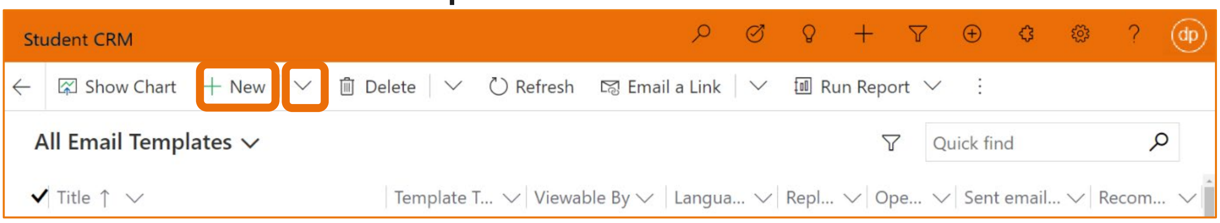
- **Individual** – only seen, edited and used by the creator.
- **Organisation** – seen, edited and used by any Flinders University Staff member who uses MS Dynamics CRM.

Category (previously referred to as Template Type)

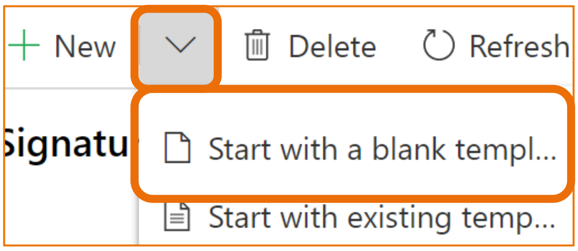
- Selecting the **Category** assists in the available dynamic text and locating the Template from the Email Template System Views.

Start with blank template

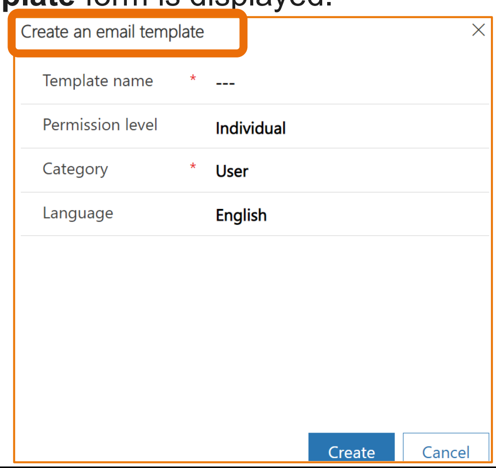
1. Click on **Email Templates** in the Navigation Pane.
2. Click on **New** in the Menu Bar OR click the drop down arow adjacent to **New** and click on **Start with a blank template.**



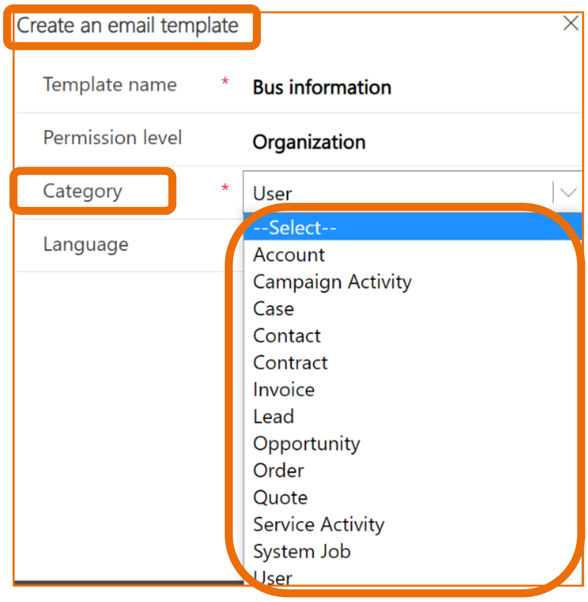
OR



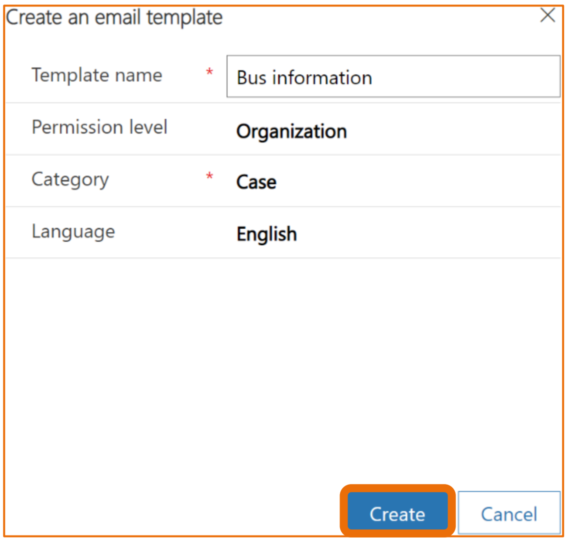
3. The **Create an email template** form is displayed.



4. Type the **Template name**.
5. Select the correct **Permission level (Individual** – for you only; **Organisation** – available to all Flinders University CRM Staff users).
6. Select the correct **Category** by clicking on User (the current) and clicking on the correct option. Category assists in the available dynamic text and locating the Template from the Email Template System Views.



