MS Dynamics Student CRM
Flinders University

Viewing Attachments

Developed by Wendy James, Training Specialist

December, 2020

Version 7.0

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.

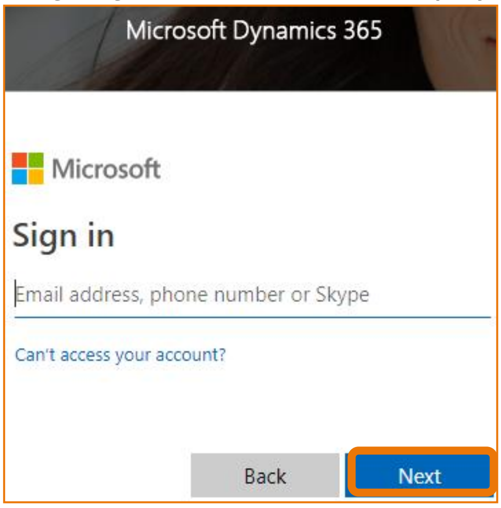
These notes refer to working in MS Dynamics Student CRM **Customer Service Hub** to locate an Attachment when a Student has created a Case via Ask Flinders, Request Support and attached a file to this Request which creates a **Public Comment** with Attached file OR a Student or Staff member has sent an **Email** and attached a file.

Sign in to MS Dynamics Student CRM

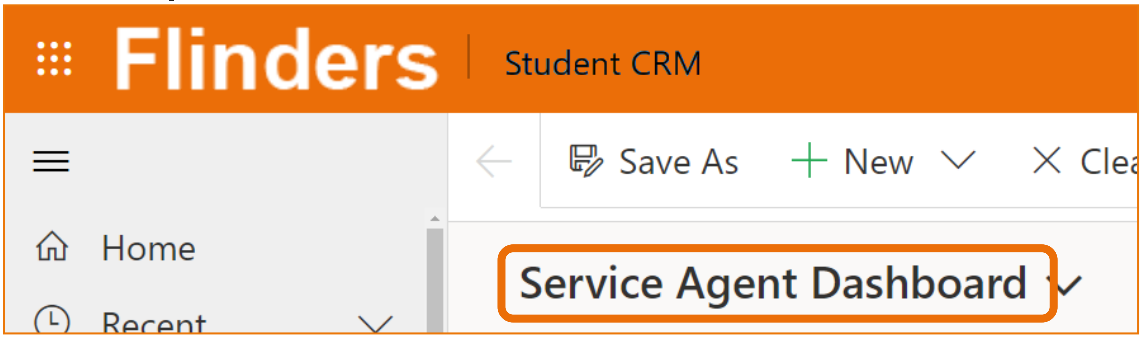
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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.

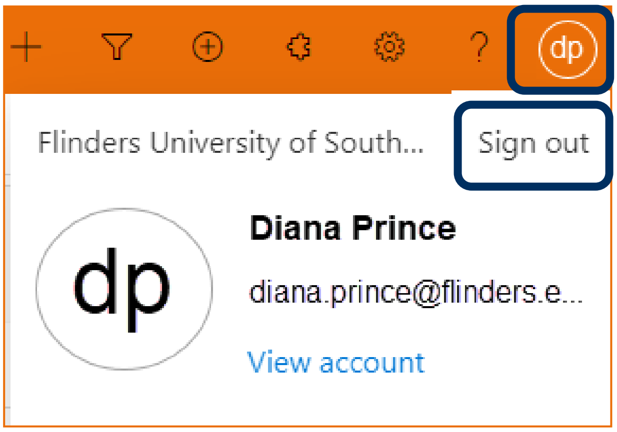


Sign Out of MS Dynamics Student CRM

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**.

