MS Dynamics Student CRM
Flinders University

Creating Bulk Email Templates using Marketing Module

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Version 3.0

Contents

These notes refer to the steps involved to create an Email Template when working in Marketing Module, Email Marketing area. The purpose of the Template is to enable the sending an Email from MS Dynamics Student CRM to Flinders University Students and prospective Students. In October, 2020 Marketing Module is accessed in the Unified User Interface. Permissions are needed to use the Email Marketing area.
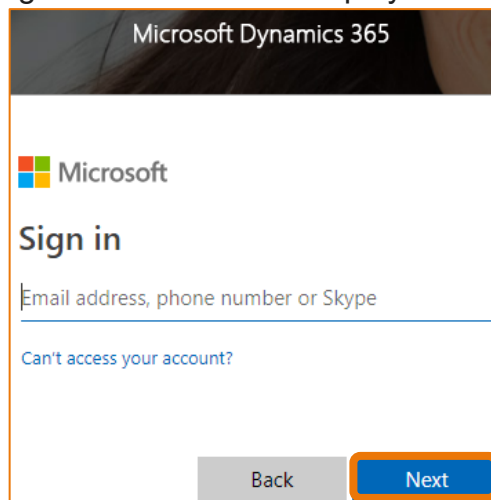
Sign in to MS Dynamics Student CRM

Due to Microsoft changes, from 30th October 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.
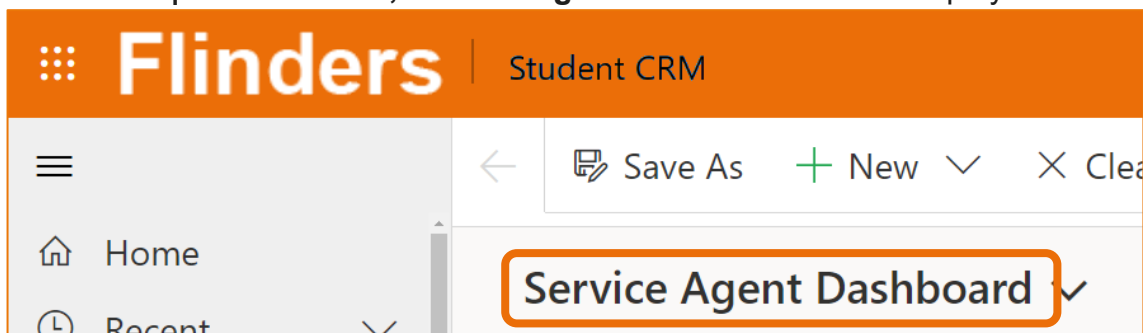
Sign Out of MS Dynamics Student CRM

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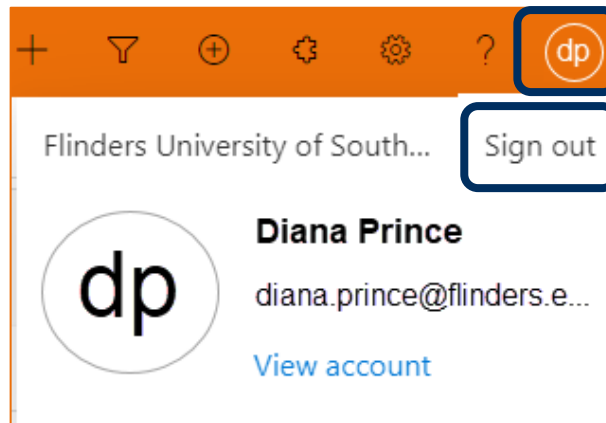
3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

Email Marketing, Email Templates – Create an Email Template

An Email Template needs to be created and this is the template used when creating the Email.

