MS Dynamics Student CRM
Flinders University

Frequently Asked Questions

Developed by Wendy James, Training Specialist

March, 2021

Version 3.0

Frequently Asked Questions
Assign & Comment The Team list (for example Assign & Comment) contains Teams who do not use CRM. Is this a current list? **ANSWER** Please log a call with ServiceOne with all details if an occurrence that a Team needs to be decommissioned.
Assign & Comment Timeline, Activities, Navigation Menu, Assign & Comment: what is **Regarding**? **ANSWER** We are not using this at present.
Case Can Flinders University Staff members with a CRM logon see any Case in MS Dynamics Student CRM? **ANSWER** Yes. At present any Flinders Staff member with a logon to CRM can see all Records in MS Dynamics Student CRM.
Case What can the Student see in CRM? **ANSWER** A Student cannot access CRM – this is for Flinders University Staff members only. The Ask Flinders portal allows the Student to view their past and current open Cases.
Case How can I view a Case in a new tab. **Answer** Copy the URL, open a new browser tab and paste the URL though it is best not to open too many CRM sessions concurrently.
Case Details Case Details; Responsible Academic – is this field going to be used in the future? **ANSWER** At present this is not being used but this field was created part of credit transfer form implementation. “Indicates an academic as a point of contact for this case. Helps to identify the academic responsible for a given requisite waiver or credit transfer. Follow Business Processes.
Case Record If a Case is created under the incorrect Contact Record, can the Case be moved to the correct Contact record or do I need to recreate again? **ANSWER** Yes – log a call with ServiceOne including the Record information and request this merge.

Frequently Asked Questions
Case Record How to open a Case in a new tab? **ANSWER** Rest the mouse on the Case Title (hyperlink). Ctrl+Click will open the Case in a new Browser Tab. Shift+Click will open the Case in a new Browser window.
Case Title Case Title – sometimes the Case Title does not exist. **ANSWER** This can happen if a Student sends an email via AskFlinders without a Subject. Double click the date to open the Case and type a Case Title.
Case, Audit History Where is the full Audit History of the Case in Customer Hub? **ANSWER** Case – click **Related**, **Activities** (under the Case title, left hand side of the screen). The list of Activities are displayed. Click on **Summary** to return to the Case, Timeline.
Case Details form Can the Student ID be positioned in the Case Details, underneath the Preferred name or straight under the Case ID? They use this number a lot and it would be easier to locate it more quickly? **ANSWER** These can only be achieved through customisations or plugins. The CRM Team would need to look further into this.
Case, Knowledge Base I cannot see any KB in the Case. **ANSWER** Type the key words in the Case Record, KB Records search field.
Case, Timeline Timeline – on occasions this is not in date order. **ANSWER** If this occurs please log a call with screen shots and Case number with asyssNET.
Case, Timeline Timeline: Size of the Timeline, Activity Status is too big; would be nice to have the area of the Timeline larger so reading emails and comments without clicking the drop down arrow or … enlarge entity. Could the Case Details column could be reduced in size? **ANSWER** The filter area has been removed so the area of the Timeline is now larger.

