MS Dynamics Student CRM
Flinders University

Flinders International Intent to Study

Developed by Wendy James, Training Specialist

October, 2020

Version 8.0

Contents

Intent to Study 3
Sign in to MS Dynamics Student CRM 4
Sign Out of MS Dynamics Student CRM 5
Navigation Menu, New, Phone Call Activity 6
  Phone call 6
  Owner 7
  Subject 7
  Call From 8
  Call To 8
  Description 8
  Call Response 8
  Call Outcome 8
  Save and Close 9
  Mark Complete 9
  Area of Study 9
Case Record, Create a Phone Activity 10
Contact Record and Return to Case Record 10
  Navigate the Case Record 10
  Navigate back to the Case Record 11
Contact Record – Create a Timeline, Phone Call Activity 12
Contact Record 12
  Area of Study 12
Version Control 13

Intent to Study

The Contact Record of a **Prospective International Student** includes a field in the CONTACT INFORMATION pane - **Intent to Study**.

The instructions below include information on how to update the **Intent to Study**. The methods are:

- Create a **Navigation Menu**, **New**, **Phone Call Activity.** Refer to Page 6 or click here.
- **Case Record** – create a **Phone Call Activity**. Refer to Page 10 or click here.
- **Case Record, Update Contact Record and Return to Case Record**. Refer to Page 10 or click here.
- **Contact Record** – create a **Timeline**, **Phone Call Activity**. Refer to Page 12 or click here.
- **Contact Record** – select the correct option in the **Intent to Study** field. Refer to Page 12 or click here.
- Information is also included on how to update the **Area of Study:**
  Creating the Phone Call from Navigation Menu on Page 9 of click here.
  Contact Record on Page 12 or click here.

The instructions below also include some Business Processes.

The Phone Call Activity form is exactly the same regardless of which of the three options are selected.

Complete the Contact Record, Area of Study field whenever possible.

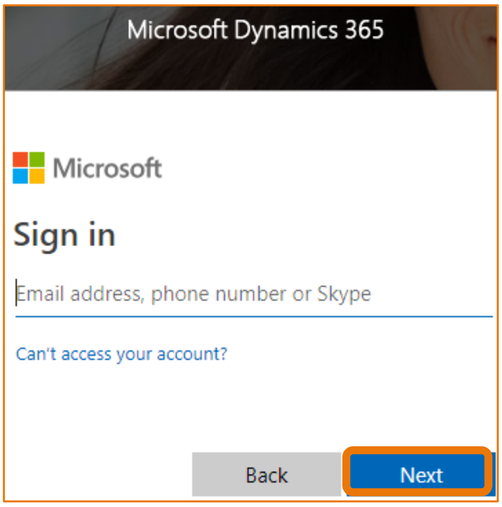
If a Phone Call Activity has inadvertently been assigned to the wrong Contact Record it is possible to change the Contact Record. If the Phone Call Activity has been Marked Complete refer to Megan Turnbull or Andrew Roddam.

Sign in to MS Dynamics Student CRM

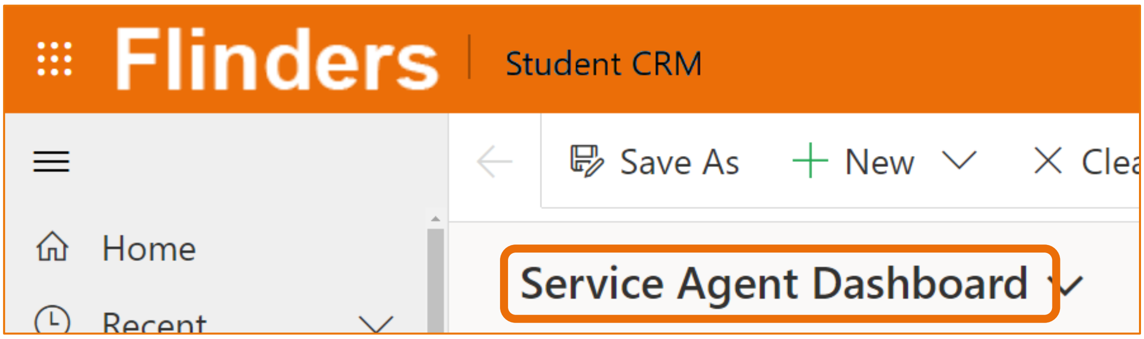
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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.

