

MS Dynamics Student CRM

Flinders University

Open University Australia

Opportunities

Developed by Wendy James, Training Specialist

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Version 8.0

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Open University Applications - Opportunities

Open Universities Australia is an online higher education organisation. It has a unique partnership with leading Australian Universities to provide prospective Students with more choice and easier access to study at University.

Previously the details of prospective Flinders University Students were imported in to a MS Dynamics Student CRM Case. As of October, 2020 the information is accessed in MS Dynamics Student CRM instead of Dynamics 365 – custom (sometimes referred to as Standard Environment).

The steps involved to view the Opportunity details, the Contact details, create an Email Activity, create a Phone Call Activity and Action an Enquiry are described in these notes.

OUA Data Background

- **OUA** is the acronym used for Open Universities Australia in these notes.
- In MS Dynamics Student CRM the terms **Prospective**, **Student** and **Contact** all refer to the **Contact**.
- A prospective University Student completes a form on the Open Universities Australia website. A sample OUA lead referral form can be viewed [here](#).
- Software integrating between OAU and MS Dynamics Student CRM feeds appropriate information every 2 minutes into the CRM and creates a Contact record if not already existing in the CRM and an Opportunity record.
- If the prospective Student does not already have a Contact record in MS Dynamics CRM, a new Contact record is automatically created in MS Dynamics CRM. This is based on unique Contact information being added in the OUA form.
- If the prospective Student already has a Contact record in MS Dynamics CRM, the Opportunity record will be created using the existing Contact Record.
- Should a Prospective Student complete an OUA form more than once for the same Course only one Opportunity Record will be created. Therefore, there will not be duplicate Opportunities.
- Prospective Students Team & STEM Outreach Team members will view the new Opportunities in the DOM-Opportunities OUA Leads Dashboard.

OUA Opportunity Assignment Workflow

- An Opportunity is Assigned to 'Me' to ensure only one Staff Member takes action on the Opportunity. Many opportunities can be 'Bulk Assigned' as explained on Page 13. The Opportunities are then displayed in the **Dom-OUA Opportunities Dashboard, My OUA Open Opportunity – UnActioned System View**. These records will remain in this System View until they have been **Enquiry Actioned** and are then moved to the **Dom-OUA Opportunities Dashboard, My OUA Open Opportunities – Actioned System View**.
- When an Opportunity has been Assigned to 'Me' and not Enquiry Actioned within 5 consecutive days, the Opportunity will then move to the **Dom-Opportunities OUA Leads System View**. This will allow other staff members to pick up the opportunity and ensure that all Opportunities are visible if a Staff member goes on leave.
- If a Prospect responds to the Opportunity again, for example replying to an Email, and within 5 consecutive days, the Opportunity becomes UnActioned and moves back to the **My OUA Open Opportunity – UnActioned System View**. This means that the Opportunity becomes a **new** Opportunity and needs to be actioned again by ticking the **Enquiry Actioned tick box** each time there is new activity from the Prospect on the same Opportunity. This process will continue to happen until the Prospect no longer has any follow up questions.
- If a Prospect has not responded to the initial Opportunity response, for example an Email, within 5 consecutive days, the Opportunity will remain on the **My OUA Open Opportunity – Actioned**.
- **Note:** A process is to be determined in regard to responses from the Prospect and assigning the Opportunity. Refer to **Assign the Opportunity** on Page 12.
- The Opportunity remains open and if a Prospective Student does not enroll the Opportunity automatically closes at the end of the Calendar year. It is then automatically changed to **CLOSE AS LOST** and the **Status Reason** changes to **Lost**.
- Actions in the Opportunity (the arrows beneath the Opportunity name are dependent upon the Prospective Student's enrolment and application status in Student 2. If a Prospective Student enrolls in the Course the Opportunity will be Saved as **CLOSE AS WON** and the **Status Reason** changes to **Won**.

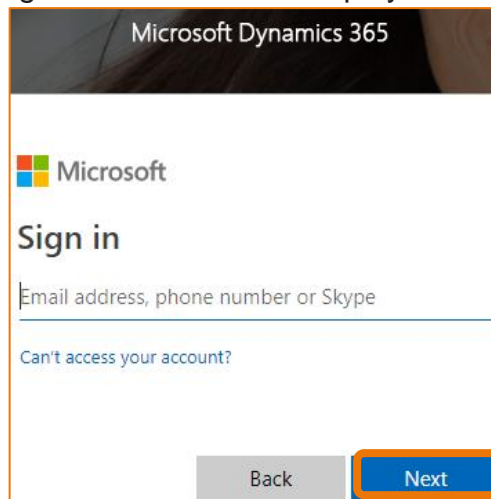
Sign in to MS Dynamics Student CRM

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.

