MS Dynamics Student CRM
Flinders University

Start Guide

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Version 4.0

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Introduction

This document includes an introduction and guide to using MS Dynamics Student CRM. Other documents have been created to assist in using MS Dynamics Student CRM, as listed below in the table. Please note more information will be added to this document and more How to Guides documents will be created the future. Some of the uses of CRM need permissions and may not be applicable to your role.

MS Dynamics Student CRM How to Guides

These documents are located in FLO.

Document name	Details
Start Guide (this document)	Includes Navigating and Searching.
Frequently Asked Questions	Glossary of Frequently Asked Questions about MS Dynamics Student CRM.
Glossary	Definition of MS Dynamics Student CRM terms.
Adding Comments to a Case	Adding **Comments** to a Case is a useful tool to provide updates to both colleagues and students. MS Dynamics Student CRM has two types of comments – **Internal** and **Public**.
Adding Timeline Notes to a Contact and Case Record	Adding a **Note** to the Contact Timeline or Case Timeline is useful to provide updates to MS Dynamics Student CRM users. Follow your team's business processes in regard to entering information into a Note. A Timeline Note is not an Activity and therefore cannot be located when using Related, Activities. Refer to instructions in CRM How to Guide Searching Contact and Case Timeline.
Advanced Find Filter and View Case Information	The **Advanced Find** feature enables searching for CRM information based on certain criteria. This can also be referred to as a **Query**. These notes include some basic steps for creating a Query, saving it as a Saved View, sharing and removing the sharing between CRM users or team, saving the View as a Dashboard and sharing the Dashboard. The CRM users or teams may need to have the correct CRM permissions to view the information shared.
Assign and Comment a Case	Assigning Cases to CRM queues is an essential function of Student Case management. This is how Cases are escalated to specialist areas, teams or specific people for action. In addition to assigning Cases, the **Assign & Comment** function can be used to provide the assigned user or team with additional information.
Audit History Filter and View	Displays some of the actions which have been taken on the Case. Filtering can be used to only view a particular field.

Create a Case	A **Case** can be created in MS Dynamics Student CRM on behalf of someone who makes an enquiry over the phone or in person. The best process is to search for and select the person's Contact record and then create a Case. It is important to search first to ensure the correct Contact is selected as in our large University community some people share the same name.
Create and Use Email Signatures	Create and use an Email Signature. These are extremely useful for inserting standard information into an Email.
Creating Bulk Email Templates	These notes refer to the steps involved to create an Email Template when working in Marketing Module, Email Marketing Group. The purpose of the Template is to enable the sending an email from MS Dynamics Student CRM to Flinders University Students and prospective Students. Permissions are needed to use the Email Marketing Group.
Create and Use Email Templates	**Email Templates** are extremely useful for inserting standard information into an email. The email templates can be viewable by Organisation (seen and edited by all CRM Users) or Individual (seen and edited only by the CRM User who created the Template). Hyperlinks and attachments can be added to the Template. The content of an existing Email Template can be copied and pasted into a new Email Template and then edited instead of recreating.
Flinders International Intent to Study	The Contact Record of a **Prospective International Student** includes a field in the CONTACT INFORMATION pane - Intent to Study. The instructions include information on how to update the **Intent to Study field** from using a Phone Call Activity or manually.
Forwarding a Case from CRM	Forwarding a Case to a Staff member who does not use MS Dynamics Student CRM using Email within CRM.
Domestic Live Chat for the Agent	MS Dynamics **Live Chat** enables a Student to digitally message Flinders University staff (referred to as Agents) via a Chat Widget on selected Flinders University Domestic webpages. The Chats are received as conversations in the Omnichannel which is accessed in MS Dynamics CRM by the Agent.
Library Live Chat for the Agent	MS Dynamics **Live Chat** enables a student to digitally message Flinders University staff (referred to as Agents) via a Chat Widget on selected Flinders University Library webpages. The Chats are received as conversations in the Omnichannel which is accessed in MS Dynamics CRM by the Agent.

Live Chat for the Supervisor	This is the Omnichannel Supervisor how to guide. MS Dynamics Live Chat enables a student to digitally message Flinders University staff (referred to as Agents) via a Chat Widget on selected Flinders University Library webpages.
New Search Functionality	The new CRM Search bar will be available from Friday 11th December, 2020. The Search bar is similar to Office 365 applications and will always be displayed in the centre of MS Dynamics CRM Navigation Menu, top of the screen. The search results are displayed in a List view and Filters can be applied to narrow down the results. These notes provide the features and instructions about the new search functionality.
Phone Call Activity	A Phone Call Activity enables the recording of a phone call and can be saved to the Contact or Case Record. The instructions below advise how to do this from the Navigation Menu and linked to the Contact / Case Record, Contact Record Timeline or Case Record Timeline. The Phone Call Activity form is exactly the same regardless of which of the three options are used.
Ping Statistics How to View and Save	This document is applicable to the **Student Experience Office** to enable the reporting of **Ping Email** viewing statistics.
Resolve a Case	A Case is completed, the Owner assigned is the original Queue and the Status is changed to **Resolved**.
Searching Contact and Case Timeline	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.
Sending an Email to a Student including Attachment and Hyperlink	**Email** is the primary form of communication from MS Dynamics Student CRM to Students. Emails sent from MS Dynamics Student CRM are formatted in enhanced, rich text editing which accommodates professional communication. The history of emails sent are located in the Contact and Case Timelines. A hyperlink can be inserted into the body of the email and can be in the form of text or a picture. As of April, 2020 a file can be attached using drag and drop and the prompt to save displayed if doing so before the email has been saved.

