

## 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"

New Mailing List		×
List Title	New Mailing list 19/11/2015	
List contains	Customers -	
The New List is to	o be created containing	
Nothing Wa	e will add the contacts manually	
<ul> <li>Contacts ret</li> </ul>	turned by the stored query	
<ul> <li>All Customer</li> </ul>	rs whose status is Active Customer	
Customers w	who belong to the Category - ABM -	
Customers w	who have purchased the Product -	
Customers w	who opened accounts with us in the past Month	
Customers w	who are beyond their trading terms	
Customers w	who have spent over 1,000 in the past Month 👻	
Not application	ble	
		Cancel



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

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Home				۵ (
Close E <u>x</u> cel Co	dd Remove tract Contact ctions			
🕝 📀 🛛 Open Maili	ng List - June Hardware Specials			-
	ardware Specials Contact Type Cust	omers 👻		
Mailing List Drag a column header he	re to group by that column			-
-	re to group by that column	Company Name	Mobile Phone	Business P
Drag a column header he		Company Name Mark Creston	Mobile Phone	Business P 256-266-50
Drag a column header he	Email		Mobile Phone	
Drag a column header he Full Name Abner, Clay	Email Clay.Abner@advancedbusinessmanager.com	Mark Creston	Mobile Phone	256-266-50
Drag a column header he Full Name Abner, Clay Boren, Magdalena	Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt	Mobile Phone 0412 689 914	256-266-50 (08) 364 17
Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard	Email Clay, Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt Sydney House of Colour		256-266-50 (08) 364 17 (08) 364 55 (02) 9362-7 214-295-85
Full Name           Abner, Clay           Boren, Magdalena           Broadway, Bernard           Brogan, Rayford           Gallant, Reece           Hubble, Sydney	Email Clay, Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office)		256-266-50 (08) 364 17 (08) 364 55 (02) 9362-7 214-295-85 256-266-50
Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard Brogan, Rayford Gallant, Reece Hubble, Sydney Conger, Erwin	Email Clay, Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators Mark Creston Wellington Bay Hospital	0412 689 914	256-266-50 (08) 364 17 (08) 364 58 (02) 9362-7 214-295-88
Drag a column header he Full Name Abner, Clay Boren, Magdalena Brogan, Rayford Gallant, Reece Hubble, Sydney Conger, Erwin West, David	Email Clay Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators Mark Creston Wellington Bay Hospital Lakeview Complex		256-266-50 (08) 364 17 (08) 364 58 (02) 9362-7 214-295-86 256-266-50 (03) 9876-3
Drag a column header he           Full Name           Abner, Clay           Boren, Magdalena           Brogan, Rayford           Gallant, Reece           Hubble, Sydney           Conger, Erwin           West, David           Demarco, Michi	Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com Michi.Demarco@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators Mark Creston Wellington Bay Hospital Lakeview Complex Melbourne Colour Specialists	0412 689 914	256-266-50 (08) 364 17 (08) 364 58 (02) 9362-7 214-295-86 256-266-50 (03) 9876-3 981-784-71
Drag a column header he           Full Name           Abner, Clay           Boren, Magdalena           Broadway, Bernard           Brogan, Rayford           Gallant, Reece           Hubble, Sydney           Conger, Erwin           West, David           Demarco, Michi           Edwards, Joyce	Email Clay Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com Michi.Demarco@advancedbusinessmanager.com Jayce.Edwards@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators Mark Creston Wellington Bay Hospital Lakeview Complex Melbourne Colour Specialists Island Colour	0412 689 914	256-266-50 (08) 364 17 (08) 364 58 (02) 9362-7 214-295-86 256-266-50 (03) 9876-3
Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard Brogan, Rayford Gallant, Reece Hubble, Sydney Conger, Erwin West, David Demarco, Michi Edwards, Joyce Fuentes, Garrison	Email Clay Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com Michi.Demarco@advancedbusinessmanager.com Joyce.Edwards@advancedbusinessmanager.com Garrison.Fuentes@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators Mark Creston Wellington Bay Hospital Lakeview Complex Melbourne Colour Specialists Island Colour Hendersons Builders	0412 689 914	256-266-50 (08) 364 17 (08) 364 56 (02) 9362-7 214-295-86 256-266-50 (03) 9876-3 981-784-71 751-345-65
Drag a column header he           Full Name           Abner, Clay           Boren, Magdalena           Broadway, Bernard           Brogan, Rayford           Gallant, Reece           Hubble, Sydney           Conger, Erwin           West, David           Demarco, Michi           Edwards, Joyce	Email Clay Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com Michi.Demarco@advancedbusinessmanager.com Jayce.Edwards@advancedbusinessmanager.com	Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators Mark Creston Wellington Bay Hospital Lakeview Complex Melbourne Colour Specialists Island Colour	0412 689 914	256-266-50 (08) 364 17 (08) 364 58 (02) 9362-7 214-295-86 256-266-50 (03) 9876-3 981-784-71