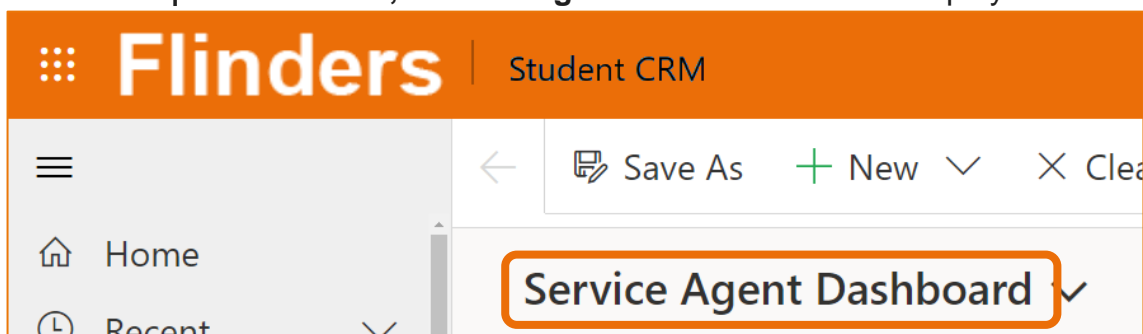
1. Locate [Okta](https://flinders.okta.com) (flinders.okta.com) and click on MS Dynamic CRM as circled below.



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.



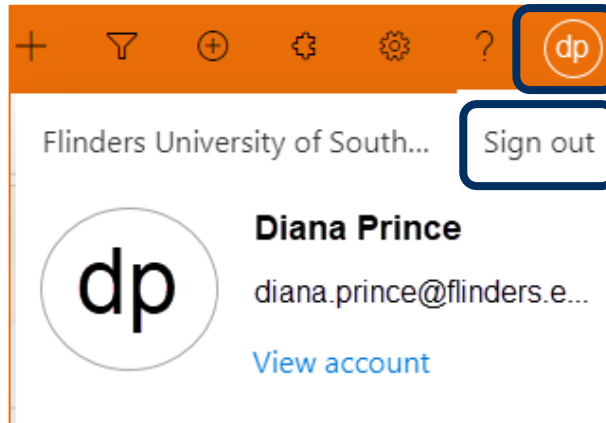
3. **Flinders CRM | Student CRM, Service Agent Dashboard** is now displayed.



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.

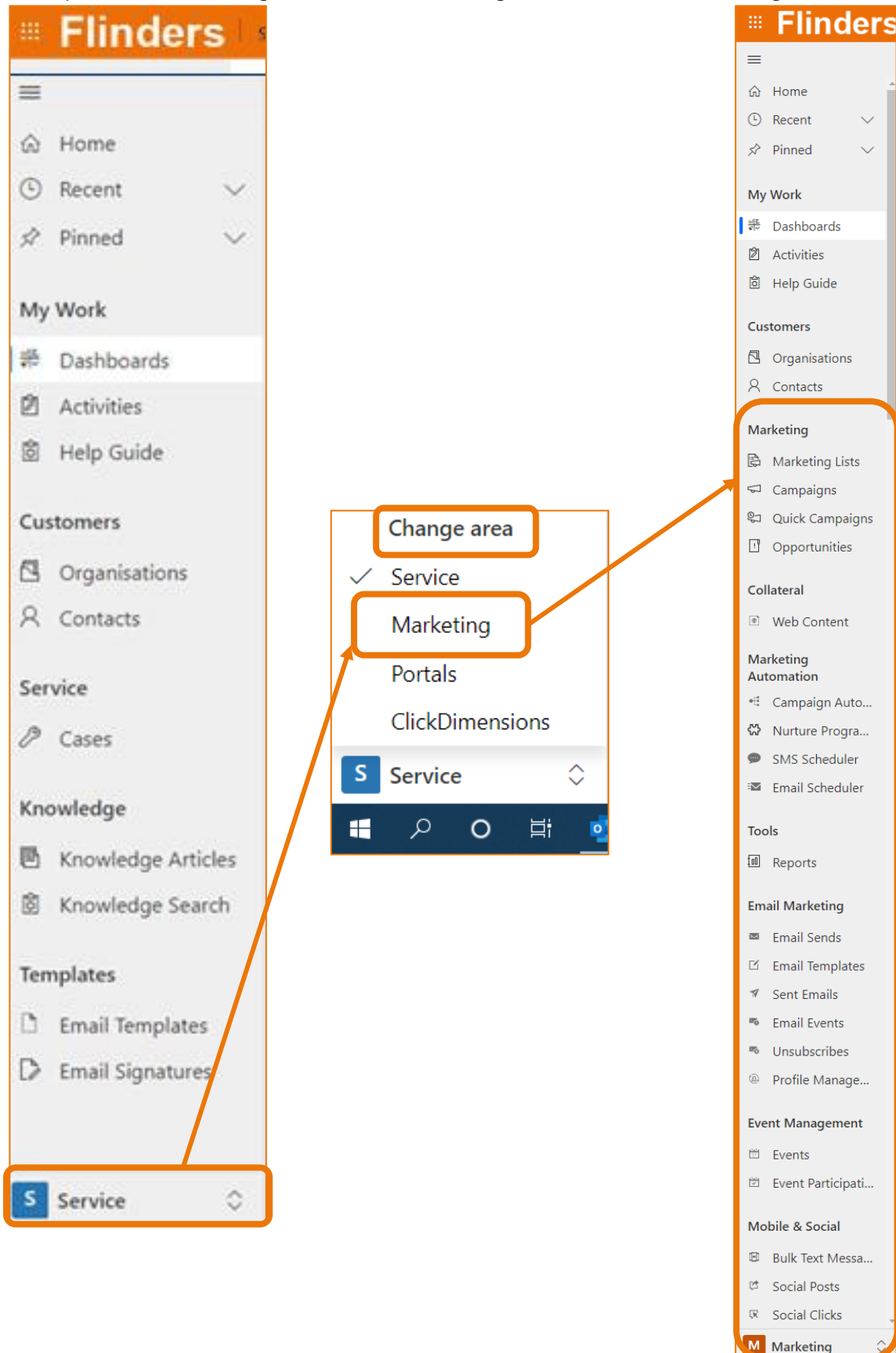
1. **Click your initials** in the **Navigation Pane**, top right hand corner.
2. Click on **Sign out**.