Student Progress SMS Responses	When a Student’s academic record shows unsatisfactory progress in their course for a subsequent time, they are sent an email, followed by an SMS to enquire if they would like to speak with a support officer to receive help/advice with their academic progress. The emails are sent by the Student Progress and Assessment Team, who form part of the Student Administration Services Team. These notes provide instructions in regard to the SMS Reporting only.
Training Session Handout	Overview of the Training Sessions.
Viewing Attachments	These notes include how to locate an **Attachment** when a student has created a Case via Ask Flinders, Request Support and attached a file to this Request which creates a Public Comment with the attached file OR sent an email and attached a file.

What is MS Dynamics Student CRM?

MS Dynamics CRM is the Flinders University name for MS Dynamics CRM. CRM is the acronym for Customer Relationship Management and this is the software application which is used to manage Student enquiries (referred to as Cases). Cases are logged, tracked, assigned, answered and resolved and therefore provide an online view to current Students of their current and past enquiries. CRM also supports marketing campaign functionality which includes the facility to send communications to prospective Students.

- CRM is the acronym for Customer Relationship Management.

- Enquiries are referred to as Cases.

- Students and Staff who log enquiries are referred to as Customers or Contacts.

- Routing rules apply to Cases logged in CRM therefore the Cases are directed to the appropriate Team.

- Navigate the different screens using the links described in this document,
- **Navigating MS Dynamics Student CRM** starting on page 11.

- If possible, use the navigation icons or hyperlinks to navigate MS Dynamics CRM. Otherwise use the **Go Back** arrow located beneath 'Student CRM'.

- Occasionally the screen will need to be refreshed by clicking the Refresh refresh icon in the address bar beneath the Navigation Menu to update information.

- Selected current Student data is brought over from Student Two each night.

- Selected Staff data is brought over from Active Directory each night.

- Remember to save your work using the Save icons available.

How do Students use MS Dynamics Student CRM?

Ask Flinders acts as a 'front door' for Students to **MS Dynamics Student CRM**.

Any enquiry logged through the **Ask Flinders** portal will result in a Case being automatically created in MS Dynamics Student CRM and allocated to one of a number of Teams / Queues before being actioned by a member of Staff. Some legacy email addresses previously used to manage Student enquiries are also redirected to Student CRM and therefore will also result in a Case being automatically created in MS Dynamics Student CRM. Students can log into Ask Flinders to view a list of their open and resolved Cases as well as submit a request for an update.

How does Flinders Connect use MS Dynamics Student CRM?

Flinders Connect Team is a major user MS Dynamics Student CRM.

MS Dynamics Student CRM is used by the Flinders Connect Team to manage a wide range of Student enquiries which are created:

- Through Ask Flinders;
- Legacy email channels;
- Through Cases which are created manually by the Team.

A Case is manually created by the Team occurs when a Student presents at the Hub or calls the **1300 FLINDERS** phone number and has an enquiry which is either:

- Deemed important enough to be recorded as an interaction against the student; or
- Needs to be transferred to another area within the University for resolution.

The Flinders Connect Team also triage the **Stray queue** in MS Dynamics Student CRM. This queue is the holding area for any incoming enquiries for which there is no clear owner.

How do other areas of the University use Student CRM?

Other areas of the University use MS Dynamics Student CRM for a range of prospective Student and current Student related enquiries.

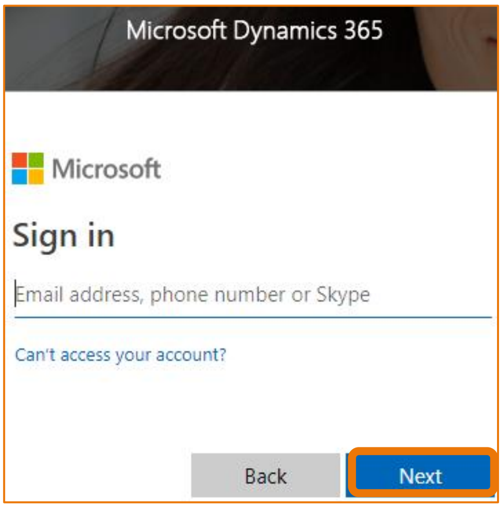
All Colleges have an MS Dynamics Student CRM queue which is used to manage a variety of Student enquiries, typically relating to Student administration services. **Library** also uses MS Dynamics Student CRM to track current student enquiries. **Student Recruitment** uses MS Dynamics Student CRM to communicate with prospective Students, either through outbound Marketing campaigns or through receiving incoming enquiries into the Admissions queue.

Sign in to MS Dynamics Student CRM

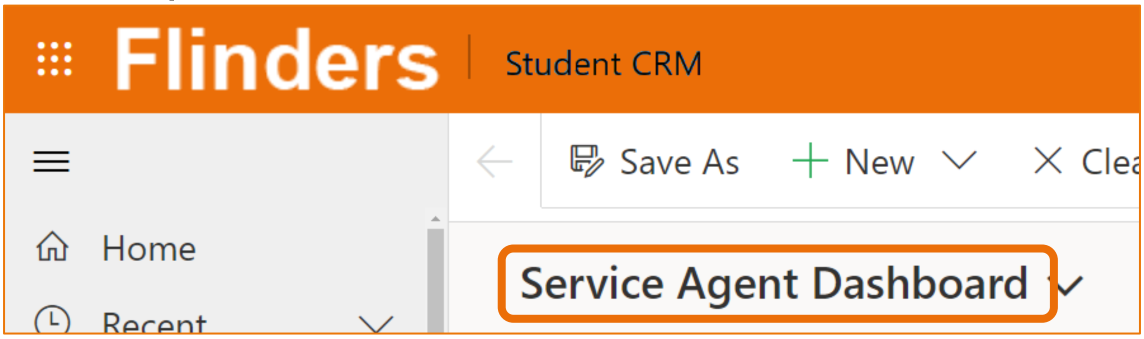
Due to Microsoft changes, from 30th October Flinders University will be using a Unified User Interface when working in MS Dynamics Student CRM. The Dynamics 365 - custom will no longer be available.

