MS Dynamics Student CRM
Flinders University

Student Progress
SMS Responses

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Version 3.0

Contents

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.

The SMS are sent twice per year to students who fail 50% or more of their topics in a semester for a subsequent time.

- August - Semester 1;
- January - Semester 2 (previous year).

The Students are asked to reply with a YES if they need assistance.

The CRM Assyst ticket is created by the Student Progress and Assessment, Team. The CRM Team sends the SMS as requested. The responses from the Students are saved to MS Dynamics Student CRM and, with correct permissions, viewed in a CRM Dashboard or in a Power BI report and can be exported from Power BI to Excel for record keeping. The exporting might be useful as the report is overwritten in Power BI each time a report is created.

The steps involved are listed below:

- Students failing 50% or more of their topics for a subsequent time are sent an email, followed by an SMS at the end of Semester 1 (August) and Semester 2 (January of the following year).

- At least 5 working days before the SMS is to be sent the Student Progress and Assessment Team opens a CRM Assyst ticket with the SMS information (maximum of 160 characters) and estimated date the SMS should be sent.

- As soon as known, the CSV file is sent to the CRM Team – attached to the CRM ticket or emailed. The CSV file includes the Student ID of all the Students to be sent the SMS. This is referred to as a **Marketing List**.

- The date the CRM Team is to send the SMS is also confirmed in the CRM Assyst ticket.

- The CSV File should only have one column with the title **Student ID** and contain the Student IDs who are to be sent the SMS.

- The sending of the SMS is confirmed by the CRM Team via Assyst and the ticket is closed.

- The sender of the SMS is not identified as it is sent from a random mobile number.
- Students reply to the SMS if they need assistance.

- The CRM Team would have already created a Power BI report. Once the report is created it is set up for future reporting and sharing as requested.

- The Power BI report includes all the Student's replies including the Student ID, Student Name and their response in full, regardless of content. Please be warned that some responses may include profanity. The report is automatically updated each morning.

- For Semester 1, 2019 the key dates will be:
  a. 5 Aug – Student Progress report pulled from the Student Management System.
  b. 12 Aug – SMS sent to relevant students.
  c. 18 Aug – Deadline for students to reply to SMS
  d. 19 Aug – Power BI report pulled.
  e. 20 Aug – Start of calling campaign.

- The current Power BI report is always available to the CRM Team.

- CRM Users needing to use Power BI are required to ask their Supervisor to request a Power BI license from the Help Desk.

- The Student's responses contained in the results of the report can be viewed in an MS Dynamics Student CRM Dashboard. The name is the same as the BI Report.

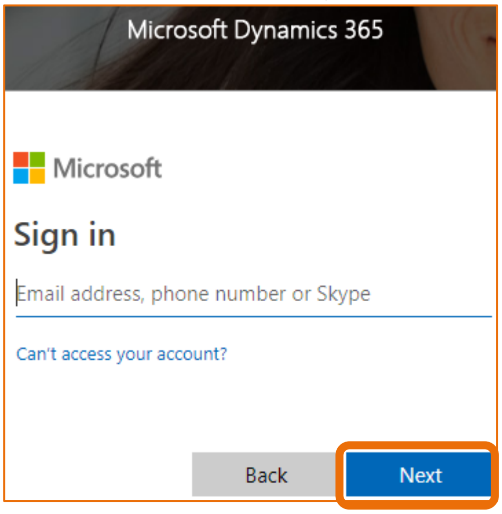
- With correct permissions the report can be exported from Power BI to Excel.

- As the process is repeated and the report is overwritten in Power BI it is dependent upon the Student Progress and Assessment Team to export from Power BI and save the report for their history if needed.

