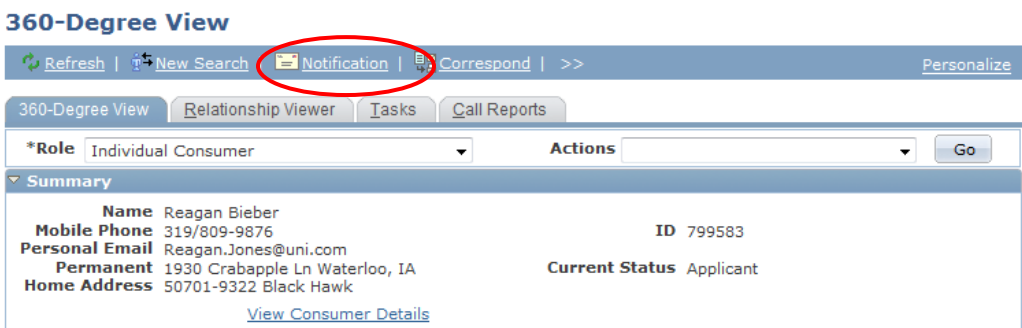
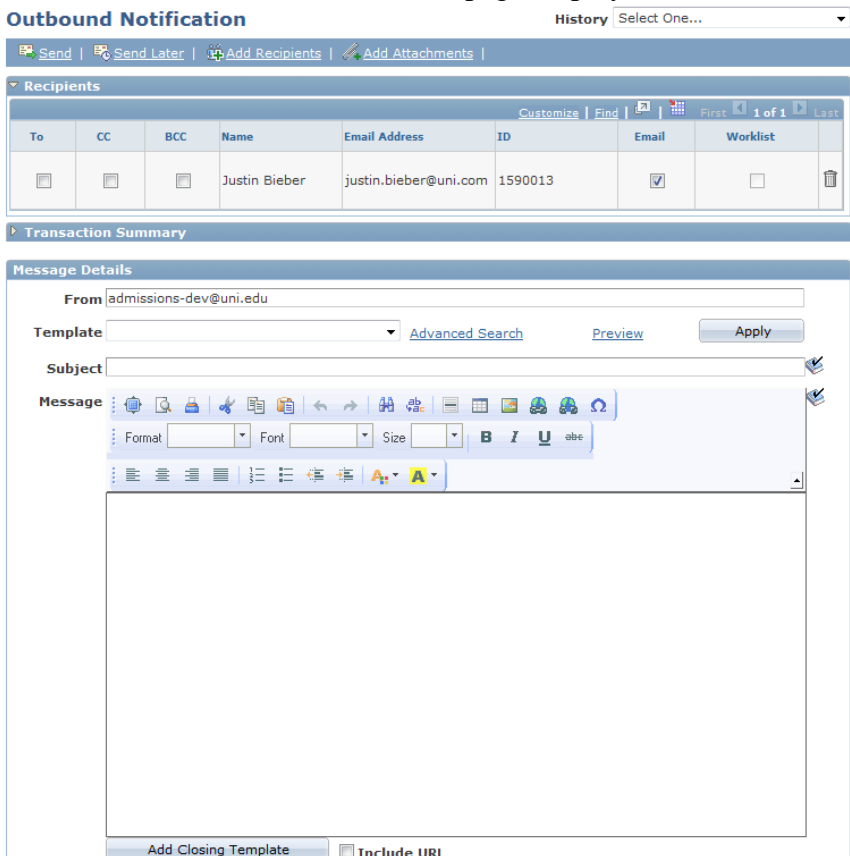