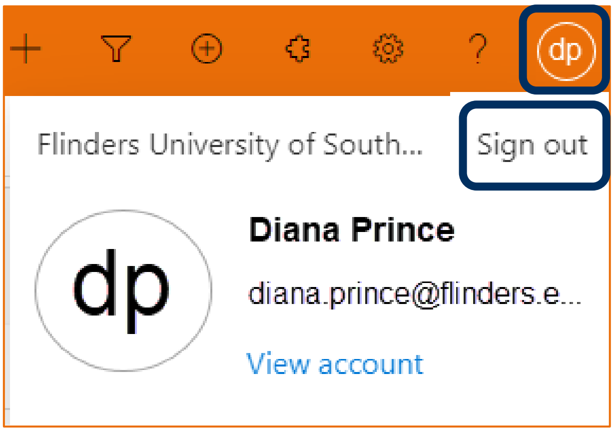


Sign Out of MS Dynamics Student CRM

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.

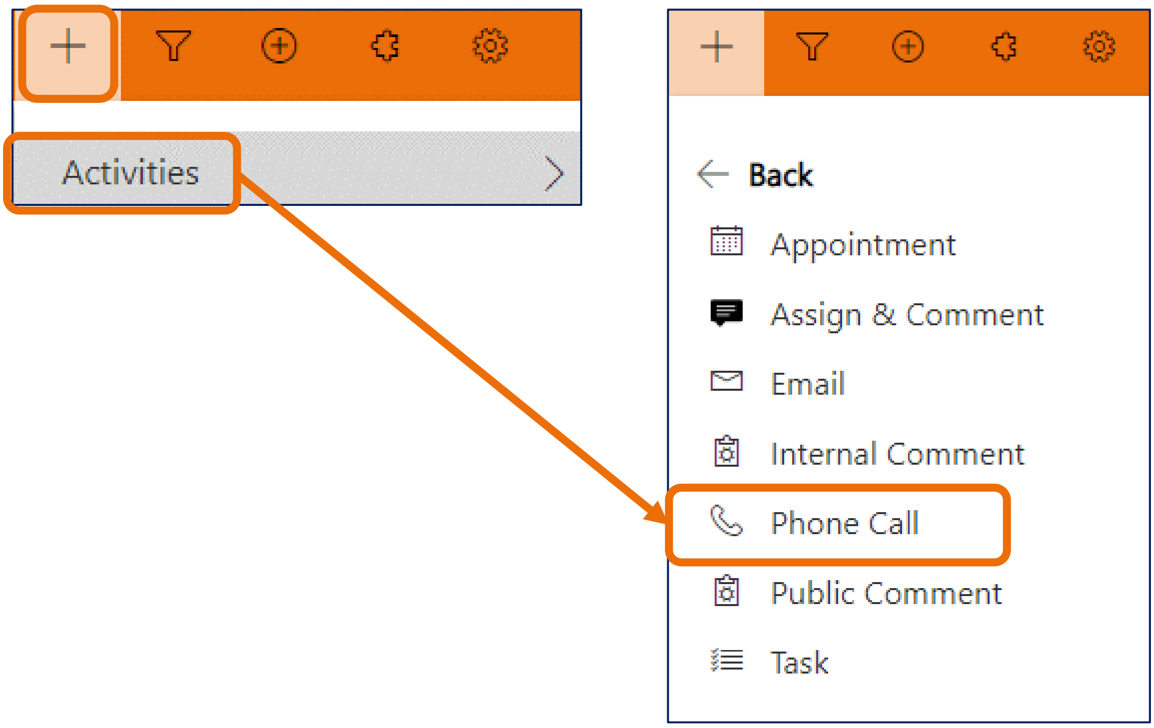
Navigation Menu, New, Phone Call Activity

The Staff member records the details of the phone call with the prospective Student and creates a Phone Activity against the Contact Record. A Work flow automatically updates the Intent to Study field in the Contact Record.