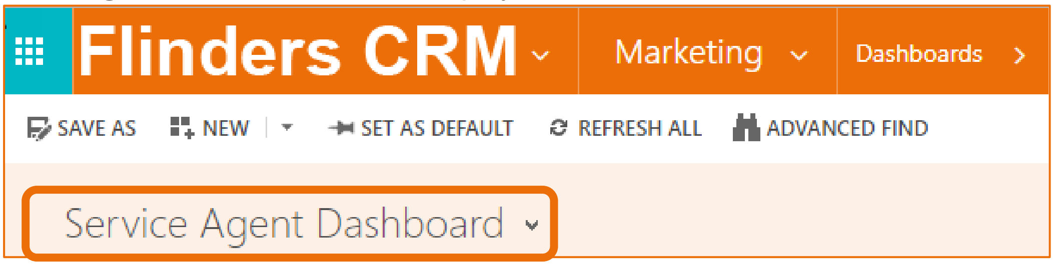
Sign in to MS Dynamics Student CRM

1. Locate [Okta](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.

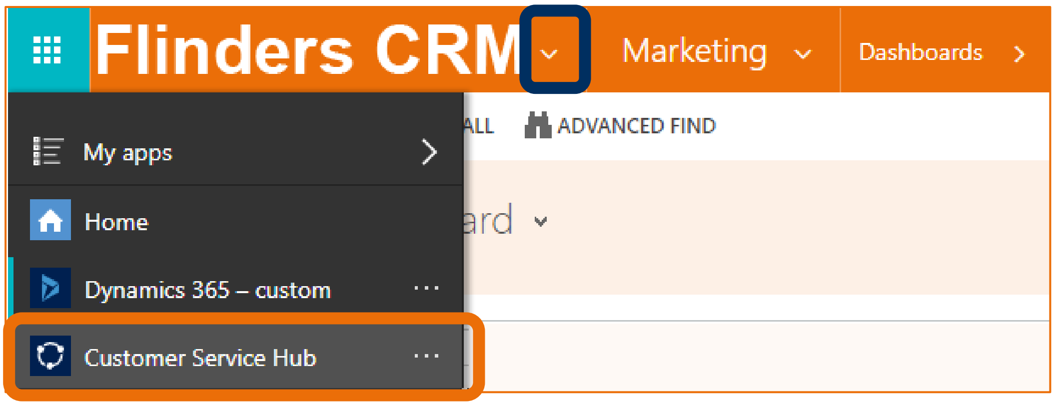


3. The **Service Agent Dashboard** is now displayed.

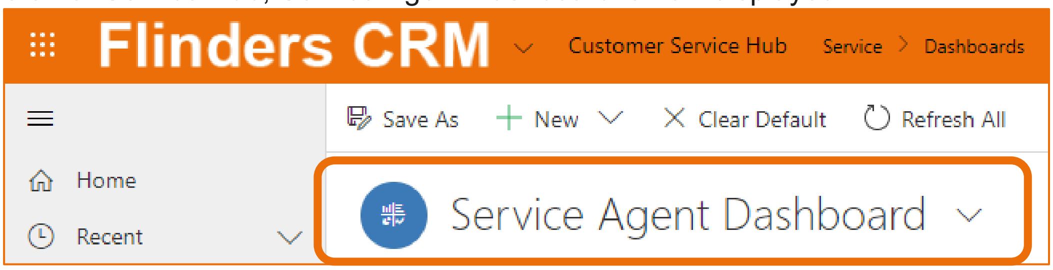


Customer Service Hub

1. Click the drop down arrow adjacent to Flinders CRM. The Navigation Pane is displayed on the left hand side of the screen.
2. Click on Customer Service Hub.



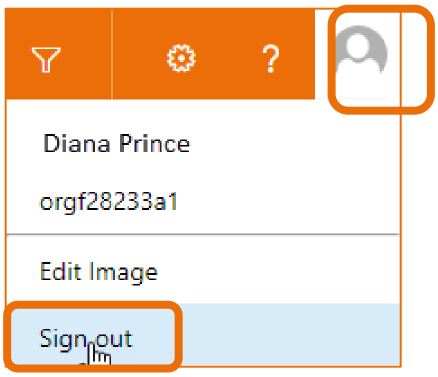
3. The Customer Service Hub, Service Agent Dashboard is now displayed.



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 the 'head and shoulders'** in the **Navigation Pane**, top right hand corner.
2. Click on **Sign out**.