Frequently Asked Questions
Case, Timeline, Activities, Assign Timeline, Activities, Assign icon beneath the Activity – using this for an Activity only assigns the Activity and why would we use it? **ANSWER** Use the Timeline, Navigation Menu, Assign & Comment.
Case, Timeline, Activity If an Activity is created under an incorrect Case, can the Activity be moved to the correct Case. **ANSWER** Yes- log a call with ServiceOne and request this merge.
Case, Timeline, Assign & Comment Timeline, Assign & Comment – Notify User tick box – can this be configured to be ticked by default based on User or Team selected? **ANSWER** This can be configured by the CRM Team. A Request needs to be made.
Case, Timeline, Assign & Comment Timeline, Activities, Navigation Menu, Assign icon – assigns the Case but the prompt is the same as if using the Activity Assign. This is confusing. **ANSWER** Use the Timeline, Navigation Menu, Assign & Comment.
Case, Timeline, Email Case/Contact Timeline - how to delete an unwanted Draft Email Activity **ANSWER** It is not possible for a CRM Staff Member to be able to delete a Draft Email. Please log a ticket in ServiceOne with the details of the Draft Email Activity to be deleted.
Case, Timeline, Email Timeline, Email Activity – notification about potentially harmful email content – is this configurable. **ANSWER** This is a known issue with Microsoft and it is not likely to change. It is a security feature.
Case, Timeline, Email Is it possible to create an email from the Contact Record without creating a case? **ANSWER** Yes – it is possible to create the email from the Contact Record (**+, Activity, Email**) but follow Business Processes as the email will not have a Case number and is difficult to trace.
Case, Timeline, Email Will the CRM sender (Team or User) of the email be notified when the Recipient replies? **ANSWER** The Sender will receive an Outlook email advising an email has been received; the email will located in the Case Timeline.

Frequently Asked Questions
Case, Timeline, Email How to create Email Templates? **ANSWER** Follow Team Business Processes. As at October, 2020 Email Templates is located at the bottom of the Navigation Pane. The information is still found in Settings, Personalise Settings, Email Templates, New, Template Type; create the Template, Save and Close, Close. Refer to the document How to Guide Create and Use Email Templates and also CRM How to Guide Create and Use Email Signatures to create a Email Signature.
Case, Timeline, Email How to add attachments and are they visible for the CRM User? **ANSWER** Yes, the CRM User can view the attachments. Case, Timeline, Email – create the email, save the email, click the Attach File icon in the Navigation Menu; select the file; Send the email. Refer to the document CRM How to Guide Sending an Email and with Attachment and Hyperlink to a Student. More information will be created in a CRM User guide about adding an attachment to an Internal Comment and Note.
Case, Timeline, Email Can I easily view the contents of an email in another window. **ANSWER** Click on the **… Open Entity Record** to view the Email. Click the Back arrow or name of Case to navigate back to the Case. **OR** Copy the URL, open a new browser tab and paste the URL, then **…Open Entity Record** to view the Email. Close the Tab. Do not open though it is best not to open too many CRM sessions concurrently.
Case, Timeline, Email Can the From field in an email default to the Team? **Answer** This would need to be a global change to MS Dynamics Student CRM with agreement across all Organisations.
Case, Timeline, Email If I forward a Case via email to CRM does the reply return to CRM? **ANSWER** Yes. The CRM number is in the Subject of the email and there is also a link.

Frequently Asked Questions
Case, Timeline, Email An email has been sent to the Student from CRM and the Student replies. If a Staff member replies to this email from Outlook, given the Case Number is included in the Subject, will the reply automatically be added as an Activity in the Case? **ANSWER** Yes. Ensure the Subject remains the same.
Case, Timeline, Email Can I save an email as a draft and then it is saved as a draft email to send later? **ANSWER** Yes. Click the Save icon in the Email menu. The Activity Icon displays 'Draft email. Click on **… Open Record** and continue working on the email.
Case, Timeline, Email Would it be possible to mark an Email UNREAD (like in Outlook) to make it more outstanding that it has not been read? **ANSWER** This feature has not been mentioned for the next release but will be raised as a suggestion.
Case, Timeline, Email How can the Staff who do not use CRM be informed/educated that when they reply to a CRM generated email the reply is linked to CRM. **Answer** Include this information at the beginning or end of the email being sent. Follow Business Process.
Case, Timeline, Email, Default Email Address A Contact has finished studying at Flinders Uni so therefore their Flinders email address (CRM default email address) is no longer valid. BUT if they send an email (could be from AskFlinders or an email to askflinders@flinders.edu.au) a Case is therefore created. As this Student was an original Contact in CRM with this default email address this is automatically filled in the reply but the email address is no longer valid. How do we change the default Contact email address? **ANSWER** To be able to reply to this Contact create a new Contact Record with their personal email address (alternative email).
Case, Timeline, Email, Email Address Email sent to a Student defaults to their FAN email address. How can we send to their second email address or how can we reply to the email address the Student has used. **ANSWER** Follow Business Processes. Some staff work around is to send from their outlook account.