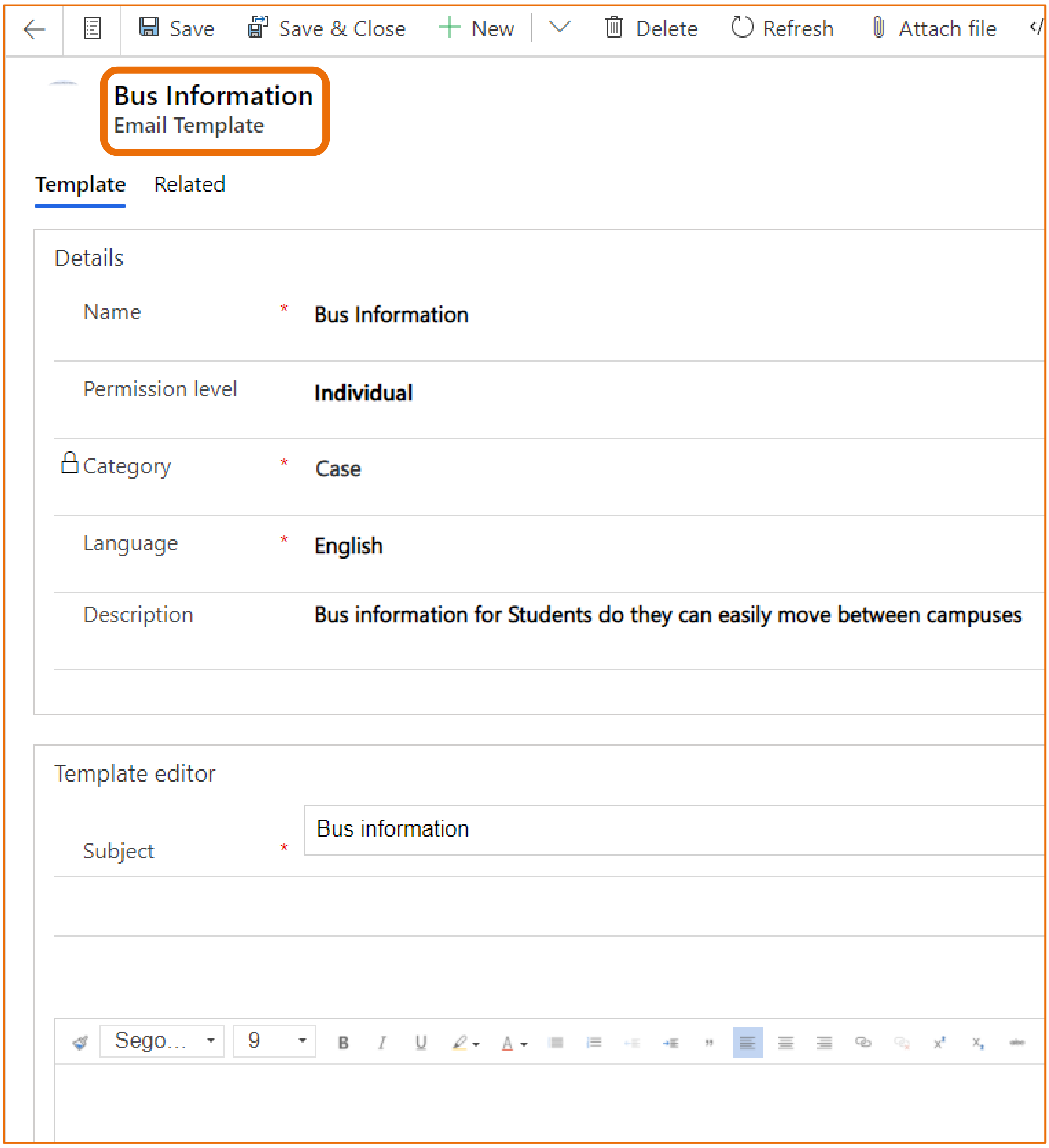
7. Click on **Create**.



8. The **Email Template** form is displayed.
   - **Description** – information about this template as to why it has been created and how it is to be used. **This is not inserted into the Email**.

   - **Subject** – this is the information which **will be placed in the Subject of the Email**.

- **Email Content** – type the contents of the Email which **will be inserted into the Email** and can also be edited when inserted into the Email, for example typing the name of the Recipient who does not use CRM (refer to the how to guide **CRM How to Guide Forwarding a Case from CRM**).



Insert information

1. Click in the body of the Email and type the information to be included.

Insert Dynamic Text (previously referred to as Data Fields)

Fields from CRM Records, for example **First Name** or **Last Name** or **Preferred Name** or **Case Title**, can be inserted into the Template. The Data Fields can be inserted in the Subject as well as the contents of the email. A second field can be inserted into the Template in case the first field is empty, for example, if **Preferred Name** has not been entered in a Contact Record then **First Name** will populate after Dear in the Email, as shown in this how to guide.

1. Click in either the Subject area or contents of the email and place the cursor where the Data Field Value is to be inserted. For example, inserting the Case Title in the Subject field or Contact Preferred Given Name or First Name after Dear which is the example used below.

