

Sending a DMS Mail to Contacts

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Donor Management System

The DMS has a built-in DMS Mail tool (previously known as the *bulk email* tool) that can be used for your newsletters, announcements and any other mass communications with your Contacts.

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▮ Prefer to watch a **guided walk-through** of the DMS Mail tool? Check out our [Communicating with your Donors Webinar!](#)

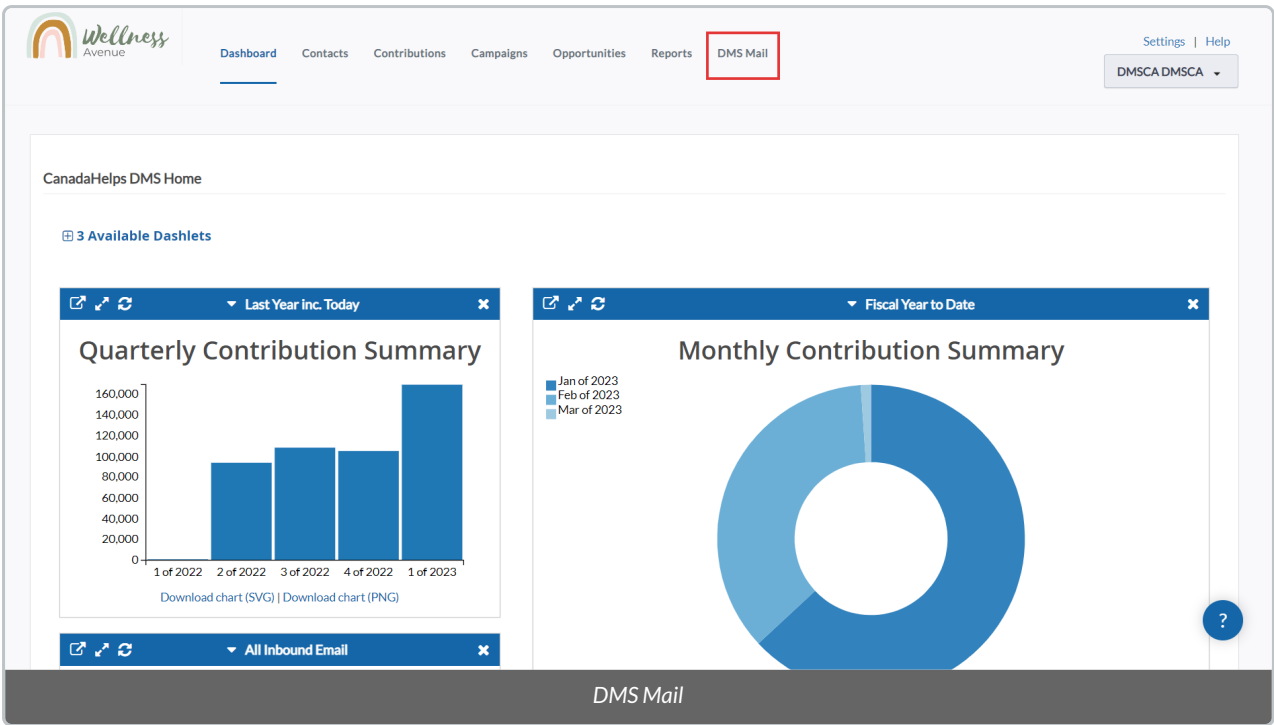
Considerations

- If you haven't already, make sure you [configure your Email Settings](#) first.
- In order to be available for repeated sending, your DMS Mail recipient list must be part of a [Group or a Smart Group](#) that has been marked as "Mailing List"

Accessing the DMS Mail Tool

Through the DMS Mail Tab

1. Visit your *DMS Mail* tab



2. On the next page, you will see a list of all of your Mailings. Select **New Mailing** at the top.

The page is titled 'Draft, Schedule, and Manage DMS Mails'. A red box highlights the 'New Mailing' button. Below the button are various filters and a search bar.

Filters include: Mailing Name, Mailing Date (Any), Created or Sent by, Mailing Status (Scheduled, Running, Complete, Paused, Canceled, Draft / Unscheduled), Is Mailing Archived? (Yes/No), Language (- all languages -), and Campaign Groups.

A search bar with a 'Search' button is located below the filters.

