MS Dynamics Student CRM
Flinders University

Resolve a Case

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Version 5.0

Contents

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.

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.

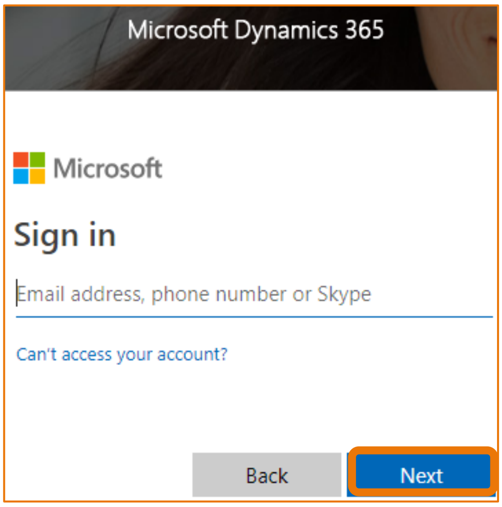
When reopened, the Case is assigned to the 'Owner' queue. Therefore, assigning the Case to the correct Team queue before resolving ensures a reopened Case is assigned correctly. This avoids a Case not being actioned if a Staff member is on leave or has left their Role at Flinders University. The Status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

Sign in to MS Dynamics Student CRM

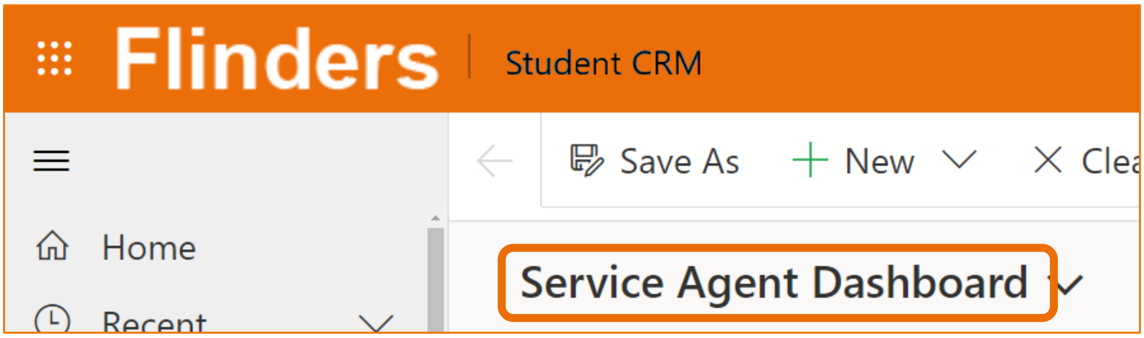
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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: 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.

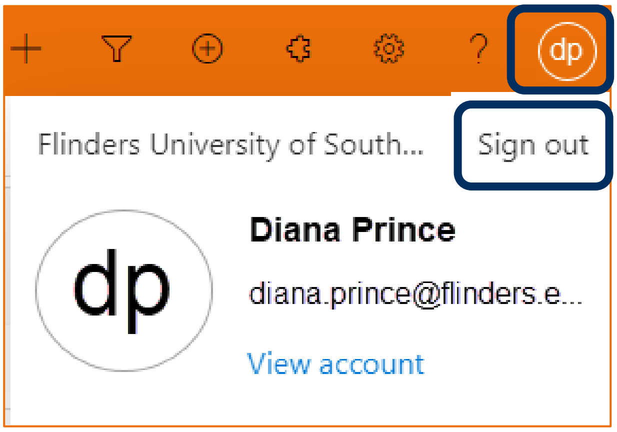


Sign Out of MS Dynamics Student CRM

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**.