2. Type any text (this can be typed after the insertion of the Data Field Value as well).

3. Click on </> Insert dynamic text **Insert dynamic text** in the Menu Bar. The **Edit dynamic text** pane is displayed.

Record type

4. Click on the field beneath **Record type** and select the appropriate option. This will determine which fields are available, for example **Contact**.

Field name/s

5. Click on the drop down arrow beneath **Field name** and scroll down to locate the field to be inserted, for example **Preferred Name**.

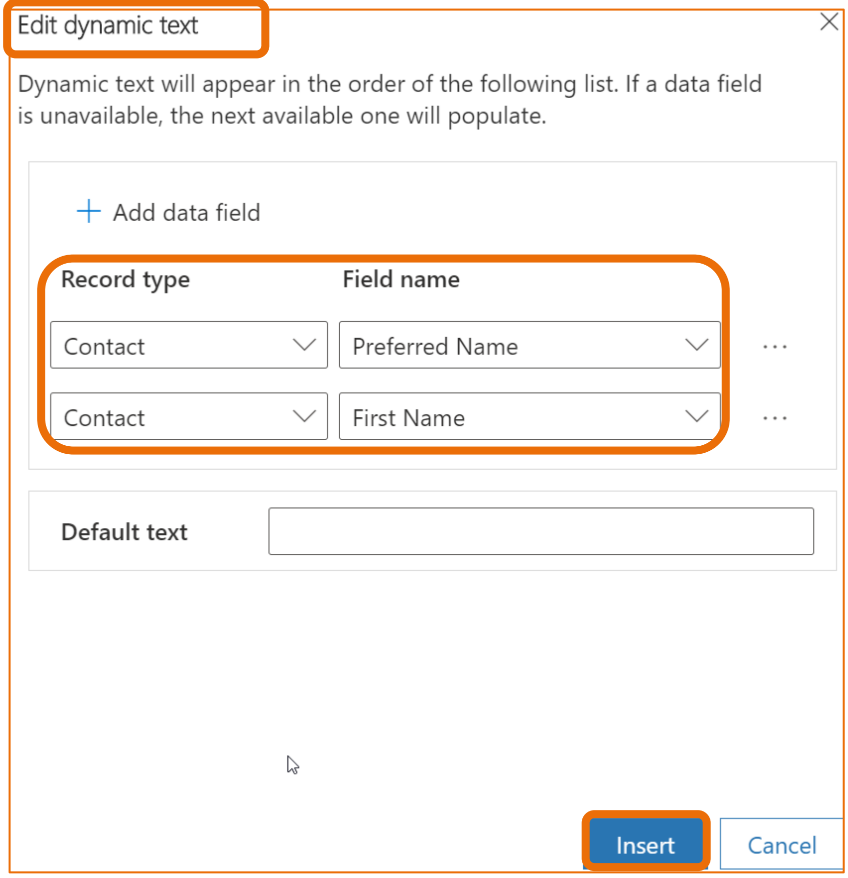
6. In the event a field is empty in the CRM Contact Record, for example Preferred Name, another field can be added, for example First Name. The first valid field will be inserted and then the second field ignored or vice versa.

   Click + Add data field **Add data field**. Complete steps 4 and 5 above and insert the appropriate Field name, for example First Name.

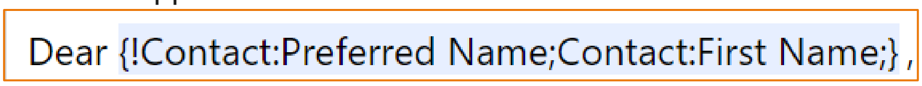
Default text

7. Information in the **Default text** field will be inserted if the select field is not filled in the CRM record, for example Responsible Academic or College, therefore ensuring blank space is not displayed after information.

8. Click on **Insert** (as circled above). The **Edit dynamic** text pane is closed and the field inserted into the Email Template.



9. The fields are inserted into the Email Template. Repeat steps 3 to 5 on Page 11 above to insert more fields as applicable.



Format the Email Contents

1. Select the text to be formatted.
2. Click on any on the icons in the Email Formatting Toolbar.

Insert Hyperlinks

A hyperlink can be to a URL (web page) somewhere in the Email, an Email address or phone number. Type the text to be displayed, select the text and type or copy the web address.

1. Type the text to be displayed and clicked, for example **Flinders University Loop bus information**.
2. Select the text.
3. Click on the  **Link** icon in the Email Formatting Toolbar.

Link Info tab

4. **Display Text:** The selected text is displayed in the Display Text field. This is the information to be seen in the Email.

5. **Link Type:** Click on the current option and select the type of link from the drop down list.

6. **Protocol:** Click on the current option and select the correct Protocol from the drop down list.

