

## 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 11/2		
	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 👻	
<ul> <li>Not applicat</li> </ul>	ble	
		Cancel



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

	ecials Mailing List		<b>+</b>	
Home				~ (
ave & Send To Close Excel Cor A	dd Remove tract Contact ctions			
🕝 📀 🛛 Open Maili	ng List - June Hardware Specials			-
Mailing List Title June H.	ardware Specials Contact Type Cust	omers 👻		
Mailing List	e to group by that column			<b>A</b>
Mailing List Drag a column header he Full Name	e to group by that column	Company Name	Mobile Phone	Business P
Mailing List Drag a column header he Full Name Abner, Clay	e to group by that column Email Clay.Abner@advancedbusinessmanager.com	Company Name Mark Creston	Mobile Phone	Business P
Mailing List Drag a column header he Full Name Abner, Clay Boren, Maqdalena	re to group by that column Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com	Company Name Mark Creston DIY - Upper Hutt	Mobile Phone	Business P 256-266-50 (08) 364 17
Mailing List Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard	e to group by that column Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com	Company Name Mark Creston DIY - Upper Hutt Sydney House of Colour	Mobile Phone	Business P 256-266-50 (08) 364 17 (08) 364 55
Mailing List Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard Brogan, Rayford	E to group by that column Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com	Company Name Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office)	Mobile Phone	Business P 256-266-50 (08) 364 17 (08) 364 52 (02) 9362-7
Mailing List Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard Brogan, Rayford Gallant, Reece	E to group by that column Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com	Company Name Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators	Mobile Phone	Business P 256-266-50 (08) 364 17 (08) 364 58 (02) 3362-7 214-295-88
Mailing List Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard Brogan, Rayford Gallant, Reece Hubble, Sydney	E to group by that column Email Clay Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com	Company Name Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators Mark Creston	Mobile Phone 0412 689 914	Business P 256-266-50 (08) 364 17 (08) 364 55 (02) 9362-7 214-295-88 256-266-50
Mailing List Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard Brogan, Rayford Gallant, Reece Hubble, Sydney Conger, Erwin	e to group by that column Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com	Company Name Mark Creston DTY - Upper Hutt Sydney House of Colour DTY Wellington (Head Office) Alpine Interior Decorators Mark Creston Wellington Bay Hospital	Mobile Phone	Business P 256-266-50 (08) 364 15 (02) 3634 55 (02) 9362-7 214-295-85 256-266-50 (03) 9876-5
Mailing List Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard Brogan, Rayford Gallant, Reece Hubble, Sydney Conger, Erwin West, David	e to group by that column Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com	Company Name Mark Creston DIY - Upper Hutt Sydney House of Colour DIY Wellington (Head Office) Alpine Interior Decorators Mark Creston Wellington Bay Hospital Lakeview Complex	Mobile Phone 0412 689 914 0214849328	Business P 256-266-50 (08) 364 17 (08) 364 17 (02) 3362-7 214-295-88 256-266-50 (03) 9876-3
Mailing List Drag a column header he Full Name Abner, Clay Boren, Magdalena Broadway, Bernard Broadway, Bernard Gallant, Reece Hubble, Sydney Conger, Erwin West, David Demarco, Michi	E to group by that column Email Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com Michi.Demarco@advancedbusinessmanager.com	Company Name 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	Mobile Phone 0412 689 914 0214849328	Business P 256-266-50 (08) 364 17 (08) 364 55 (02) 9362-7 214-295-88 256-266-50 (03) 9876-3 981-784-71
Mailing List 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	e to group by that column Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadwa@advancedbusinessmanager.com Rayford.Brogan@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com Michi.Demarco@advancedbusinessmanager.com Jayce.Edwards@advancedbusinessmanager.com	Company Name 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	Mobile Phone 0412 689 914 0214849328	Business P 256-266-50 (08) 364 15 (02) 9362-7 214-295-86 256-266-50 (03) 9876-5 981-784-71 751-345-65
Mailing List 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	e to group by that column 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	Company Name 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	Mobile Phone 0412 689 914 0214849328	Business P 256-266-50 (08) 364 17 (08) 364 17 (08) 364 55 (02) 9362-7 214-295-86 256-266-50 (03) 9876-5 981-784-71 751-345-65
Mailing List Drag a column header he Full Name Abner, Clay Boren, Magdalena Brogan, Rayford Gallant, Reece Hubble, Sydney Conger, Erwin West, David Demarco, Michi Edwards, Joyce Fuentes, Garrison Gilmer, Chassidy	E to group by that column Email Email Clay.Abner@advancedbusinessmanager.com Magdalena.Boren@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Erwin.Conger@advancedbusinessmanager.com Michi.Demarco@advancedbusinessmanager.com Jayoce.Edwards@advancedbusinessmanager.com Garrison.Fuentes@advancedbusinessmanager.com Chassidy.Gilmer@advancedbusinessmanager.com	Company Name 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 Shades and Hues	Mobile Phone 0412 689 914 0214849328	Business P 256-266-50 (08) 364 17 (08) 364 55 (02) 9362-7 214-295-88 256-266-50 (03) 9876-5 981-784-71 751-345-65 (02) 4141-5