It is possible to copy and paste the contents of an existing Email Template and then make the appropriate editing changes.
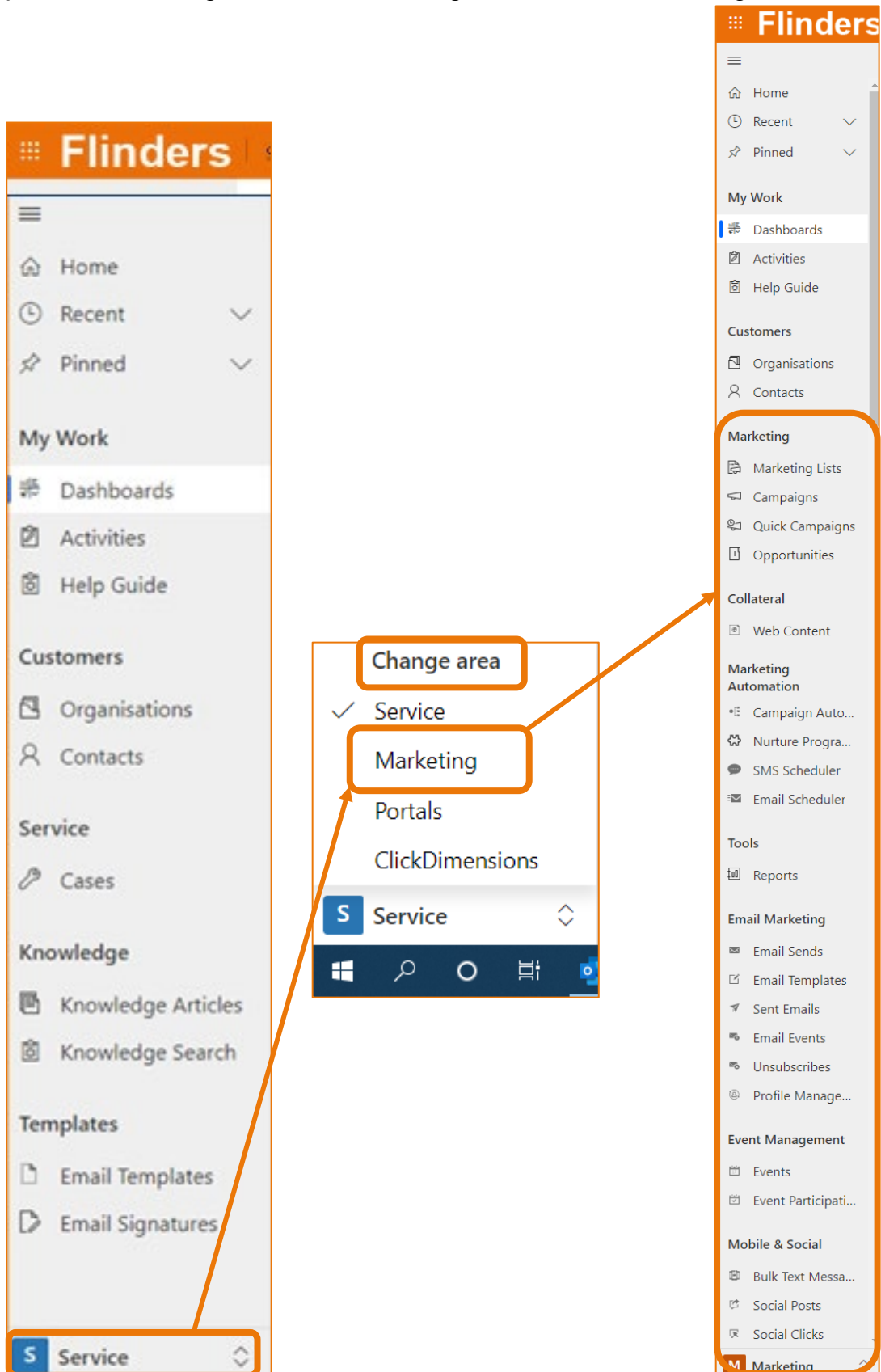
An **Editor** is used to create the Email Template and this is similar to Microsoft Word. **Pictures**, **Links** (hyperlinks) and **HTML** formatting (Hyper Text Markup Language) which is formatted text can be inserted to enhance the quality of the Email.
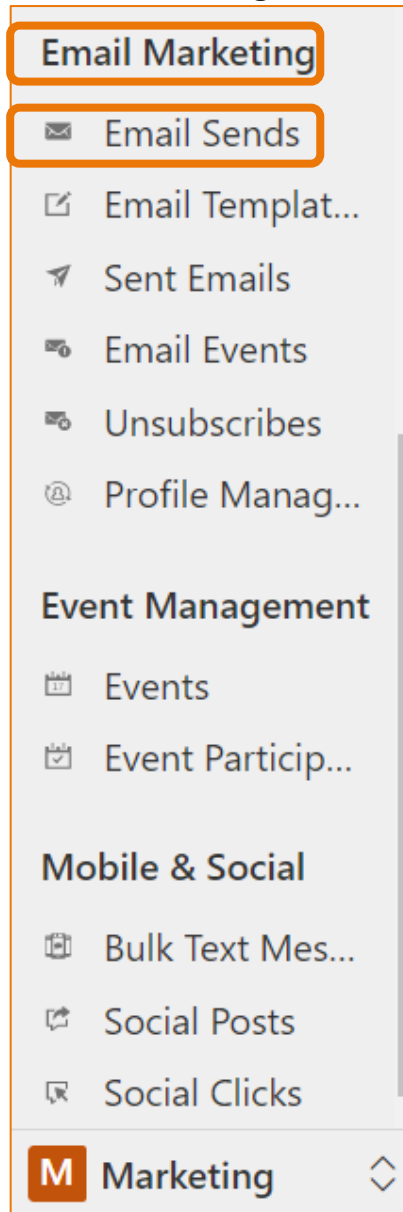
Field codes can be inserted to personalise the email – for example inserting the Student's First Name and Last Name, sourced from MS Dynamics Student CRM Records.

Marketing Area

1. **Change area**: Click **Service** in the **Change area** (bottom of the Navigation Pane).
2. The Change area menu pops up. Click on **Marketing**.
3. The options in the Navigation Pane will change to reflect the Marketing area.

Need help with the CRM?   **Use the Okta, Service One web form.** Find the appropriate form for a **Request** or **Incident** and complete the details.

4. In the Navigation Pane, under **Email Marketing** click on **Email Templates**.
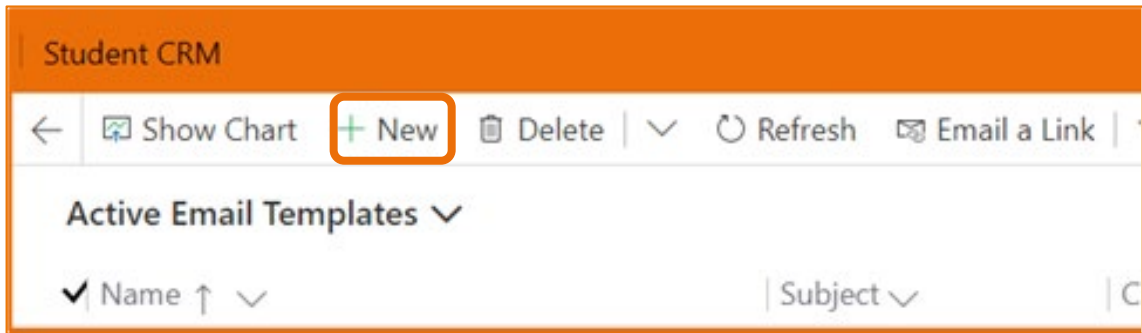