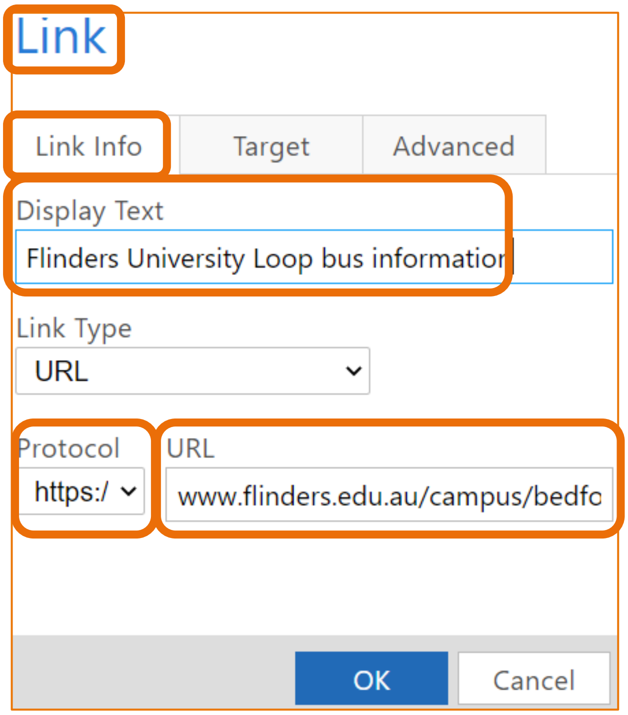
7. **URL:** Click beneath URL and type, or copy and paste for accuracy, the web address.

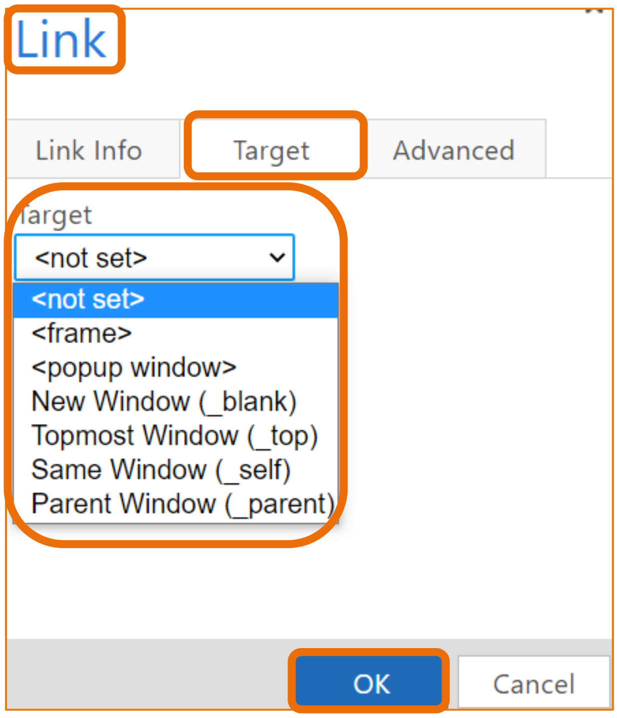
Target tab

8. Click on the **Target** tab.

9. **Target:** Click on the current option and select the manner in which the link will open from the drop down list, for example a new browser window will open.

10. Click **OK**.





Insert Images

An image can be included from a file (**Embedded image**) or from a websites (**URL**)

Embedded Image

1. Position the cursor in the correct location in the Email Template.

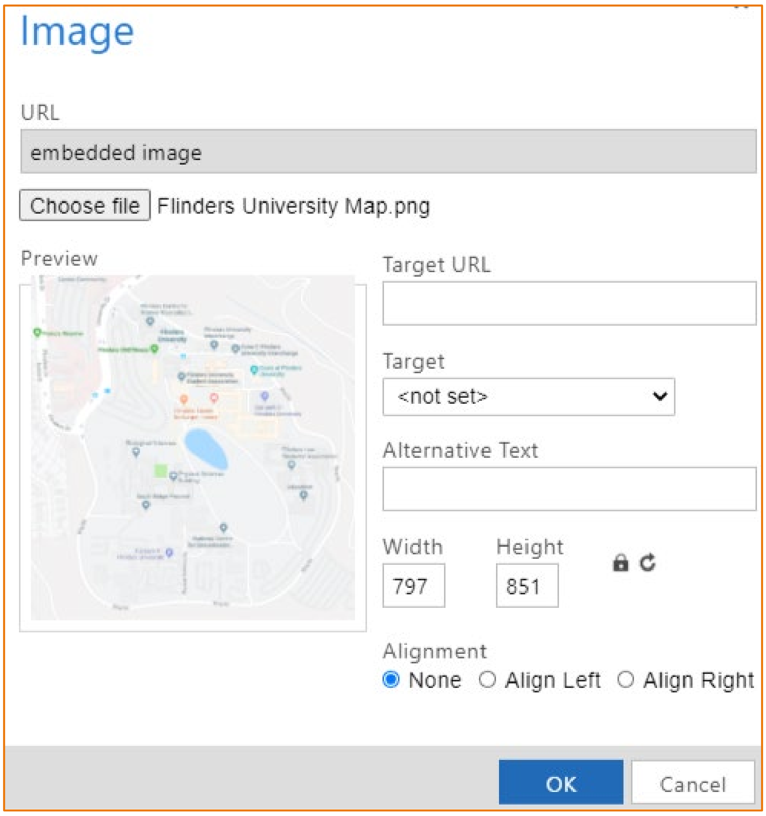
2. Click on the  **Image** icon, Email formatting toolbar.

