

## **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.

Step	Action
1.	In CRM, navigate to the <b>360-Degree View</b> . Select <b>Main Menu &gt; Customer 360-Degree View</b> .
	<i>Result:</i> The Search For Customer page displays.
	University of Northernlowa Favorites Main Menu > Customer 360-Degree View
	Search For Customer
	▼ Search
	Organization
	First Name
	Last Name
	Customer ID
	Phone
	City
	State
	Postal
	Country
	Search Advanced Search
2.	Enter applicable search criteria. Click the <b>Search</b> button.
	<i>Result:</i> The <b>360-Degree View</b> for the matching record displays. Note: If multiple records match the search criteria, all matches will display. Click the appropriate result.



<ul> <li>3. Select Correspond from the top navigation bar.</li> <li>360-Degree View</li> <li>Badrah 1 Them. East 1 Badrah View 1 Data Constrained</li> <li>Badrah 1 Them. East 2 Badrah View 1 Data Constrained</li> <li>Badrah 1 Them. Badrah View 1 Data Constrained</li> <li>Badrah 1 Them. Badrah View 1 Data Constrained</li> <li>Badrah 1 The Correspondence Request page displays.</li> <li>Correspondence Request</li> <li>Badrah 2 Data 2 D</li></ul>	Step	Action
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*Role individual Consumer       Actions       Go         Summary       Mante Reagen Dieber       ID 799583         Personal Email Reagen, Dieseguni, com       Current Status Applicant         Permanent 1990 Croboppie Lin Waterloo, IA       Current Status Applicant         New Address       Source Details         Result: The Correspondence Request page displays.         Correspondence Request         With Consumer Details       History Select One         Result: The Correspondence Request page displays.         Correspondence Request         With Consumer Details       Recipients Reagen Bieber         Edit Recipients         Respondence Detail         Print         Processing Foreground         Description Send Correspondence         Add Templete Personalete         Processing Foreground         Description Send Correspondence         <td colspon="</th> <th></th> <th>360-Degree View Relationship Viewer Tasks Call Reports</th>		360-Degree View Relationship Viewer Tasks Call Reports
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Result: The Correspondence Request page displays.         Correspondence Request         History Select One         Stando Correspondence         Object ID         Bend Correspondence         Correspondence Detail         Recipients Reagan Bleber         Channel © Email         Sender's Email Address @dmissions-dev@uni.edu         Print         Print         Print         Processing © Foreground         Description Send Correspondence         Correspondence Content         Templates         Template Package         Reckground and Sending         Correspondence Content         Template Package         Reckground Schedule         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@uni.edu), however you may enter your STAR email address         • Language – By default English is selected         • Processing –         • Description -		
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Step	Action
5.	In the Correspondence Content (Templates) section, click the Search for Packages icon.
	Correspondence Content
	Templates
	Template Package Templates
	Add Template Personalize Templates
	<b>Result:</b> The Look Up Packages page displays.
	Look Up Packages
	Package Name
	Search Results Customize   Find   E   First 1-4 of 4 D Last Package Name
	Simple Email Enable
6.	If necessary, use the <b>Search</b> feature to locate the applicable template. Click the <i>template</i> .
	<i>Result:</i> The template populates in the <b>Template Package</b> field.
7.	Click <b>Submit</b> in the top navigation bar. <i>Note:</i> You may select Preview to see the email.
	<i>Result:</i> The Correspondence Request displays the results/details
	Correspondence Request History Select One
	Object ID
	Send Correspondence
	Correspondence Request Details
	Merge Date 07/14/2010 Submitted By raiones
	Send Date         07/14/2010         Date Submitted         07/14/2010
	Success Rate 1 Of 1 Processing Mode Foreground
8.	The bottom of the page also displays the Correspondence Summary.
	Correspondence summary       Customize   Find   Main Tilling First & 1 of 1 D Last       Select     Recipient     Channel     Template or File     Content     Status     Date Merged     Date Sent
	Reagan Bieber Email UNI STARS Bad address test Email Body Delivery Complete 07/14/2010 07/14/2010 Download Replace