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Mailing Name	Language	Status	Created By	Created Date	Sent By	Scheduled	Started	Completed	Campaign Group	Action
Valentine's Day 50/50 Raffle	English (Canada)	Complete	DMSCA DMSCA	Feb 24th, 2023 2:52 PM	DMSCA DMSCA	Feb 24th, 2023 2:53 PM	Feb 24th, 2023 2:53 PM	Feb 24th, 2023 2:53 PM		Report Copy More
Mailing test 99	English (Canada)	Complete	Irfan Haque	Feb 13th, 2023 4:42 PM	Irfan Haque	Feb 13th, 2023 4:42 PM	Feb 13th, 2023 4:43 PM	Feb 13th, 2023 4:43 PM		Report Copy More

3. You will be directed to **Craft your Email** and select your desired Groups who will receive the DMS Mail.

Through your administrative Settings

1. Visit your **Administrative Settings**.
2. Under **DMS Mail**, select **Draft, Schedule, and Manage DMS Mails**.

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings Help

DMSCA DMSCA

Administer CanadaHelps DMS

Customize Data and Screens

Website Forms Contact Types

Activity Types Tags (Categories)

Communications

Organization Address and Contact Info Print Page (PDF) Formats

Message Templates

Localization

Date Formats

System Settings

Payment Processor Settings Import/Export Mappings

Misc (Undelete, PDFs, Limits, Logging, etc.) Receipt Settings

CanadaHelps Contribute

Manage Campaigns GL Accounts

Funds Manage Groups

CanadaHelps Campaign Group

Campaign Groups

DMS Mail

Headers, Footers, and Automated Messages DMS Templates

From Email Addresses Draft, Schedule, and Manage DMS Mails

Mailchimp Settings

Settings > Draft, Schedule, and Manage Emails

3. On the next page, you will see a list of all of your Mailings. Select **New Mailing** at the top.

Draft, Schedule, and Manage DMS Mails

[New Mailing](#)

Mailing Name:

Mailing Date:

Created or Sent by:

Mailing Status:

- Scheduled
- Running
- Complete
- Paused
- Canceled
- Draft / Unscheduled

Is Mailing Archived? Yes No

Language:

Campaign Groups:

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Mailing Name	Language	Status	Created By	Created Date	Sent By	Scheduled	Started	Completed	Campaign Group	Action
Valentine's Day 50/50 Raffle	English (Canada)	Complete	DMSCA DMSCA	Feb 24th, 2023 2:52 PM	DMSCA DMSCA	Feb 24th, 2023 2:53 PM	Feb 24th, 2023 2:53 PM	Feb 24th, 2023 2:53 PM		Report Copy More
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Select New Mailing

4. You will be directed to **Craft your Email** and select your desired Groups who will receive the DMS Mail.

Crafting your DMS Mail

After [creating a New Mailing](#) or [selecting your desired Contacts](#), you will be directed to complete **three Email Builder Stages**:

Mailing Stage (1)

5. Fill out the initial details of your mailing. When ready, select **Continue** to be brought to Stage 2, or **Save Draft** if you want to continue later.

The screenshot shows the 'CanadaHelps DMS - Email Builder' interface. At the top, there is a navigation bar with 'Wellness Avenue' logo and menu items: Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, DMS Mail. A 'Settings | Help' link and a 'DMSCA DMSCA' dropdown are also present. The main content area is titled 'CanadaHelps DMS - Email Builder' and has three tabs: '1 Mailing', '2 Design', and '3 Options'. The 'Mailing' tab is active. Below the tabs, there are several form fields:

- Mailing Name**: A text input field containing 'March Madness Campaign'.
- Campaign Group**: A dropdown menu, currently blank.
- From**: A dropdown menu containing '"Wellness Ave." <wellnessave@canadahelps.ca>'.
- Recipients**: A dropdown menu containing 'Angela's Smart Group' with a '+3 Recipients' indicator.
- Subject**: A text input field containing '{contact.first_name}, are you ready to fundraise?' and a 'Merge Fields' dropdown.
- Language**: A dropdown menu containing 'English (Canada)'.

 At the bottom of the form, there are three buttons: 'DELETE DRAFT' (with a trash icon), 'SAVE DRAFT' (with a floppy disk icon), and 'CONTINUE' (with a right arrow icon). A 'Stage 1' indicator is visible at the very bottom of the interface.