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.

	ecials Mailing List		++	
Home				۵
IVE & Send To Nose Excel Cor	Id Remove tact Contact			
冯 📀 🛛 Open Mailir	ig List - June Hardware Specials			
Details				
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Mailing List				
Mailing List				
Mailing List Drag a column header her	e to group by that column			-
Mailing List Drag a column header her Full Name	e to group by that column	Company Name	Mobile Phone	Business P
Mailing List Drag a column header her Full Name Guerin, Amira	e to group by that column Email Amira. Guerin@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies	Mobile Phone	Business P 861-154-23
Mailing List Drag a column header her Full Name Guerin, Amira Broadway, Bernard	e to group by that column Email Amira.Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies     Sydney House of Colour	Mobile Phone	Business P 861-154-23 (08) 364 56
Mailing List Drag a column header her Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle	e to group by that column Email Amira.Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Carlyle.Temple@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies     Sydney House of Colour     Alpine Interior Decorators	Mobile Phone	Business P 861-154-23 (08) 364 55 214-295-88
Mailing List Drag a column header her Full Name Guerin, Amira Broadway, Bernard Temple, Catlyle Hatcher, Casey	e to group by that column Email Amira.Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Carlyle.Temple@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies     Sydney House of Colour     Alpine Interior Decorators     South Island Restorations	Mobile Phone	Business P 861-154-23 (08) 364 58 214-295-88 (02) 976 55
Mailing List Drag a column header her Full Name Guerin, Amira Broadway, Bernard Temple, Catyle Hatcher, Casey Gilmer, Chassidy	e to group by that column Email Amira. Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Carlyle.Temple@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com Chassidy.Gilmer@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies     Sydney House of Colour     Alpine Interior Decorators     South Island Restorations     Shades and Hues	Mobile Phone	Business P 861-154-23 (08) 364 55 (02) 976 55 (02) 4141-5
Mailing List Drag a column header her Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy Abner, Clav	e to group by that column Email Amira.Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Carlyle.Temple@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com Clav.Abner@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies     Sydney House of Colour     Alpine Interior Decorators     South Island Restorations     Shades and Hues     Mark Creaton	Mobile Phone	Business P 861-154-23 (08) 364 58 214-295-88 (02) 976 55 (02) 4141-5 256-266-50
Mailing List Drag a column header her Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy Abner, Clay Schmidt, Darline	e to group by that column Email Amira. Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Carlyle.Temple@advancedbusinessmanager.com Chassidy.Gilmer@advancedbusinessmanager.com Clay.Abner@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies     Sydney House of Colour     Alpine Interior Decorators     South Island Restorations     Shades and Hues     Mark Creston     The Fencing Specialists	Mobile Phone	Business P 861-154-2: (08) 364 5: 214-295-8: (02) 976 5: (02) 4141-5 256-266-5: 456 7890
Mailing List Drag a column header her Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy Abner, Clay Schmidt, Darline Lowman, Darold	e to group by that column           Email         -           Amira. Guerin@advancedbusinessmanager.com         -           Bernard.Broadway@advancedbusinessmanager.com         -           Caryle.Temple@advancedbusinessmanager.com         -           Casey.Hatcher@advancedbusinessmanager.com         -           Clay.Abner@advancedbusinessmanager.com         -           Clay.Abner@advancedbusinessmanager.com         -           Darline.Schmidt@advancedbusinessmanager.com         -           Darline.Schmidt@advancedbusinessmanager.com         -	Company Name     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	Business P 861-154-22 (08) 364 56 (02) 976 55 (02) 4141-5 256-266-50 456 7890 4664400