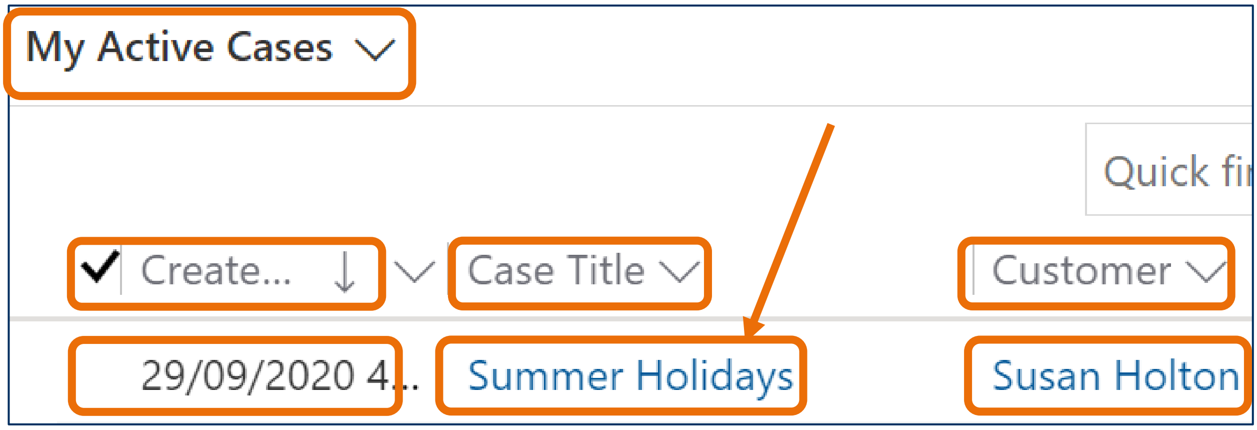


3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

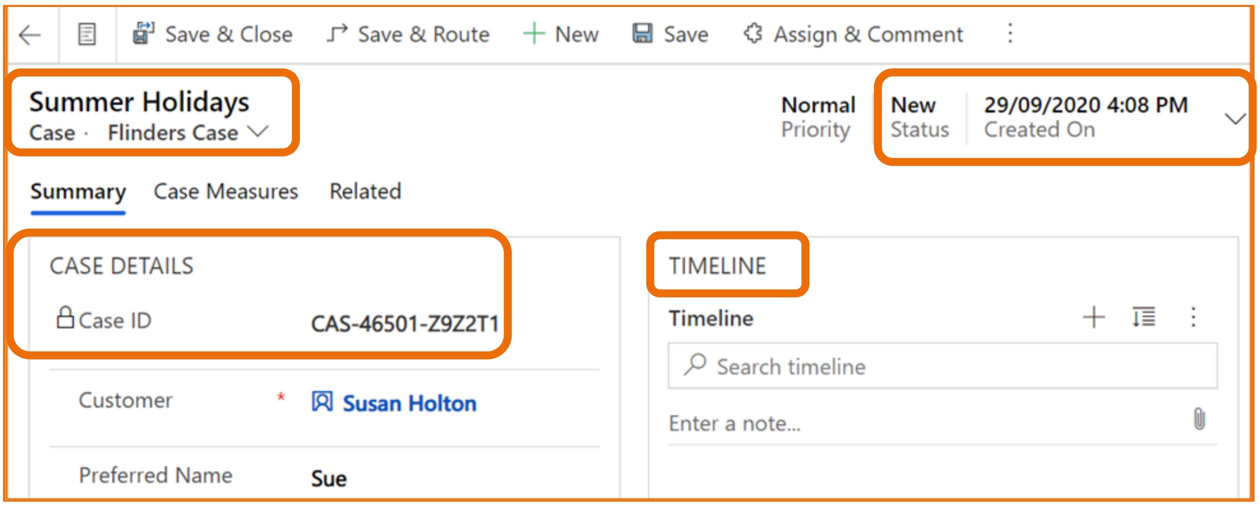
Locate and select the Case to be Resolved

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.