Phone call

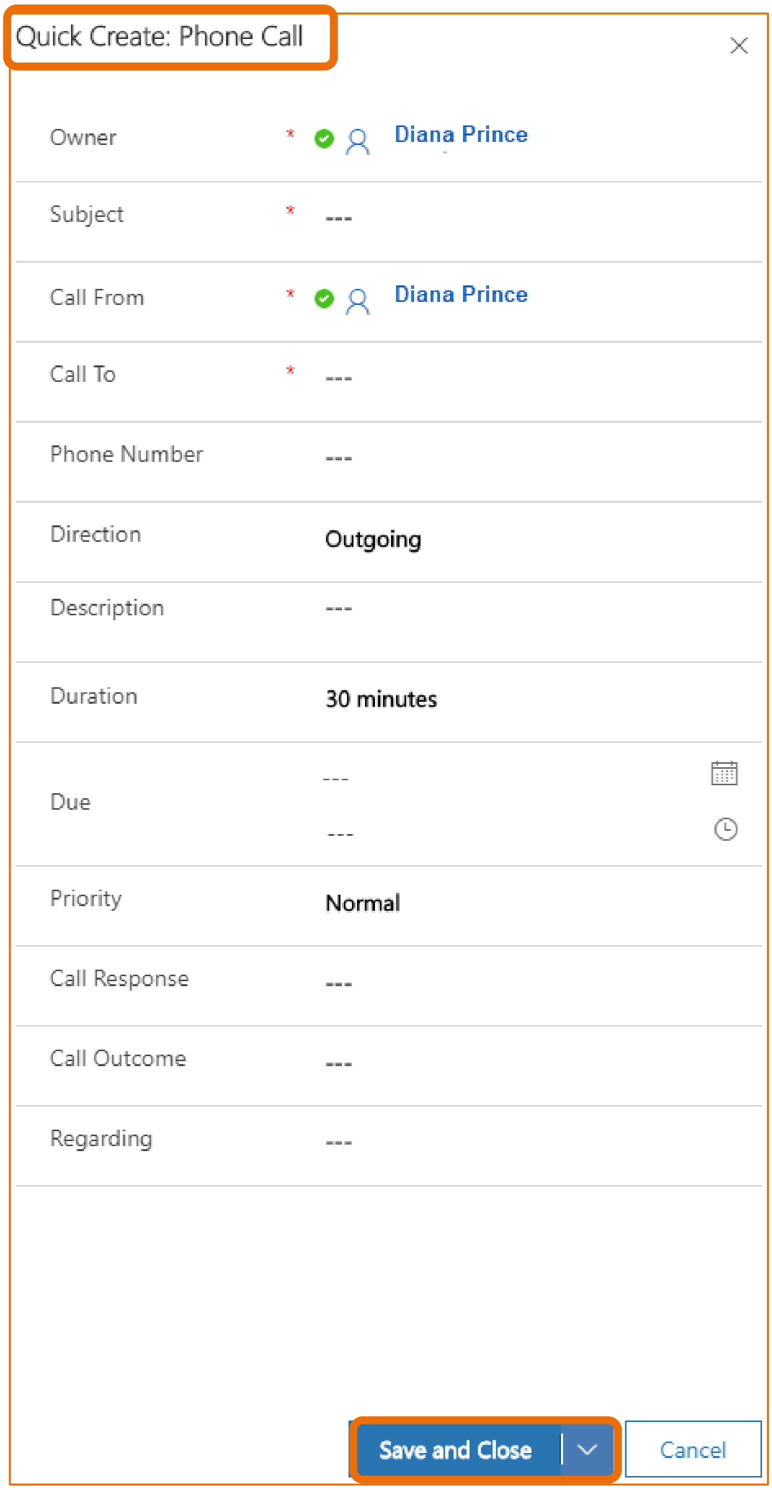
1. After or during the phone call, click on the click on + **New** icon on the right hand side Navigation Menu.

