

# **MS Dynamics Student CRM**

## **Flinders University**

# **New Search Functionality in MS Dynamics Student CRM**

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Version 1.0

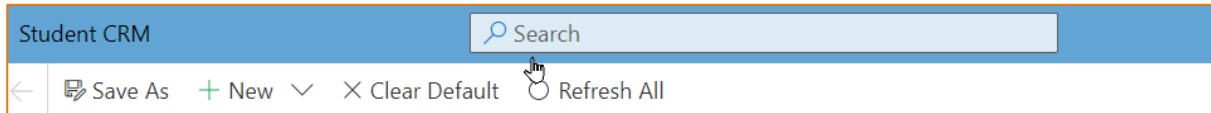
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The new CRM Search bar will be available from Friday 11<sup>th</sup> December, 2020. Some of the features and instructions are described below.

### ‘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.

### Records and Fields searched

- The table below explains the Records and some of the fields which can be searched.
- Search will locate information in most of the following record fields. Some fields can be filtered. Refer to **Filters** on Page 7.

Record	Fields
Contact	FAN First Name Middle Name Last Name Full Name Flinders / Default Email Home Phone Mobile Phone Preferred Name Student ID
Case	Case Number Case Title Customer Description (Works best with quotation marks around the text.)
Email	Subject
Opportunity	Opportunity Title
Organisation	Email address Organisation Name Organisation Number

## Quotation marks (“ ”)

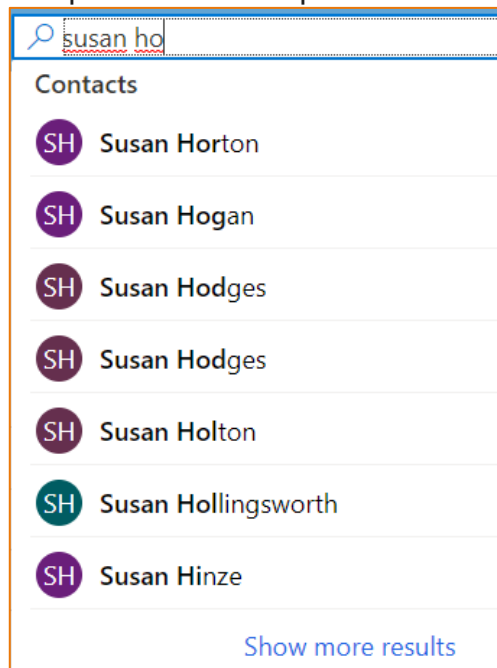
- On occasions there are many more results than expected due to the in depth searching. If you are absolutely sure about the information to be searched, place quotation marks around the words to narrow down the search.