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

View the Report in a Dashboard

As requested in a CRM Assyst ticket, the CRM Team will create and share the CRM Dashboard and Power BI Report

1. Open MS Dynamics Student CRM, Customer Service Hub.

2. Click the drop down arrow adjacent to the **Service Agent Dashboard**. Scroll down to **My Dashboards**.

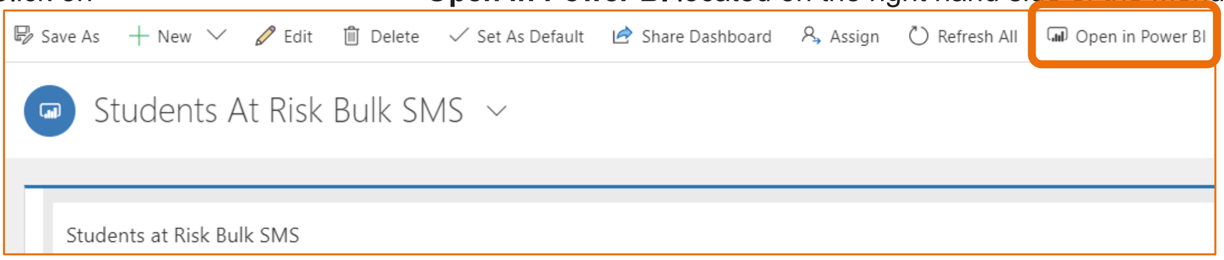
3. Click on the **Students at Risk Bulk SMS Dashboard** which is the name used for the purpose of these notes.

4. The **Students at Risk Bulk SMS** Dashboard is now displayed and includes the results of the current Power BI Report.

View the Report in Power BI

1. Complete the steps in **View the Report in a Dashboard** on Page 6.

2. Click on  **Open in Power BI** located on the right hand side of the Menu bar.



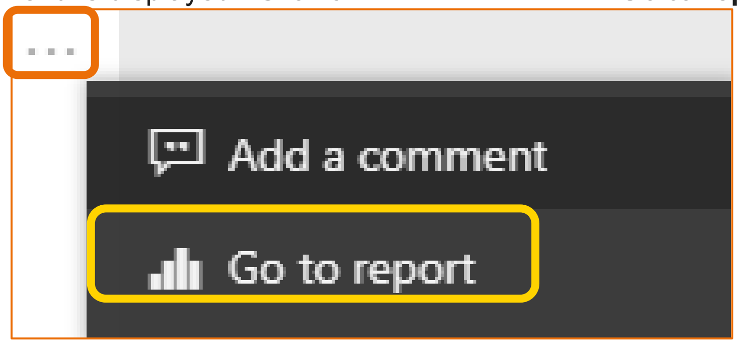
3. A new browser tab is opened and Power BI is displayed together with the **Students at Risk Bulk SMS** report.

Export the Report from Power BI to Excel

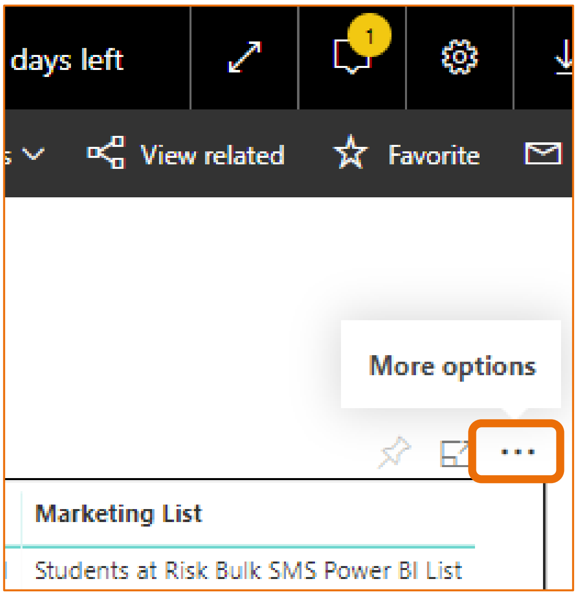
1. Complete the steps in **View the Report in Power BI** on Page 6.

2. Position the mouse over the top right hand corner of the report. An **ellipsis** will appear. Rest the mouse on the ellipses and the prompt **More options** is displayed.

3. Click the ellipses. A menu is displayed. Click on  **Go to report**.



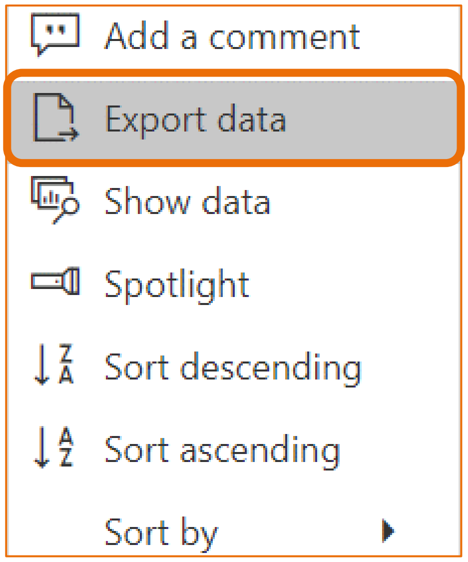
4. Position the mouse just above the top right hand corner of the report, above the **Marketing List** column. An **ellipsis** will appear. Rest the mouse on the ellipses and the prompt **More options** is displayed.