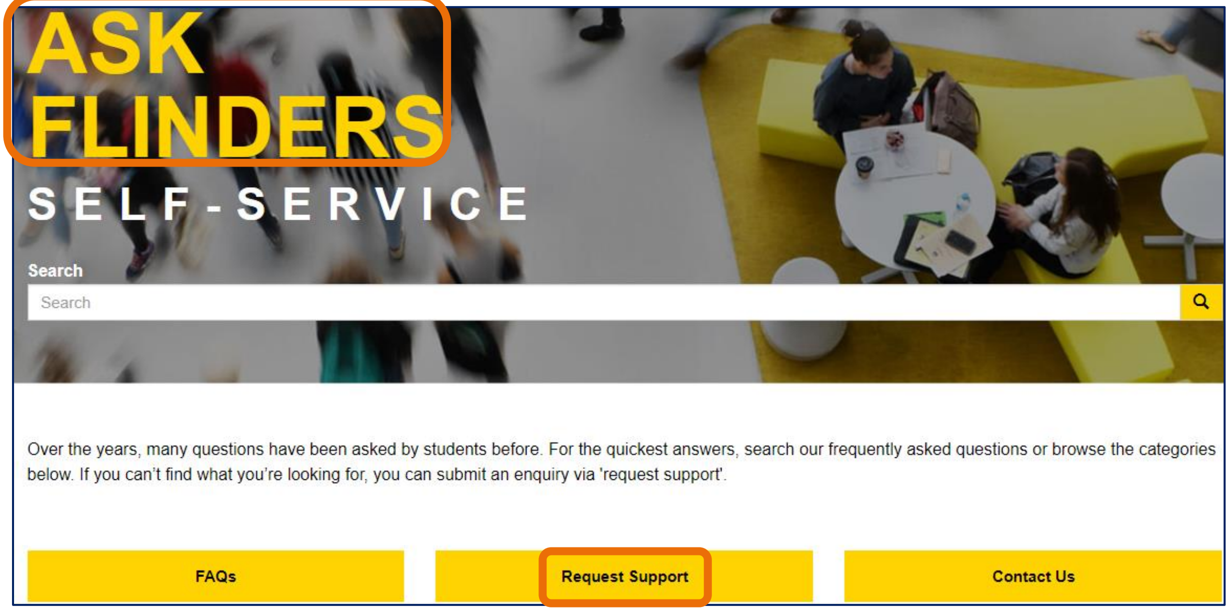


3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

Ask Flinders – Student creates the Case including an Attachment

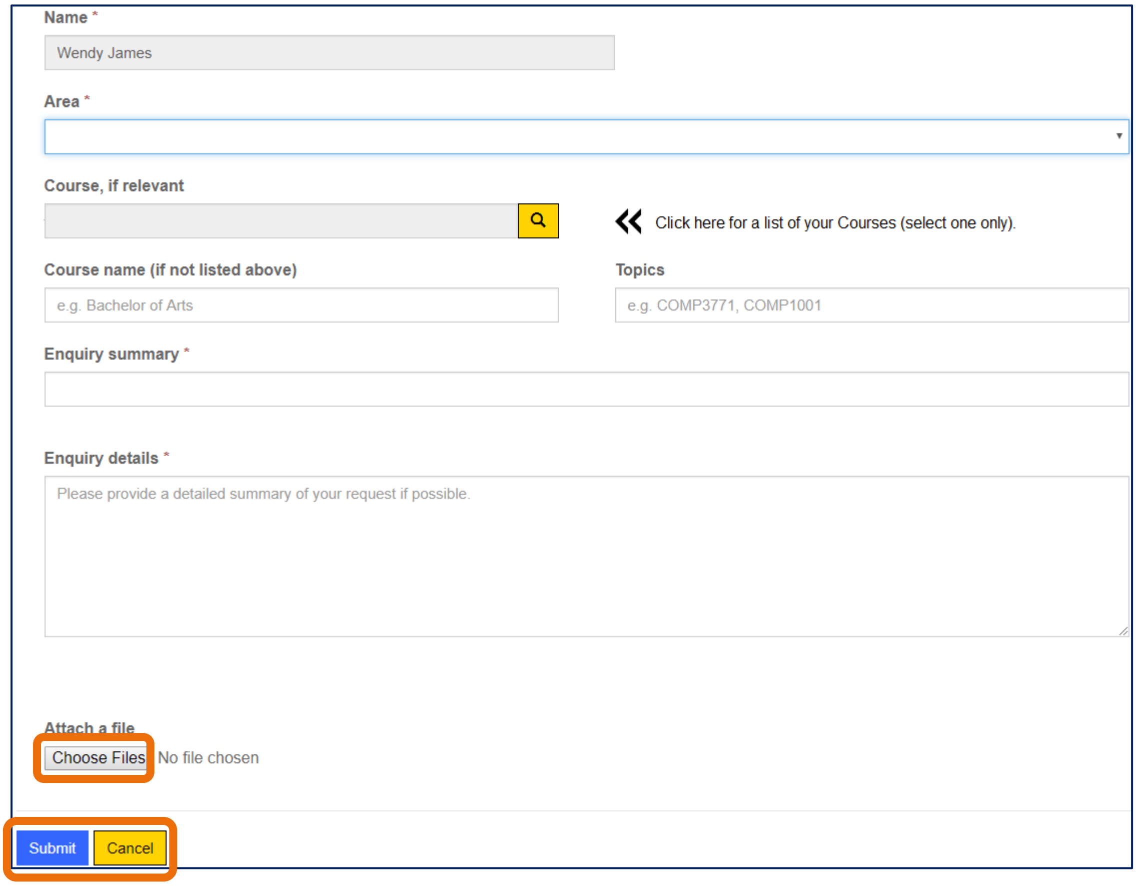
Student signs into Ask Flinders and selects Requests Support