## 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.

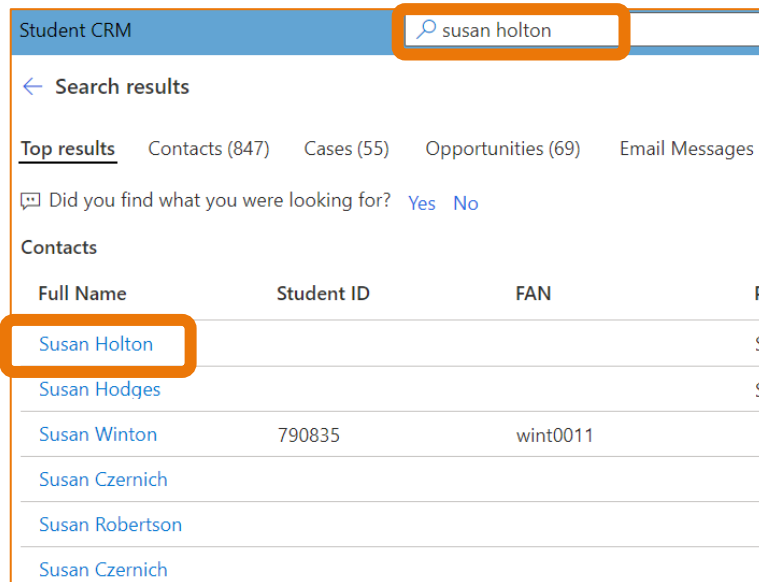


## Display Search results

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

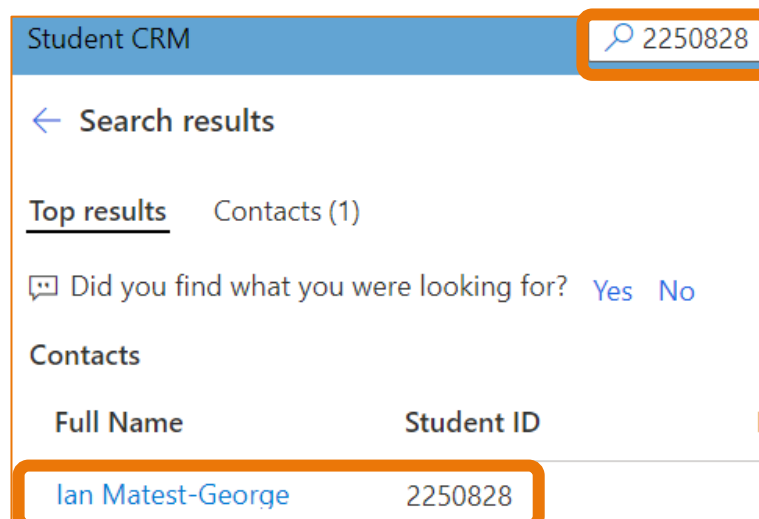
### Search for Contact Record

- Type the first and last names in the Search bar and press the **Enter** key.
- The matching Contact record is displayed at the top of the Search results and similar names beneath.



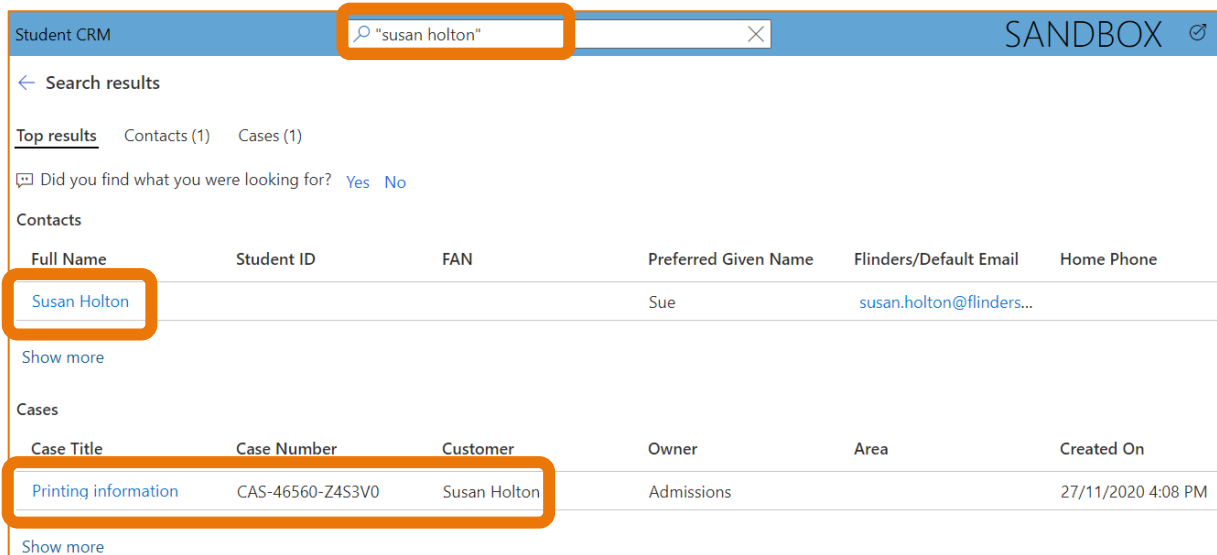
### Search for Student ID

- Type the Student ID and press the **Enter** key.
- The matching Contact record is displayed in the Search results.



### Quotation marks (“ ”)


- Typing any information in quotation marks narrows down the search results.
- Typing the first and last names in quotation marks and pressing the **Enter** key displays the Contact and Case information for the exact search in the Search results.

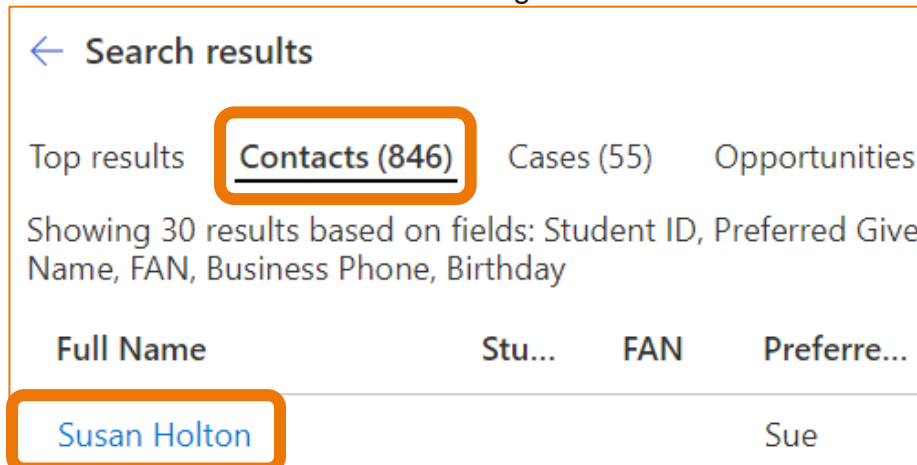


## Navigate the Search results List view

This will depend on the selected Search results view and the example below is Contacts. The same applies if Cases has been selected.