3. Click on **Choose file**.

4. Locate the file to be inserted, **click to select** and click on **Open** to insert.

5. **Width and Height:** change the width and height to an appropriate size.

6. Click **OK**.



Website (URL)

1. Open the web address with the picture to be inserted.

2. Right mouse click on the picture and left mouse click on **Copy image address**, making sure it is not copyright.

3. Position the cursor in the correct location in the Email Template.

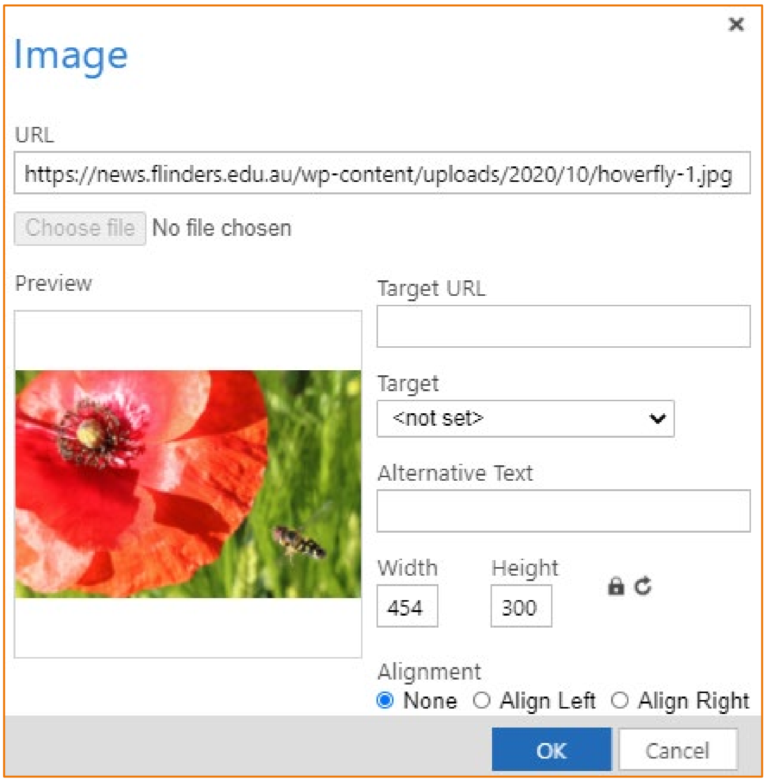
4. Click on the  Image icon, Email formatting toolbar.

5. The Image form is displayed.

6. **URL:** Paste the copied image address in the URL field.

7. **Width and Height:** change the width and height to an appropriate size, for example 300 for width and pressing the tab key will automatically set the height.

8. Click **OK**.



Edit an image

1. Double click on the image.
2. The Image form is displayed.
3. Edit any information and click OK.

Delete an image

1. Click on the image to select it.
2. Press delete on the keyboard.

Insert Tables

1. Create and format the table in a Word document including the colours, width and margins of columns as this cannot be done in the Email Template.
2. Copy and paste into the Template.
3. Insert the Field Codes in the Template which entails completing the insertion of each Field Code in each cell, moving the cursor to the next cell and repeating the insertion of each Field Code.

Save and Close

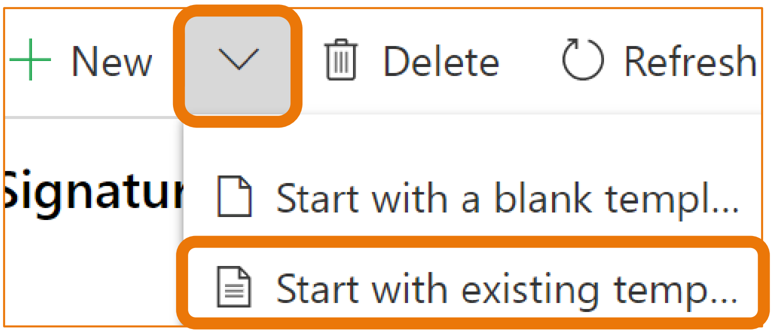
1. Click on the 

Save & Close Menu Bar.
2. The Email Template is displayed in the appropriate System View.