1. Locate Okta (flinders.okta.com) and click on **Microsoft Dynamics 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.

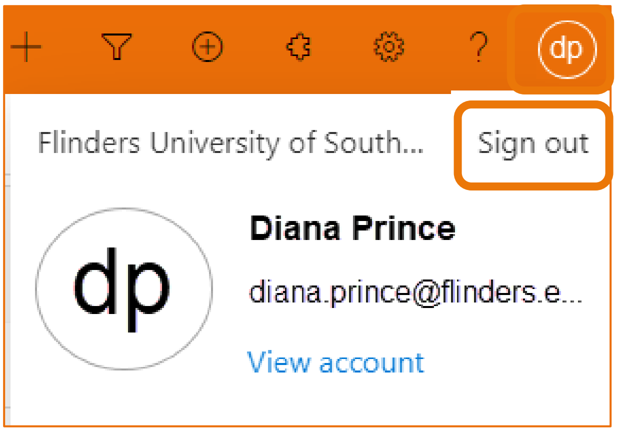


Sign Out of MS Dynamics Student CRM

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**.

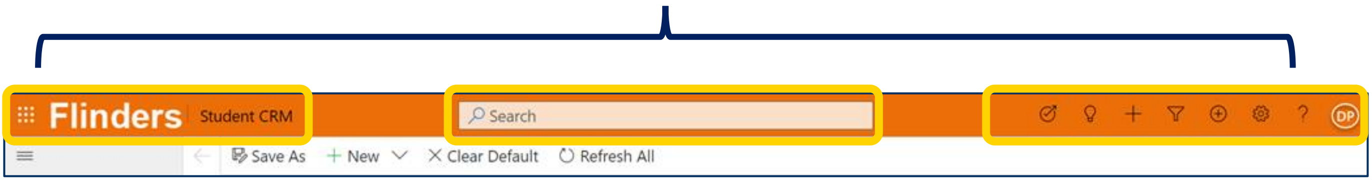


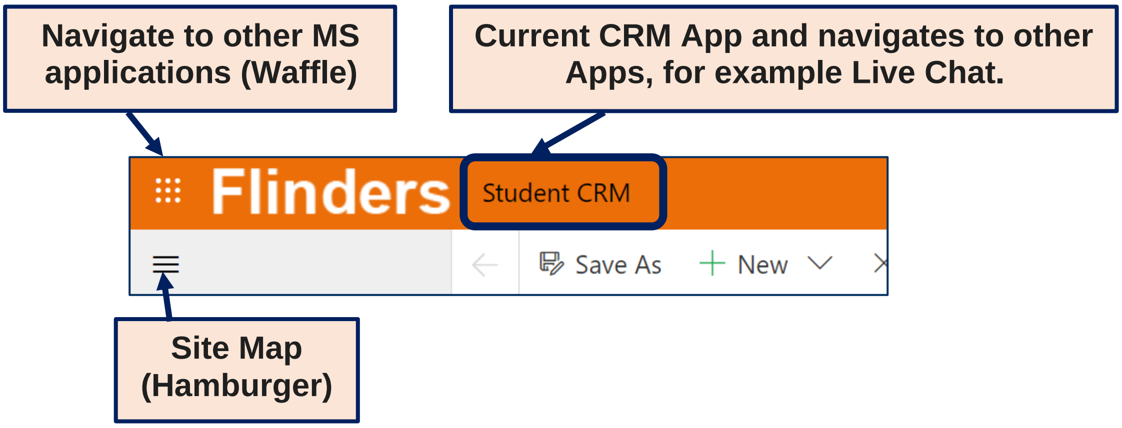
3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