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

Marketing Area

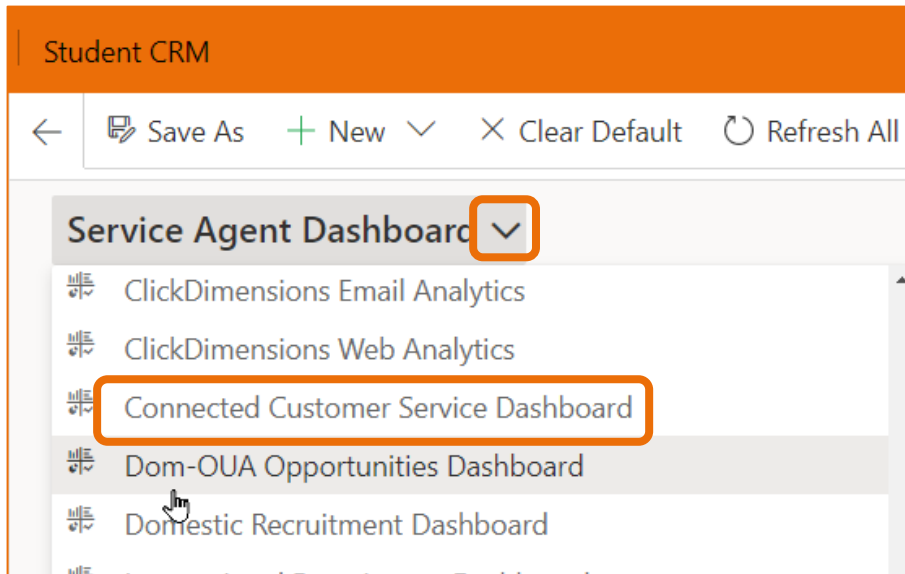
1. **Change area:** Click **Service** in the **Change area** (bottom of the Navigation Pane).
2. The Change area menu pops up. Click on **Marketing**.
3. The options in the Navigation Pane will change to reflect the Marketing area.



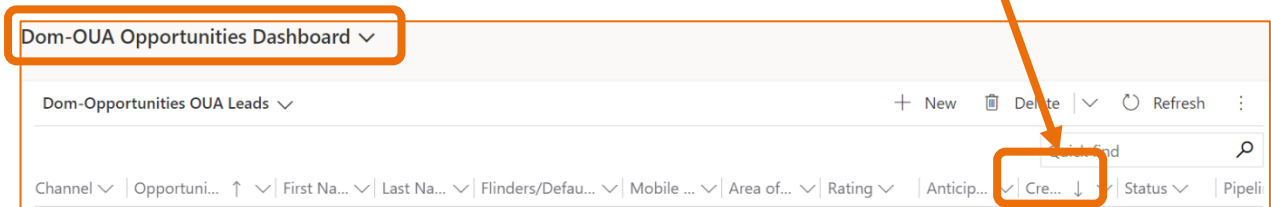
Dom-OUA Opportunities Dashboard

4. Click the drop down arrow adjacent to **Service Agent Dashboard** and click on **Dom-OUA Opportunities Dashboard**. The Dom-OUA Opportunities Dashboard is displayed with 3 System Views:

- **Dom-Opportunities OUA Leads;**
- **My Open Opportunity – UnActioned;**
- **My Open Opportunities – Actioned.**



5. The fields can be sorted by clicking on a field name, for example **Created On** which will sort the list in created date order.



