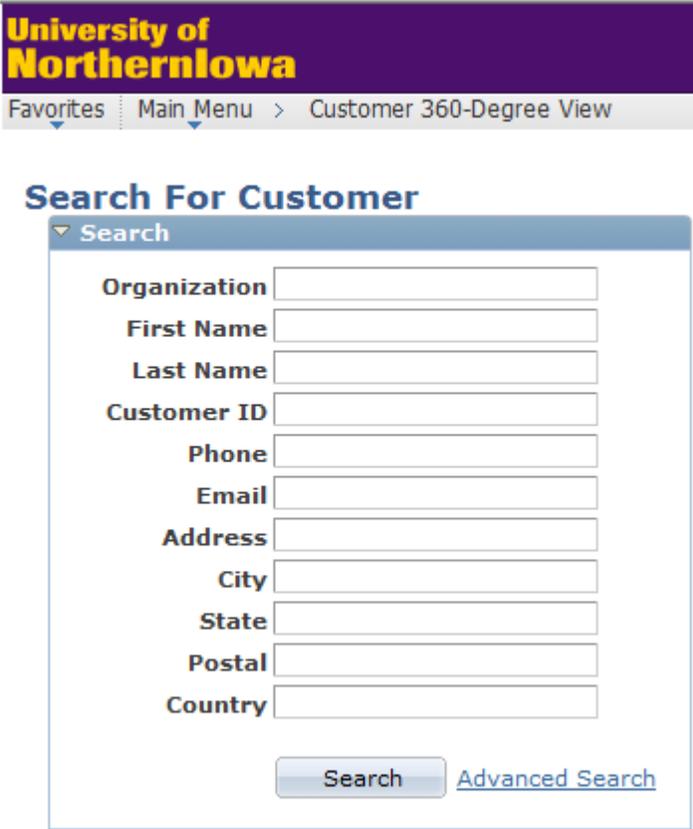
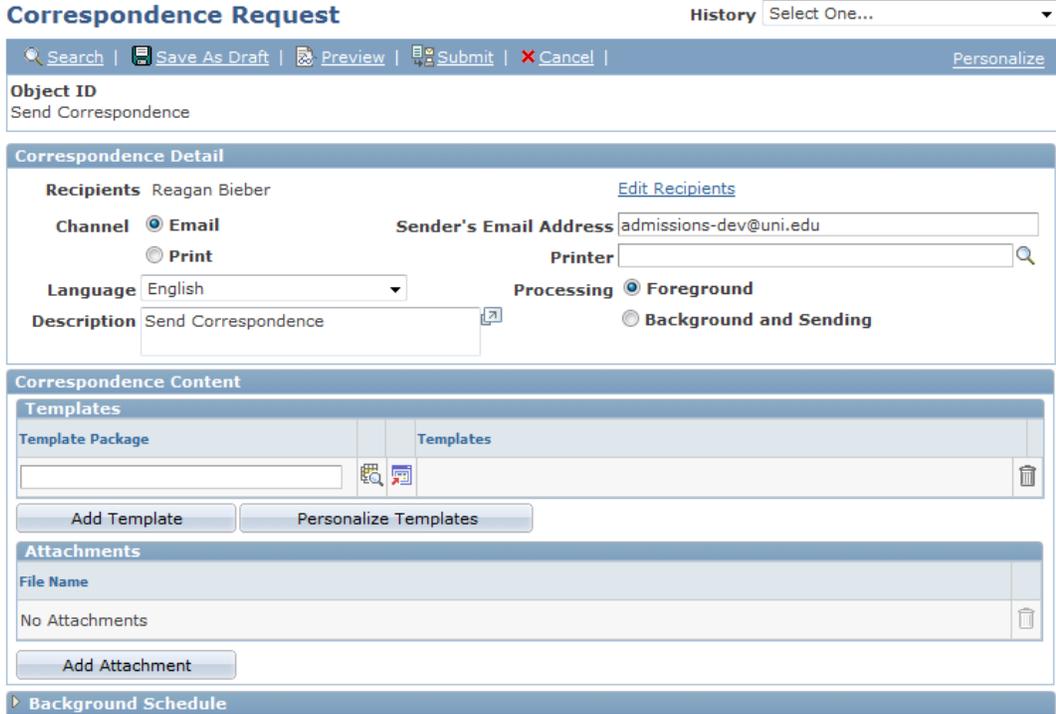
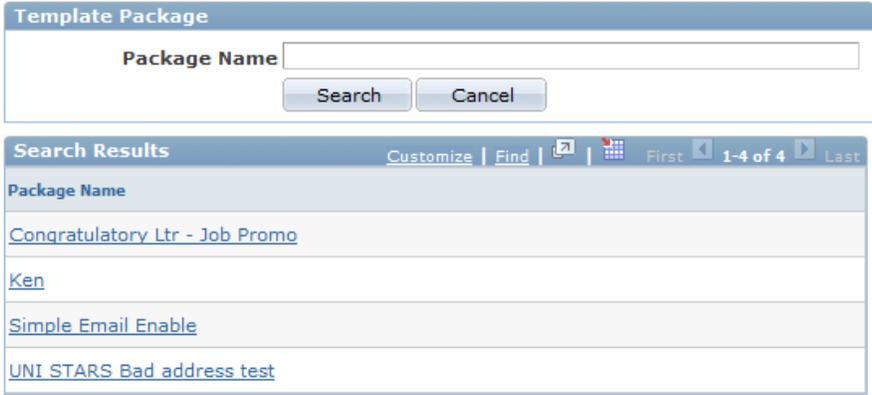
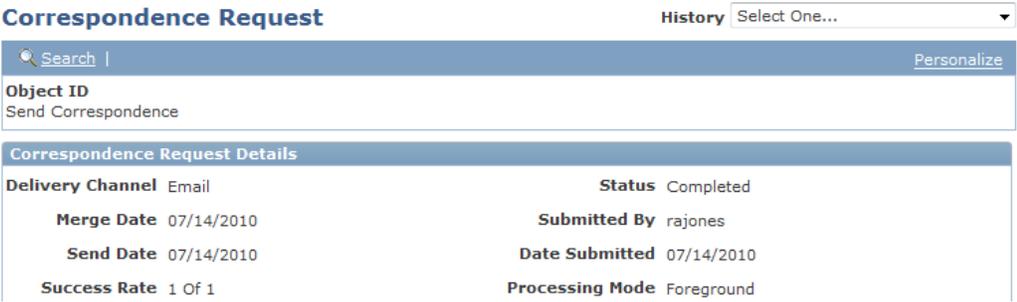


