

## HOW TO USE MAILING LISTS IN ABM

Under the Contacts Tab in ABM, you will see an option called Mailing Lists

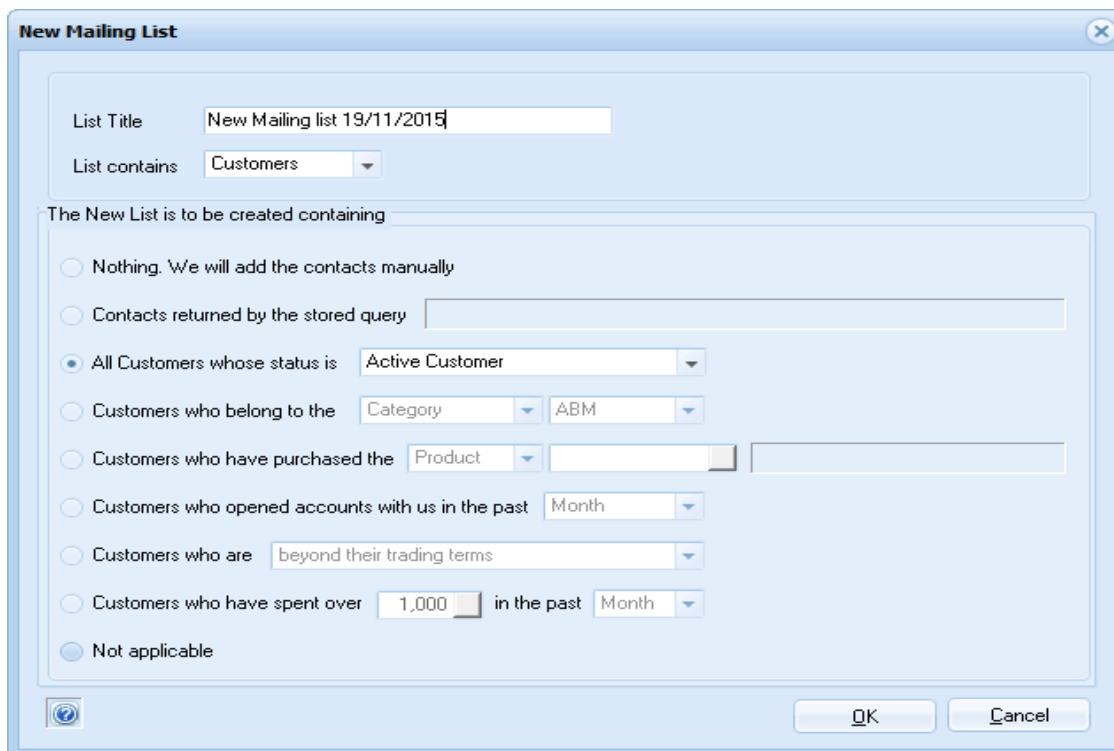
This feature allows you to create a list of contacts to email, then create a template message including attachments and you can then send the template to the contacts in the Mailing list

The steps are as follows:

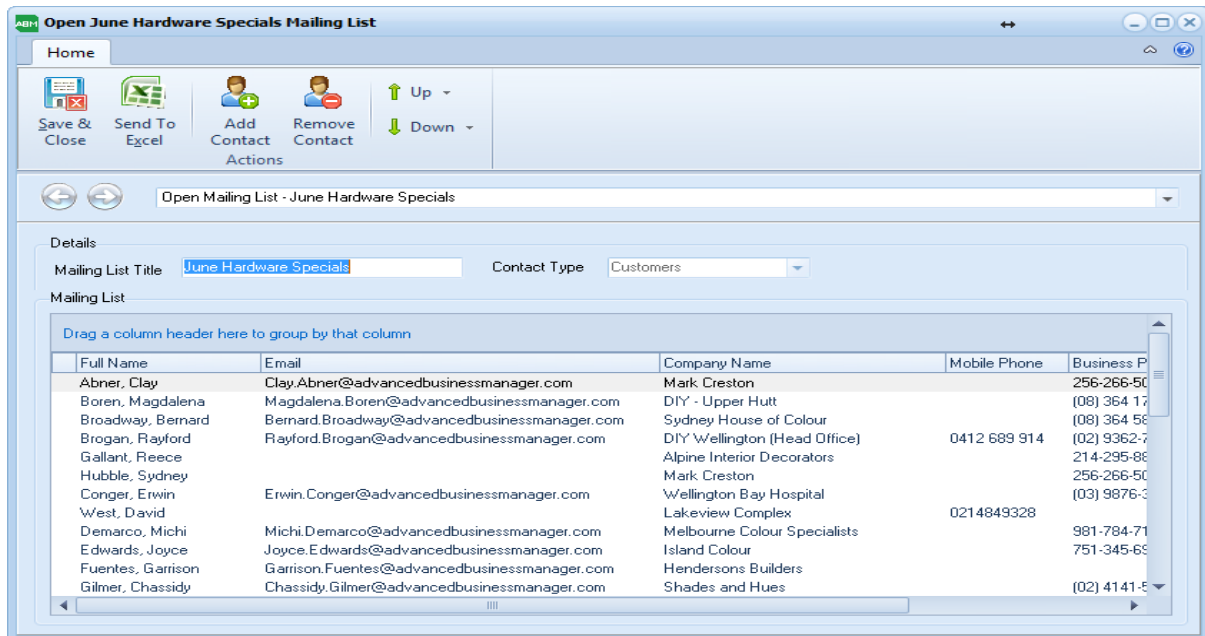
### Step 1 – Create a Mailing List

Click on Add / New button from the Mailing List tab and add a List Title. It's a good idea to add the date you created the list so you know which customers are already included when you need to add more records to update the list.

You can select from the options to below to help target the customer contacts you want. You can also use it to create Supplier Mailing Lists or Other Contacts lists as well. If you cannot find an easy way to select the contacts you want to include, Ajendico can assist with a script that is customized to suit your needs using the option called "Contacts returned by the stored query"

