Unite Education Program v6.3
Job Aid: 5186

Send an Email Message

There are several different places in Unite where you can send an email message to a person or a group of people. The steps for sending an email message differ depending on whether you want to send an email message to a specific person or to a group of people.

To send an email message to a specific person

1. Open a browser and log on to Unite.

2. On the main menu, click PEOPLE.

3. Click **Clear** to clear the previous search.

4. Specify search criteria to find the person.

5. Click **Search**.

6. In the grid, click the name of the person to whom you want to send an email.

Note

   You may need to sort, filter, or increase the items per page to see all the records in the grid.

7. In the *Activities* section on the person record, click **Send Communication**.

Note

   There is a **Send Communication** link on the *All* tab and on the *Communication* tab, as well as in other places throughout Unite.

8. Specify the email options.

> **Note**
>
> If you select an existing email, you can send the email as is, update and save the email record before sending, or add a new email record to Unite before sending.

> **Note**
>
> The **Subject** displays as a communication activity in the *Activity Log* on the person record for each email recipient.

9. Design the email message.

10. Click **Send** .

11. If prompted to save the email before sending, click **Yes** or **No** .

> **Note**
>
> If you want to save the email before sending, the **Title** appears as the name of the email record on marketing grids in Unite.

12. Verify the queued email recipient.

> **Note**
>
> If you selected **Marketing** for the **Legal Designation**, Unite checks to see if any of the recipients have requested to unsubscribe from receiving commercial emails and removes them from the queued email recipient list.

13. Click **Send** .

14. Click **X** to close the person record.

To send an email message to a group of people

1. Open a browser and log on to Unite.

2. Navigate to the grid from where you want to send the email message.

Note

   You can send an email message from the following Unite admissions workflow grids: PEOPLE, APPLICATIONS, and REVIEWS (except for the *My Pending Reviews* grid).

3. Find the person or group of people to whom you want to send the email.

4. Select the check box next to each person name.

Note

   If you want to select all records showing in the grid, you can select the check box in the grid table header.

5. At the bottom of the grid, click **Actions** .

6. On the pop-up menu, click 💬 **Send Communication** .

7. Specify the email options.

Note

   If you select an existing email, you can send the email as is, update and save the email record before sending, or add a new email record to Unite before sending.

Note

   The **Subject** displays as a communication activity in the *Activity Log* on the person record for each email recipient.

8. Design the email message.

9. Click **Send** .

10. If prompted to save the email before sending, click **Yes** or **No** .

> **Note**
>
> If you want to save the email before sending, the **Title** appears as the name of the email record on marketing grids in Unite.

11. Verify the queued email recipients.

> **Note**
>
> If you selected **Marketing** for the **Legal Designation**, Unite checks to see if any of the recipients have requested to unsubscribe from receiving commercial emails and removes them from the queued email recipient list.

12. Click **Send** .