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.

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Drag a column header her				<b>^</b>
Drag a column header her	Email	Company Name	Mobile Phone	Business P
Drag a column header her Full Name Guerin, Amira	Email Amira. Guerin@advancedbusinessmanager.com	Spectrum Paint Supplies	Mobile Phone	861-154-23
Drag a column header here Full Name Guerin, Amira Broadway, Bernard	Email Amira. Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour	Mobile Phone	861-154-23 (08) 364 58
Drag a column header her Full Name Guerin, Amira	Email Amira. Guerin@advancedbusinessmanager.com Bernard. Broadway@advancedbusinessmanager.com Carlyle. Temple@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators	Mobile Phone	861-154-23 ≡ (08) 364 58 214-295-88
Drag a column header here Full Name Guerin, Amira Broadway, Bernard	Email Amira. Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour	Mobile Phone	861-154-23 (08) 364 58
Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle	Email Amira. Guerin@advancedbusinessmanager.com Bernard. Broadway@advancedbusinessmanager.com Carlyle. Temple@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators	Mobile Phone	861-154-23 ≡ (08) 364 58 214-295-88
Drag a column header hern Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey	Email Amira. Guerin@advancedbusinessmanager.com Bernard. Broadway@advancedbusinessmanager.com Carlyle. Temple@advancedbusinessmanager.com Casey. Hatcher@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators South Island Restorations	Mobile Phone	861-154-23 (08) 364 58 214-295-88 (02) 976 55
Drag a column header here Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy	Email Amira. Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Carlyle.Temple@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com Chassidy.Gilmer@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators South Island Restorations Shades and Hues	Mobile Phone	861-154-23 (08) 364 55 214-295-85 (02) 976 55 (02) 4141-5
Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy Abner, Clay	Email Amira. Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Carlyle.Temple@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com Chassidy.Gilmer@advancedbusinessmanager.com Clay.Abner@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators South Island Restorations Shades and Hues Mark Creston	Mobile Phone	861-154-23 (08) 364 58 214-295-88 (02) 976 58 (02) 4141-5 256-266-50
Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy Abner, Clay Schmidt, Darline	Email Amira. Guerin@advancedbusinessmanager.com Bernard. Broadway@advancedbusinessmanager.com Carlyle. Temple@advancedbusinessmanager.com Casey. Hatcher@advancedbusinessmanager.com Chassidy. Gilmer@advancedbusinessmanager.com Clay. Abner@advancedbusinessmanager.com Darline. Schmidt@advancedbusinessmanager.com Darlol. Lowman@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators South Island Restorations Shades and Hues Mark Creston The Fencing Specialists	Mobile Phone	861-154-22 (08) 364 55 214-295-85 (02) 976 55 (02) 4141-5 256-266-50 456 7890
Drag a column header here           Full Name           Guerin, Amira           Broadway, Bernard           Temple, Carlyle           Hatcher, Casey           Gilmer, Chassidy           Abner, Clay           Schmidt, Darline           Lowman, Darold           Hembree, Dorian	Email Amira. Guerin@advancedbusinessmanager.com Bernard. Broadway@advancedbusinessmanager.com Cartyle. Temple@advancedbusinessmanager.com Casey. Hatcher@advancedbusinessmanager.com Chassidy. Gilmer@advancedbusinessmanager.com Clay.Abner@advancedbusinessmanager.com Darline. Schmidt@advancedbusinessmanager.com Darold_Lowman@advancedbusinessmanager.com Dorian. Hembree@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators South Island Restorations Shades and Hues Mark Creston The Fencing Specialists Rainbow Shades	Mobile Phone	861-154-22 (08) 364 56 214-295-86 (02) 976 55 (02) 4141-5 256-266-50 456 7890 4664400 809-797-22
Full Name Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy Abner, Clay Schmidt, Darline Lowman, Darold Hembree, Dorian Pruitt, Douglas	Email Amira Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Carlyle.Temple@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com Clay.Abner@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com Dorian.Hembre@advancedbusinessmanager.com Dorian.Hembre@advancedbusinessmanager.com Douglas.Pruitt@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators South Island Restorations Shades and Hues Mark Creston The Fencing Specialists Rainbow Shades Shades of Gold Walker Colours	Mobile Phone	861-154-22 (08) 364 52 (14-295-88 (02) 976 55 (02) 4141-5 256-266-50 456 7890 4664400 809-797-22 (09) 377 45
Drag a column header here           Full Name           Guerin, Amira           Broadway, Bernard           Temple, Carlyle           Hatcher, Casey           Gilmer, Chassidy           Abner, Clay           Schmidt, Darline           Lowman, Darold           Hembree, Dorian	Email Amira. Guerin@advancedbusinessmanager.com Bernard. Broadway@advancedbusinessmanager.com Cartyle. Temple@advancedbusinessmanager.com Casey. Hatcher@advancedbusinessmanager.com Chassidy. Gilmer@advancedbusinessmanager.com Clay.Abner@advancedbusinessmanager.com Darline. Schmidt@advancedbusinessmanager.com Darold_Lowman@advancedbusinessmanager.com Dorian. Hembree@advancedbusinessmanager.com	Spectrum Paint Supplies Sydney House of Colour Alpine Interior Decorators South Island Restorations Shades and Hues Mark Creston The Fencing Specialists Rainbow Shades Shades of Gold	Mobile Phone	861-154-22 (08) 364 56 214-295-86 (02) 976 55 (02) 4141-5 256-266-50 456 7890 4664400 809-797-22