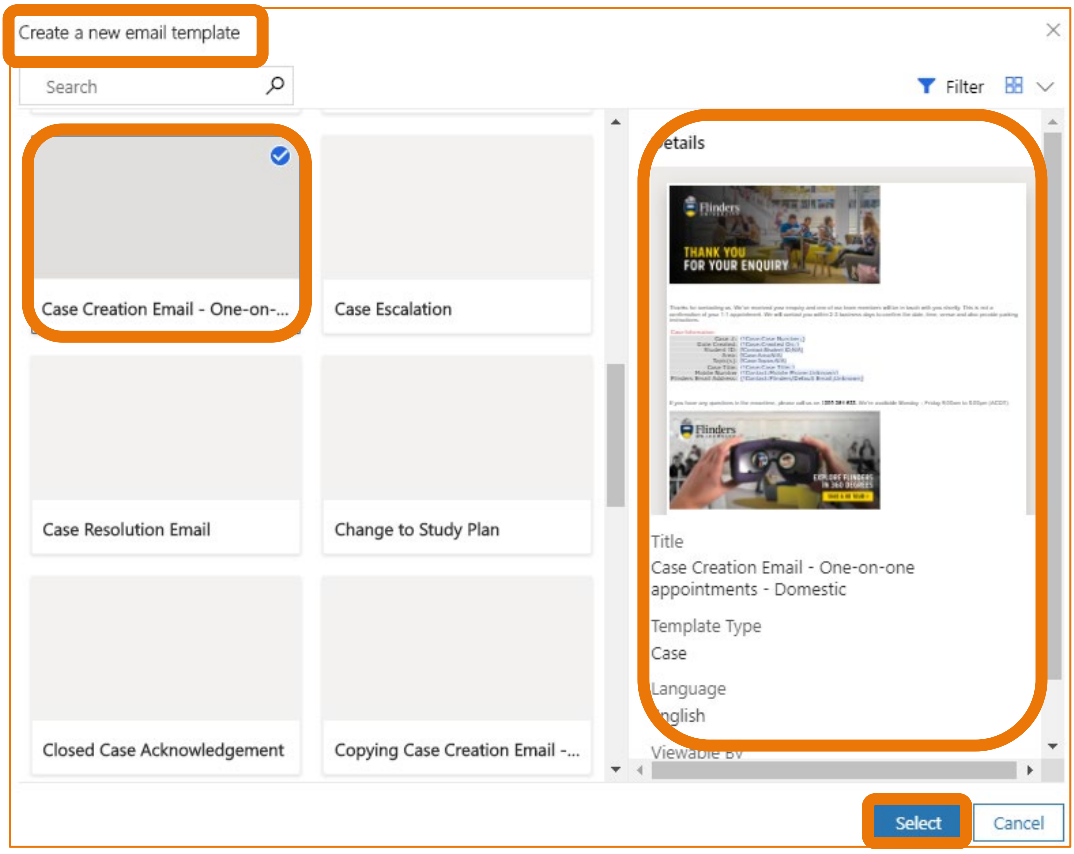
Start with existing template

Instead of creating a new Email Template, the contents of an existing one which contains the majority of the information can used to create a new Email Template.

1. Click on **Email Templates** in the Navigation Pane.
2. in the Menu Bar Click on the drop down arrow adjacent to + New **New** and click on **Start with existing template**.



3. The **Create a new email template** window is displayed.
4. Click on the template to be ‘copied’. The details are displayed on the right hand side of the window.
5. Click **Select**.



6. The new Email template is displayed with the name of the copied template and **– Copy** at the end. Rename as appropriate in the Name field.

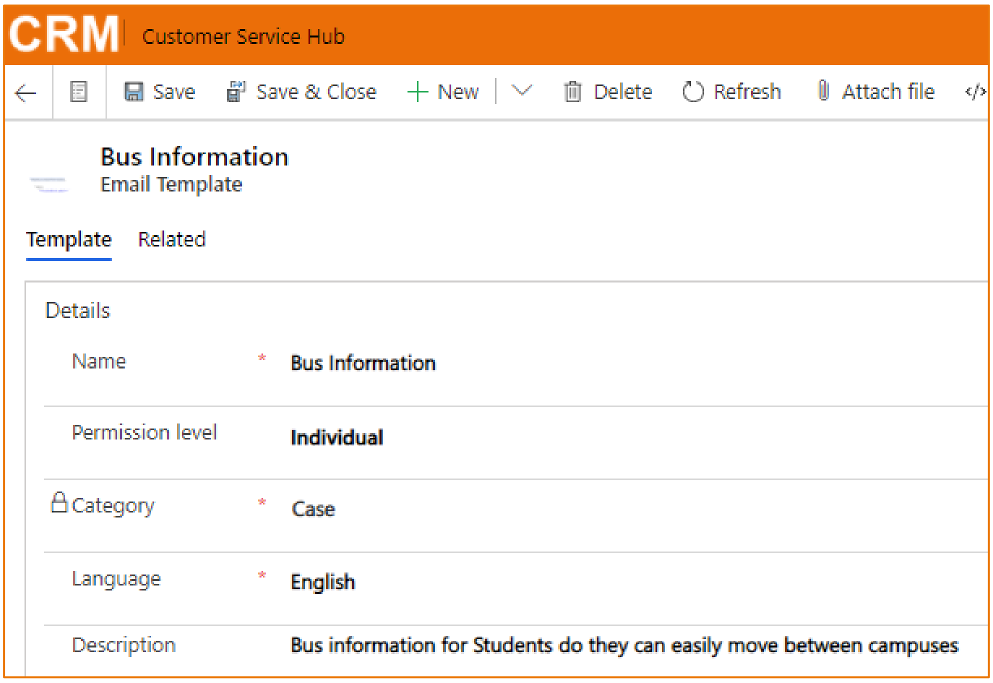
7. Complete all the details as needed and 

Save & Close.