CRM Sending Emails (Using Templates)

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.	<p>In CRM, navigate to the 360-Degree View. Select Main Menu > Customer 360-Degree View.</p> <p><i>Result:</i> The Search For Customer page displays.</p> 
2.	<p>Enter applicable search criteria. Click the Search button.</p> <p><i>Result:</i> 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.</p>

Step	Action
3.	<p>Select Correspond from the top navigation bar.</p>  <p>360-Degree View</p> <p>Refresh New Search Notification Correspond >> Personalize</p> <p>360-Degree View Relationship Viewer Tasks Call Reports</p> <p>*Role Individual Consumer Actions Go</p> <p>Summary</p> <p>Name Reagan Bieber ID 799583 Mobile Phone 319/809-9876 Personal Email Reagan.Jones@uni.com Permanent 1930 Crabapple Ln Waterloo, IA Current Status Applicant Home Address 50701-9322 Black Hawk View Consumer Details</p> <p>Result: The Correspondence Request page displays.</p>  <p>Correspondence Request History Select One... Personalize</p> <p>Search Save As Draft Preview Submit Cancel</p> <p>Object ID Send Correspondence</p> <p>Correspondence Detail</p> <p>Recipients Reagan Bieber Edit Recipients</p> <p>Channel <input checked="" type="radio"/> Email Sender's Email Address admissions-dev@uni.edu <input type="radio"/> Print Printer</p> <p>Language English Processing <input checked="" type="radio"/> Foreground <input type="radio"/> Background and Sending</p> <p>Description Send Correspondence</p> <p>Correspondence Content</p> <p>Templates</p> <p>Template Package Templates</p> <p>Add Template Personalize Templates</p> <p>Attachments</p> <p>File Name</p> <p>No Attachments</p> <p>Add Attachment</p> <p>Background Schedule</p>
4.	<p>In the Correspondence Detail section, complete the following:</p> <ul style="list-style-type: none"> • Channel – Ensure <i>Email</i> 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 -

Step	Action
5.	<p>In the Correspondence Content (Templates) section, click the Search for Packages icon.</p>  <p>Result: The Look Up Packages page displays.</p> <p>Look Up Packages</p> 
6.	<p>If necessary, use the Search feature to locate the applicable template. Click the <i>template</i>.</p> <p>Result: The template populates in the Template Package field.</p>
7.	<p>Click Submit in the top navigation bar. Note: You may select Preview to see the email.</p> <p>Result: The Correspondence Request displays the results/details</p> 
8.	<p>The bottom of the page also displays the Correspondence Summary.</p> 