Dashboard Field Names

Below are some of the field names extracted from the OUA Application form into MS Dynamics CRM. The columns will need to be widened to display the full name.

- **Channel** – this is a Web form as it has been imported from OUA.
- **Opportunity Title** – the Prospective Student's name – imported from the OUA form.
- **First Name (Potential Customer)** – first name of the Prospective Student.
- **Last Name (Potential Customer)** – last name of the Prospective Student.
- **Flinders/Default Email** – email address of the Prospective Student.

- **Mobile Phone (Potential Customer)** – mobile phone number of the Prospective Student.
- **Area of Study** – study area grouping, for example all courses related to Medicine area of study.
- **Rating** – current prospective rating.
- **Anticipated Start year** – the Prospective Student’s potential starting time at Flinders University.
- **Created on** – date and time the Opportunity was captured by OUA and imported to MS Dynamics Student CRM.
- **Status** – current status of the application.

Open an Opportunity Record

Review the Opportunity Record to ensure all the details entered in the OUA enquiry form are included in the MS Dynamics CRM Opportunity form.

1. Locate the Opportunity in the Dom-Opportunities OUA Leads Dashboard.
2. Click on the **Opportunity Title** to open the Opportunity Record.
The **OPPORTUNITY : RECRUITMENT** screen will be displayed.
3. Confirm the following details have been completed.

Summary, Opportunity Information

The Opportunity Information is located on the left hand side of the screen.

1. **Domestic/International;**
2. **Preferred Course Title;**
3. **How did you find out about us – OUA** is displayed.

Opportunity Information

Domestic/International	Domestic
Opportunity Title	Diana Prince
Prospect	Diana Prince
Channel	Web Enquiry
Anticipated Start Year	---
Anticipated Start Time	---
Course Level	---
Preferred Course Title	Master of Public Administration (M...

Prospect Information

Student ID	---
FAN	---
First Name	Diana
Last Name	Prince
Preferred First Name	DI
Home Phone	---
Birthday	---
Gender	---
Mobile	---
Flinders/Default Email	diana.prince@flinders.ed...

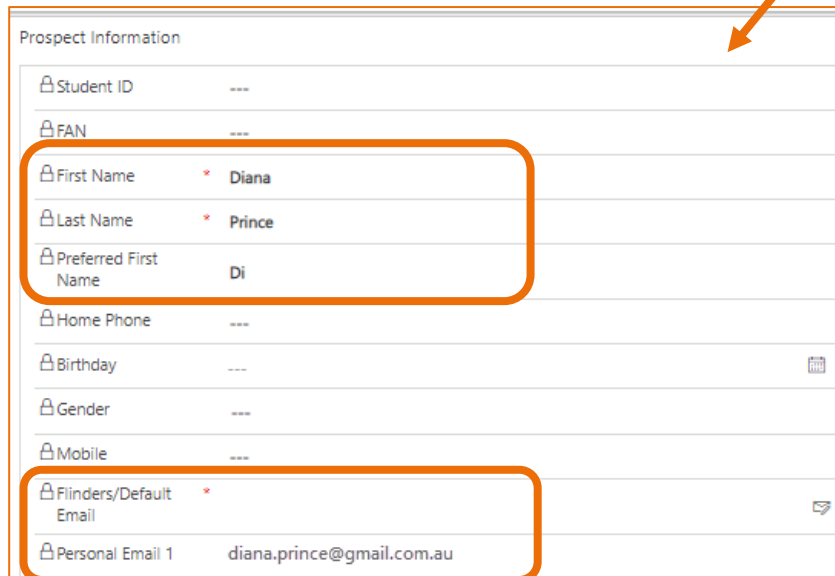
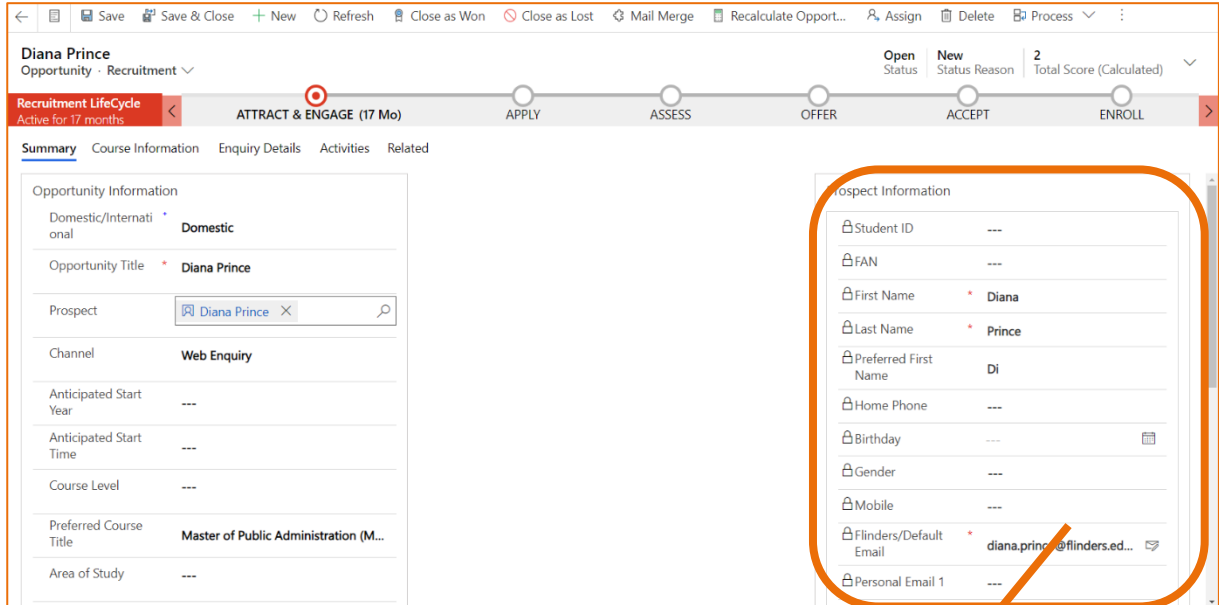
Opportunity Information