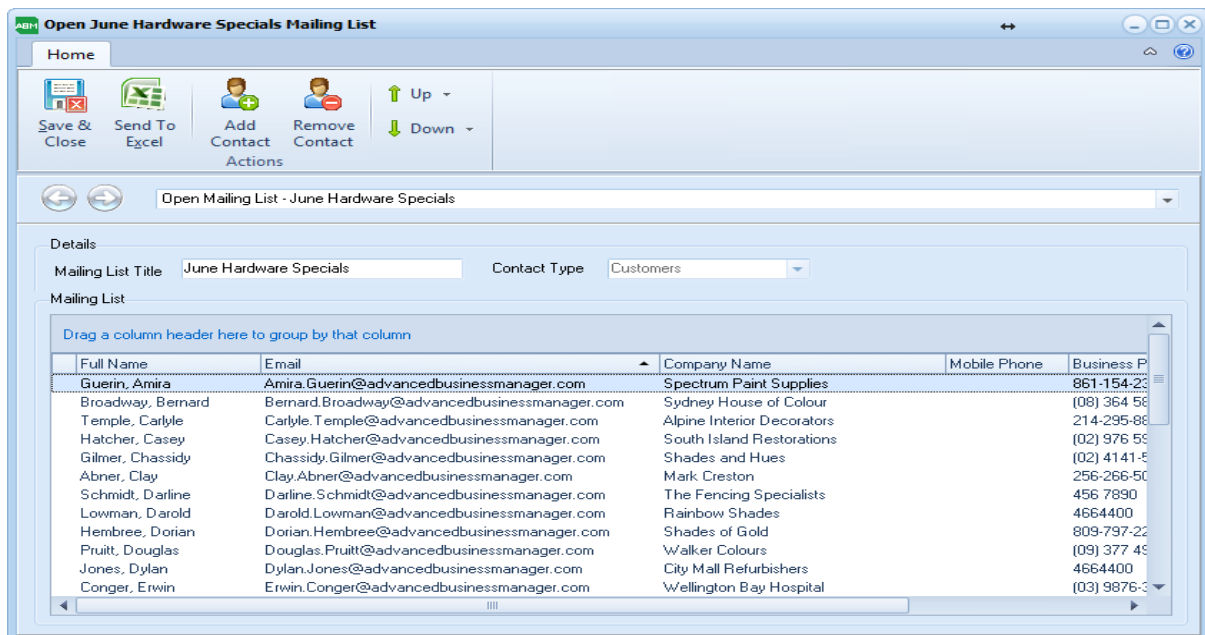


Once you have created your new mailing list, double click it to view the records

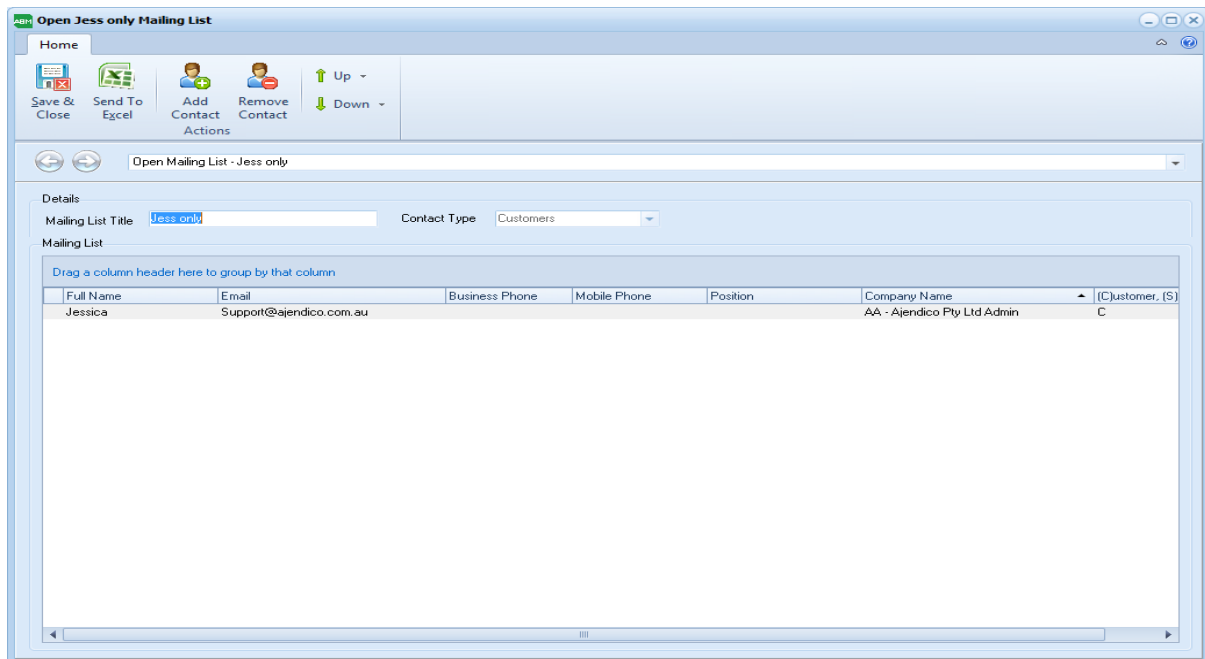


You will need to remove any records that do not have an email address as these records will stop the program from sending out to the other contacts below them in the list.

You can also add more contacts to the list using the Add button at the top menu bar. Your mailing list should look like this when cleaned up and all contacts without email addresses are removed.