ABN 77 135 777 678 Email: sales@ajendico.com.au Web: www.ajendico.com.au



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.

In Open Jess only Mailing List					×
Home					~ ⊛
Save & Send To Close Excel Contact Actions					
Cpen Mailing List - Jess only					-
Details Mailing List Title Liess only Mailing List Drag a column header here to group by that column	Contact Type Customers	*			
Full Name Email	Business Phone	Mobile Phone	Position	Company Name	<ul> <li>(C)ustomer, (S)</li> </ul>
Jessica Support@ajendico.com.au				AA - Ajendico Pty Ltd Admin	С
4		101			ŀ

## Step 2 – Create an Email Template

Click on "Design Emails" form the menu bar above.

Au Evaluation Company9 - Australia as at October 20	15			
Home Documents & Reporting Tools				۵ 🔞
	Da 😂 🖾			
Email Add View Delete S New or Edit	Settings Refresh Send To Excel	Design Send E-Mails E-Mails		
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Opportunities				
Activities				
Service Calls				
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4 Mailing Lists				1.

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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			<b>↔</b>	- <b>x</b>	
Home					۵ 🔞	
New Save	Delete					
Edit a Message	New Widget Sales B	mail 🖵				
Description	New Widget Sales E	mail				
This message w Customers Suppliers	vill be used as					
Subject	Ajendico can show y	ou how t sell more Widge	ts to your customers			
Attachments			g Information - New Widget	Range.pdf	Add Remove	
Plain Text HTM	мL					
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, d	ag it to the message	Salutation FirstName LastName	JobTitle Email CompanyName	CompanyAddress CompanyURL CompanyTaxNumber	Company( Company 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 :-

- 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

Mailing List			×
Home		۵	0
<u>S</u> end <u>C</u> lose			
Actions			
<ul> <li>Select a Mailing List</li> </ul>	Sales@ajendico.com.au only	1.	
<ul> <li>Or Select a Campaign</li> </ul>	Aircraft paint promotion	+	
Then select a Template	New Widget Sales Email	Ŧ	

When completed, you will see this screen.





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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