Domestic/International	Domestic
Opportunity Title	Diana Prince
Prospect	Diana Prince
Channel	Web Enquiry
Anticipated Start Year	---
Anticipated Start Time	---
Course Level	---
Preferred Course Title	Master of Public Administration (Management)
Area of Study	---
Study Online	<input type="checkbox"/>
Rating	Cold
Owner	Wendy James
Actual Close Date	---
How did you find out about us?	OUA
What best describes you?	---
Year Level	---

Summary, Prospect Information

The Opportunity Information is located on the right hand side of the screen.


- **First Name** and **Last Name**;
- **Preferred Name**;
- **Mobile**;
- **Flinders/Default Email** or **Personal Email 1**.



Open the Prospect/Contact Record

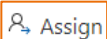
1. Locate the Opportunity in the Dom-Opportunities OUA Leads Dashboard.
2. Click on the **Opportunity Title** to open the Opportunity Record.
3. The **Prospect/Contact** name is located in the **Summary** section, adjacent to **Prospect** on the left hand side of the screen circled below. Click the **Prospect/Contact** name.

The screenshot shows the 'Summary' tab of an Opportunity Record. The 'Prospect' field is highlighted with an orange box, displaying a search result for 'Diana Prince' with a magnifying glass icon and a close button. Other fields include Opportunity Information (Domestic/International: Domestic), Opportunity Title (Diana Prince), Channel (Web Enquiry), Preferred Course Title (Master of Public Administration (Management)), and Owner (Wendy James).

4. The Contact Record is displayed. Scroll down to view all the Contact details.
5. Navigate back to the Opportunity Record by clicking the  **Go back** arrow beneath the Navigation menu.

Assign the Opportunity


Assign the Opportunity to yourself (**Me**) to avoid more than one Staff members taking action on the Opportunity. When the Opportunity is assigned to you it will be displayed in the **My OUA Open Opportunity – UnActioned** System View.

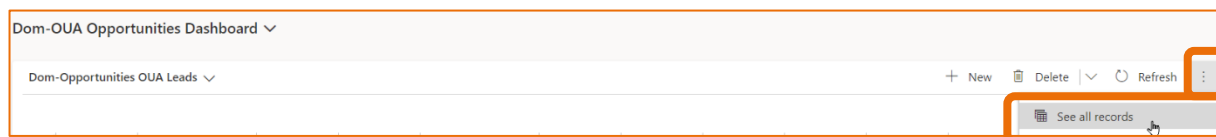
1. Open the Prospect/Contact Record (refer to Open an Opportunity Record on Page 10).
2. Click on  **Assign** in the Tool Bar.
3. The **Assign Opportunity** window is displayed. **Me** should be displayed in the **Assign to** field. If **Assign to** is set to **User or Team**, click in that field and click on **Me**.


4. Click on **Assign** in the bottom right hand corner of the **Assign Opportunity** window.

Bulk Assign Opportunities




The facility to **Bulk Assign Opportunities** is helpful if many Opportunities are to be assigned to one Staff Member.