1. The Student will sign into the **Ask Flinders Portal** and click on **Request Support** to create a Case to which they will attach a file.

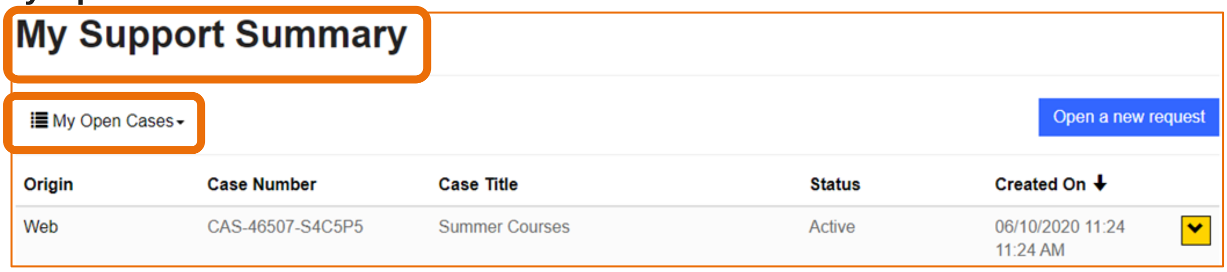


Student creates the Case and attaches a file

2. The Student will complete all areas of the form as applicable, shown below, and attach a file by clicking either **Choose file** or **Browse** (depending upon the browser being used) beneath **Attach a file** and then click **Submit** to submit the new Case, as circled below. As the Enquiry details are typed, suggested topics from the Knowledge Base are displayed.



3. The Student will see their Case details in the Portal, under **My Support Summary**, **My Open Cases**.



4. The Case is automatically created in MS Dynamics Student CRM and displayed in the appropriate Queue on the Team's Dashboard.

Case created by Student by signing into Ask Flinders and requesting support

Locate and select the Case

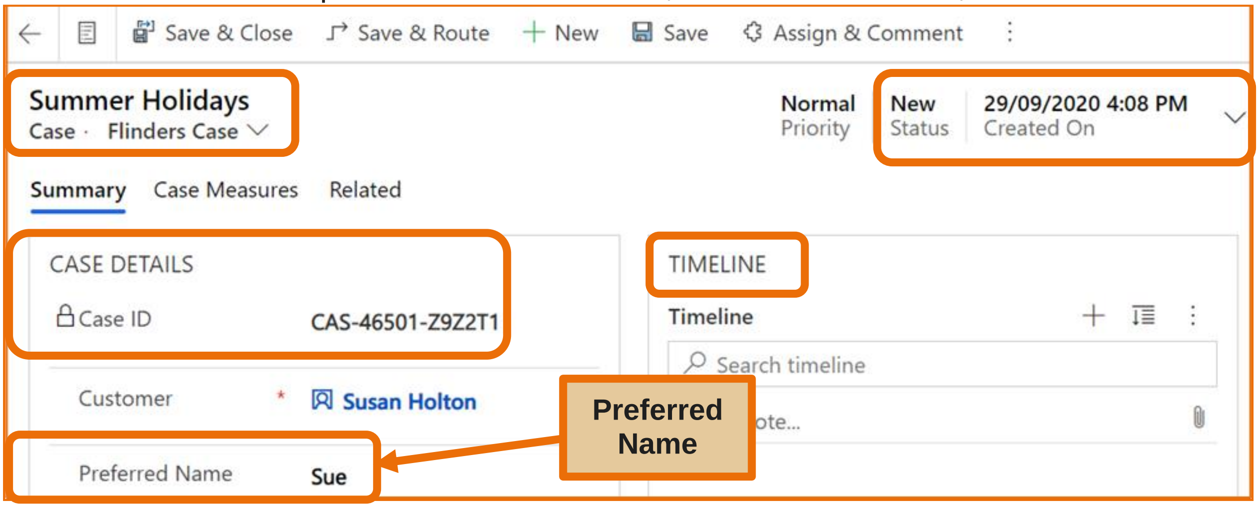
1. Ensure the correct view is displayed, for example **My Active Cases** or **My Team's Active Cases**.
   - **Created on** – the Date and time of the Case Creation is displayed.
   - **Case Title** – lists the names of the Cases.
   - **Customer** – Student's name.