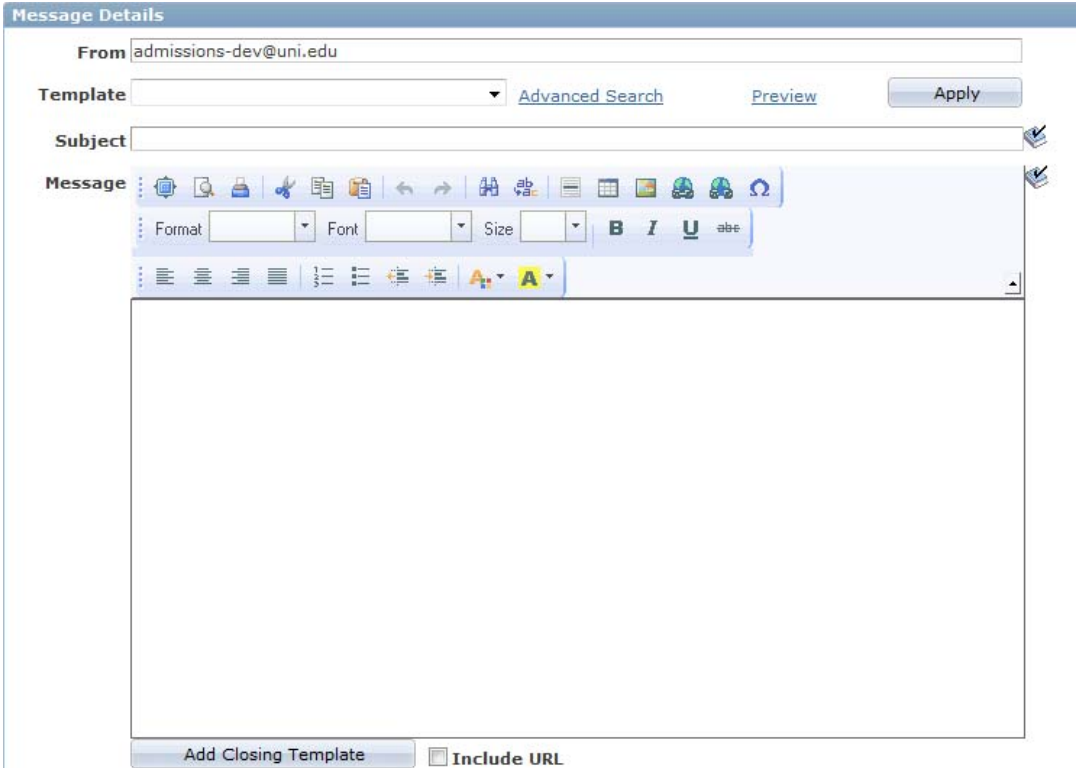
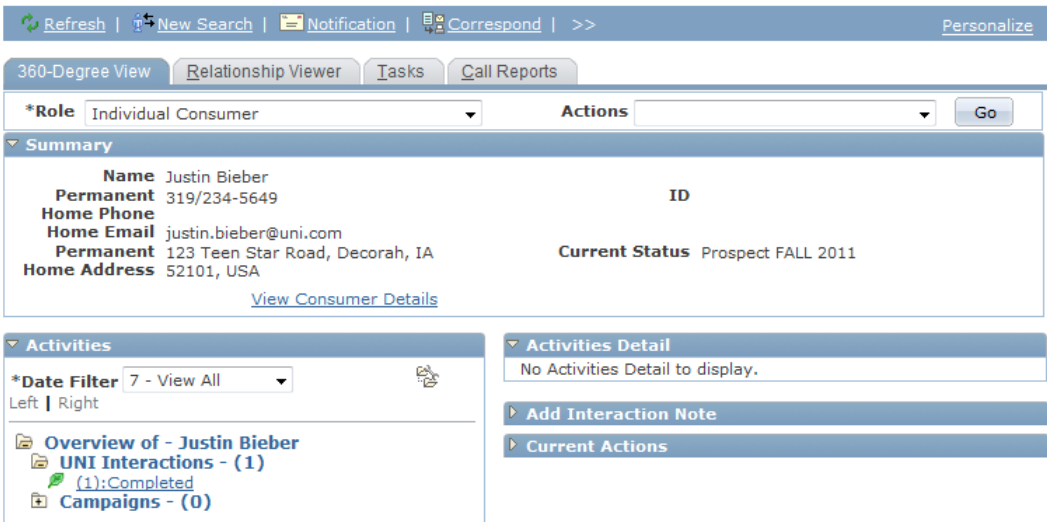
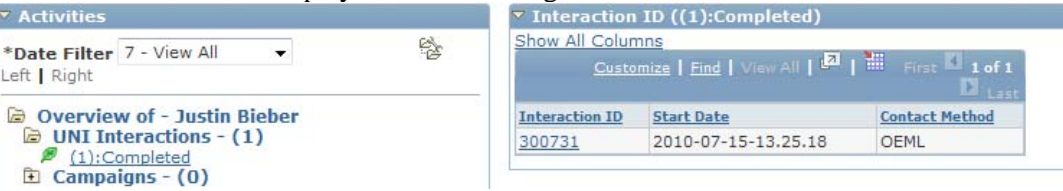
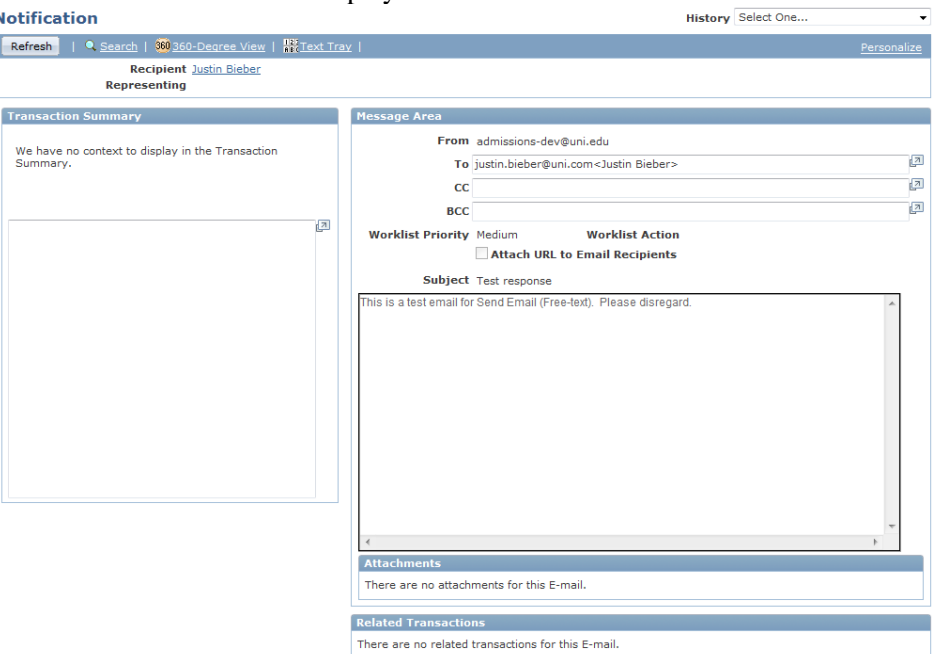