5. The **Active Email Templates** Dashboard is displayed with any Active Email Templates. The fields can be sorted by clicking on a field name, for example **Created On** which will sort the list in created date order.
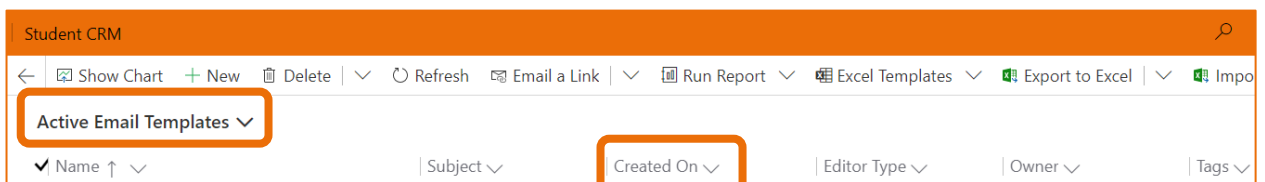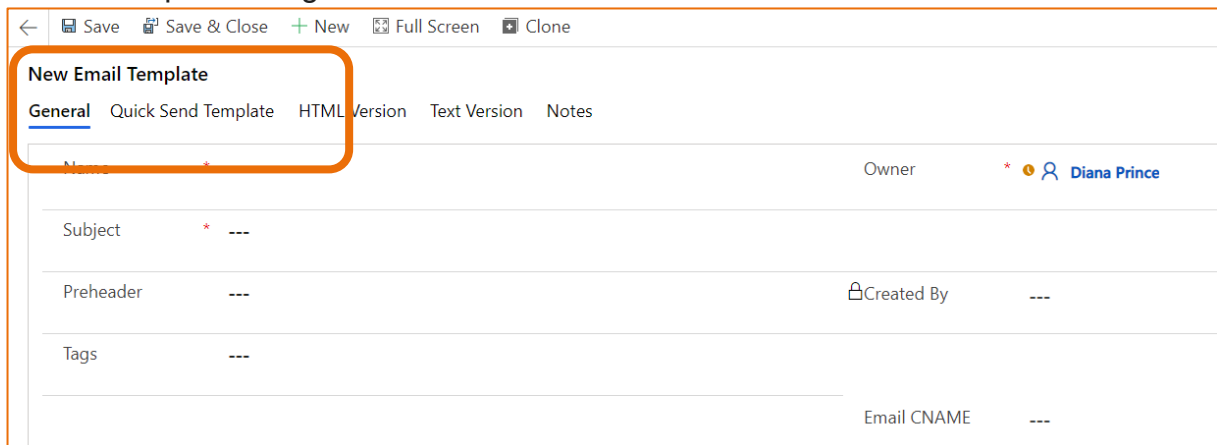
Create a New Email Template

1. Click on **+ New** **NEW** icon located in the top left hand corner of the screen.

2. The **New Email Template** screen is displayed.
   The fields to be completed are described below in **New Email Template**
   General Step 1 on Page 7.

New Email Template
General

1. The relevant fields are described below:

   ### Name
   This is the name of the Template, for example Student Newsletter. This is the hyperlink selected when creating the Email Scheduler. Click in the area to the right of **Name** and type the **Email Template** name.

   ### Subject
   This is the Subject of the Email. Click in the area to the right of **Subject** and type the **Subject** name.

Editor Type

Click in the area to the right of **Editor Type** and select **Drag and Drop** from the drop down list.
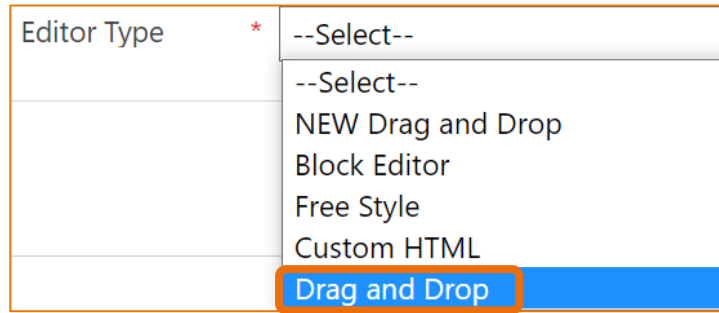

Owner

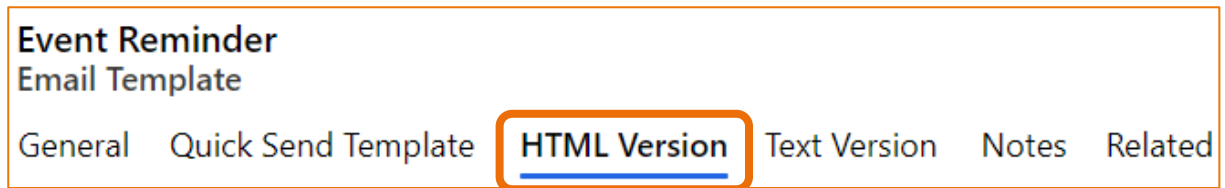The name of the CRM User creating the Email Template and this field is auto filled.

Save

1. Click 🖫 **Save** **Save** in the top left hand corner of the screen. The name of the Email Template is displayed beneath the Menu Bar, above Email Template, top left hand corner of the screen together with all of the details as entered.