Frequently Asked Questions
Case, Timeline, Email, Email Addresses Free text for the email address? From which email address on a Contact Record is a CRM email sent? Different situations are: • Sometimes the Student requests to be emailed to a different email address; • Student's Flinders email address is obsolete; • Student does not read their Flinders University emails **ANSWER** Emails are only sent to the default CRM Customer Record email address. Therefore, create a new contact with the same name and add the new email address. The CC field cannot be used with 'free text' either as it will still select the default email address therefore CC is overridden.
Case, Timeline, Email, Email Attachment Is it possible to select more than one file at the same time instead of individually select files? **ANSWER** No – more than one file can be attached to an email but they must be selected individually. Select the files as per the instructions in CRM How to Guide Sending an Email and with Attachment and Hyperlink to a Student; click on Attach File in the menu or New attachment on the right hand side to attach more files.
Email, Pop-out Email Form Could the new pop out Email form be like a window and be able to be dragged on the screen? **ANSWER** In April, 2020 Microsoft provided a new Enhanced Email 'pop-out' Email window. This window can be maximised and minimised but cannot be dragged. This feature has not been mentioned for the next release but will be raised as a suggestion.
Case, Timeline, Email, Templates Email Template – General Response template keeps disappearing. It was renamed to General 2 but has not worked consistently over the past few months. **ANSWER** If the General Template is not visible, remove the recipient's name in the To: field, click on **Insert Template**, type **gen** to search, select and insert the General Template.
Case, Timeline, Email, Templates Can a list of all the Templates available be collated? **ANSWER** The CRM Team can provide a list and contents of Global Templates **BUT** as these are updated by CRM Users it would need to be maintained. Each time a Global Template is changed or added the CRM Team would need to be advised.

Frequently Asked Questions
Case, Timeline, Email, Templates Templates are not always working properly. **ANSWER** Please log a call with asyssNET with examples if you experience a problem with the Email Templates.
Case, Timeline, Internal Comment How to attach, for example an Academic Record, to an Internal Comment. **ANSWER** Create and save the Internal Comment. Click on **… Open Entity Record**. Right hand side of the screen, Internal Comment Timeline – click on the paper click symbol; select the file and save. NOTE: 5MB is the maximum size at present.
Case, Timeline, Public Comment Can Public Comments be viewed by the Student when logging into AskFlinders? **ANSWER** Yes. BUT the Public Comment needs Mark Complete to be completed first. Then a Student can see their Case's Public Comments via AskFlinders. Refer to the document CRM How to Guide Adding Comments to a Case.
Case, Timeline, Public Comments Should Public Comments be used? **ANSWER** As the Student can see the public comment in AskFlinders, be careful and follow Business Processes which are appropriate guidelines for Staff use.
Contact Details Incorrect student details in CRM? How did this happen? **ANSWER** Information is updated from Student2 to CRM every night so if a change is made in the CRM Contact Record it will be overwritten from Student2. Ask the Student to update their information in their Student2 record.
Contact Details Does Student2 override the CRM details, for example phone number. **ANSWER** Yes. Information is updated from Student2 to CRM every night if a change has been made in Student2. Ask the Student to update their details in Student2 if it is incorrect in CRM.
Contact Record In Standard environment I used the Contact Record **Customer Face …** by opening three sessions of CRM. How do I do this when using Customer Hub environment. **ANSWER** Use the pin feature, Navigation Pane, Favourites and Recent to pin the Contact Record and can therefore access it quickly.

