

# **MS Dynamics Student CRM**

## **Flinders University**

# **Searching Contact and**

# **Case Timeline**

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Version 5.0

## Contents

Sign in to MS Dynamics Student CRM .....	3
Sign Out of MS Dynamics Student CRM.....	4
Search the Timeline .....	5
Version Control .....	7

Searching for information in the Contact or Case Timeline is now enabled using a Timeline search feature.

The search feature enables certain fields of Activities and a Timeline Note to be searched and the results displayed in the Timeline. The instructions to search in the Contact Record or Case Record Timelines are the same.

A Timeline search locates information as follows:

- Timeline searching searches in the subject and description/content of Activities and Note.
- The word searched is highlighted in the results.
- **Email Activity (subject and content);**
- **Phone Call Activity (subject and description);**
- **Internal Comment (subject and description);**
- **Public Comment (subject and description);**
- **Notes (subject and description).**
- Wild cards **cannot** be used.
- **Does not** search an attachment name or an attachment content.
- The search is not case sensitive.

## Sign in to MS Dynamics Student CRM

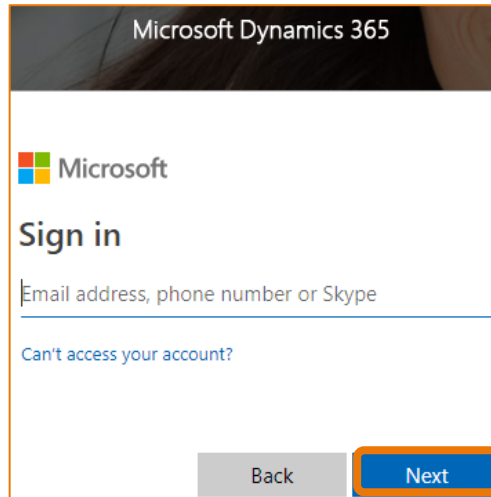
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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

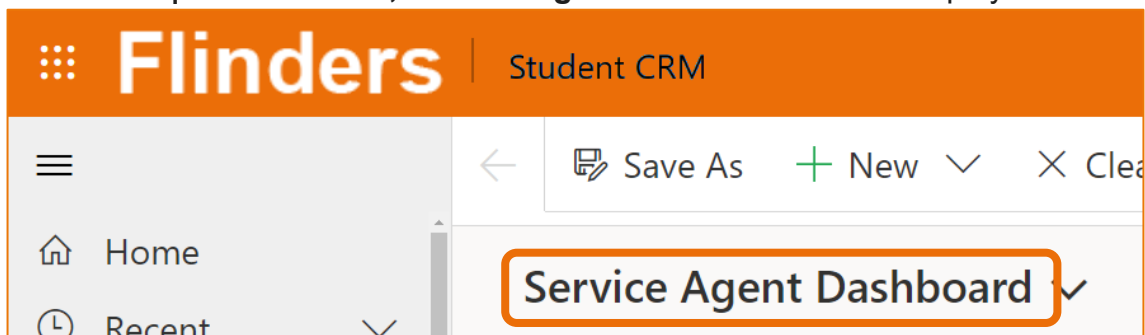


2. Sign into MS Dynamics Student CRM. Signing in for the first time will present the following screen.
  - Type either your user name or FAN:  
[firstname.lastname@flinders.edu.au](mailto:firstname.lastname@flinders.edu.au) OR [fan@flinders.edu.au](mailto:fan@flinders.edu.au).
  - Click **Next** to sign 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.



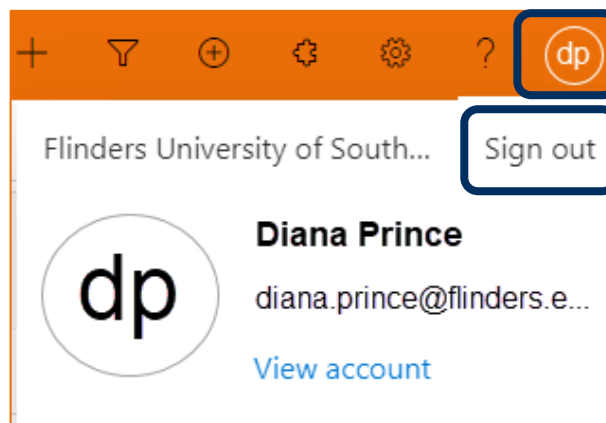
3. **Flinders CRM | Student CRM, Service Agent Dashboard** is now displayed.



## 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.

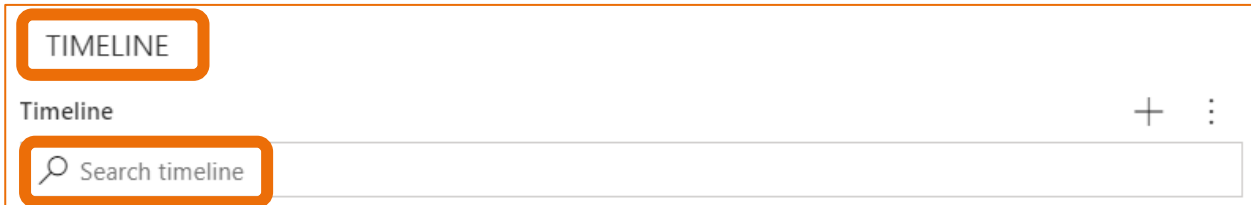
1. **Click your initials** in the **Navigation Pane**, top right hand corner.
2. Click on **Sign out**.