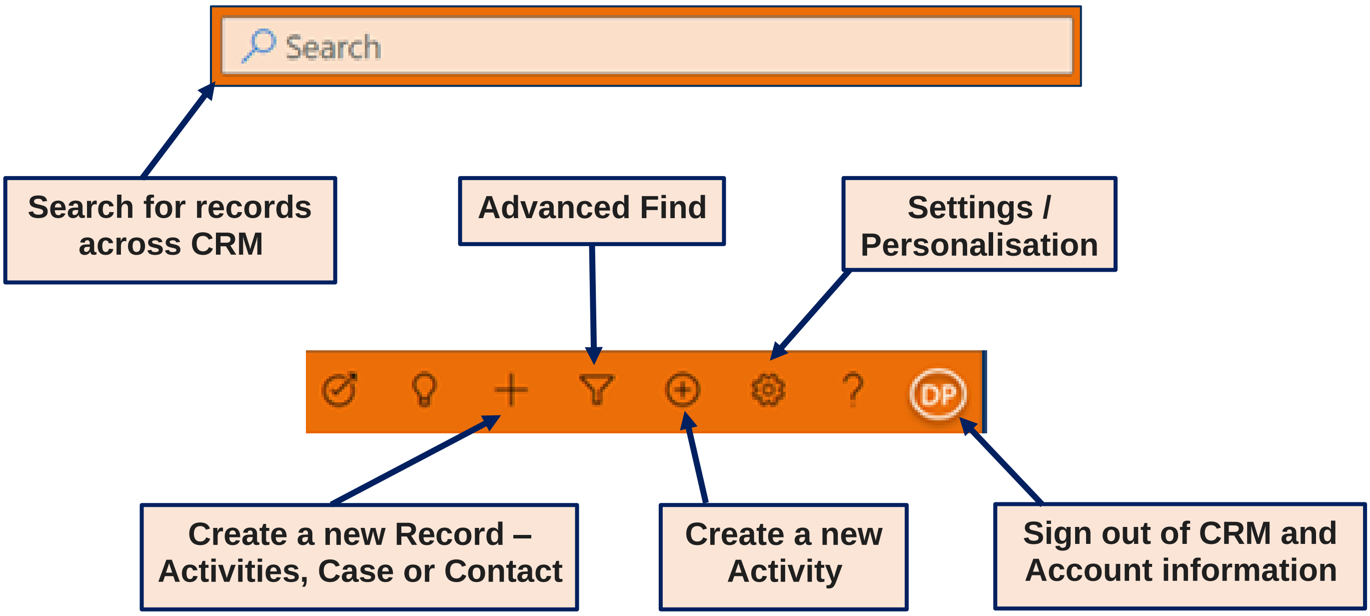
Navigating MS Dynamics Student CRM

Navigation Menu / Toolbar

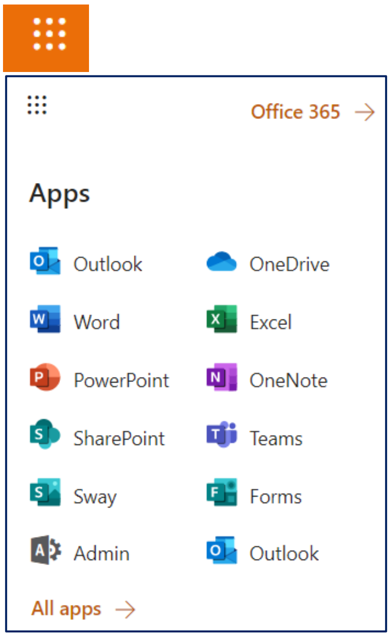
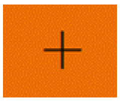
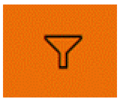
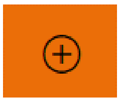
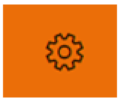
The Navigation Toolbar is located across the top of the screen. The picture below displays the Navigation Toolbar in two parts for ease of layout and description.







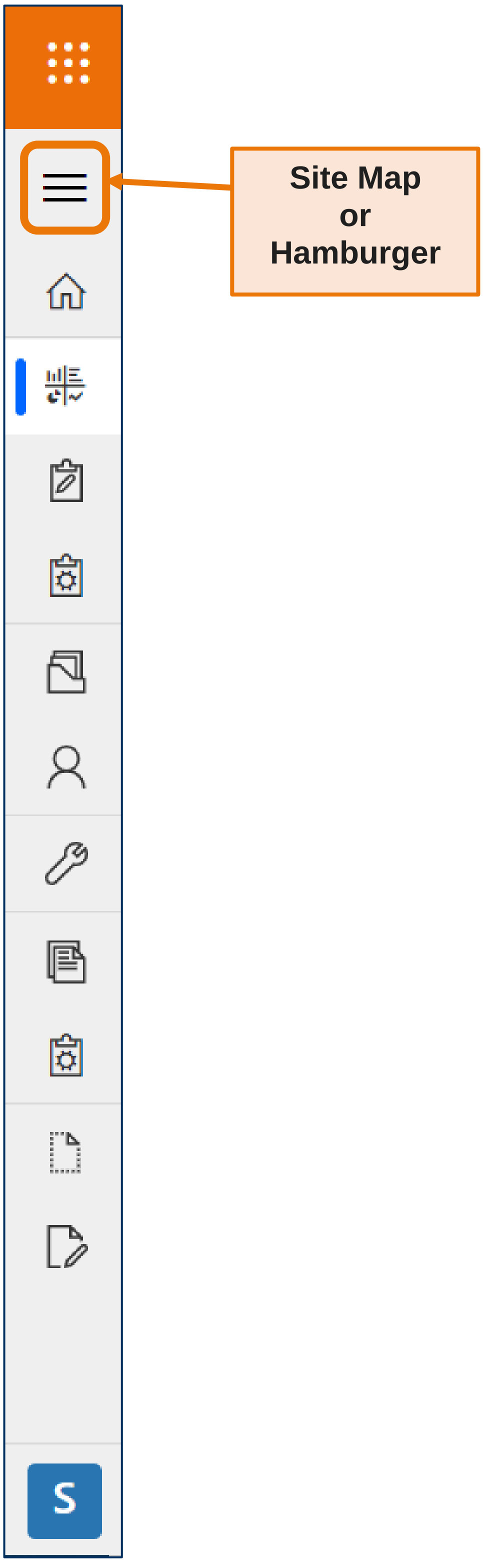
Features of the Navigation Menu / Toolbar

