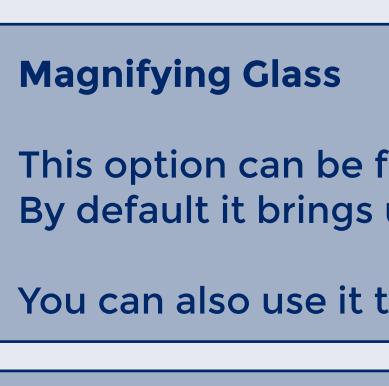


## DY102.2.2 - Emails

This document will comprehensively cover the essential steps involved in sending an email in Dynamics. We will explore the fields and available options both prior to and following the task's saving process.

### Creating an Email

When creating an email, some of the fields have very specific rules on how they operate. Take your time when you are creating your emails to avoid errors.



#### From

This is the account that the email will be sent from. Whilst this can be changed, permissions will prevent you sending an email on behalf of someone else.



#### To/CC/BCC

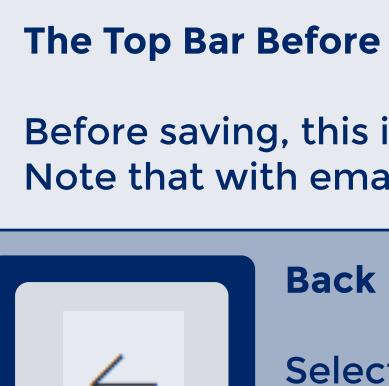
In essence these fields work exactly like their Outlook counterparts. By default, the fields are locked to the linked contacts of the organisation. This prevents errors when sending to contacts who may share similar names.

#### Magnifying Glass

This option can be found to the right hand side of the To, CC and BCC fields. By default it brings up a list of all the linked contacts for the Organisation.

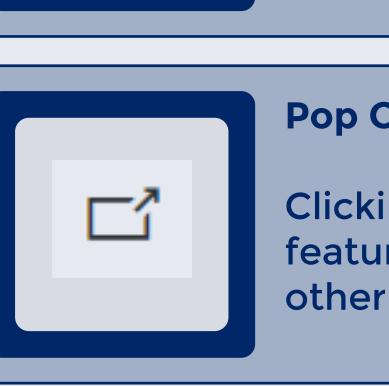


You can also use it to do Advanced searches for users.



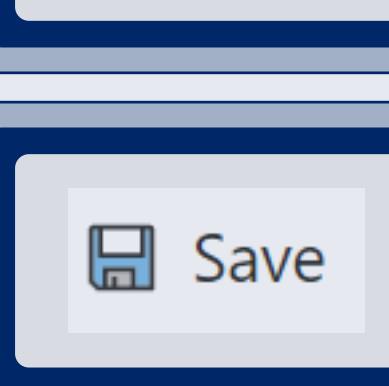
#### Subject

This works like the typical email Subject line.



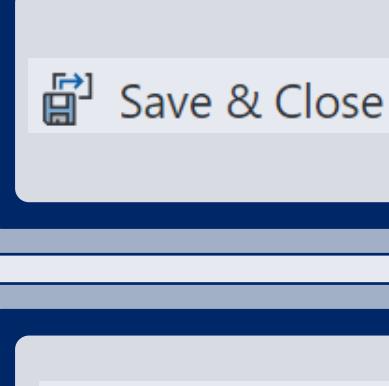
#### Category

The "Category" field offers a dropdown menu with various options to specify the nature of the email. This category will not effect the email content; it allows the DofE to have a quick oversight of the common themes of emails.



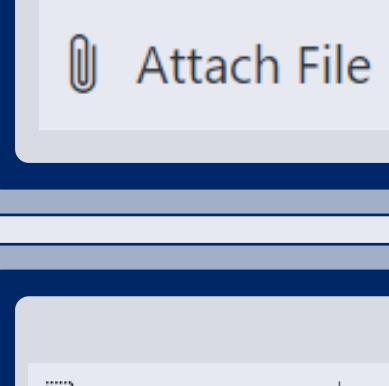
#### Regarding

This field connects the task to an Organisation. If left empty, the email won't appear on any timeline; when created via the timeline, the organisation's name auto-fills here.



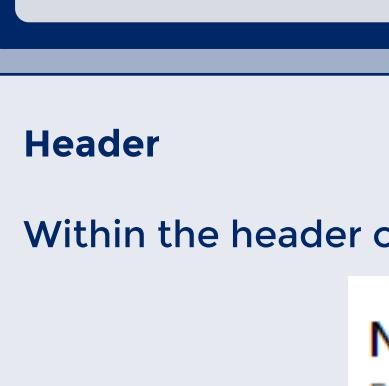
#### Body

This is where you will compose your email to your recipients.



#### Back

Selecting "Back" will navigate you to the previous screen without saving any changes.



