CRM Sending Emails (Using Templates)

**Purpose:** STARS may need to send email to an applicant or prospect. For example, the applicant is on a “Bad Address” report and we need to contact them to request an address correction. Since this email correspondence is common, STARS will use a template to send a pre-defined email.

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<thead>
<tr>
<th>Step</th>
<th>Action</th>
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| 1.   | In CRM, navigate to the **360-Degree View**. Select **Main Menu › Customer 360-Degree View**.  
**Result:** The **Search For Customer** page displays. |
| 2.   | Enter applicable search criteria. Click the **Search** button.  
**Result:** The **360-Degree View** for the matching record displays. Note: If multiple records match the search criteria, all matches will display. Click the appropriate result. |
### Step 3
Select **Correspond** from the top navigation bar.

**Result:** The Correspondence Request page displays.

### Step 4
In the Correspondence Detail section, complete the following:

- **Channel** – Ensure *Email* is selected
- **Sender’s Email Address** – By default emails are sent from the Admissions mailbox ([admissions-dev@uni.edu](mailto:admissions-dev@uni.edu)), however you may enter your STAR email address
- **Language** – By default English is selected
- **Processing** –
- **Description** –
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<td>5.</td>
<td>In the Correspondence Content (Templates) section, click the <strong>Search for Packages</strong> icon.</td>
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</tbody>
</table>

**Result:** The Look Up Packages page displays.

![Look Up Packages](image)

6. If necessary, use the **Search** feature to locate the applicable template. Click the **template**.

**Result:** The template populates in the **Template Package** field.

7. Click **Submit** in the top navigation bar. **Note:** You may select Preview to see the email.

**Result:** The Correspondence Request displays the results/details

![Correspondence Request](image)

8. The bottom of the page also displays the Correspondence Summary.