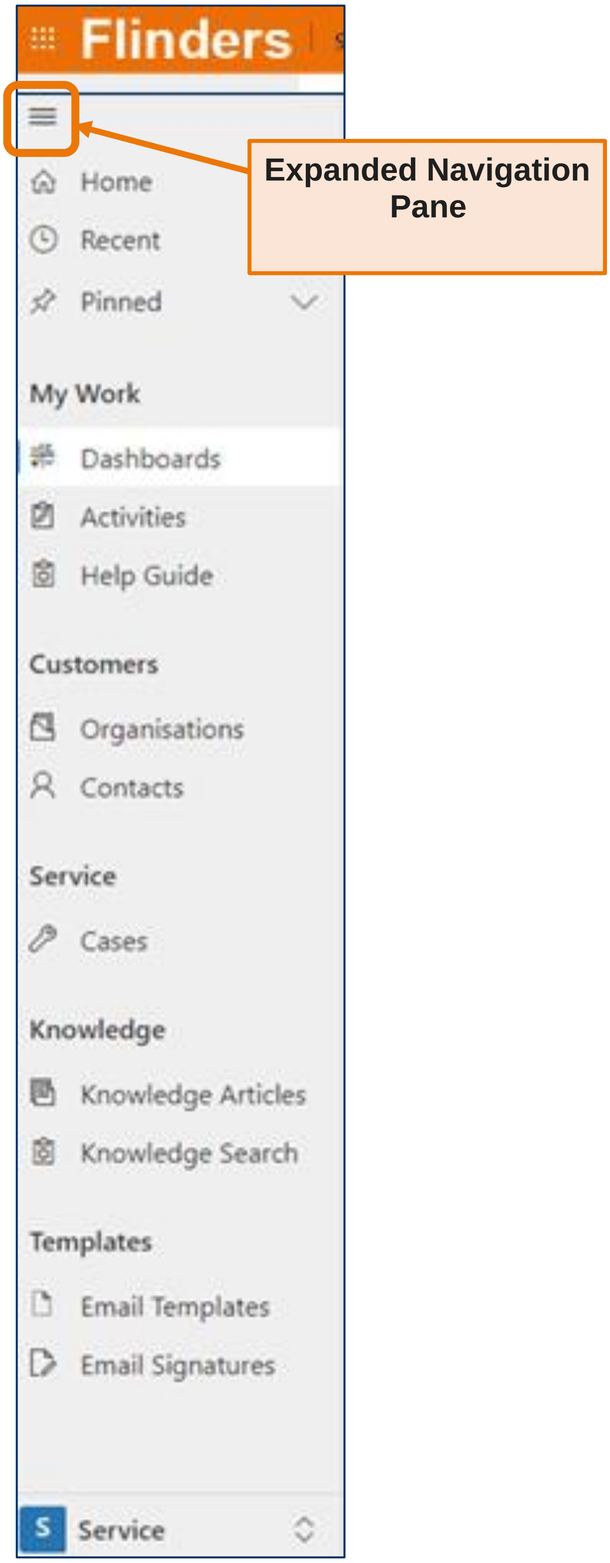
Icon	Description
	**Navigate to other applications (Waffle)** Clicking the Waffle will display all of the Microsoft services available.
	Indicates the current CRM Application (App). Staff working in Omnichannel for Customer Service will have this displayed.
	**Search** for records across CRM including Contacts, Activities, Cases, Opportunities, Organisations.
	**Create a new Record**, for example Activities, Case or Contact.
	**Advanced Find**.
	**Create a new Activity**.
	**Settings** – Personalisation Settings to change the time zone (Adelaide) and Formats (English Australia).
	Who is logged in to CRM. User information and sign out of CRM

Customer Services Navigation Pane

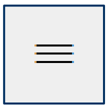
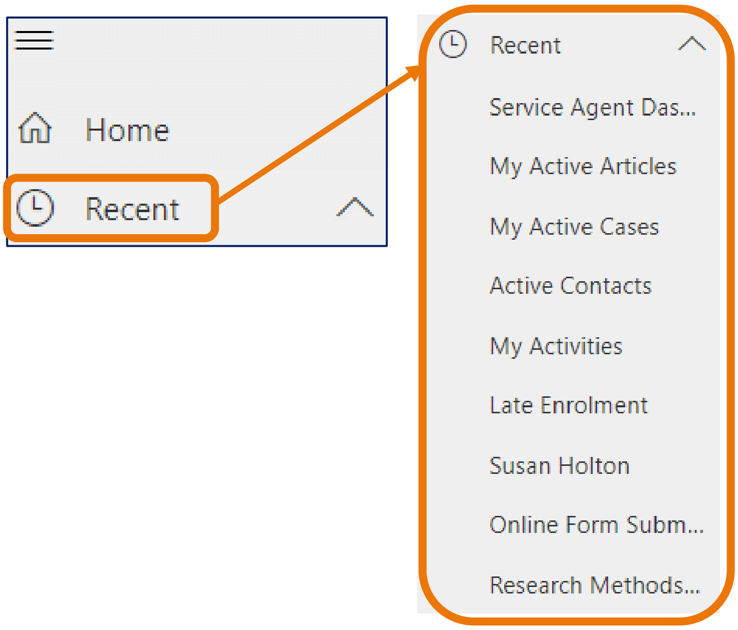
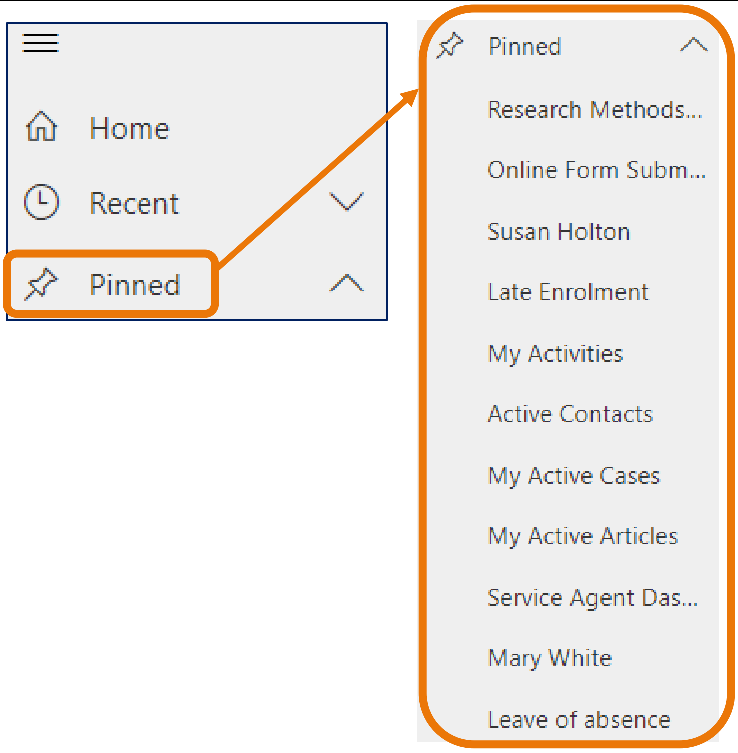
The Navigation Pane is located on the left hand side of the screen. The Site Map or Hamburger (3 lines) is located beneath the Waffle (9 dots). Click the Hamburger to expand or compress the Navigation Pane which displays the descriptions of each icon. These are described below.