2. The **Created by** field is now filled with the Owner's name.
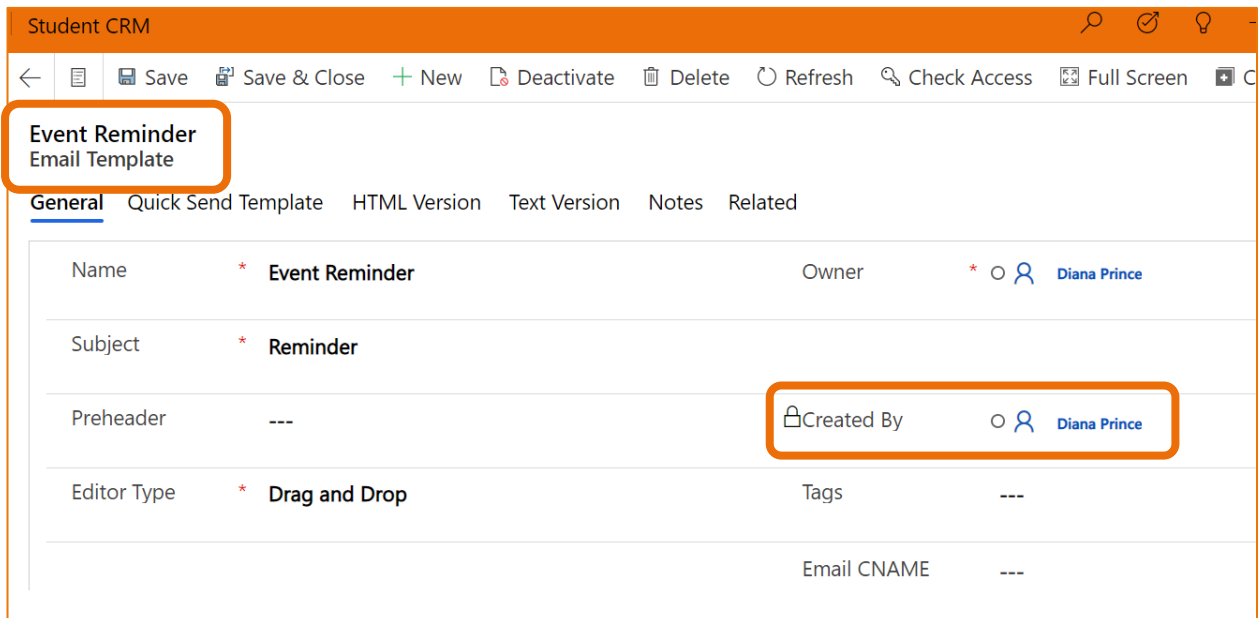
HTML Version

1. Click on HTML Version at the top of the screen beneath the name of the Template.

Event Reminder
Email Template

General   Quick Send Template   **HTML Version**   Text Version   Notes   Related

2. This is the area of the Email Template where the content of the Email to be sent is inserted. This can include HTML formatting (Hyper Text Markup Language) which is formatted text; Links (hyperlinks) and pictures which can also be hyperlinks.

   After clicking on **Open Editor**, the 🖫 Save **Save** icon located in the top left hand corner of the window can, and should, be used frequently and at any time – not just at the end of the Email Template creation.

Open Editor

3. Click on the **Open Editor** link. A web page will open which is the online Editor to create the CRM Email Template. Click the **Maximise** icon to enlarge the window.

Open Editor   Refresh
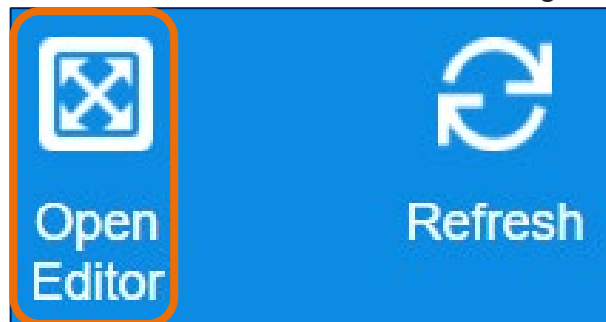
Design or Preview

4. The view is **Design**. Clicking on **Preview** mode displays how the Email will appear when the Template is inserted into the Email. Design and Preview are circled below, top left hand corner of the screen.

Header panel

5. This can be a picture. Click in this area to edit, as circled below. Instructions are located below in **Entering the Email Template Information** on Page 10. Resting the mouse in this panel will display **Header** in the top left hand corner of the image.

