CRM Sending Emails (Free text)

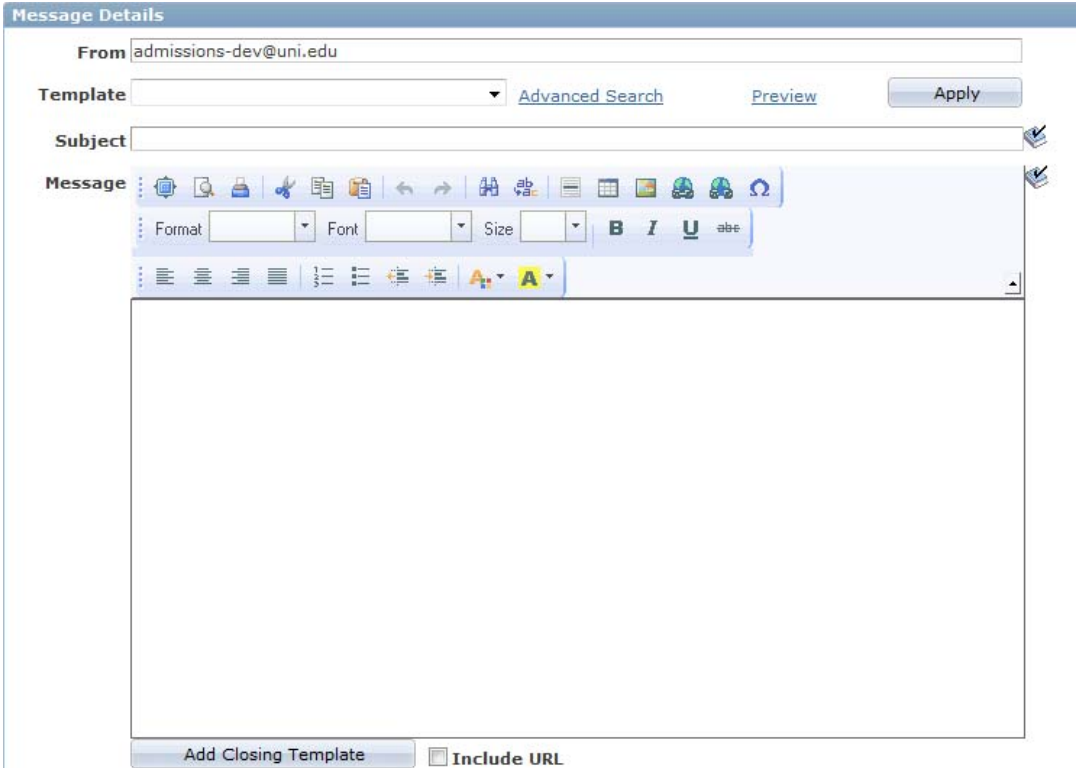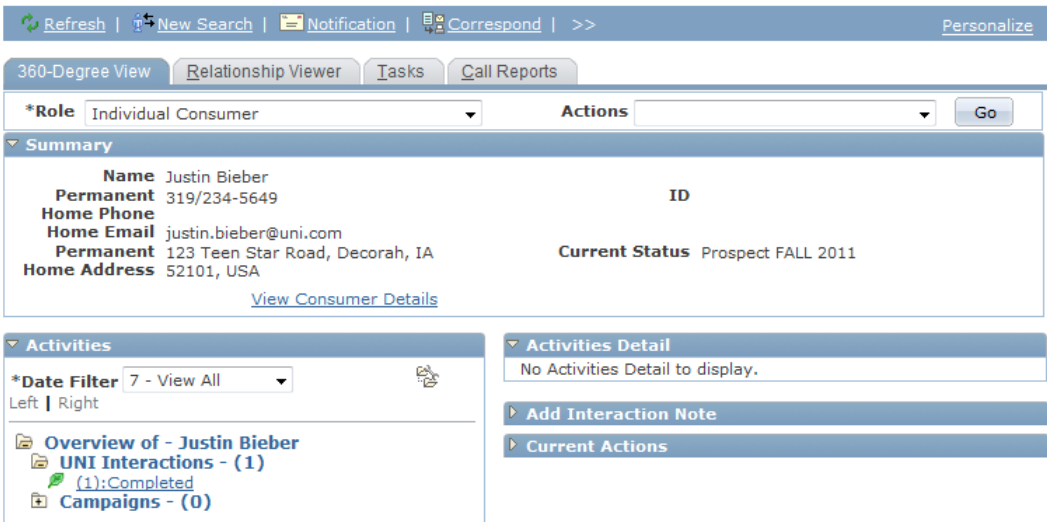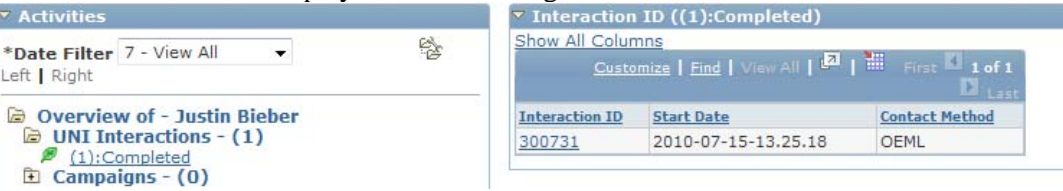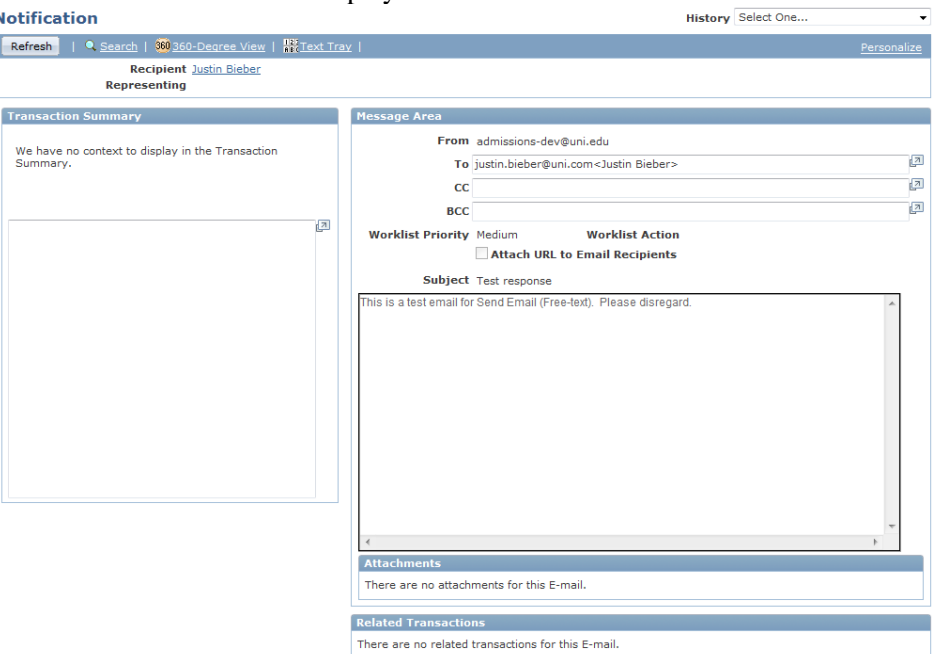**Purpose:** STARS may need to send a free text email to an applicant or prospect. This email may be in response to an email request from the applicant or prospect or an email for which there is no template.

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

Step	Action
3.	In the *Recipients* section, select the **To checkbox** *Note:* The Email checkbox is already selected.
4.	In the Message Details section, complete the following: • **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. *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.
5.	Select **Send** from the top navigation bar. *Note:* Use the **Send Later** option to set a specific time/date for the email to be sent.

Step	Action
6.	The email can now be viewed in the *Activities* section of the 360-Degree View, under **UNI Interactions.**
7.	Click the interaction to display details on the right.
8.	Click the *Interaction ID* to display the notification.