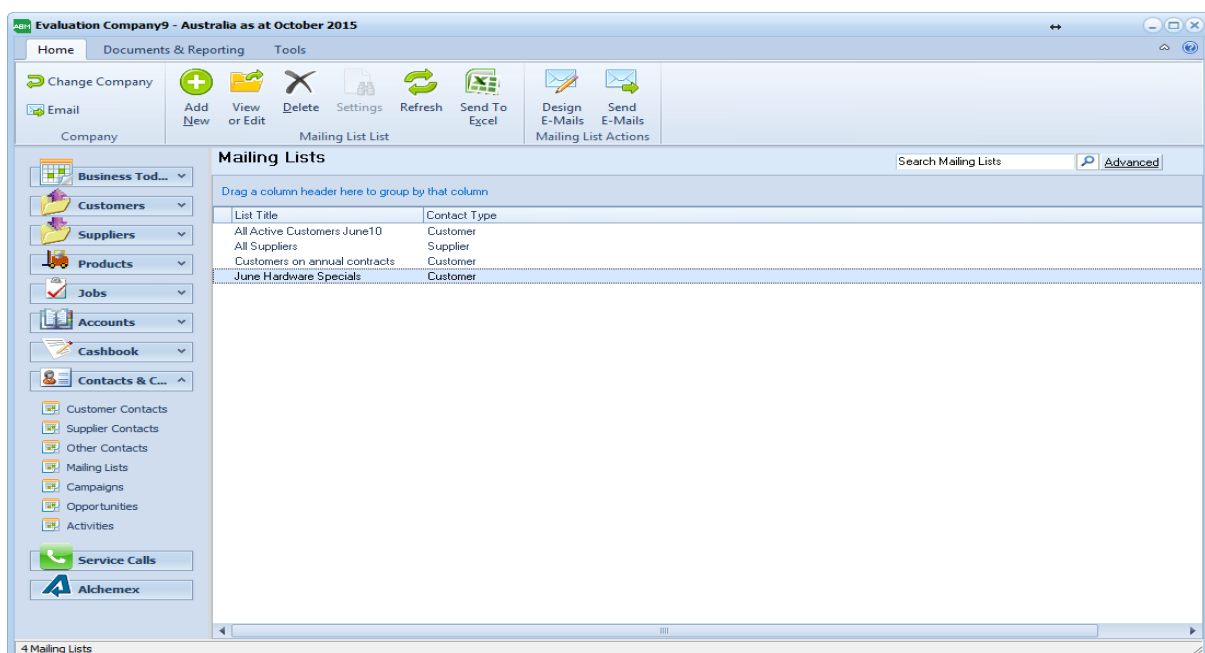


It is also a good idea to create a mailing list with just your own contact information included so you can send your template to your own email address as a test prior to sending it out to the larger mailing list. This step will save you time and a great deal of pain as there is nothing worse than sending out the wrong information to your customers.



## Step 2 – Create an Email Template

Click on “Design Emails” from the menu bar above.

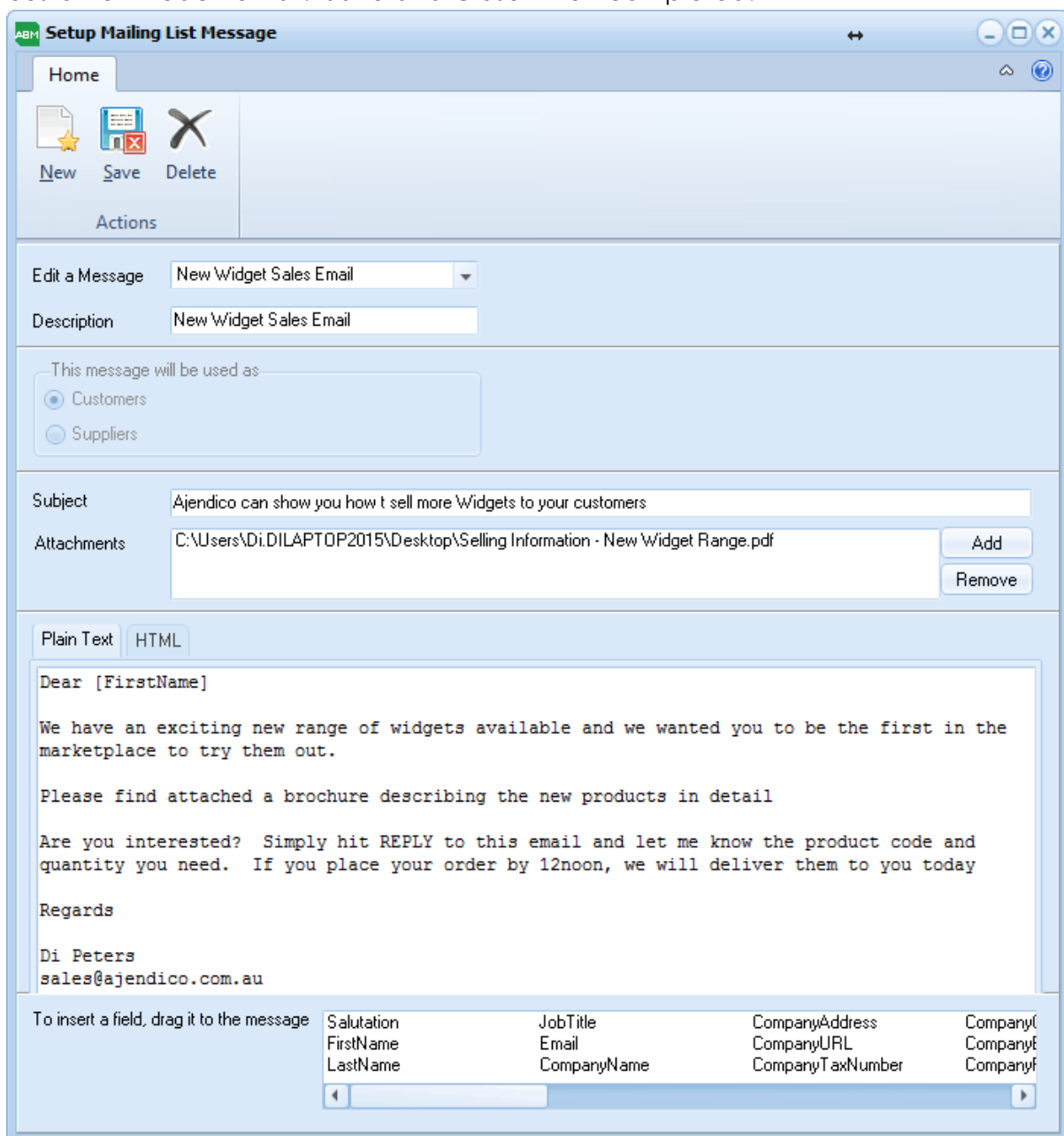


You can edit an existing message or create a new one. To add a new message, give it a name and save it when completed.