### Open the Contact Record

- Click in the Search bar and type the information to be searched. Press the **Enter** key.
- Click on the Search results **Contacts** tab. This reduces the amount of information in the list.
- Click on the **Full Name** to open the Contact record.
- If needed, click the  Go Back arrow to navigate back to the Search results.



## Filters

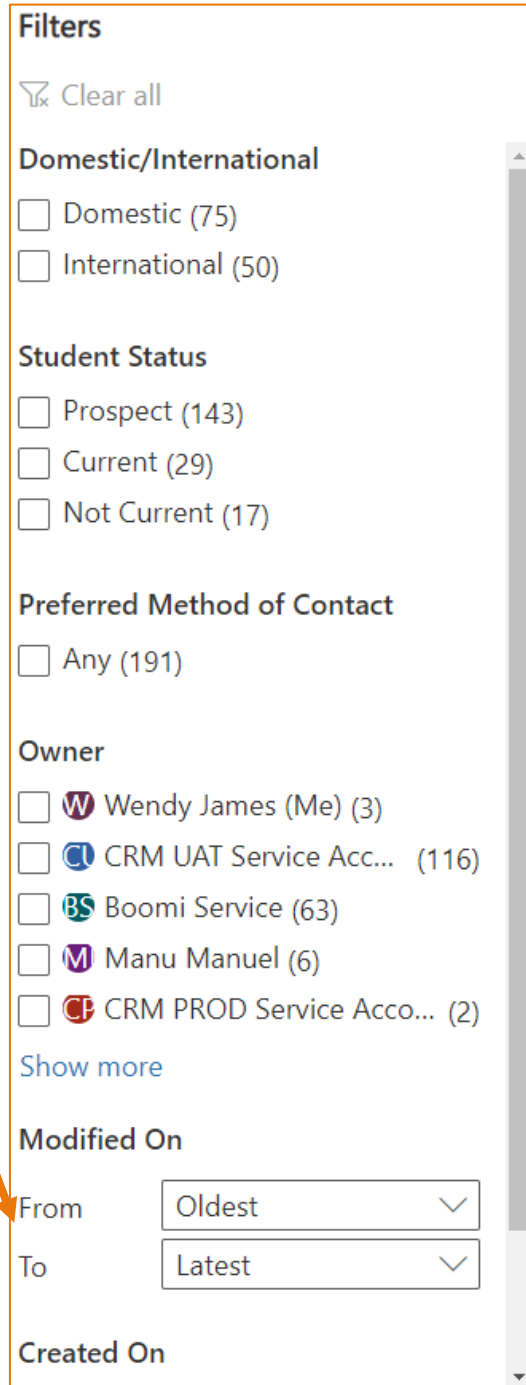
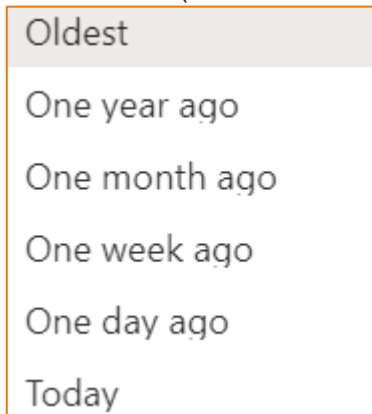
Filtering can be applied to narrow down the search results. The options available in the Filters pane are dependant upon which Search results tab is selected. Click in the square to the left of the Filters option to select and again to deselect. Click **Clear all** to clear all searches.

### Filtering on Contacts

- Click in the Search bar and type the information to be searched. Press the **Enter** key.
- Click on the Search results **Contacts** tab.

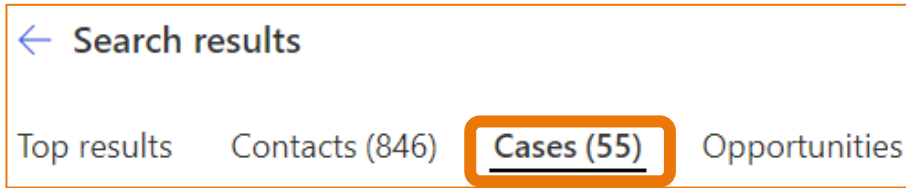


- The following fields can be filtered:
  - Domestic / International.
  - Student Status.
  - Owner.
  - Modified On (From Oldest to Latest).
  - Created On (From Oldest to Latest).