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.

Preferred Name, Case Record

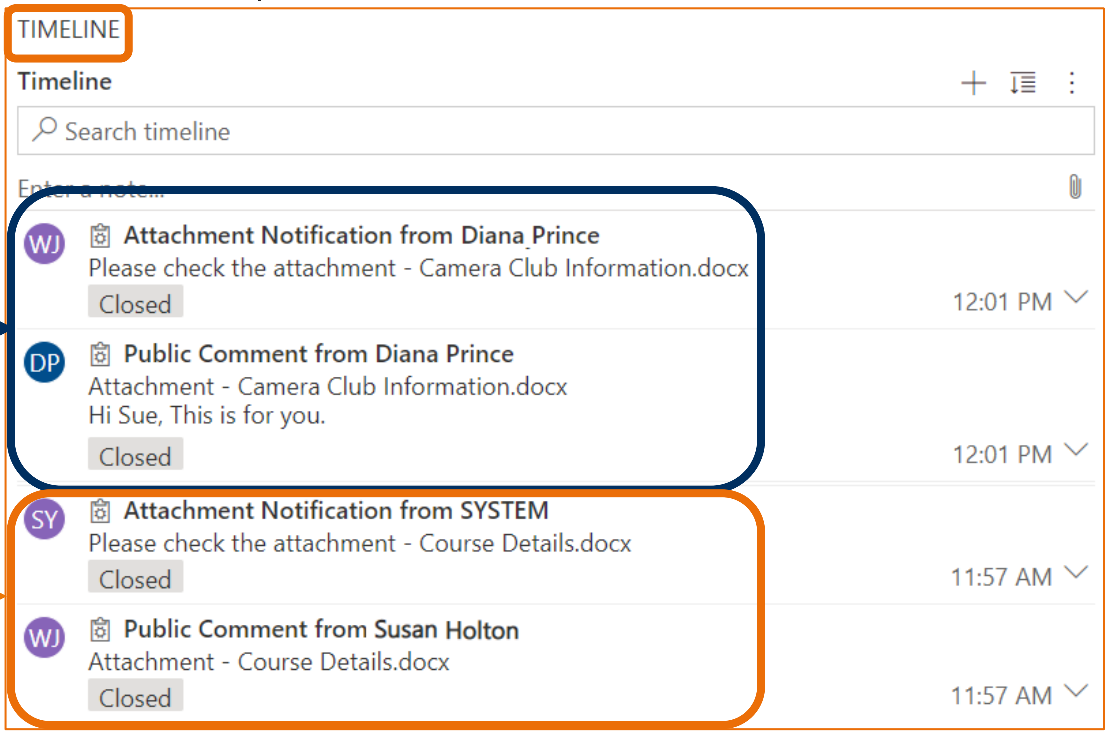
4. If the Student has updated their details in Student Two and added a **Preferred Name**, it will be visible at the top of the CASE DETAILS, beneath **Customer**, as circled below.



Timeline Activities

The Case Timeline, Activities will be displayed.

1. The **TIMELINE** pane displays that the Case has an **Activity with at least one an attachment**.
   - The **Public Comment from the Student with the Attachment**. Click on **Open Record** and click on the attachment on the right hand side in the **Note**.
   - **Attachment Notification from SYSTEM**. This is advice and is not where the attached file will be opened. The Avatar is SY implying it is system generated.
   - **Public Comment from Staff Member**. Click on **Open Record** and click on the attachment on the right hand side in the **Note**.
   - **Attachment Notification from Staff Member**. This is advice and is not where the attached file will be opened.