You can add an attachment that will be sent with each email.

Your email can be created and sent as Plain Text or HTML

At the bottom of the screen, there are a range of fields you can insert into your document using drag and drop. These will insert the specific information for each customer in each email. Save and Close when completed.



**Setup Mailing List Message**

Home

New Save Delete

Actions

Edit a Message: New Widget Sales Email

Description: New Widget Sales Email

This message will be used as:

- Customers
- Suppliers

Subject: Ajendico can show you how t sell more Widgets to your customers

Attachments: C:\Users\Di.DILAPTOP2015\Desktop\Selling Information - New Widget Range.pdf

Add Remove

Plain Text HTML

Dear [FirstName]

We have an exciting new range of widgets available and we wanted you to be the first in the marketplace to try them out.

Please find attached a brochure describing the new products in detail

Are you interested? Simply hit REPLY to this email and let me know the product code and quantity you need. If you place your order by 12noon, we will deliver them to you today

Regards

Di Peters  
 sales@ajendico.com.au

To insert a field, drag it to the message

Salutation	JobTitle	CompanyAddress	CompanyI
FirstName	Email	CompanyURL	Companyf
LastName	CompanyName	CompanyTaxNumber	Companyf

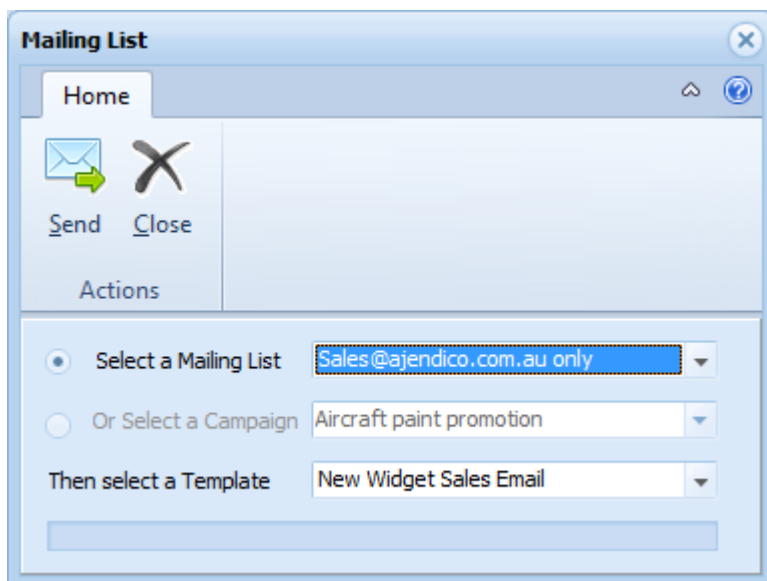
### Step 3 – Test Email Send to Your Own Email Address

Click on “Send Emails” from the menu bar above.

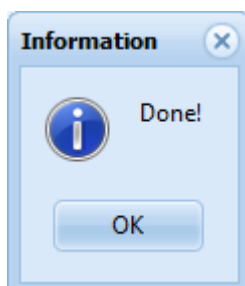
There are two tricks to be aware of :-

- 1) You should always do a test send to your own email address, so make sure you have created a Mailing list with only your contact information included and
- 2) When you go to this screen, it will ALWAYS default to the first template name alphabetically, so make sure you change it if you have several of them, otherwise it will send you the wrong template. Whilst this is not a big issue when doing the test, it is a huge issue if you send the wrong email to hundreds of customers in a mailing list.

Select the correct template and the correct mailing list then hit the Send button on the menu bar above



When completed, you will see this screen.



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Now go to your Outlook sent items and you will see a copy of the sent message and another in your Inbox for checking.

When you are satisfied that the template is accurate, you can send it to your customer mailing list.

To watch a video on how to use this feature please click on this link. In the video, the mailing list is being used to send Debt Collection emails to customers with outstanding balances which is one of the many uses of the Mailing List feature in ABM.

<https://www.youtube.com/watch?v=13Le5IFq3fQ>

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