## Filtering on Cases

- Click in the Search bar and type the information to be searched. Press the **Enter** key.
- Click on the Search results **Cases** tab.



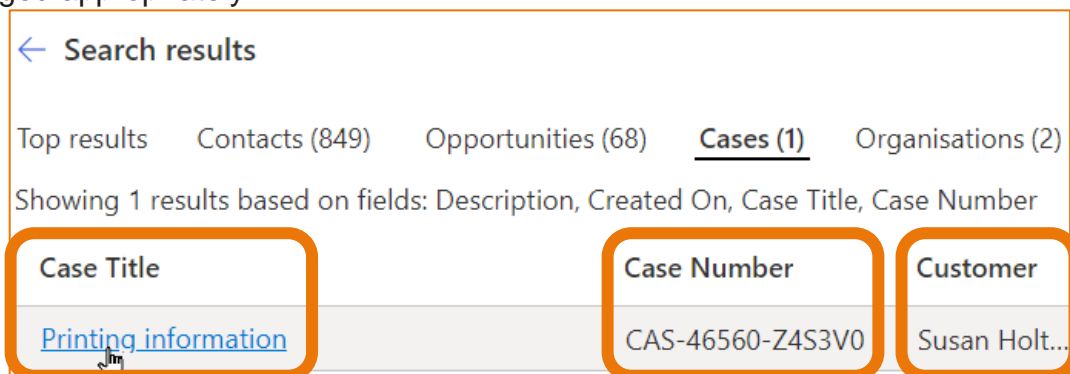
- **Filters** pane—click in the box to the left of the Contact name. **Show more** may need to be clicked to expand the list.

OR

- Click on each of the names under **Filters, Customer** to select them and display the Cases in a list view.

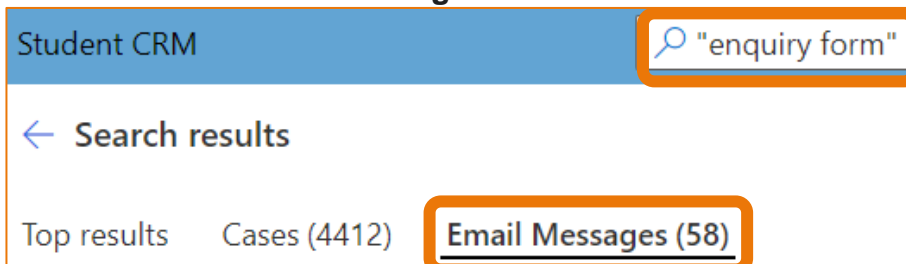


- Only the Cases for the selected Contact Record/s are displayed and the field names have changed appropriately.



## Filtering on Emails

- “Enquiry form” was searched with the quotation marks to narrow down the search. This is the information in the Email subject.
- Click on the Search results **Email Messages** tab.





- The following fields can be filtered:
  - Regarding.
  - Status Reason.
  - Owner.
  - Modified On (From Oldest to Latest).
  - Created On (From Oldest to Latest).

Oldest

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One year ago

One month ago

One week ago

One day ago

Today



**Filters**

Clear all

**Regarding**

Printing information (4)

**Status Reason**

Sent (2)

Received (2)

**Owner**

Admissions (4)

**Modified On**

From

To

**Created On**

From

To

### Filtering Case – Created On date

This is helpful to locate Cases created between a length of time.

- Click in the Search bar and type the name of the Contact. Press the **Enter** key.
- Click on the Search results **Cases** tab.
- **Filters – Created On.**
  - **From:** Click on One month ago.
  - **To:** Click on Today.
- The Cases meeting the search and filter conditions are displayed.

The screenshot shows the Student CRM interface with a search for 'susan holton'. The search results are displayed in a table with columns: Case Title, Case Number, Customer, Owner, Area, Created..., Status Re..., and Origin. One result is shown: 'Printing information' with Case Number 'CAS-46560-Z453V0', Customer 'Susan Holt...', Owner 'Admissions', and Created date '27/11/202...'. The Filters panel on the right is open, showing filters for Customer (Susan Holton), Owner (Admissions), Modified On (From: Oldest, To: Latest), and Created On (From: One month ago, To: Latest). The 'Created On' filter is highlighted with an orange box.

## Version Control

Version Number	Version Date	Changes
1.0	2020	Original Notes. Uploaded to FLO.