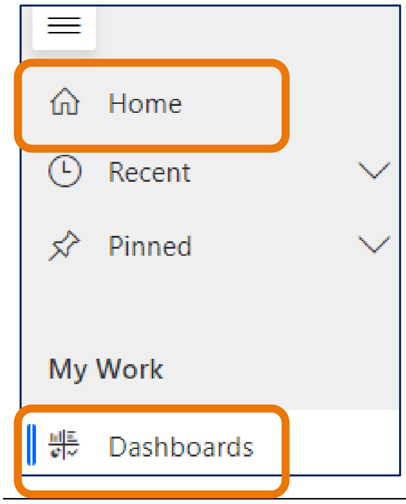
The Navigation Pane does not need to be expanded to use the icons unless Recent or Pinned need to be used.



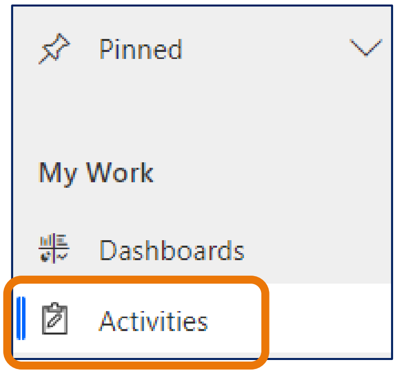


Features of the Navigation Pane

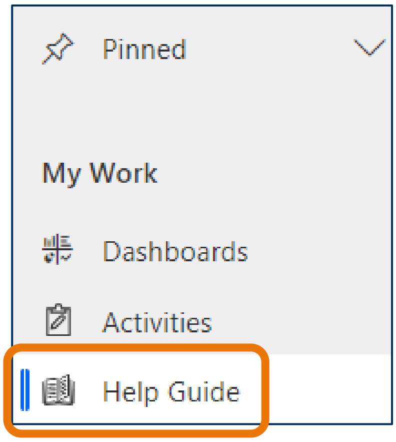
Icon	Description
	**Site Map** (**Hamburger**) – click to expand the Navigation Pane.
	**Recent** – displays the last ten Records viewed. Click on the Record name to navigate to that Record. A Record can be an Activity, System View, Contact or Case, Dashboard. To **pin** - rest the mouse on a Recent Record and click on the  Pin icon. Therefore pinning and keeping the record in the Navigation Menu, as described below.
	**Pinned** – displays any Record which has been pinned. Click on the Record name to navigate to that Record. To **pin** - rest the mouse on a Recent Record and click on the  Pin icon. To **unpin** – rest the mouse on a Pinned (or Recent) Record and click on the  Pin icon.



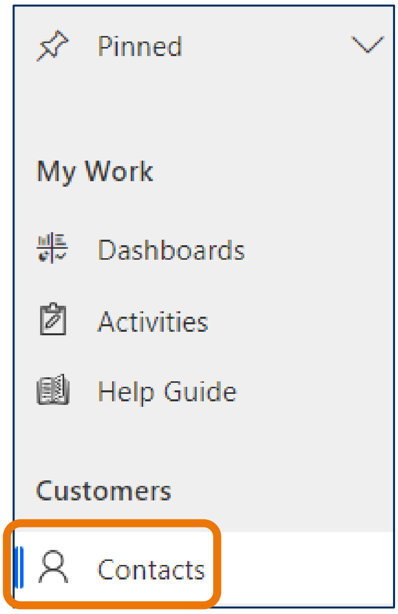
Home and Dashboards – Displays the default **Dashboard**. By Default this is Service Agent Dashboard.



Activities – displays Activities. By default the System View is My Activities.

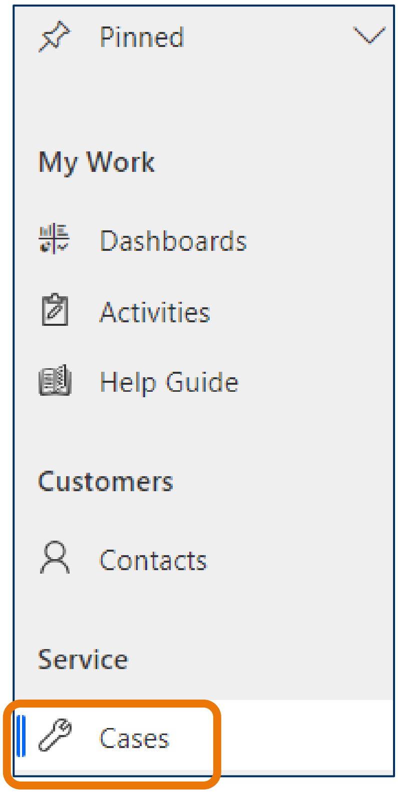


Help Guide –is a link to FLO, MS Dynamics Student CRM Training where the User Guides are located. You may need to sign into FLO.



Contacts – displays Contacts.

By default the System View is Active Contacts.

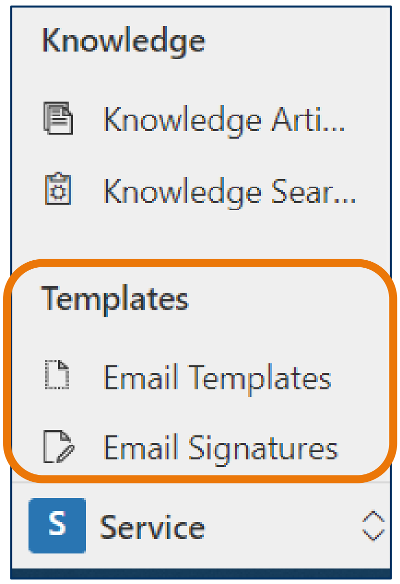


Cases – displays Cases.