5. Click the ellipses. A menu is displayed.

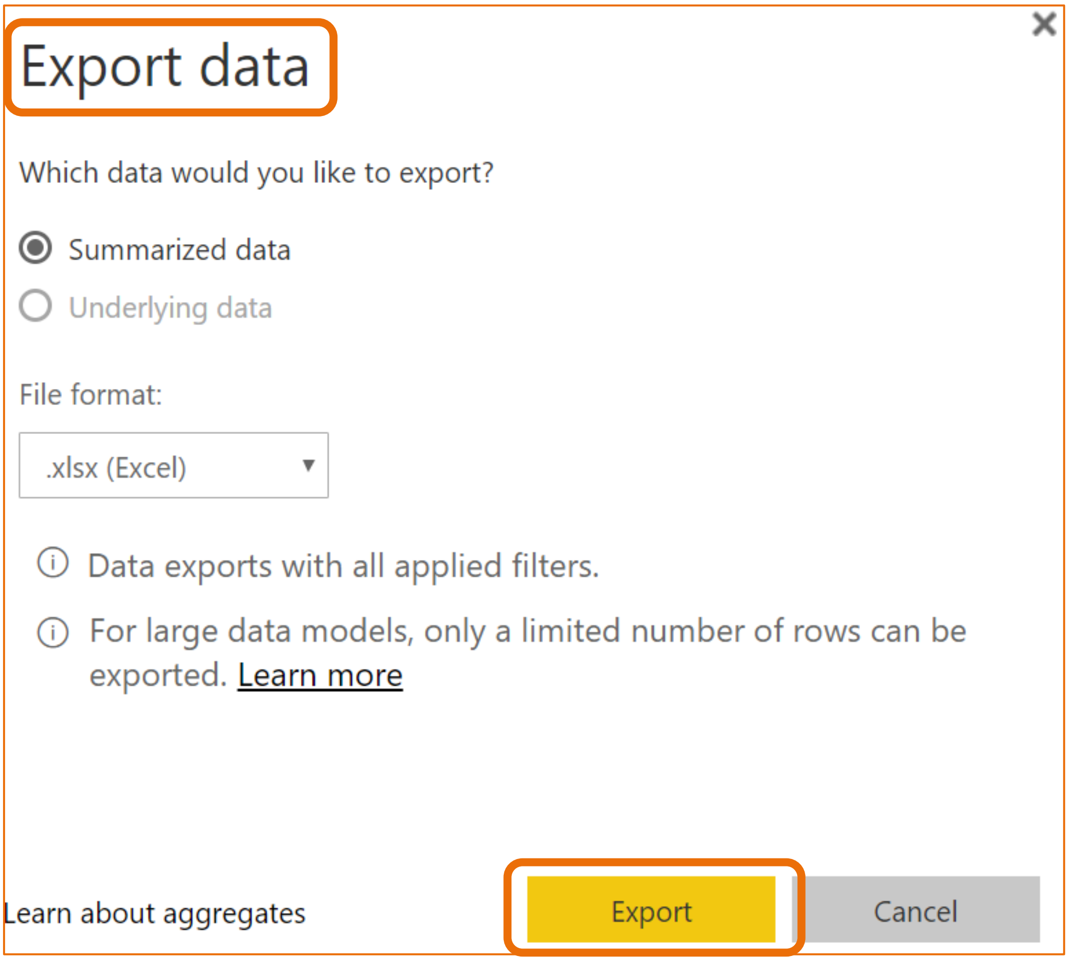
6. Click on 

Export data.



7. The Export data window is displayed, as shown below. Click 

Export in the bottom right hand corner of the window.



8. Open the Excel workbook. The information is formatted in an Excel Table.

9. Name and save the Workbook appropriately.

10. Close Power BI.

Version Control

Version Number	Version Date	Changes
1.0	July, 2019	Original Notes. Uploaded to FLO.
2.0	October, 2019	Updated for October Upgrade. No changes made to information. Uploaded to FLO.
3.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.