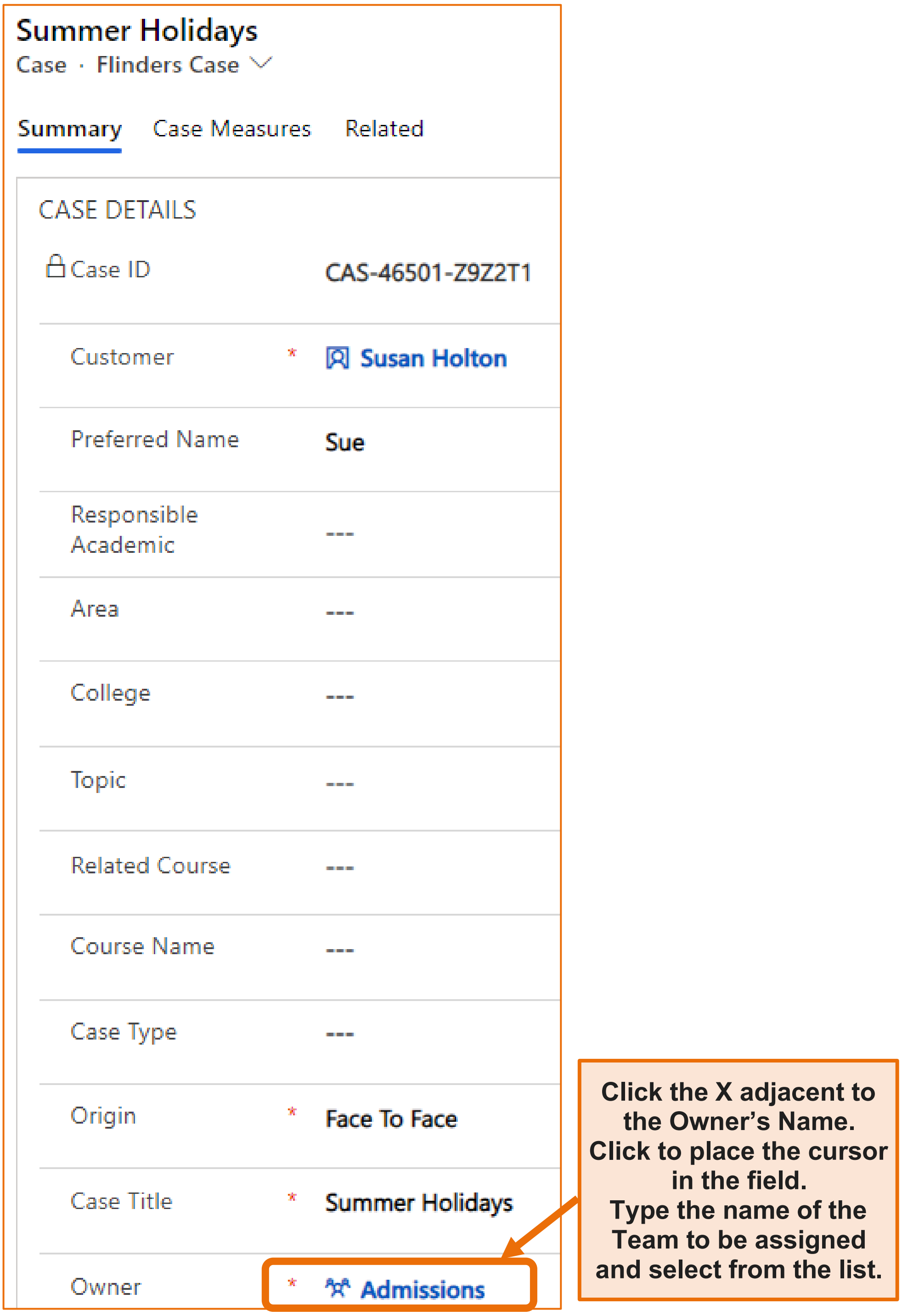
3. The Case is displayed.
   - **CASE Title** – is displayed in the top left hand corner of the Case screen.
   - **CASE DETAILS** – includes the Case ID which is automatically created when the Case is saved.
   - **TIMELINE** – displays all Activities.



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

Reassign the Owner to the original Queue

6. 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.

