

Resolve a Case



MS Dynamics Student CRM Flinders University Resolve a Case

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A Case can be closed when all work associated with that Case has been completed. The Status of the Case is **Resolved**. Cases can be individually or bulk resolved. A Student can also close their own Cases from AskFlinders. The procedure to resolve a Case is:

- 1. Reassign the Case back to the appropriate Owner follow Business Processes.
- 2. Change the Status to **Resolved** OR select all Cases (in the Dashboard) to be resolved and select **Bulk Resolve**.

A Case is automatically reopened if:

- 1. A Student reopens the Case from AskFlinders (Reopen case).
- 2. An email is sent from or received to the Case.

A Case can be manually reopened if:

1. A Staff member uses the **Reactivate Case** icon in the Case Toolbar.

When reopened, the Case is assigned to the 'Owner' queue. Therefore, assigning the Case to the correct Team queue before resolving ensures a reopened Case is assigned correctly. This avoids a Case not being actioned if a Staff member is on leave or has left their Role at Flinders University. The Status will change to **Re-opened** or **Awaiting Information** and will be placed in the Owner's queue.

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: <u>firstname.lastname@flinders.edu.au</u> OR <u>fan@flinders.edu.au</u>.
 - 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.

Locate and select the Case to be Resolved

- 1. Ensure the correct view is displayed, for example **My Active Cases** or **My Team's Active Cases**.
 - Created on the Date and time of the Case Creation is displayed.
 - **Case Title** lists the names of the Cases.
 - **Customer** Student's name.
- 2. Click on the name of the Case Title to open the Case.

My Active Cases \checkmark	
	Quick fi
- Create \downarrow \checkmark Case Title \checkmark	Customer \smallsetminus
29/09/2020 4 Summer Holidays	Susan Holton

- 3. The Case is displayed.
 - CASE Title is displayed in the top left hand corner of the Case screen.
 - CASE DETAILS includes the Case ID which is automatically created when the Case is saved.
 - **TIMELINE** displays all Activities.

\leftarrow		🛱 Save & Close	e 」→ Save & Route	+ New	🖬 Save	兌 Assign & Œ	Comment	:	
S C	umme ase · F	er Holidays linders Case \smallsetminus)			Normal Priority	New Status	29/09/2020 4:08 Created On	PM 🗸
S	ummar	y Case Measure	es Related						
	CASE	DETAILS			TIMEL	.INE			
	合 Cas	e ID	CAS-46501-Z9Z2T1		Timeli	ne		+ ī	:
	Cus	tomer *			,₽ s	earch timeline			
	Cus	tomer	R Susan Holton		Enter a	a note			Û
	Pret	erred Name	Sue						

5. Add any relevant Activities about how the Case was resolved.

Reassign the Owner to the original Queue

 The Owner field is located under CASE DETAILS. Rest the mouse on the current Owner name. Click the X adjacent to the current name to remove the name and click to place the cursor in the field. Type the name of the appropriate queue to be assigned. Teams may need to be selected to reduce the number of records displayed. Click to select from the drop down list.

ase · Flinders Case ~	vres Related	
CASE DETAILS		
A Case ID	CAS-46501-Z9Z2T	1
Customer	* 🛛 Susan Holton	
Preferred Name	Sue	
Responsible Academic		
Area		
College		
Торіс		
Related Course		
Course Name		
Case Type		
Origin	* Face To Face	Click the X adjacen the Owner's Nam Click to place the cu
Case Title	* Summer Holidays	in the field. Type the name of the assign
Owner	* ^A Admissions	and select from the

Change the Status to Resolved

7. Click the drop down arrow adjacent to **Created on**, top right hand corner of the screen.



- The information expands. Rest your mouse adjacent to the current Status and click the
 drop down arrow. The list of Status options is displayed.
- 9. Click **Resolved** from the dropdown menu.

Normal Priority	Assigned Status	29/09/2020 4:08 PM Created On
Priority		Normal
Status		Assigned 🗸
		New
ACreated On		Assigned
		Awaiting Information/Advice
		Has New Information
		Resolved
		Re-opened
e 11 1		Submitted

10.Click **Save** Menu bar.