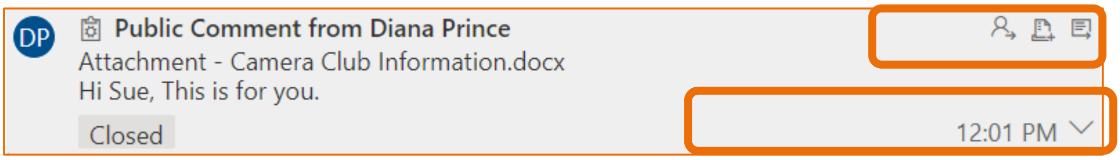


Need help with the CRM? **Use the Okta, Service One web form.** Find the appropriate form for a **Request** or **Incident** and complete the details.

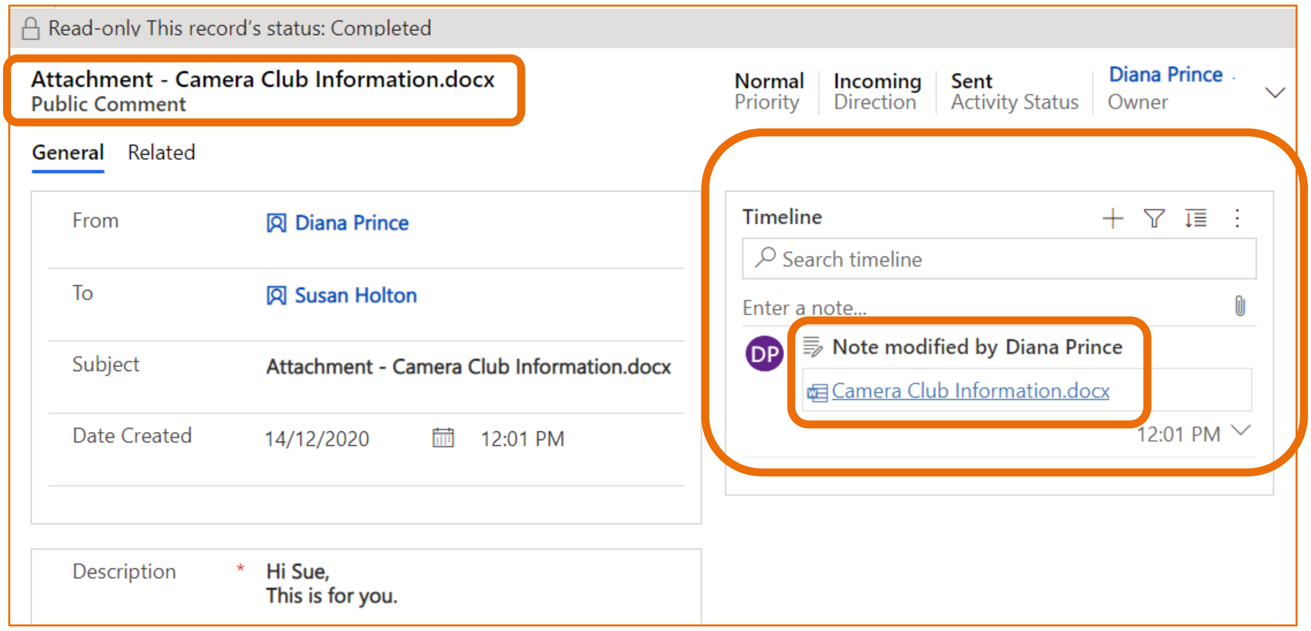
Open the Public Comment

2. Rest the mouse on the Public Comment Activity. The group of icons are displayed on the right hand side of the screen and beneath them the name of the attached file.

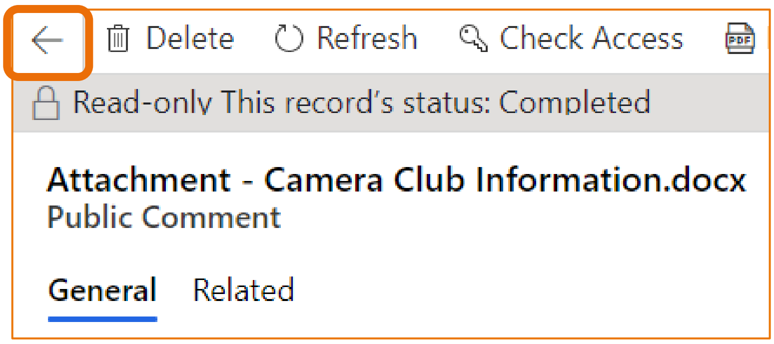
   Click the last icon in the group **Open Record**. The Public Comment is displayed with all details.



3. The name of the attached file is located in the Public Comment Timeline, right hand side of the Public Comment. Click on the name of the file to open it.