Body panel

6. This is the body of the email. Click in this area to edit, as circled below. Instructions are located below in **Entering the Email Template Information** on Page 10. Resting the mouse in this panel will display **Body** in the top left hand corner of the image.
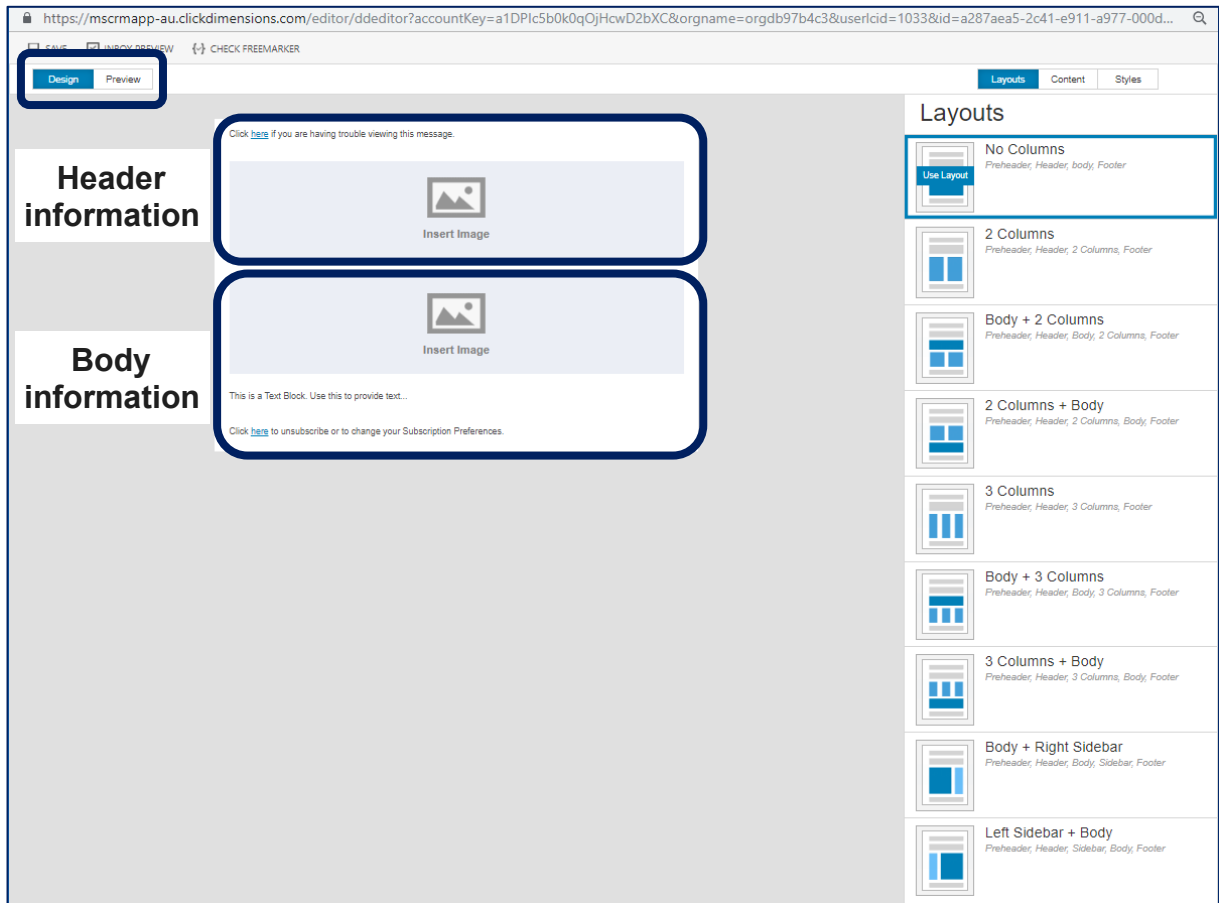
Entering the Email Template Information

Please refer to **Inserting Field Codes** on Page 13 to personalise the Email and **Hyperlinks** on Page 14 to enter a link to a web site for more information.
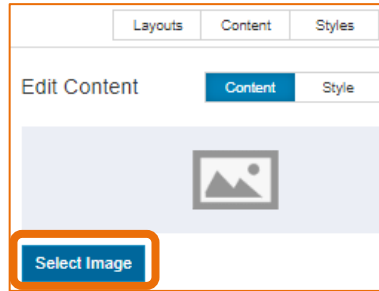
The information to be included in the Email Template is described below.

Header panel
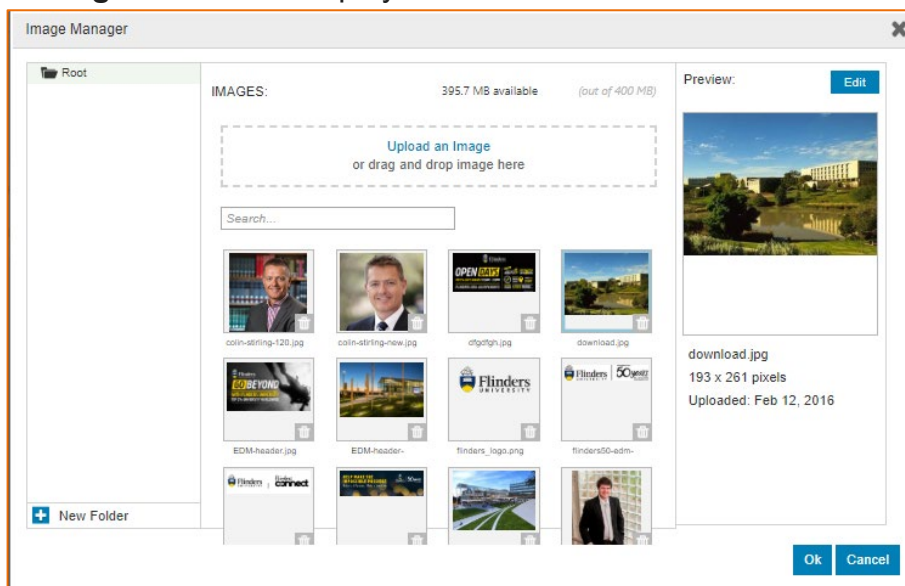
1. Click in the **Header panel** to select it.