1. Navigate to the **DOM-OUA Opportunities Dashboard** (refer to Marketing Area on Page 7).
2. Click the  **See the records associated with this view** icon located on the right hand side of the screen, same 'line' as the Dom-Opportunities OUA Leads System View. The elipses may need to be clicked to view this icon.

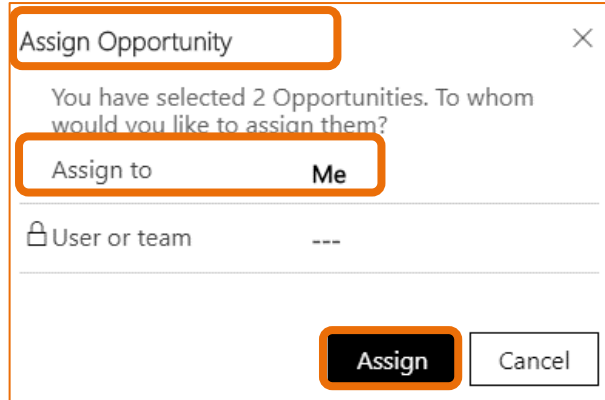


3. The **Dom-Opportunities OUA Leads** System View will open in a new browser window. Click the  **maximise** icon to easily view all of the records.

Select Multiple Records as to Bulk Assign

4. Rest the mouse to the left of the desired Record. A  tick box is displayed. Left mouse click on the tick box to insert a  tick and therefore select the Record. Repeat as necessary.
5. Click on  **Assign** in the Tool Bar.
6. The **Assign Opportunity** window is displayed. **Me** should be displayed in the **Assign to** field. If **Assign to** is set to **User or Team**, click in that field and click on **Me**.

- Click on **Assign** in the bottom right hand corner of the **Assign Opportunity** window.



Assign Opportunity

You have selected 2 Opportunities. To whom would you like to assign them?

Assign to Me

User or team ---

Assign Cancel

- The selected Records are removed from the Dom-Opportunities OUA Leads System View.
- Close the **Dom-Opportunities OUA Leads** System View browser window.
- Refresh the **Dom-OUA Opportunities Dashboard**.

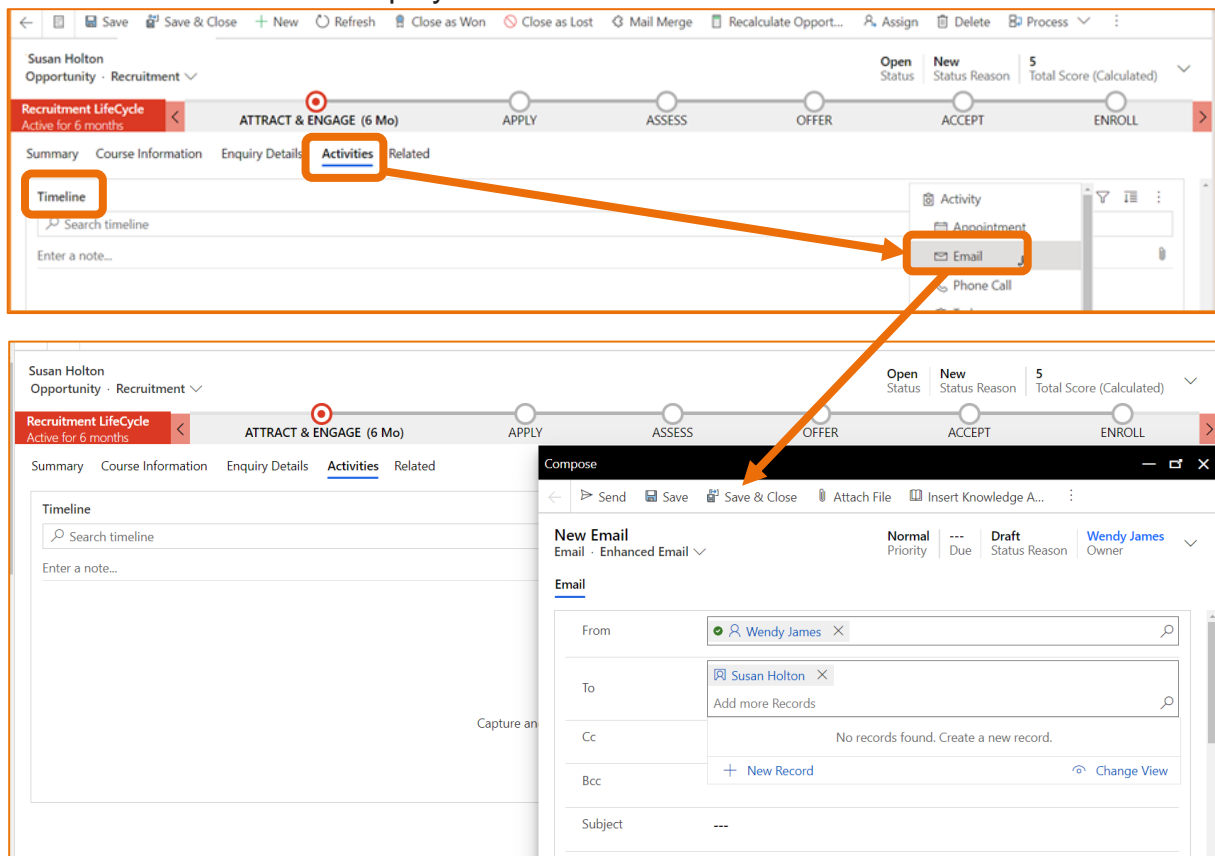
The Records assigned to 'Me' are displayed in the **Dom-OUA Opportunities Dashboard, My OUA Open Opportunity – UnActioned** System View.