Frequently Asked Questions
Contact Record, Timeline, Activities Can we/do we use the + and Tasks from the Customer record, not the Case record. **Answer** Follow Business Procedures. This does not appear to be a good process as the Task is not on a Case and cannot be easily traced. Meredith Legg will ask her Team.
Contact Record, Timeline, Activities, Email Can I create an email from the contact record instead of creating a new Case. **Answer** Follow business procedures but not really a good idea as not as easily searched and the email conversation is not attached to a CRM Case number.
Contacts When creating Contacts, does CRM check for duplicates? If so, based on what field? **ANSWER** Yes. This is based on the email address. A message will appear after saving the Contact Record to advise there is a duplicate Contact Record.
Customer Service Hub Why has the Customer Hub been introduced? **ANSWER** Customer Service Hub was introduced due to architectural changes implemented by Microsoft to CRM Dynamics. Microsoft will continue to build and enhance the Customer Service Hub. Therefore Flinders University is able to use these enhancements.
Email Replies Does the Student see the email as a reply from, for example, an Academic who does not use CRM? **ANSWER** The Student should only see the contents of an Email if their Email address is inserted in the To or Cc fields.
Email Replies As a Student can see the email as a reply from, example, an Academic can information be added to the Template to advise the Academic that the Student will be able to read the contents of the email about to be sent? **ANSWER** Follow Business Processes. This can be added to the Team’s Template.
Knowledge Articles/Knowledge Base IS KB (Knowledge Base) the same as Knowledge Articles? **ANSWER** KB (Knowledge Base) is now Knowledge Articles and is now found in Customer Service Hub, Navigation Pane as well as in the Case Record.

Frequently Asked Questions
Knowledge Articles/Knowledge Base The majority of the Staff said they do not use the KBs. They are not sure if they are reliable, who owns and updates them. **ANSWER** This has been discussed at the CRM Working Group. Further discussion is needed before any changes can be made.
Printing Can I print from Microsoft Dynamics Student CRM? **ANSWER** A print of the current screen is available through the browser printing BUT if more specific printing of fields and information is required it would involve the CRM Team to add functionality to generate a printable version of the Case. Therefore more information is needed on which fields and information is to be printed.
Reactivate a Case Does Reactivating a Case by a member of Staff send a notification to the Student to advise the Case is now open again? **ANSWER** No. Reactivating a Case by a Staff member does not send an Email to the Student The Student is only notified when a new Case is created and the Student is the Contact.
Resolve Cases How can I bulk Resolve Cases? **ANSWER** Display the appropriate System View, for example My Active Cases. Click on the See all records located on the right hand side of the System View. Click to the left of each Case to be Resolved to select the Cases and insert a tick. Click on Bulk Resolve in the Menu Bar. The message 'Bulk close process initiated. Please refresh the view after a min.' is displayed. Click on OK.
Resolved Cases Many Cases have been resolved in a Staff member’s name instead of the Team’s name. Can these Resolved Cases assigned back to Student Recruitment and remain Resolved? **Answer** Log a call with ServcieOne with as much detail as possible.
Student 2 and Contact Details Does Student2 override the CRM details, for example phone number. Problem is that if a Contact detail is updated in CRM it can be overwritten by the original data from Student2. This is more a problem with prospective Students who exist in Student2 but do not yet have access to Student2 to change their details. **ANSWER** Yes – CRM receives nightly updates from Student2 so any updates in CRM will be overwritten.

Frequently Asked Questions
Student Communication How to communicate with the Student as to the status of their Case? **ANSWER** Follow Business Processes. Send the Email from CRM to ensure the history of all emails are saved in CRM – Timeline, Activities, Email.
Student Communication When does the Student receive any information from MS Dynamics Student CRM? **ANSWER** If a Student sends an enquiry from AskFlinders, an automatic email advising the Case has been created is sent to the Student. If a Staff member creates a Case in CRM with the Student as the Contact, an automatic email advising the Case has been created is sent to the Student. A Case, Timeline, Public Comment is created. Case, Timeline, Email – the Student is emailed. Email sent or received with the Case number included in the Subject.

Version Control

Version Number	Version Date	Changes
1.0	2018	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	March, 2021	Updated to reflect change from Customer Service Hub to Student CRM.