4. Click on the **Go Back** arrow beneath Flinders CRM in the Public Comment screen to return to the Case Timeline.



Case created by Student sending an Email

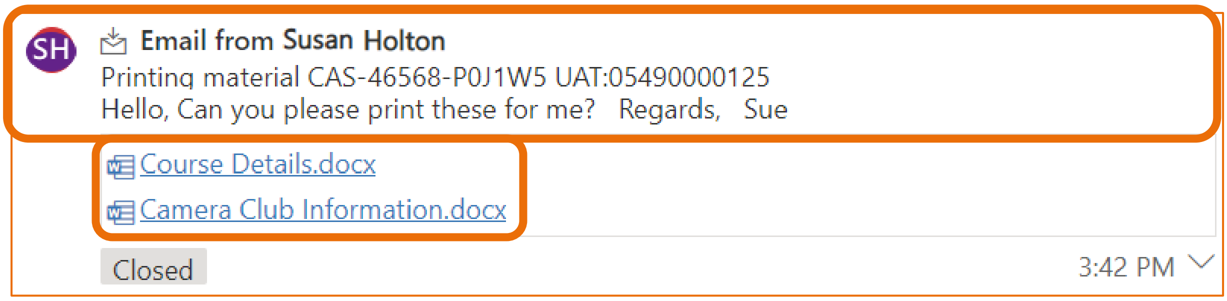
Open the Case

1. Refer to **Locate and select the Case** on Page 6.

Timeline Activities

2. The Case Timeline, Activities will be displayed.

3. The **TIMELINE** pane displays that the Case has an **Email Activity with an attachment**.
   - The Email Activity displays the attachment at the bottom of the Activity.
   - Click the attachment to open the file. Depending on the browser in use the attachment will open or be displayed in the bottom left hand corner of the screen to be opened or downloaded.



View all Attachment Notifications in the Case Activities

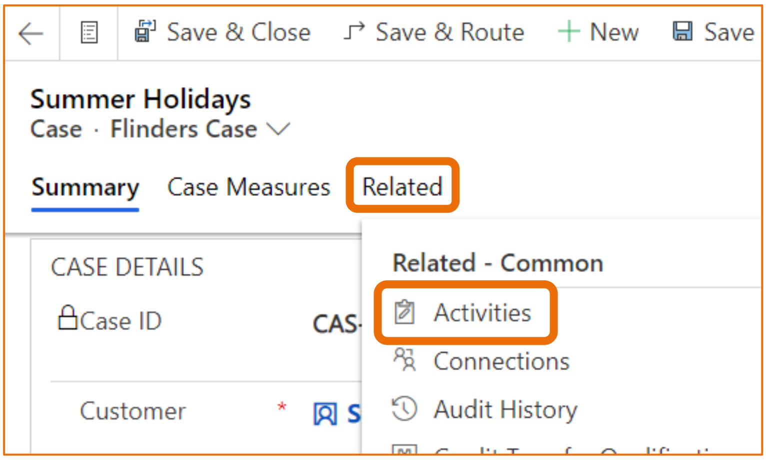
All Case Activities can be viewed from the **Case Record**, **Related**, **Activities**. Click on **Summary** to view the Case details again.

Open the Case

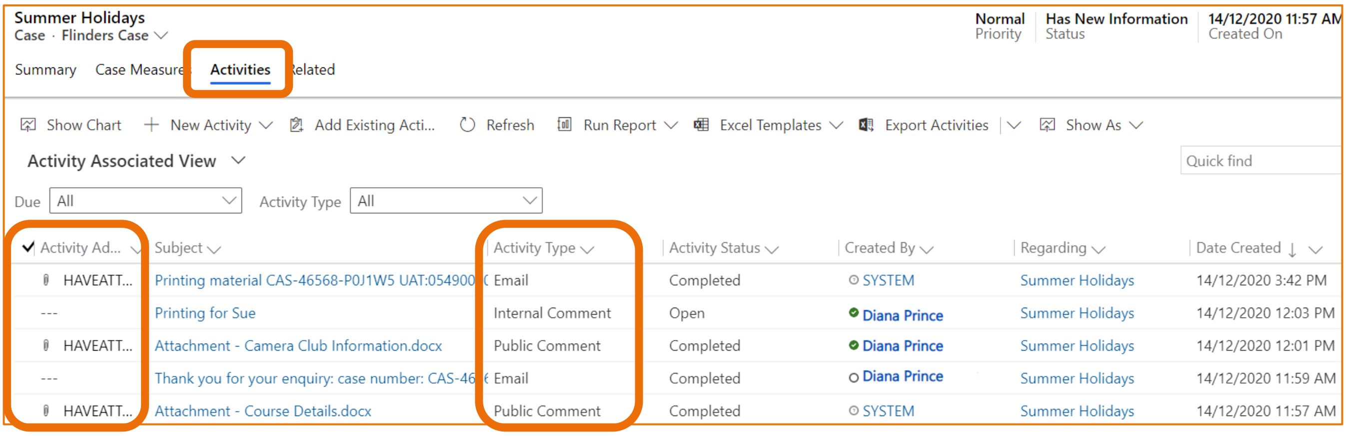
1. Refer to **Locate and select the Case** on Page 6.