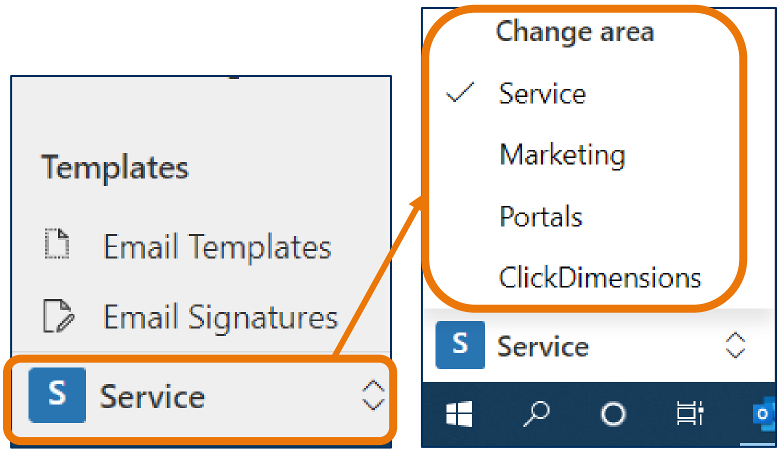
By default the System View is My Team's Active Cases.

Knowledge Articles – displays the current CRM Knowledge Articles, usually displays My Active Articles.

Knowledge Search – enables searching for a Knowledge Article.



Email Templates and Email Signatures – displays the current Email Templates and allows the creation of new Email Templates.

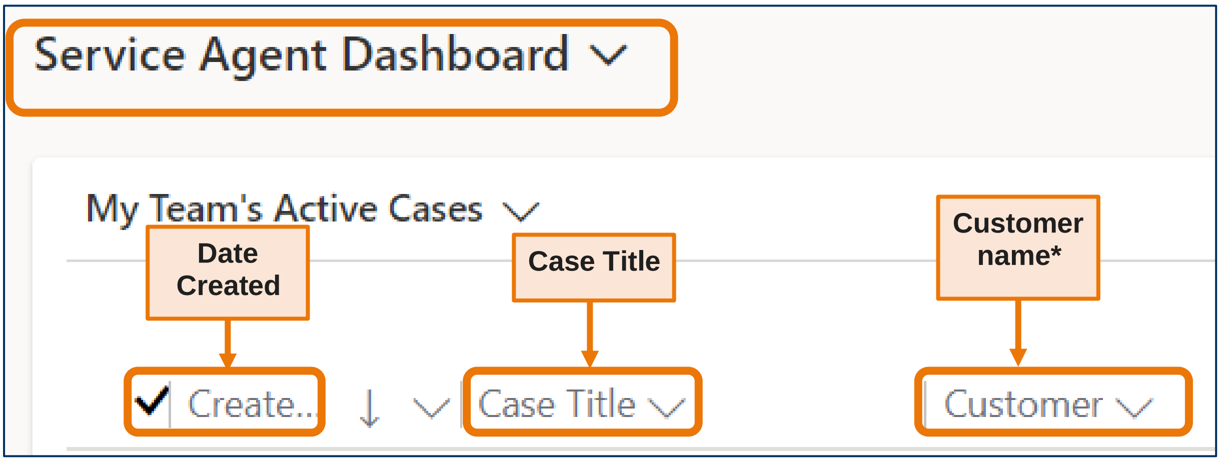


Change Area – if permission have been provided, swtiches between Marketing and Click Dimension.

Navigating the Service Agent Dashboard

The **Service Agent Dashboard** is also referred to as the Home screen. It is possible to create your own Dashboards. Information is included in the CRM How to Guide Advanced Find Filter and View Case Information. My Team's Active Cases and My Active Cases are the default System Views.

- Click on the name of the **Case Title** to navigate to that Case Record.
- Click on the **Customer** name to navigate to that Contact Record.
- Sort on each of the header names by clicking on the Field name, for example **Created On**, **Case Title**, **Customer**.



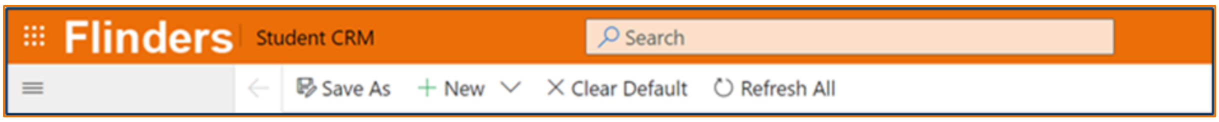
Searching in MS Dynamics Student CRM

The new CRM Search bar will be available from Friday 11th December, 2020. Some of the features and instructions are described below.

Refer to the **How to Guide MS Dynamics Student CRM How to Guide – New Search Functionality** and **video** for full instructions on this feature.

'Office 365 like' Search bar

- The Search bar is similar to Office 365 applications and will always be displayed in the centre of MS Dynamics CRM Navigation Menu, top of the screen.
- The search results are displayed in a List view and Filters can be applied to narrow down the results.



Records and the Fields which are searched

- The search results are dependant upon the information typed in the Search bar. For example, searching for **assignment comment** will display results from Cases and an Email subject,
- Searching a phone number will display Contact records. The number must be typed as it appears in the Contact record – usually without spaces.
- If any text searched exists in any of the fields below then these records will be displayed.