2. Click on **Activities** from the drop down menu and click on **Phone Call**.



3. The **Quick Create: Phone Call** form is displayed.

   Complete all details as required. The mandatory fields are marked with an *. Some fields are described below.



Owner

The name of the Owner should be inserted automatically. Otherwise search for and insert the Staff member's name.

Subject

Type the subject of the phone call.

Call From

The name of the Staff member should be inserted automatically. Otherwise search for and insert the Staff member's name.

Call To

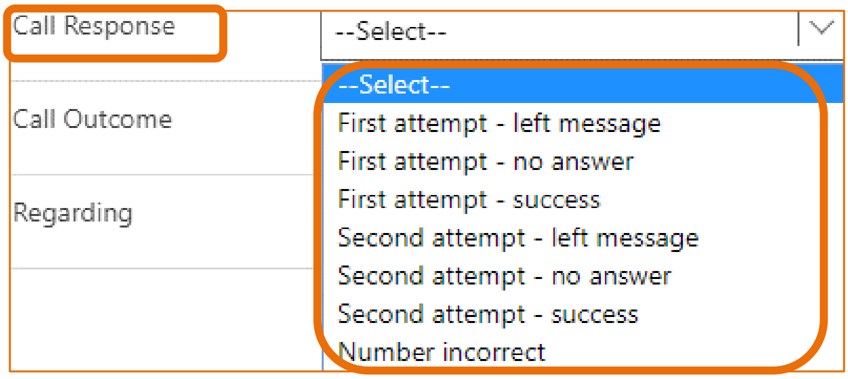
Search for and insert the Contact name.

Description

Type any details regarding the phone call conversation.

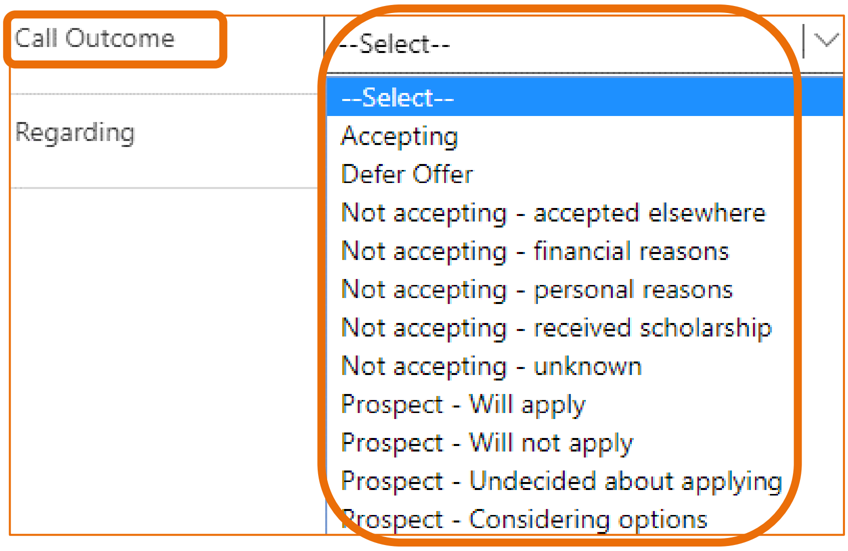
Call Response

Click in the area to the right of Call Response and select appropriately from the drop down menu.



Call Outcome.