Make Template Available to Organisation or Revert to Personal Template

1. Locate and open the Template.

2. **Permission level**: Click on the current selection, for example Individual and it will change to **Organisation** and vice versa.



Save and Close

1. Click on the 

Save & Close Menu Bar.

2. The Email Template is displayed in the appropriate System View.

Inserting an Email Template into a CRM Email Activity

Refer to the how to guide CRM How to Guide **Sending an Email to a Student including Attachment and Hyperlink** for instructions on sending an Email from CRM.

1. Click on 

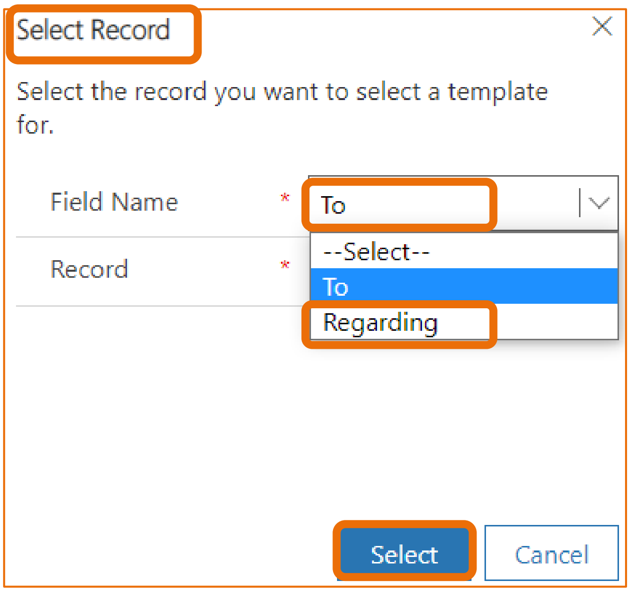
Insert Template in the Email Menu.

2. If the Email **To** field contains an email address the **Select Record** window is displayed. (Clicking Select from here will only display the Email Template Type **User**.)
Click on **To** and a menu drops down.

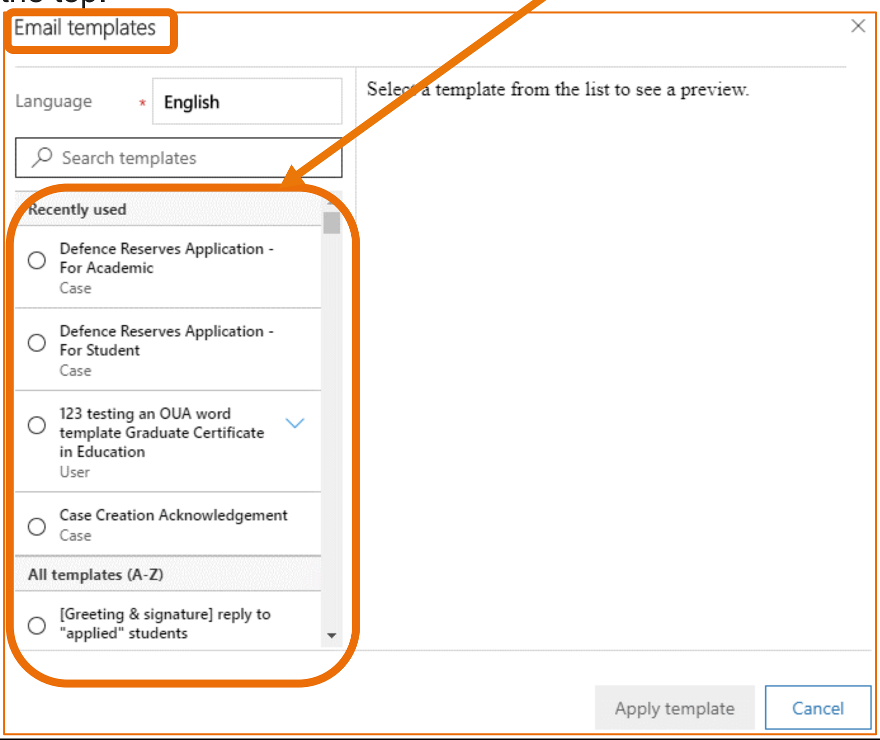
3. Click on **Regarding** from the drop down list.

4. Click 

Select.



