CRM Application Communication Tools

Summary

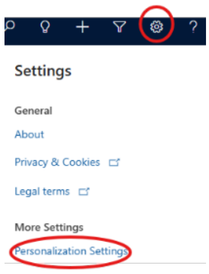
This document provides step-by-step guidance on the communication tools available in CRM for managing application related contact with applicants.

- Personalising your email signature in CRM
- Sending an email from within CRM (without and with a template)
- Creating an email template in CRM
- Tracking an email from Outlook to an application or applicant in CRM
- Making a phone call through Microsoft Teams via CRM and noting details of the phone call in CRM
- Sending a text message to an applicant from CRM

A map of automatic communications sent from CRM is included at the end of this document.

Process notes

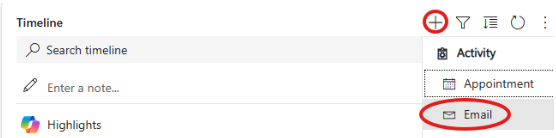
Personalise your CRM email signature



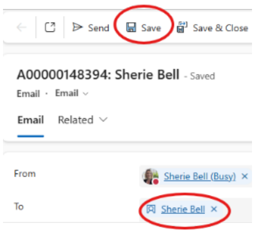
1. Open ‘personalization settings’ by clicking on the cog in your menu
2. Click ‘email signatures’ and create a new one by clicking ‘new’
    a. Name the signature and set as default (this will add the default signature to all emails you create in CRM)
3. Copy your OP email signature from Outlook
    a. Paste into the CRM new signature box
4. Save and close
5. This will save your email signature for use in future CRM sent emails.

Send an email from CRM without a template

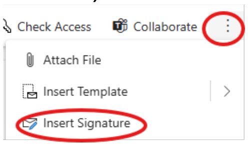
1. From application timeline (right hand side) of general tab, click ‘+’ and select ‘email’



2. Select ‘save’ and this will populate the ‘to’ section with the applicant of the application you have open and provide a default subject for the email (you can edit this to change it)



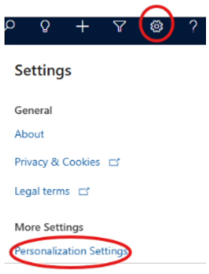
3. If you cannot see ‘insert signature’ in the top menu (because the window is not full screen), click the 3 dots and select insert signature.



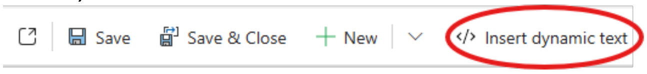
    a. Find your signature and click ‘select’ to add to your email
4. Click ‘send’ to send the email.

Sending an email from within the application (or applicant/contact) will add the email trail to the CRM timeline. Interaction with the email (eg, forwarding or replying) will come back to your Outlook inbox <u>and</u> be visible on the application timeline.

Setting up a template in CRM



1. Open ‘personalization settings’ by clicking on the cog in your menu
2. Click ‘email templates’ and create a new one by clicking ‘new’
    a. Select global as the template type, this means the template is available on any record type.
    b. Name your template
    c. Enter a subject (this will appear in the email subject)
3. Complete the body of the template
4. To use data from the applicant record (like their name), place your cursor where you want the text to appear and click on ‘insert dynamic text’ (top menu)

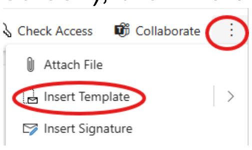


5. The record type is ‘user’ and you can choose the relevant field name – this will not bring through application data, only the applicant data.
6. Save and close
7. This will save your email template for use in future CRM sent emails.

Please note, templates will only be visible for your login. We do not have the functionality for you to make them available to others in your team at this stage.

Send an email from CRM using a template

1. Follow the above steps (send email from CRM no template) and continue from step 3a
2. If you cannot see ‘insert template’ in the top menu (because the window is not full screen), click the 3 dots and select ‘insert template’.



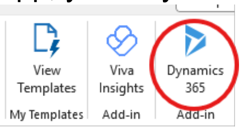
    a. Click ‘select’ to proceed
3. Search the templates to find the one you want to use
    a. Select the template and you will see a preview of it in the window
    b. Apply the template and you will return to your email message

    c. Edit as required
4. Click ‘send’ to send the email.

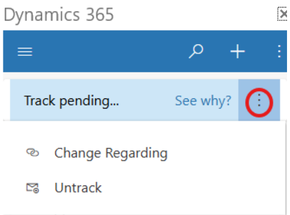
Sending an email from within the application (or applicant/contact) will add the email trail to the CRM timeline. Interaction with the email (eg, forwarding or replying) will come back to your Outlook inbox ***and*** *be visible on the application timeline.*

Track Outlook email to CRM (desktop Outlook)

1. In the email you want to track, click the ‘Dynamics 365’ button. This will launch the app, you may see a blank window briefly appear



2. Enter in the application number of the application that you want to track the email against and click on the record
    a. If it says ‘track pending’, don’t worry – it will track the email, you don’t need to wait. This just means that the tracking was not able to occur in that sync between CRM and Outlook. It will keep trying to track until it is able to sync the email with the CRM (syncing happens every 15mins), even after you have sent the message.
3. Compose and send your message, it will be tracked against the application in CRM.
4. If you tracked to the wrong application, click the 3 dots to choose ‘change regarding’ or ‘untrack’



    a. If you choose ‘change regarding’, you will be prompted to search the application you want to track against
    b. If you choose ‘untrack’ the application will be removed from the Outlook message and will no longer be tracked to CRM.