Click in the area to the right of Call Outcome and select appropriately from the drop down menu.



Save and Close

4. Click Save and Close **Save and Close** in the bottom right hand corner of the Phone Call form.
   The Phone call activity is now displayed in the Contact Record, Timeline.

Mark Complete

5. Search for and open the Contact Record.
   In the Timeline resting the mouse on the Phone Call Record displays the following icons: . Click on the **Open Record** icon.

6. Click on ✓ MARK COMPLETE **Mark Complete** in the top left hand corner of the Menu Bar. This is **very important** as the information in the Call Outcome will be updated in the Contact Record after clicking **Mark Complete**.

   The Phone Activity is displayed in the Contact Record, Timeline.

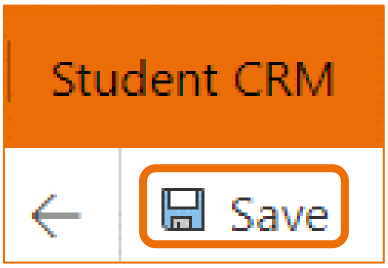
7. Refresh the screen to update the Contact Record. The **Intent to Study** field will update to the result selected in Call Outcome.

   The Phone Call Activity will be displayed in the Timeline of the Contact Record.

Area of Study

8. Contact Record, CONTACT INFORMATION, **Area of study field** – click in this field and select the correct option.

9. Click Save **Save** in the Menu Bar.



Case Record, Create a Phone Activity

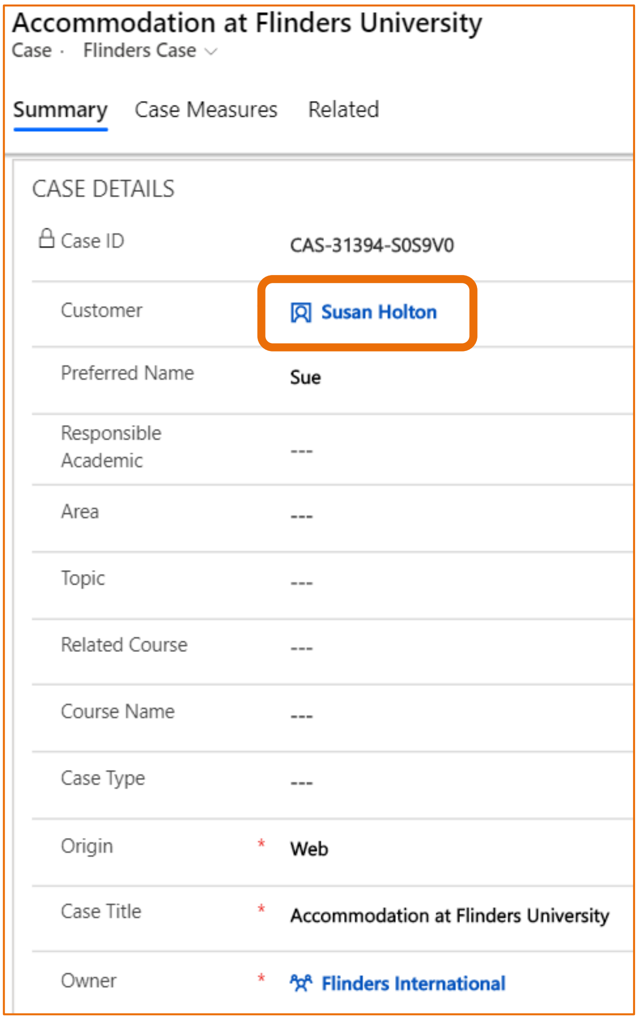
The Staff member records the details of the phone call with the prospective Student and creates a Phone Activity against the Contact's **Case Record**. A Work flow automatically updates the Intent to Study field in the Contact Record.
These are exactly the same instructions as Navigation Menu, New, Phone Call Activity, starting Step 3, Page 6 to complete the information, EXCEPT the reference is to the Case Record, not the Contact Record.