2. Click on **Select Image** on the right hand side of the window.
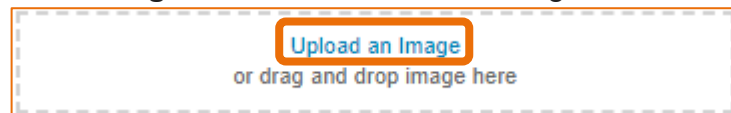

Image Manager

3. The **Image Manager** window is displayed.

- Click an image in the search area to select and display the Preview on the right hand side of the Image Manager window;

   OR

- Click on **Upload an Image**, locate and select an image from file to upload.

4. Click **OK** in the bottom right hand corner of the **Image Manager** window. The picture will be placed in the Header panel.

Body panel

5. If an image is to be inserted, repeat step 2 on Page 11 to step 4 on Page 11 except the image will be inserted in the Body panel.

6. Click in the area with the information **This is a text Block. Use this to provide text…**
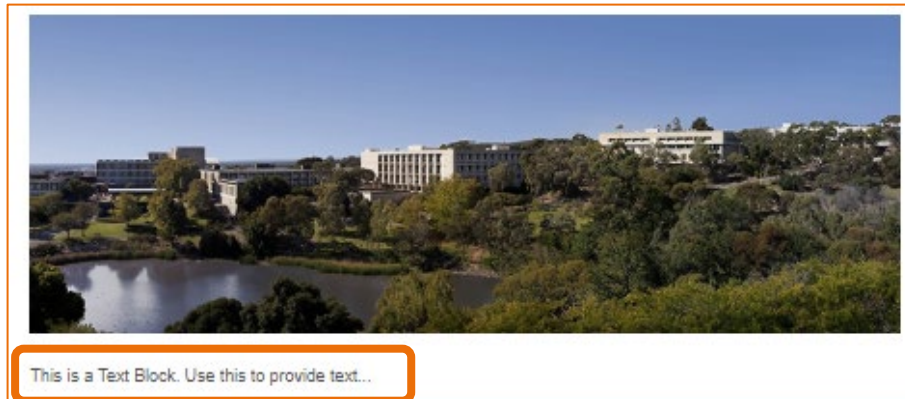

Edit Content pane

7. The **Edit Content** pane is displayed on the right hand side of the screen.
   - Click in the area **This is a text Block. Use this to provide text…**, select the text and delete this text;
   - Select the correct font formatting or format after typing the information;
   - Type the information to be included in the Body of the email. This information is displayed in the Body panel as it is typed.
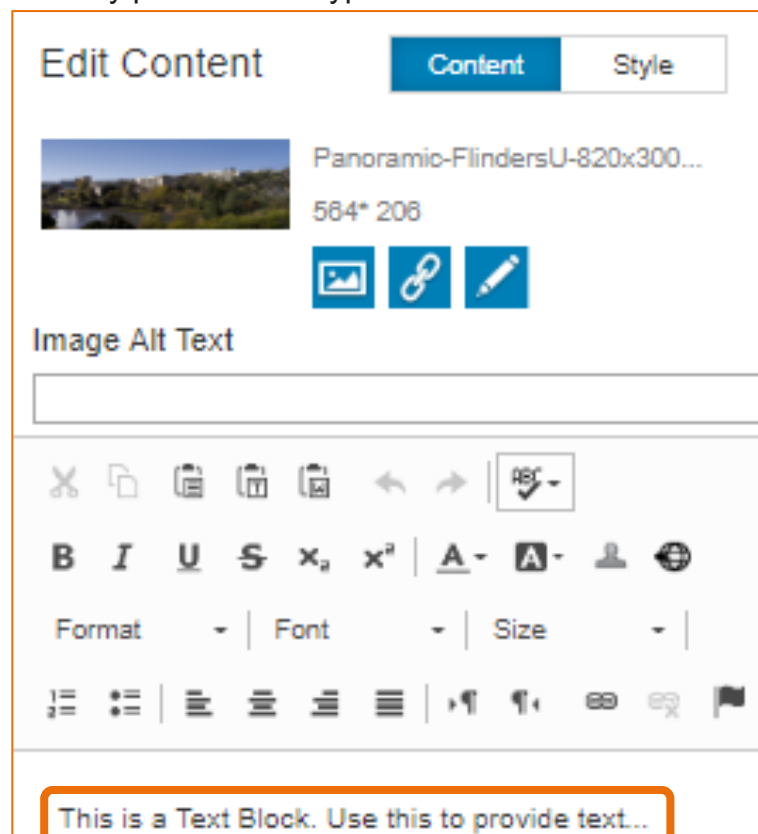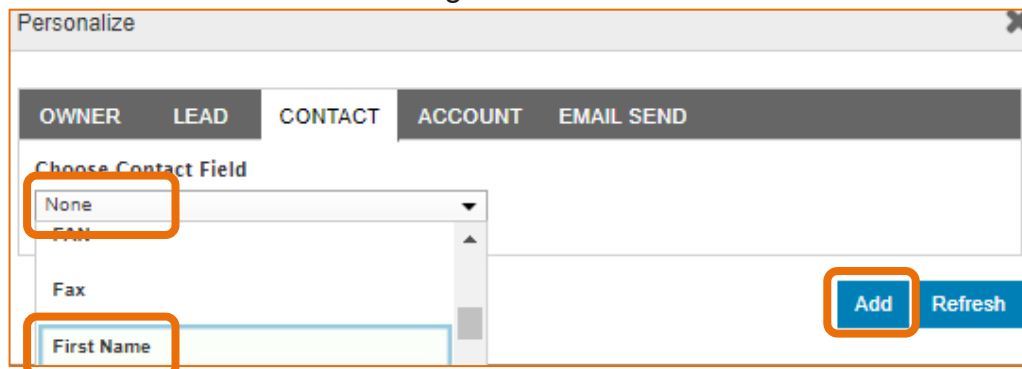
Inserting Field Codes

The Email can be personalised by inserting, for example, the **First Name** and **Last Name** of the Student as well as any other information which is relevant to the Email content. This information is sourced from MS Dynamics Student CRM Records.