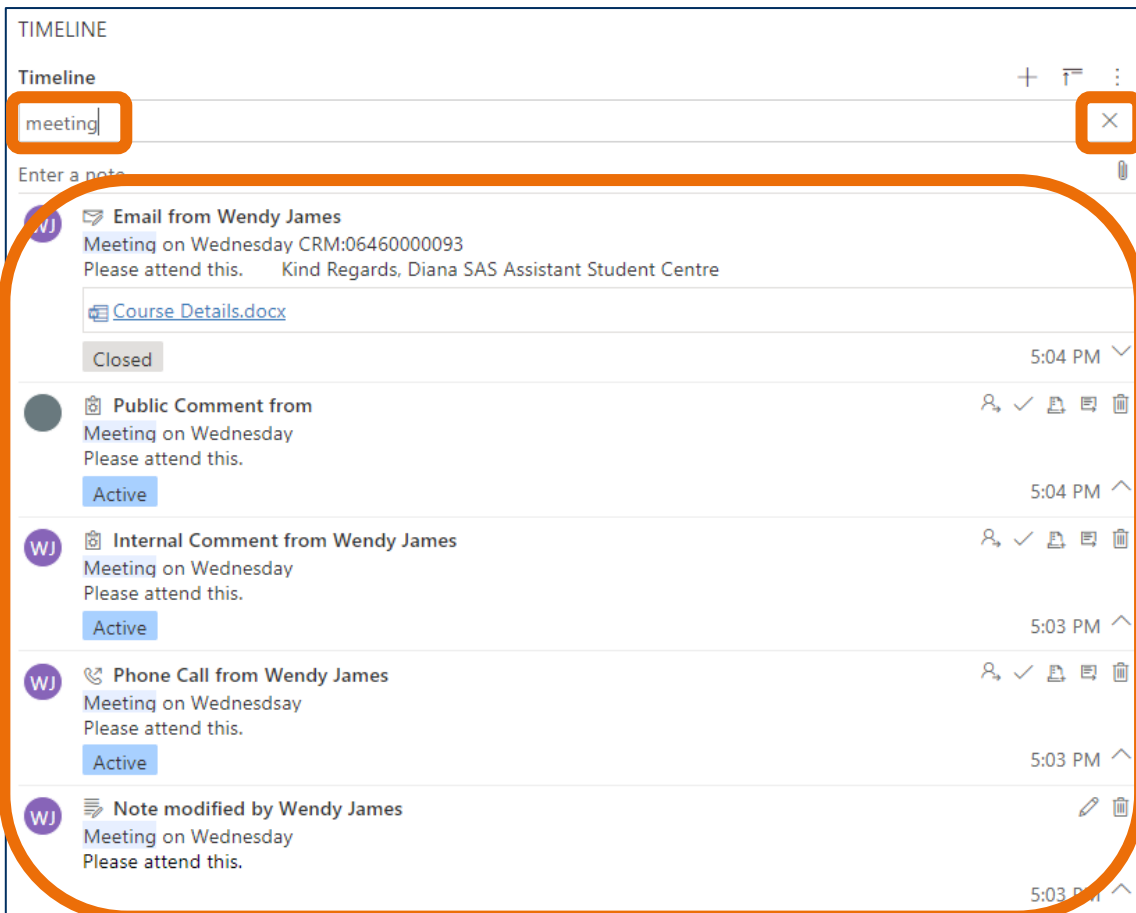
3. The prompt **'You've signed out of your account'** is displayed. Close the browser.

## Search the Timeline

1. Click in the Search timeline field, located at the top of the Timeline.
2. Type the word/s to be searched.
3. Press the **Enter** key.



4. The example below displays the result of searching for the word **meeting**. Each of the Activities and the Note in the results has the word **meeting** in the Subject.



5. The example below displays the result of searching for the words **attend this**. Each of the Activities and the Note in the results has the words **attend this** in the description/body of information.

The screenshot shows a 'TIMELINE' view in Microsoft Dynamics CRM. At the top, there is a search bar containing the text 'attend this'. To the right of the search bar is a clear search button (an 'X' icon). Below the search bar, a list of activities is displayed, all of which contain the phrase 'Please attend this.' in their descriptions. The activities include:

- Email from Wendy James**: Meeting on Wednesday CRM:06460000093. Please attend this. Kind Regards, Diana SAS Assistant Student Centre. Includes a document icon for 'Course Details.docx'. Status: Closed. Time: 5:04 PM.
- Public Comment from**: Meeting on Wednesday. Please attend this. Status: Active. Time: 5:04 PM.
- Internal Comment from Wendy James**: Meeting on Wednesday. Please attend this. Status: Active. Time: 5:03 PM.
- Phone Call from Wendy James**: Meeting on Wednesday. Please attend this. Status: Active. Time: 5:03 PM.
- Note modified by Wendy James**: Meeting on Wednesday. Please attend this. Time: 5:03 PM.

Each activity entry includes a user icon (WJ), a status indicator (Closed or Active), and a time stamp. The search results are highlighted with an orange border.

6. All Activities and the Timeline Note are searched meeting the criteria listed above.
7. Click the **X** on the right hand side of the search field to clear the search and display all the Activities and Timeline Notes.

## Version Control

Version Number	Version Date	Changes
1.0	June, 2020	Original Notes.
2.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
3.0	August, 2020	Updated: Internal Comment (subject and description); Public Comment (subject and description). 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.