Tracking an email from Outlook will add the email trail to the CRM timeline in the application (or applicant/contact). Interaction with the email (eg, forwarding or replying) will come back to your Outlook inbox ***and*** *be visible on the application timeline.*

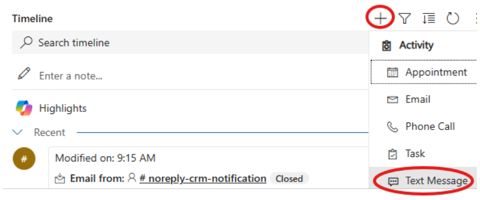
Logging a phone call in CRM

1. In the application (or applicant contact), click the phone icon next to the applicant’s phone number
2. You will be prompted to open Microsoft Teams to make the call.
    a. If you do not want to make the call and simply want to note that there was a call, click cancel
3. This will open a phone record for you to note the details of the phone call
    a. Mark complete if the call has already happened

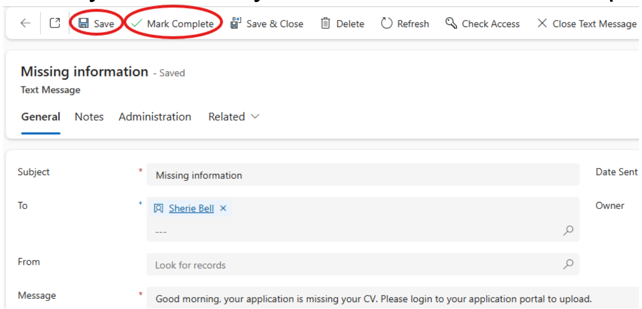
b. Select ‘save & close’ to return to the application or applicant

Send a text message from CRM

1. From application timeline (right hand side) of general tab, click ‘+’ and select ‘text message’



2. Enter the subject and content of the text message
3. Select ‘save’ and this will populate the ‘to’ section with the applicant of the application you have open
4. When you are ready to send, select ‘mark complete’ and the text message will send



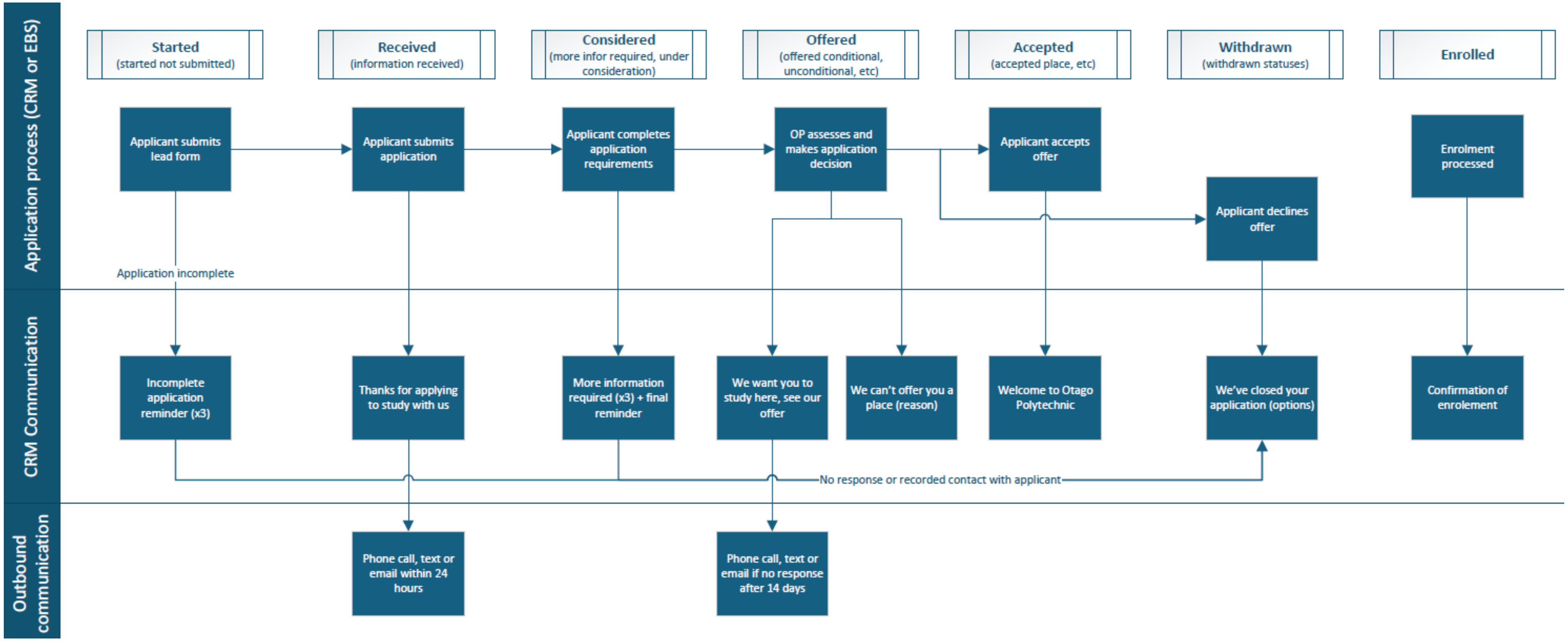
5. If the applicant replies to the text, the message will go to whoever is assigned as the owner of the application

Definitions

Acronyms, abbreviations, or terms that users may not be familiar with.

TERM	DEFINITION
Dynamics 365	Also known as CRM, OP application management system
CRM	OP application management system

Map of automatic communications



** outbound communication refers to the outbound calling team.*