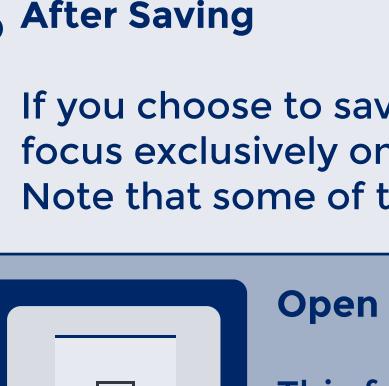
#### Pop Out

Clicking "Pop Out" will open the current activity in a separate window. This feature is handy when you need to reference information for the activity from other areas within Dynamics.



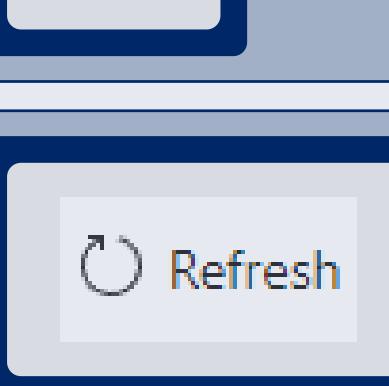
#### Send

When you click Send, the email is sent to the recipients. The email is then marked as read only and the activity is closed.



#### Save

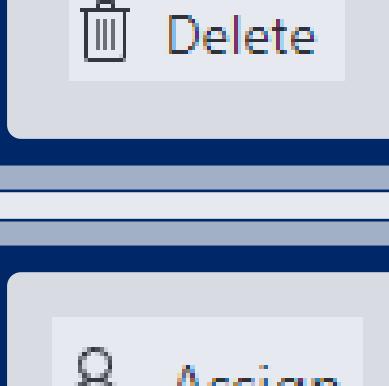
Selecting "Save" will save any modifications you've made to the activity and keep the window open, allowing you to make additional changes if needed.



#### Save and Close

Opting for "Save and Close" will save the activity and return you to the previous screen.

This is useful for creating drafts of emails.



#### Attach File

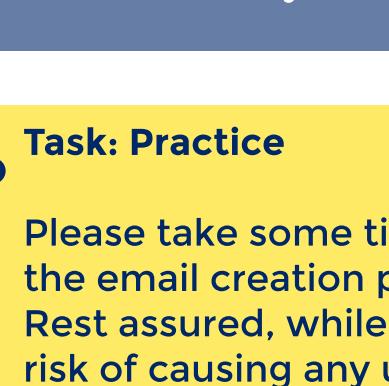
This option allows you to attach files to your emails. Note that there is a limit of ~10MB per file. Anything larger than this will require alternative methods of sending.



#### Insert Template

This allows you to use a pre-set email.

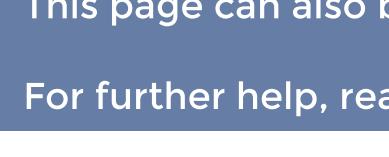
Further guidance will be provided on how to create and use Templates in more detail in another document.



#### Insert Signature

This allows you to insert a footer to the email.

Further guidance will be provided on how to create and use Templates in more detail in another document.



#### Header

Within the header of the email, you'll find some slightly hidden options for managing your email.



To make changes to these options, simply click on the down arrow located to the right of your name.



#### Priority

The Priority setting determines the level of importance assigned to this task. By default, it is set to "Normal." To adjust the priority, simply click on "Normal," and you can choose a different priority level.



#### Owner

The Owner is the individual responsible for managing the task. You can change the owner by hovering over their name and clicking the 'X'. Then, type in the name of the new owner to make the change.



#### Open Record Set

This feature enables you to view all your activities and swiftly switch between them for efficient navigation.



#### Refresh

Clicking "Refresh" updates the task in case someone else is working on it and saves changes while you have the task open, ensuring you have the latest information.



#### Delete

Exercise caution with this option, as it should be rarely used. Selecting "Delete" will permanently remove the task. It's typically employed when a task has been created in error and needs to be completely removed from the system.



#### Assign

The "Assign" option enables you to reassign the ownership of the task to another individual. Please note that when you change the owner, the task will be removed from your 'My Activities' page.



#### Share

The "Share" option provides you with the ability to share the task with a colleague either via email or by generating a shareable link. Importantly, this action does not alter the ownership of the task.



Do not use any of the other options on the top menu.

#### Task: Practice

Please take some time to explore and use all the options mentioned above to become familiar with the email creation process.

Rest assured, while you're in the testing site (identified by the orange banner at the top), there's no risk of causing any unintended changes or issues.



For further Dynamics guides, make sure to check out the Digital Systems page on the hub.

This page can also be used to access an array of other learning material.

For further help, reach out to systemstraining@dofe.org