Introduction

This guide details the steps which should be followed to view and edit emails sent from Dynamics CRM.

Certain emails will be created and sent automatically by the system, other emails will be created as drafts and rely on a user to send them. This gives the user the opportunity to review, and edit if appropriate, the email before it’s sent.

Login

1. Login to the IRAMS CRM via https://production.dynamics.ox.ac.uk/
2. Click Continue to Sign In.
3. Enter your User name, e.g. bsp\ABCD1234 and your Password.

Access Emails

1. Ensure the IRAMS Dashboard is selected.
2. From the Emails sections, select a View.

   The System Views we would recommend you use are listed below, alternatively you can create your own.
   - All IRAMS Emails – lists all of your emails including those that have been sent, waiting to be reviewed etc.
   - All IRAMS Emails (Draft) – lists all of your emails which need to be reviewed and manually sent.

3. To open any of the emails, click on the email Subject.

   Any emails which have a Status Reason of Draft, will not be sent until they have been reviewed.

Edit and Send a Draft Email

1. Open the draft email by clicking on the email Subject. If you are using a View which contains emails with different statuses, refer to the Status Reason column to help locate Draft emails.

   You can attach documents using the Attach File option from the Command Bar.

   It is also possible to format the body of the email, for example you can have text which bold, insert bullet points etc.

   4. Click Send from the Command Bar.

Further Support

IRAMS Notification document

This details what email notifications, and their contents, are created when certain processes are followed. Some emails are automatically sent others are saved as draft so that they can be reviewed beforehand.

Dynamics manual

For help with navigation and settings, for example creating views, searching, creating charts etc.

Technical issues

Please raise any technical issues with the IT service desk: http://help.it.ox.ac.uk/