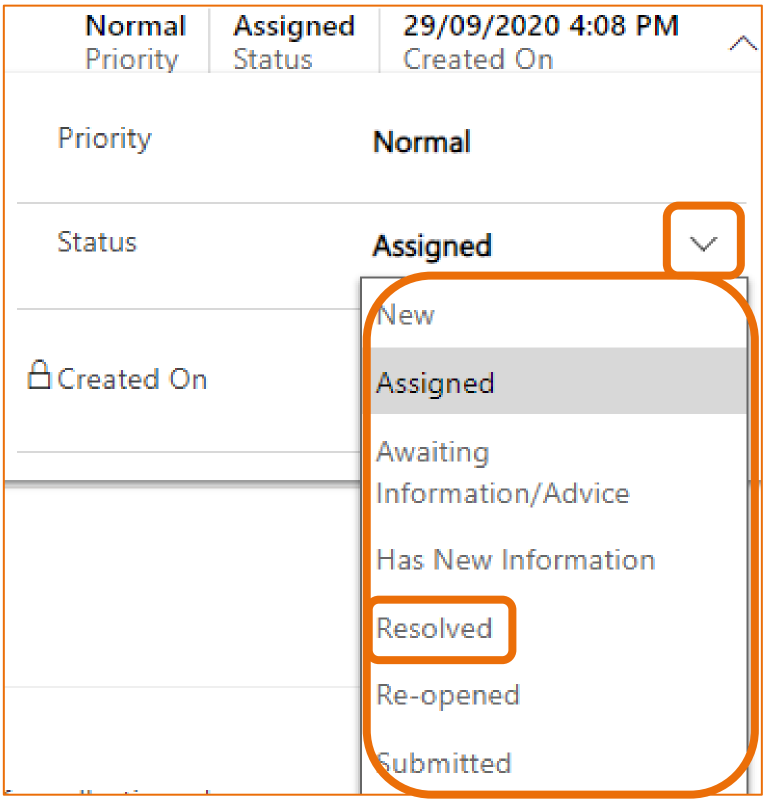


Change the Status to Resolved

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

8. 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.



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.

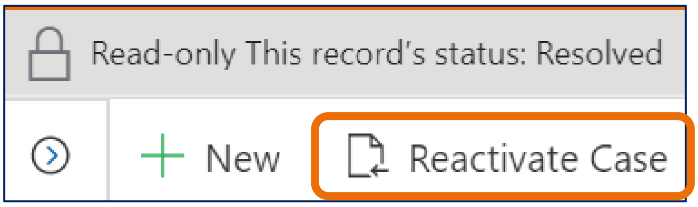
Reopen a Case or Reactivate a Case

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.

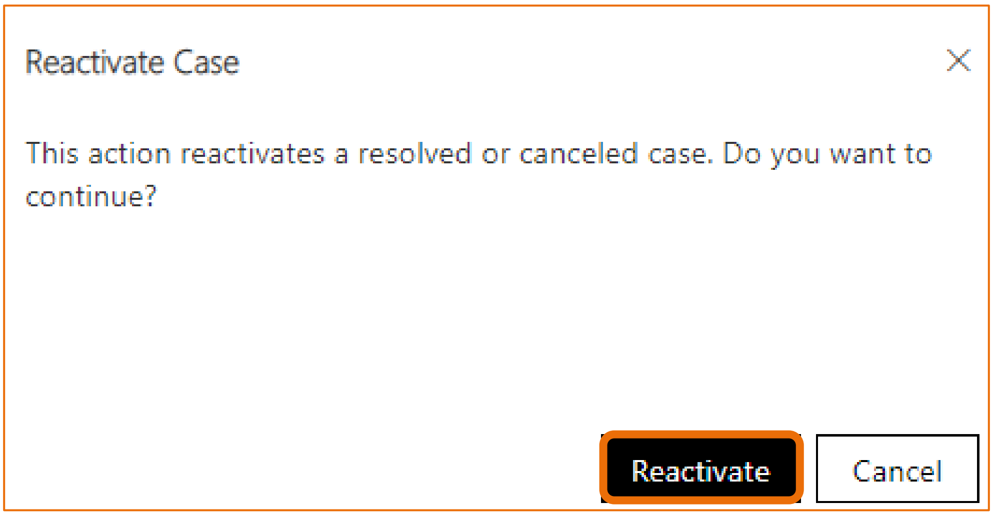
Reactivate Case

1. 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.