Contact Record and Return to Case Record

If a case presents an insight into a Contact's intention to study it is helpful to move to the Contact Record, update the **Intent to Study** field and then return to the Case Record.

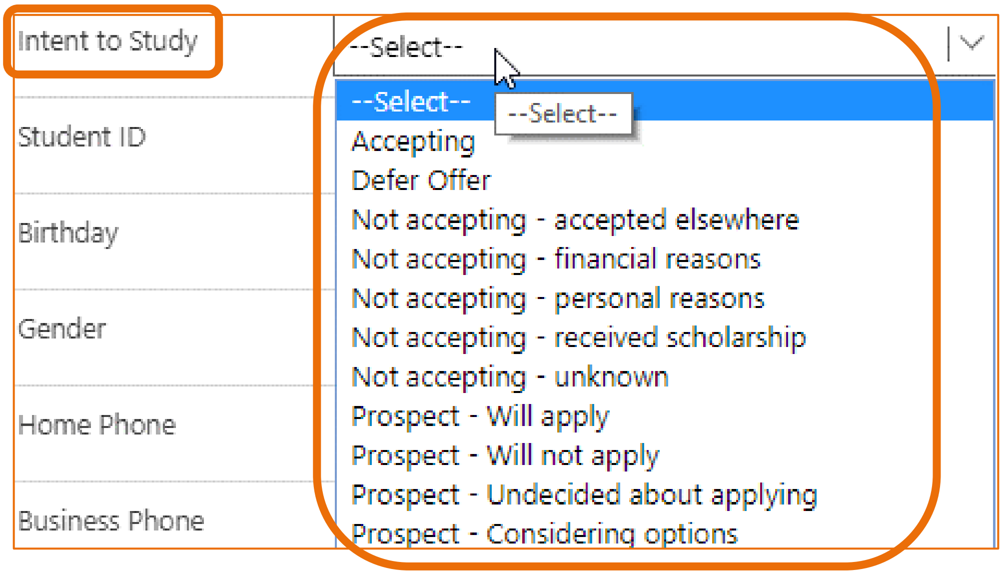
Navigate the Case Record

1. Whilst viewing the Case, click on the **Contact Record** name.



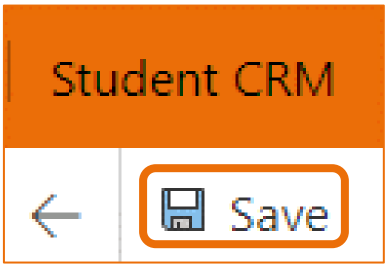
2. The Contact Record is displayed.

3. Click adjacent to **Intent to Study** field and select from the drop down list.



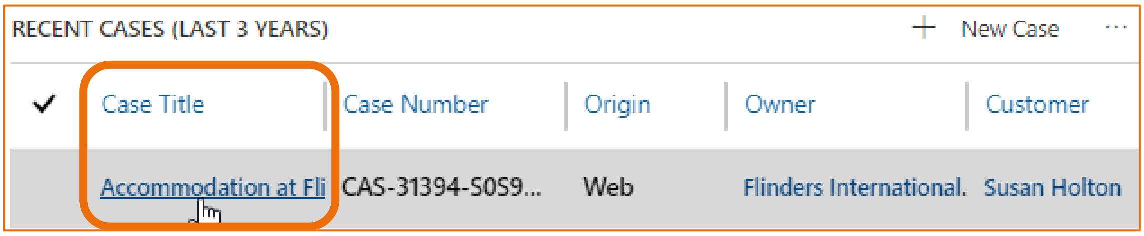
4. Click 

Save in the Menu Bar.



Navigate back to the Case Record

5. Click on the name of Case, located on the right hand side of the Contact Record or from Navigation Menu, Recent list. The Case is now displayed.