These records will remain in this System View until they have been **Enquiry Actioned** and will then be moved to the **My OUA Open Opportunity – Actioned System View**. Refer to **Enquiry Actioned** and **Managing Responses to Opportunities** on Page 17.

Responding to an Opportunity

Email

1. Locate the Opportunity in the **Dom-Opportunities OUA Leads Dashboard, My OUA Open Opportunity – Unactioned System View**.
2. Click on the **Opportunity Title** to open the Opportunity Record.
3. Click on **Activities**. The **Timeline** is displayed.
4. Click on the **+** sign on the right hand side of the Timeline and click on Email. The Enhanced email form is displayed.



5. Complete the Email as per Business Processes. The Email will be recorded as an **Activity** in the **Opportunity Record**. Refer to Business Processes as to the name and email address inserted in the Email From field.

Phone Call

1. Locate the Opportunity in the **Dom-Opportunities OUA Leads Dashboard, My OUA Open Opportunity – Unactioned** System View.
2. Click on the **Opportunity Title** to open the Opportunity Record.
3. Click on **Activities**. The **Timeline** is displayed.
4. Click on the **+** sign on the right hand side of the Timeline and click on **Phone Call**. The Phone call form is displayed.

The screenshot shows the Dynamics CRM interface for the 'Diana Prince' Opportunity Record. The 'Activities' tab is selected, and the 'Timeline' section is visible. A 'Phone Call' activity is being added to the timeline. The 'Quick Create: Phone Call' form is shown below, with fields for Owner (Domestic Recruitment), Subject, Call From (Susan Holton), Call To (Diana Prince), Direction (Outgoing), Call Response, Call Outcome, DESCRIPTION, Phone Number, Description, Duration (30 minutes), Due, Priority (Normal), and Regarding (Diana Prince).



5. Complete the Phone Call details as per Business Processes and click **OK** in the bottom right hand corner of the Add Phone call window. The Phone Call will be recorded as an **Activity** in the **Opportunity Record**.

Enquiry Actioned

After completing an Activity (refer to **Responding to an Opportunity** on Page 15, the Opportunity Record needs to be marked that an enquiry has been actioned – this is referred to as **Enquiry Actioned**.

1. Locate the Opportunity in the **Dom-Opportunities OUA Leads Dashboard, My OUA Open Opportunity – Unactioned** System View.
2. Click on the **Opportunity Title** to open the Opportunity Record.
3. Click on **Enquiry Details**. The **Enquiry Actioned** tick box and **Enquiry Description** are displayed.

The screenshot shows the Dynamics CRM interface for an Opportunity Record. The user is Diana Prince, and the Opportunity is for Recruitment. The Recruitment LifeCycle is 'Active for 17 months'. The current stage is 'ATTRACT & ENGAGE (17 Mo)'. The 'Enquiry Details' tab is selected, showing the 'Enquiry Actioned' checkbox and the 'Enquiry Description' field. The 'Enquiry Actioned' checkbox is highlighted with an orange box. The 'Enquiry Description' field is also highlighted with an orange box. The 'Save' icon in the menu bar is highlighted with an orange box.

4. Click the  tick box to the right of **Enquiry Actioned**.
5. Complete any information in the **Enquiry Description**.
6. Click the  **Save** icon in the Menu bar.
7. Navigate back to the **Dom-OUA Opportunities Dashboard** by clicking the back arrow in the browser Tool Bar.
8. The Opportunity is now located in the **Dom-Opportunities OUA Leads Dashboard, My OUA Open Opportunity – Actioned** System View.

Managing Responses to Opportunities

Once a staff member responds to an Opportunity, the Opportunity will move from **My OUA Open Opportunity – UnActioned System View** to

My OUA Open Opportunity – Actioned System View.

If a Prospect responds to the **Opportunity** again, and within 5 consecutive days, the **Opportunity** becomes **UnActioned** and moves back to the **My OUA Open Opportunity – UnActioned System View**.