2. Click on **Related** located beneath the Case name, left hand side of the screen.

3. Click on **Activities** from the drop down list. The **Activity Associated View** is displayed.



4. The Activities are automatically sorted on **Date Created** (last column).
   - An Activity with an **Attachment** is indicated by a paper clip to the left of the **Subject** (first column titled **Activity Additional Parameters**).
   - The **Activity Type** is displayed (third column).



5. Click on the Subject name which opens the Activity.

6. Open the Attachment. Follow the instructions above for the appropriate Activity selected.

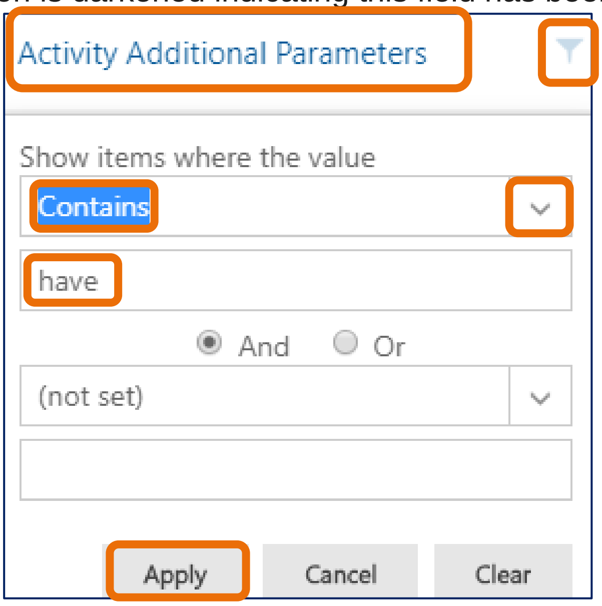
Filter the Columns

1. If too many Activities are displayed, click on the Filter icon on the right hand side of the first column **Activity Additional Parameters**. The column may need to be widened or the drop down arrow clicked to display **Filter by**.

2. Click the first drop down arrow (under the heading **Show items where the value**) and select **Contains**.

3. Click in the text area beneath Contains and type **have**.

4. Click on **Apply**. All Activities with the word **have** and therefore contain an attachment are displayed. The filter icon is darkened indicating this field has been filtered: .



Clear the Filter of Columns

1. Click on the Filter icon on the right hand side of the first column **Activity Additional Parameters**. The column may need to be widened or click the drop down arrow to display **Clear filter**.

2. Click on **Clear**.

3. All the Activities will be displayed.

4. Click on **Summary**, beneath the Case name, to return to the Case details.

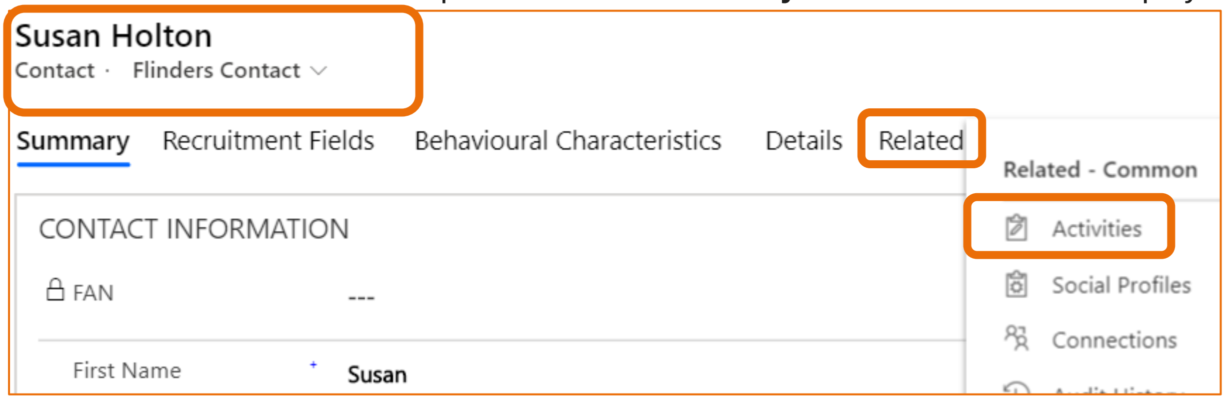
View all Attachment Notifications in the Contact Record