5. The **Email Templates** window is displayed with the 4 most recently used Templates displayed at the top.

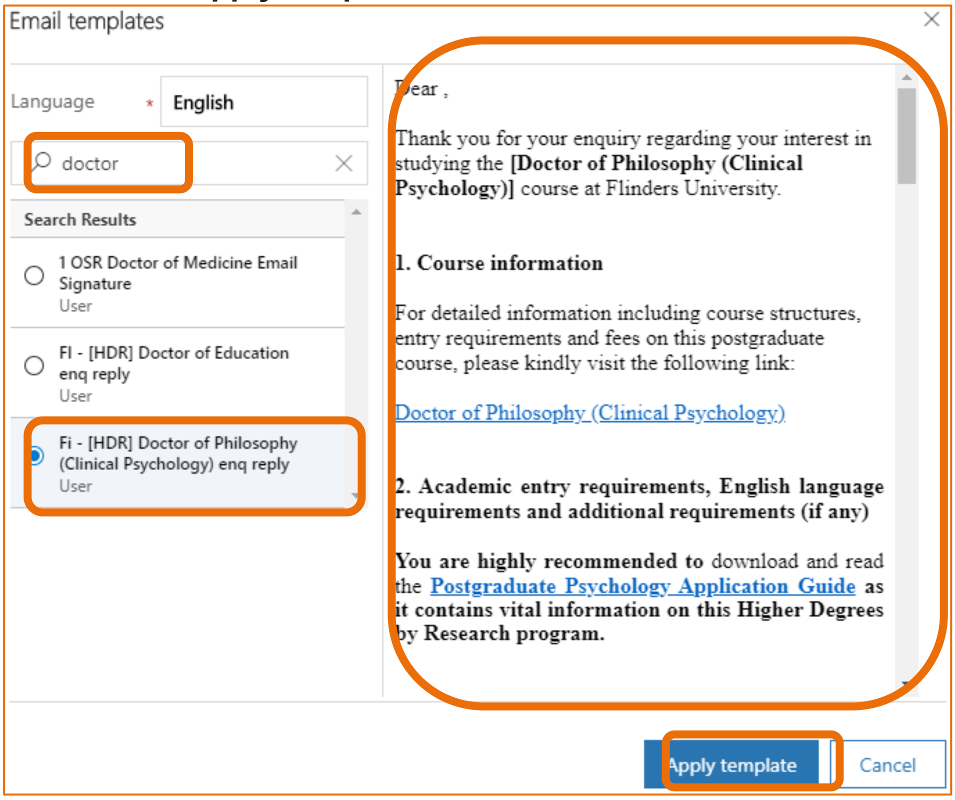


6. Click in the **Search Template** field and type some of the letters included in the Template name / title. The example below is doctor and displays the Templates with doctor included in the Template name / title.

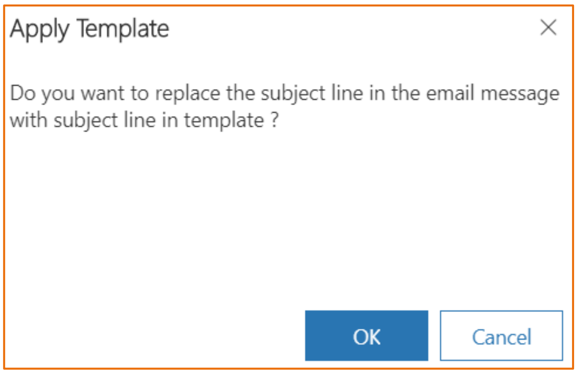
7. Click on the Template and a preview is displayed on the right hand side of the Email templates window.

8. Click on 

Apply template and the contents is inserted into the Email form.



Note: When a template is inserted it could replace any text in the Subject field **and also** add to the content of the Email, as per the prompt below. Clicking **OK** overwrites the subject information and adds to any existing Email content; clicking **Cancel** leaves the subject information as is and adds to any existing Email content so if inserting a template when replying or forwarding ensure the cursor is in the correct location.

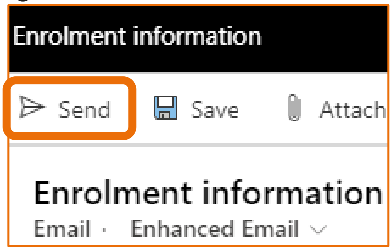


Send the Email

1. Click 

Send in the Email Menu, top left hand corner of the screen. The Case Timeline is displayed. The screen may need to be refreshed by clicking the 

Refresh icon in either the Navigation Menu or the Case Timeline.



Version Control

Version Number	Version Date	Changes
1.0	February, 2019	Original Notes
2.0	March, 2019	Updated for the April Upgrade. Uploaded to FLO.
3.0	July, 2019	Added information about **Copying an Existing Email Template** on Page 12.
4.0	October, 2019	Updated for October Upgrade. No changes made. Uploaded to FLO.
5.0	December, 2019	Updated information about **Email Template** Type on Page 7 and **Inserting an Email Template into a CRM Email Activity** starting in Page 13. Included information about **Format the Email Contents** on Page 11 and **Insert Hyperlinks** on Page 11 and **Insert Tables** on Page 11. Included a link to the notes **CRM How to Guide Sending an Email to a Student including Attachment and Hyperlink** on Page 14. Included information about **Standard Service Module - Inserting an Email Template into a CRM Email Activity** on Page 16. Uploaded to FLO.
6.0	January, 2020	Updated instructions regarding **Field Codes for Preferred Given Name and First Name** on Pages 9, 10 and 11. Included information about **Insert Images** on Page 11. Updated information about **Insert Tables** on Page 11.
7.0	April, 2020	Updated for the April Upgrade. Uploaded to FLO.
8.0	July, 2020	Footer updated as AssystNET has been replaced Service One. Uploaded to FLO.
9.0	October, 2020	Updated for the October Upgrade. Uploaded to FLO.
1.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.