In essence, this means that the Opportunity becomes a new Opportunity and needs to be actioned again by ticking the **Enquiry Actioned tick box** each time there is new activity from the Prospect on the same Opportunity. This process will continue to happen until the Prospect no longer has any follow up questions. If a Prospect has not responded to the initial opportunity response, within 5 consecutive days, the Opportunity will remain on the **My OUA Open Opportunity – Actioned System View**.

If a Staff member has not **Enabled Actioned** the **Opportunity** for 5 business days, the Opportunity will then move to the **Dom-Opportunities OUA Leads System View**. This will allow other Staff members to pick up the opportunity and ensure that all Opportunities are visible if a Staff member goes on leave.

Closing Opportunities

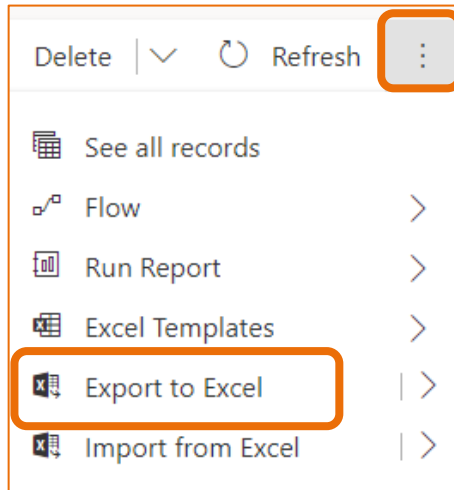
Opportunities are marked as **Won** if a prospect chooses to apply at Flinders University and is successful in securing an offer to enrol. An end of year automatic process will close these Opportunities and mark them as Won.

Opportunities are marked as **Lost** if there is no offer and enrolment within a 12-month period of the opportunity being recorded. An end of year automatic process will close these opportunities and they will no longer appear on the Dashboard system views.

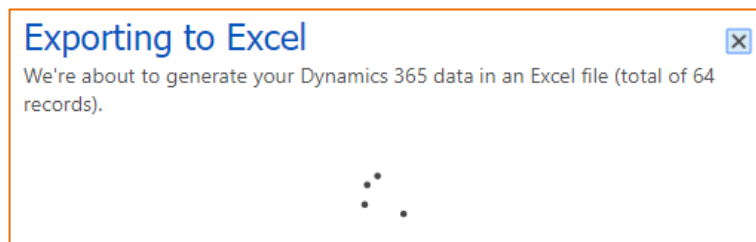
Export to Excel

Dom-Opportunities OUA Leads System View

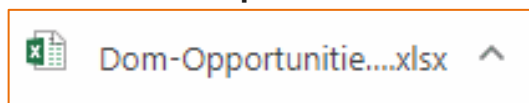
1. On the right hand side of the **Dom-Opportunities OUA Leads** System View is displayed click the vertical elipses
2. Click on Export to Excel.



3. A message is displayed, similar to below.



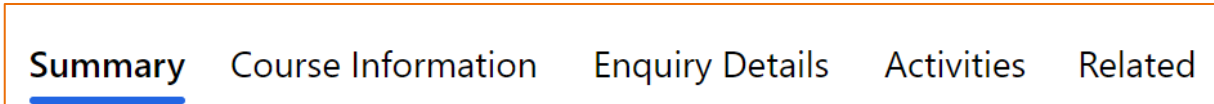
4. Depending on the browser being used, Excel will open with the contents or click on the name located in the bottom left hand corner of the screen. **Follow Business Process in regard to the use of the information exported.**



Navigating the OPPORTUNITY : RECRUITMENT Record

Navigate to different sections

1. Open an Opportunity Record.
2. Click on the appropriate tab in the top left hand side of the Opportunity. The selected tab is underlined with blue
Summary displays the Opportunity Information and Prospect Information.
Enquiry Details displays the Enquiry Actioned tick box and Enquiry Description.
Activities displays the Timeline and the + sign to create an Email or Phone Call Activity.



Version Control

Version Number	Version Date	Changes
1.0	May, 2019	Original Notes. Uploaded to FLO.
2.0	May, 2019	Updated information and screen shots to reflect the changes. Colour title changed.
3.0	May, 2019	Added on Page 12. Note: A process is to be determined in regard to responses from the Prospect and assigning the Opportunity. Refer to Assign the Opportunity on Pages 3 and 12.
4.0	June, 2019	Added on Page 15. Managing Responses to Opportunities and current workflow related to responding to prospect responses.
5.0	October, 2019	Updated for October Upgrade. No changes made. Uploaded to FLO.
6.0	November, 2019	Dot points on Pages 3 and 4 updated. Uploaded to FLO.
7.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
8.0	October, 2020	Updated for Unified User Interface. Uploaded to FLO.