11. The Status changes to **Resolved** and is also **Read only** and this is also indicated in the top left hand corner of the screen beneath the Navigation Menu.

Normal	Resolved	29/09/2020 4:08 PM	\sim
Priority	Status	Created On	
	Read-only Th	nis record's status: Resolved	

Reopen a Case or Reactivate a Case

A Case is **automatically reopened** if a Student reopens the Case from AskFlinders (Reopen case) **OR** if an email is sent from or received to the Case. A Case can be **manually reopened** if a Staff member uses the **Reactivate Case** icon in the Case Toolbar.

When the Case is reopened it is assigned to the 'Owner' queue. Therefore, assigning the Case to the original queue before resolving ensures a reopened Case is assigned correctly. This avoids a Case not being actioned if a Staff member is on leave or has left their Role at Flinders University. The Status will change to **Re-opened** or **Awaiting Information** and will be placed in the Owner's queue.

Reactivate Case

 If the Case has been resolved in error, display the Case and click on the **Reactivate** Case icon located in the top left hand corner beneath the Navigation Menu. This icon is only visible when the Status of a Case is Resolved.



2. The following window is displayed. Click on Reactivate Reactivate.



3. The Status changes to **Re-opened**.



Bulk Resolve

Bulk Resolve is the facility to select more than one Case on a Dashboard and Resolve all of them at the same time.

The Bulk Resolve icon is not displayed on the Dashboard until at least one Case is selected.

If the browser zoom is to large click on the vertical elipses and click on **Bulk Resolve**.

Select the Cases to be Resolved

- 1. Display the correct Dashboard.
- 2. Locate the Case to be Resolved and click to the left of the Created On column. A tick is now displayed AND the ^G Bulk Resolve</sup> **Bulk Resolve** icon is displayed in the View menu.
- Continue selecting the Cases to be resolved.
 Click the tick again to deselect a Case clicked in error.

Service Agent Dashboard	~						
My Team's Active Cases \lor						arge Cases 🖉 Edit	Delete
✓ Creard On ↓ ∨	Case Title \checkmark	Customer 🗸	Student ID (Custon	n $arsigma$ Status Reason $arsigma$	Owner ∨	Area \sim	Related Course V
✓ 16/1 2020 11:00 AM	Summer Courses	Mary White		Assigned	Admissions		
✓ 6/10, 020 11:24 AM	Summer Courses	Susan Holton		Assigned	Admissions	Admissions	
✓ 29/0 2020 4:08 PM	Summer Holidays	Susan Holton		Assigned	Admissions		

Click Bulk Resolve

1. Click on ³ Bulk Resolve Bulk Resolve

If the browser zoom is to large then click on the is vertical elipses and click on Bulk Resolved.



2. The following confirmation message is displayed. Click **OK**.

	×
Bulk close process initiated. Please refresh the v min.	view after a
ОК	Cancel

Refresh the screen

3. Refresh the screen by clicking on the beneath the Navigation Menu.

Version Control

Version Number	Version Date	Changes
	2017	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	November, 2018	Uploaded to iEnrol.
4.0	November, 2018	Status: Solve is replaced by Resolve in the drop down list.
4.0	November, 2018	Uploaded to FLO.
5.0	December, 2018	Updated the assystNET link in the footer to reflect the new assyst form named 'I have a problem or request with MS Dynamics Student CRM'.
6.0	March, 2019	Updated for the April Upgrade. Uploaded to FLO.
7.0	April, 2019	Added information in regard to Bulk Resolve. Uploaded to FLO.
8.0	May, 2019	Preferred Name information inserted. Updated to FLO.
9.0	October, 2019	Updated to reflect changes made in the October, 2019 upgrade. Uploaded to FLO.
1.0	January, 2020	Page 3 – updated information about how a Case can be Resolved and how a Case can be reopened.
2.0	April, 2020	Updated for the April Upgrade. Uploaded to FLO.
3.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
4.0	October, 2020	Updated for the October Upgrade. Uploaded to FLO.
5.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.