CRM Sending Emails (Free text)

Purpose: STARS may need to send a free text email to an applicant or prospect. This email may be in response to an email request from the applicant or prospect or an email for which there is no template.

Step	Action
1.	In CRM, navigate to the 360-Degree View for the appropriate person.
2.	<p>Select Notification</p>  <p>Result: The Outbound Notification page displays.</p> 

Step	Action
3.	<p>In the <i>Recipients</i> section, select the To checkbox</p>  <p>Note: The Email checkbox is already selected.</p>
4.	<p>In the Message Details section, complete the following:</p> <ul style="list-style-type: none"> From – This defaults to the Admissions mailbox (admissions@uni.edu), however you may edit the From field to display another email address (e.g. STAR Email Address) Subject – Enter as appropriate Message – Enter as appropriate. Use the formatting toolbar and spell check if desired.  <p>Note: To add additional recipients, select Add Recipient from the top navigation bar. To add an attachment, select Add Attachments from the top navigation bar.</p>
5.	<p>Select Send from the top navigation bar.</p> <p>Note: Use the Send Later option to set a specific time/date for the email to be sent.</p>

Step	Action						
6.	<p>The email can now be viewed in the <i>Activities</i> section of the 360-Degree View, under UNI Interactions.</p> <p>360-Degree View</p>  <p>The screenshot shows the '360-Degree View' for Justin Bieber. At the top, there are navigation links: Refresh, New Search, Notification, Correspond, and a Personalize button. Below this, there are tabs for '360-Degree View', 'Relationship Viewer', 'Tasks', and 'Call Reports'. A dropdown menu for '*Role' is set to 'Individual Consumer', and an 'Actions' dropdown is set to 'Go'. The 'Summary' section displays contact details: Name (Justin Bieber), Permanent Home Phone (319/234-5649), Home Email (justin.bieber@uni.com), Permanent Home Address (123 Teen Star Road, Decorah, IA 52101, USA), and Current Status (Prospect FALL 2011). A link 'View Consumer Details' is provided. The 'Activities' section shows a date filter set to '7 - View All' and a list of activities: 'Overview of - Justin Bieber', 'UNI Interactions - (1)' (with a sub-link '(1):Completed'), and 'Campaigns - (0)'. The 'Activities Detail' section shows 'No Activities Detail to display.' and buttons for 'Add Interaction Note' and 'Current Actions'.</p>						
7.	<p>Click the interaction to display details on the right.</p>  <p>The screenshot shows the 'Activities' section on the left, which is identical to the previous one. On the right, the 'Interaction ID ((1):Completed)' details are displayed. It includes a 'Show All Columns' link, a 'Customize' button, and a table with the following data:</p> <table><tr><th>Interaction ID</th><th>Start Date</th><th>Contact Method</th></tr><tr><td>300731</td><td>2010-07-15-13.25.18</td><td>OEML</td></tr></table>	Interaction ID	Start Date	Contact Method	300731	2010-07-15-13.25.18	OEML
Interaction ID	Start Date	Contact Method					
300731	2010-07-15-13.25.18	OEML					
8.	<p>Click the <i>Interaction ID</i> to display the notification.</p> <p>Notification</p>  <p>The screenshot shows the 'Notification' view for interaction ID 300731. At the top, there are navigation links: Refresh, Search, 360-Degree View, and Text Tray, along with a Personalize button. The 'Recipient' is Justin Bieber, representing. The 'Transaction Summary' section on the left states: 'We have no context to display in the Transaction Summary.' The 'Message Area' on the right shows the email details: From (admissions-dev@uni.edu), To (justin.bieber@uni.com <Justin Bieber>), CC, BCC, Worklist Priority (Medium), Worklist Action (Attach URL to Email Recipients), and Subject (Test response). The email body text is: 'This is a test email for Send Email (Free-text). Please disregard.' Below the message area, there are sections for 'Attachments' (stating 'There are no attachments for this E-mail.') and 'Related Transactions' (stating 'There are no related transactions for this E-mail.').</p>						