Quotation marks (“ “)

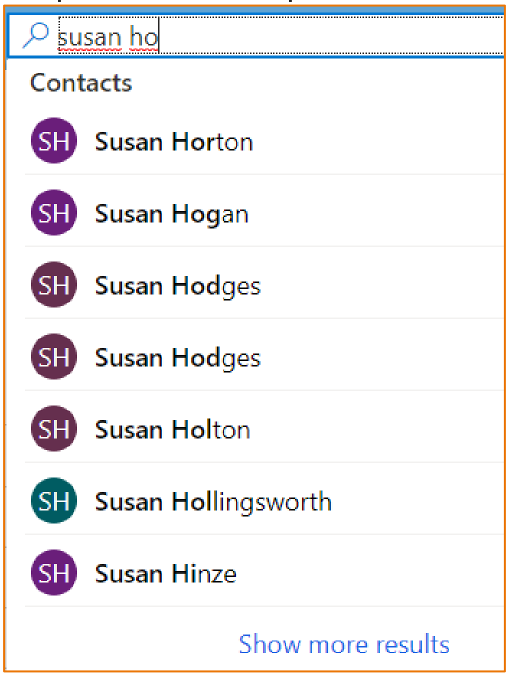
- On occasions there are many more results than expected due to the in depth searching. If you are absolutely sure about the information to be searched, place quotation marks around the words to narrow down the search.

Recent searches are displayed

- Click in the Search bar.
- Recent searches are displayed.

Automatic suggestions are displayed

- Click in the Search bar and type the information.
- **DO NOT** press the Enter key.
- A drop down list of records is displayed when typing any information
- The drop down list content is dependant on the information typed.
- Clicking a record from the drop down list will open that record.



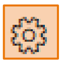
Display Search results

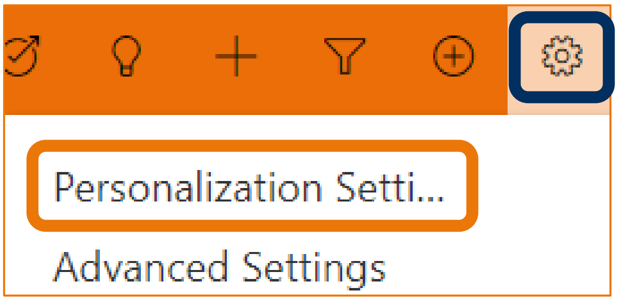
After typing the search information, pressing the **Enter** key displays the search results in the List view.

Filters

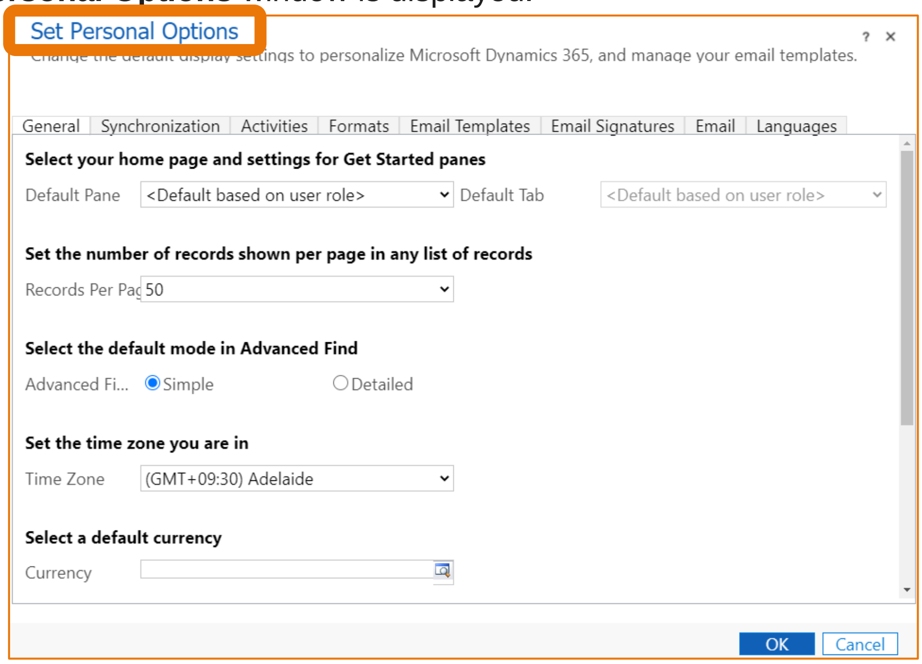
Filtering can be applied to narrow down the search results. The options available in the Filters pane are dependant upon which Search results tab is selected. Click in the square to the left of the Filters option to select and again to deselect. Click **Clear all** to clear all searches.

Change the default Change Area

1. Click on  Settings icon on the right hand side of the Navigation Menu.
2. Click on **Personalisation Settings**.

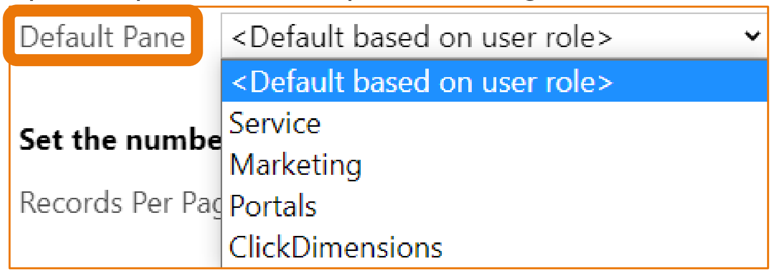


3. The **Set Personal Options** window is displayed.



4. Click adjacent to **Default Pane** and a menu drops down.

5. Click on the appropriate option, for example Marketing.



6. Click **OK** in the bottom right hand corner of the Set Personal Options.

7. Close Microsoft Dynamics Student CRM and open again. The module in the Change area will be as selected in Step 5.

Version Control

Version Number	Version Date	Changes
1.0	2017	Original Notes
2.0	October, 2018 to July 2020	Updated.
3.0	October, 2020	Included reference to Phone Call Activities. Updated for the Unified User Interface. Uploaded to FLO.
4.0	December, 2020	Updated to include the **New Search Functionality** starting on Page 18. Included information on changing the default setting for Change area on Page 20. Added reference to the **How to Guide New Search Functionality**. Reordered the list of how to guides in alphabetical order. Uploaded to FLO.