1. Place the cursor in the appropriate area of the body text.

2. Click on the 👤 **Personalise** icon, located in the formatting ribbon, 2nd row.
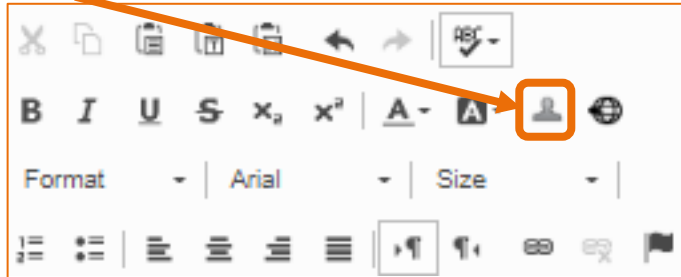
3. The **Personalise** window is displayed. Click in the field beneath **Choose Contact Field** and locate the correct Field Name, for example First Name will insert the contents of the MS Dynamics Student CRM Contact Record, First name. Typing an **f** will move the selection to the first Field Name starting with f.


4. Click **Add** in the bottom right hand corner of the Personalise window.

5. The Field code will be inserted in the Email Template.

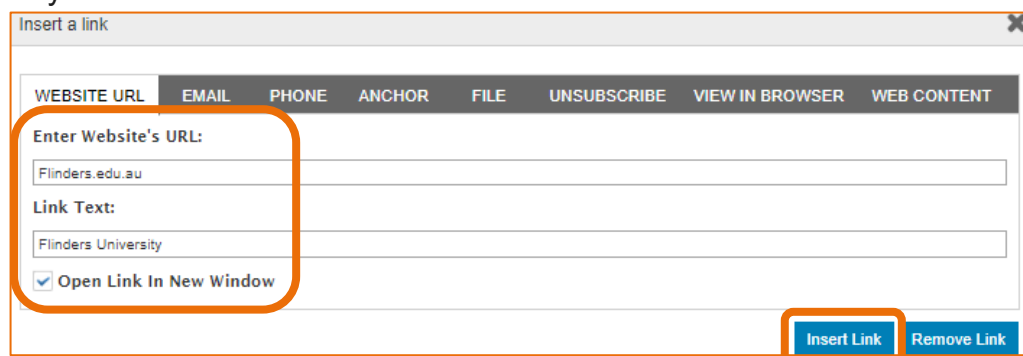6. Repeat from Step 1, Page 13 to 4, Page 13 to continue to insert more Field Codes.

Hyperlinks

Hyperlinks are helpful to share information from web sites in the Email.
1. Refer to the instructions **Edit Content pane** on Page 12.

2. Locate the cursor in the correction position. Click the Link icon, located in the formatting ribbon bottom row. The **Insert a link** window will be displayed.
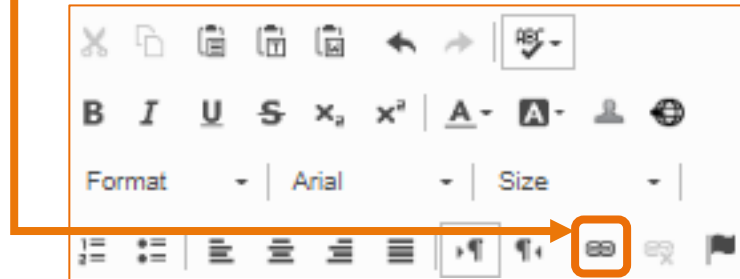
3. Enter the **Website's URL** (web address) or copy and paste from the web address to ensure accuracy.