Contact Record – Create a Timeline, Phone Call Activity

The Staff member records the details of the phone call with the prospective Student and creates a Phone Activity against the Contact's Record. A Work flow automatically updates the Intent to Study field in the Contact Record.

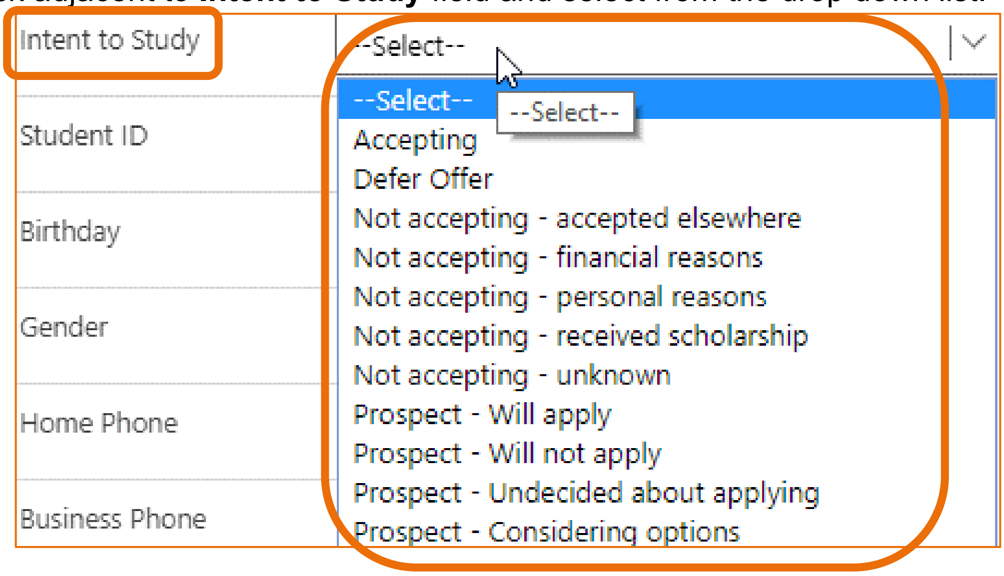
These are exactly the same instructions as **Navigation Menu, New, Phone Call Activity**, starting Step 3, Page 6 to complete the information.

Contact Record

This method allows the **Intent to Study** field change to be made directly in the Contact Record, Contact Information.

1. Open the Contact Record.

2. Click adjacent to **Intent to Study** field and select from the drop down list.

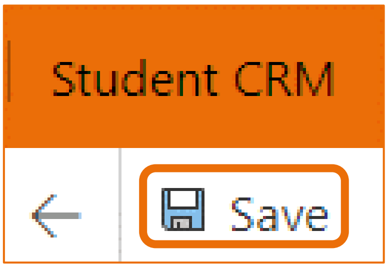


Area of Study

3. Contact Record, CONTACT INFORMATION, **Area of study** field – click in this field and select the correct option.

4. Click 

Save in the Menu Bar.



Version Control

Version Number	Version Date	Changes
1.0	September, 2019	Original Notes. Uploaded to FLO.
2.0	October, 2019	Updated the Phone Call Activity picture on page 7. Updated for October Upgrade. Uploaded to FLO.
3.0	February, 2020	Updated some pictures. Included references to Area of Study. Uploaded to FLO.
4.0	February, 2020	References on Page 3 regarding Complete the Contact Record, Area of Study field whenever possible AND If a Phone Call Activity has inadvertently been assigned to the wrong Contact Record it is possible to change the Contact Record. If the Phone Call Activity has been Marked Complete refer to Nick Andrews. Removed reference to Standard Environment. Uploaded to FLO.
5.0	April, 2020	Updated for the April Upgrade. Uploaded to FLO.
6.0	April, 2020	Replaced reference to Nick Andrews on Page 3 and replaced with Andrew Roddam or Megan Turnbull.
7.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
8.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.