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

Bulk Resolve

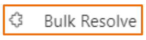
Bulk Resolve is the facility to select more than one Case on a Dashboard and Resolve all of them at the same time.

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**.

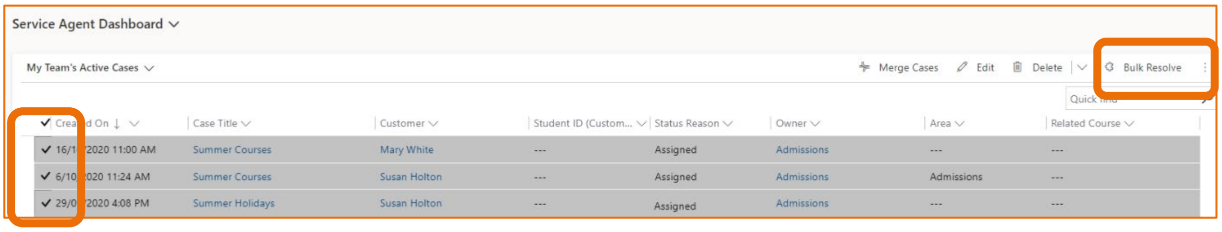
Select the Cases to be Resolved

1. Display the correct Dashboard.

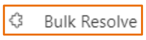
2. Locate the Case to be Resolved and click to the left of the Created On column. A tick is now displayed AND the 

 Bulk Resolve icon is displayed in the View menu.

3. Continue selecting the Cases to be resolved.
   Click the tick again to deselect a Case clicked in error.

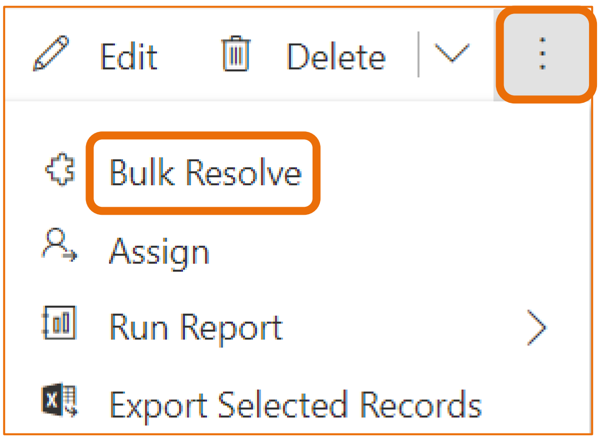


Click Bulk Resolve

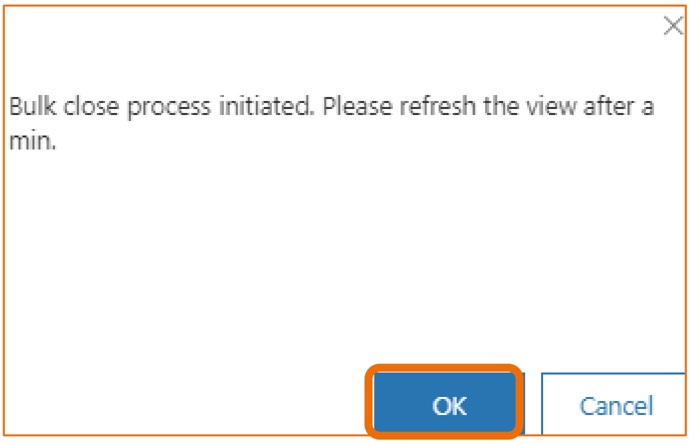
1. Click on 

 Bulk Resolve

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



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



Refresh the screen

3. Refresh the screen by clicking on the  **Refresh** icon in the Dashboard menu, 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.