Any Activities saved to the Contact Record's Case can be viewed in the Contact Record. Click on **Summary** to view the Contact details again.

1. Open the Contact Record.

2. Click on **Related** located beneath the Contact name.

3. Click on **Activities** from the drop down list. The **Activity Associated View** is displayed.



4. The Activities are automatically sorted on **Date Created** (last column).
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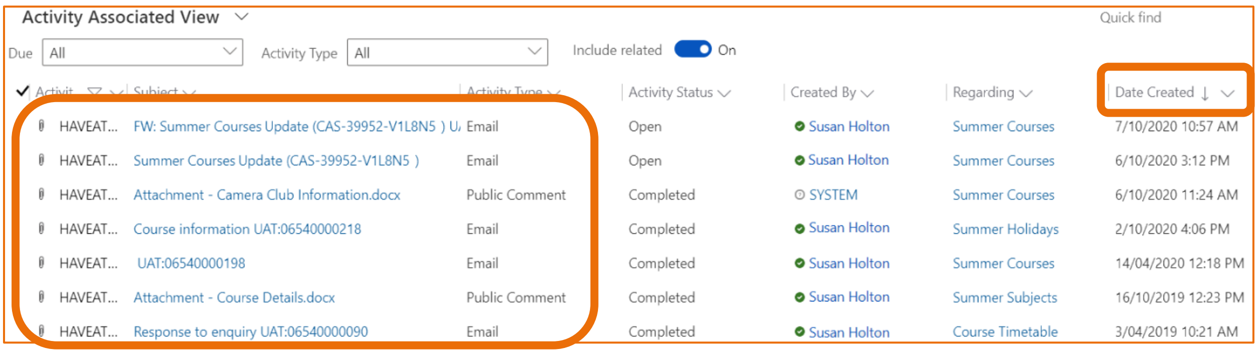

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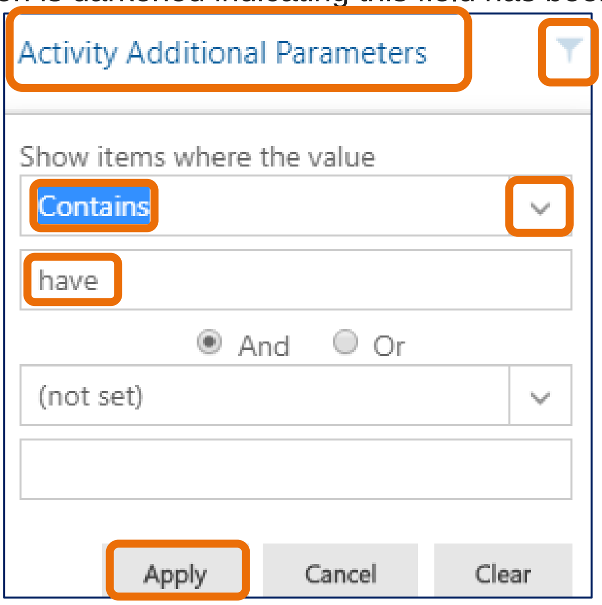

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2. Click on **Clear**.

3. All the Activities will be displayed.

4. Click on **Summary**, beneath the Case name, to return to the Case details.

Version Control

Version Number	Version Date	Changes
1.0	March, 2019	Original Notes
2.0	March, 2019	Updated for the April Upgrade. Uploaded to FLO.
3.0	August, 2019	Updated to reflect the different method of recognising and viewing the Activities with Attachments. Uploaded to FLO.
4.0	October, 2019	Updated for October Upgrade. Changes reflect the viewing of the Activities in the Timeline and Open Entity Record icon. Uploaded to FLO.
5.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
6.0	October, 2020	Updated for the October Upgrade. Uploaded to FLO.
7.0	December, 2020	Updated for the Unified User Interface. Uploaded to FLO.