Mailing List	e to group by that column Email Amira Guerin@advancedbusinessmanager.com Bernard Broadway@advancedbusinessmanager.com Carble.Temple@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com Clay.Abner@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com Darlot_Lowman@advancedbusinessmanager.com Dorial.Hembre@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies     Sydney House of Colour     Alpine Interior Decorators     South Island Restorations     Shades and Hues     Mark Creaton     The Fencing Specialists     Rainbow Shades     Shades of Gold	Mobile Phone	Business P 861-154-22 (08) 364 56 214-295-88 (02) 4141-5 256-266-50 456 7890 4664400 809-797-22
Mailing List Drag a column header her Full Name Guerin, Amira Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy Abner, Clay Schmidt, Darline Lowman, Darold Hembree, Dorian Pruitt, Douglas	e to group by that column  Email  Amira.Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Cartyle.Temple@advancedbusinessmanager.com Chassidy.Gilmer@advancedbusinessmanager.com Clay.Abner@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com Darlol.Lowman@advancedbusinessmanager.com Dorian.Hembree@advancedbusinessmanager.com Dorian.Pembree@advancedbusinessmanager.com	Company Name     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	Business P 861-154-22 (08) 364-56 214-295-86 (02) 976-55 (02) 4141-5 256-266-50 456 7890 4664400 809-797-22 (09) 377-45
Mailing List  Trag a column header her  Full Name  Guerin, Amira  Broadway, Bernard Temple, Calyle Hatcher, Casey Gilmer, Chassidy Abner, Clay Schmidt, Darline Lowman, Darold Hembree, Dorian Pruit, Douglas Jones, Dylan	e to group by that column  Email  Amira. Guerin@advancedbusinessmanager.com Bernard.Broadway@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com Chassidy.Gilmer@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com Dorian.Hembre@advancedbusinessmanager.com Douglas.Pruitt@advancedbusinessmanager.com Dugls.Pruitt@advancedbusinessmanager.com	Company Name     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     City Mall Refurbishers	Mobile Phone	Business P 861-154-22 (08) 364 56 (12) 976 55 (02) 4141-5 256-266-50 456400 809-797-22 (09) 377 42 4664400
Mailing List  Trag a column header hei  Full Name  Guerin, Amira  Broadway, Bernard Temple, Carlyle Hatcher, Casey Gilmer, Chassidy Abner, Clay Schmidt, Darline Lowman, Darold Hembree, Dorian Pruit, Douglas Jones, Dylan Conger, Erwin	e to group by that column  Email  Amira Guerin@advancedbusinessmanager.com Bernard Broadway@advancedbusinessmanager.com Carble.Temple@advancedbusinessmanager.com Casey.Hatcher@advancedbusinessmanager.com Clay.Abner@advancedbusinessmanager.com Darline.Schmidt@advancedbusinessmanager.com Darlot_Lowman@advancedbusinessmanager.com Dorian.Hembre@advancedbusinessmanager.com Dorglas.Pruitt@advancedbusinessmanager.com Dylan.Jones@advancedbusinessmanager.com Etwin.Comger@advancedbusinessmanager.com	Company Name     Spectrum Paint Supplies     Sydney House of Colour     Alpine Interior Decorators     South Island Restorations     Shades and Hues     Mark Creaton     The Fencing Specialists     Rainbow Shades     Shades of Gold     Walker Colours     City Mall Refurbishers     Wellington Bay Hospital	Mobile Phone	Business P 861-154-2: (08) 364 56 (14-295-88 (02) 976 55 (02) 4141-5 256-266-50 456 7890 4664400 809-797-22 (09) 377 45 4664400 (03) 9876-3

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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.

🔤 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>(Clustomer, (S)</li> </ul>
Jessica Support@ajendico.com.au				AA - Ajendico Pty Ltd Admin	С

## Step 2 – Create an Email Template

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

Evaluation Company9 - Austra	lia as at October 2015		
Home Documents & Report	ting Tools		۵ 🔞
Change Company	📂 🗙 🔝 💋 🔯 🛛 🎾 💐 🔤		
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Cashbook 🗸			
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Customer Contacts			
Supplier Contacts			
💽 Other Contacts			
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Opportunities			
Activities			
Service Calls			
Alchemex			
4			•
4 Mailing Lists			

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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>•</b> ×
Home					۵ 🔞
New Save	Delete				
Edit a Message	New Widget Sales B	imail 👻			
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	C:\Users\Di.DILAPT	0P2015\Desktop\Selling	Information - New Widget	Range.pdf	Add Remove
Plain Text HT	ML				
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	rag 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@aiendico.com.au only	1.	
0			
Or Select a Campaign	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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