4. Enter the **Link Text** – the information to appear in the Email where the Student will click.

5. Click on the tick box if you wish to **Open Link New Window** when this link is clicked.

6. Click on **Insert Link** in the bottom right hand corner of the window. The Link will be placed in the Body text.


Edit the Link

1. Place the cursor anywhere in the link information.

2. Click the Link icon, located in the formatting ribbon, bottom row. The **Insert a link** window will be displayed.

3. Edit the link information.

4. Click on **Insert Link** in the bottom right hand corner of the window.

Preview

8. The information typed in the Edit Content pane is simultaneously displayed in the Body Panel.
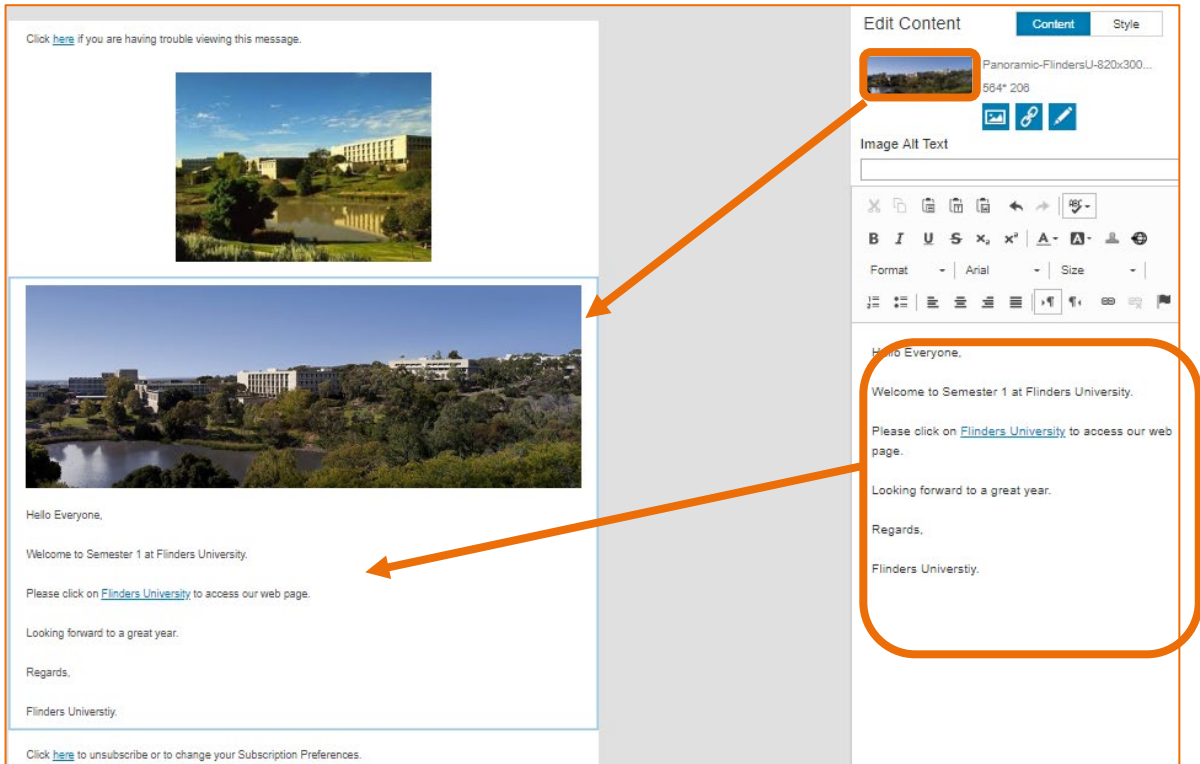
9. Click on **Preview** in the top let hand corner of the window to preview the Email. This includes how it would appear on a mobile device.
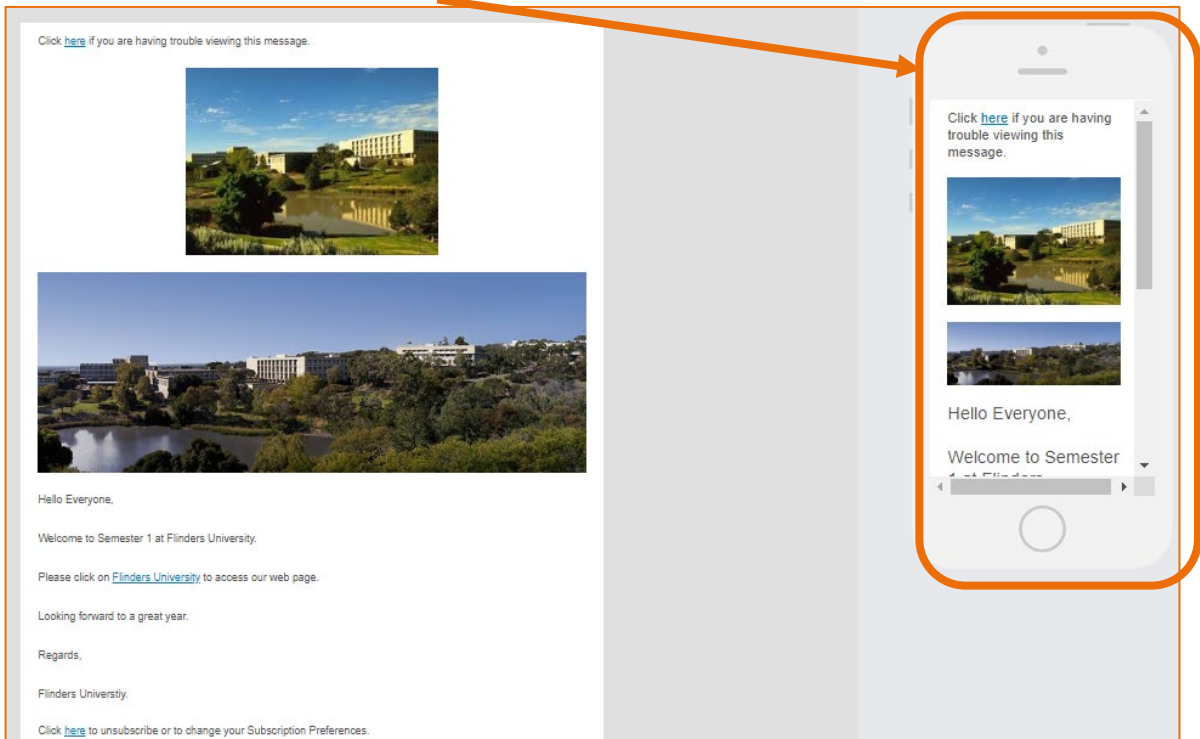
Save and Close

10. Click 🖫 SAVE **Save** in the top left hand corner of the screen, which of course should be done throughout the creation of the Email Template.

11. Click the **X** in the top right hand corner to close the Editor window.

Version Control

Version Number	Version Date	Changes
1.0	February, 2020	Original Notes. Uploaded to FLO.
2.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
3.0	October, 2020	Renamed from How to Guide Creating Bulk Email Templates using Standard Environment Market Module. Updated for Unified User Interface. Uploaded to FLO.