- **Mailing Name:** internal name to help you keep track of your Mailings.
- **Campaign Group:** leave this blank for now. In the future, you'll be able to send Bulk Emails to Campaign Groups.
- **From:** which From Email will be sending the Mailing. *If you have not yet configured your DMS From Email, please connect with your Onboarding Expert.*
- **Recipients:** include or exclude your Group or Smart Group.
 - **Note:** The list of intended recipients may be shorter than expected, in comparison to your Bulk Email Group. If an email address is associated with more than one Contact profile, the DMS will send **only one copy** to one of these duplicate email addresses.
- **Subject:** the email subject your Contacts will receive.
- **Subject – Merge Fields (Tokens):** such as "Hi {contact.first.name}".
- **Language:** either English or French.

Design Stage (2)

6. Next, pick one of our pre-set Templates by hovering your cursor to the desired one and pressing **Select**. The 3rd Template is usually the most popular.

CanadaHelps DMS - Email Builder

1 Mailing 2 Design 3 Options



Empty Template



Alex's Template



Basic - Email No Gallery



Basic - Email With Gallery



Basic - Newsletter Template



Basic - Text Only



Blog Template Example



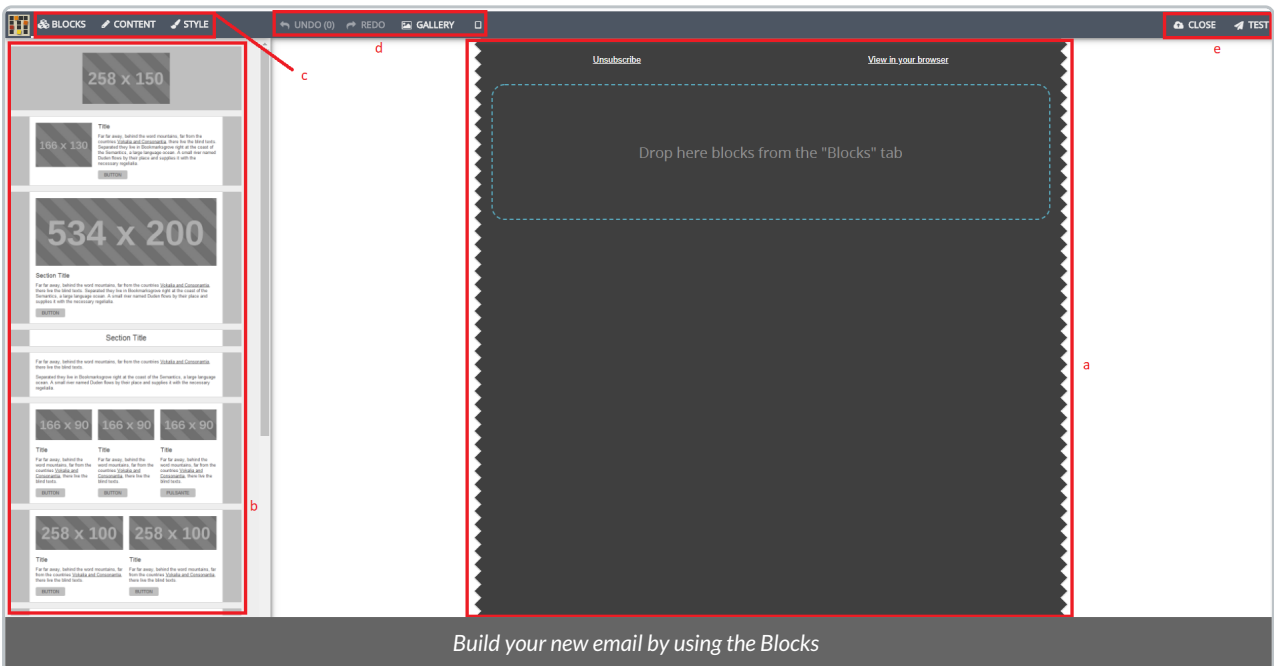
Certificates



Stage 2 - Design

7. You will then be able to **build your new Email** by using the following Blocks interface

Tip: Check out our in-depth overview on [designing your DMS Mail templates](#)



Build your new email by using the Blocks

(a)

- Drag Image or Text Blocks from (b) here and preview how your email will look.

(b)

- Select or drag and drop your desired Blocks to (a).
- You can scroll through various types of Blocks to build your email.

(c)

- **Blocks:** a list of selectable Blocks seen in (b).
- **Content:** once a Block has been added to (a), click on it to see more options in this section.
- **Style:** once a Block has been added to (a), click on it to change its style in this section.

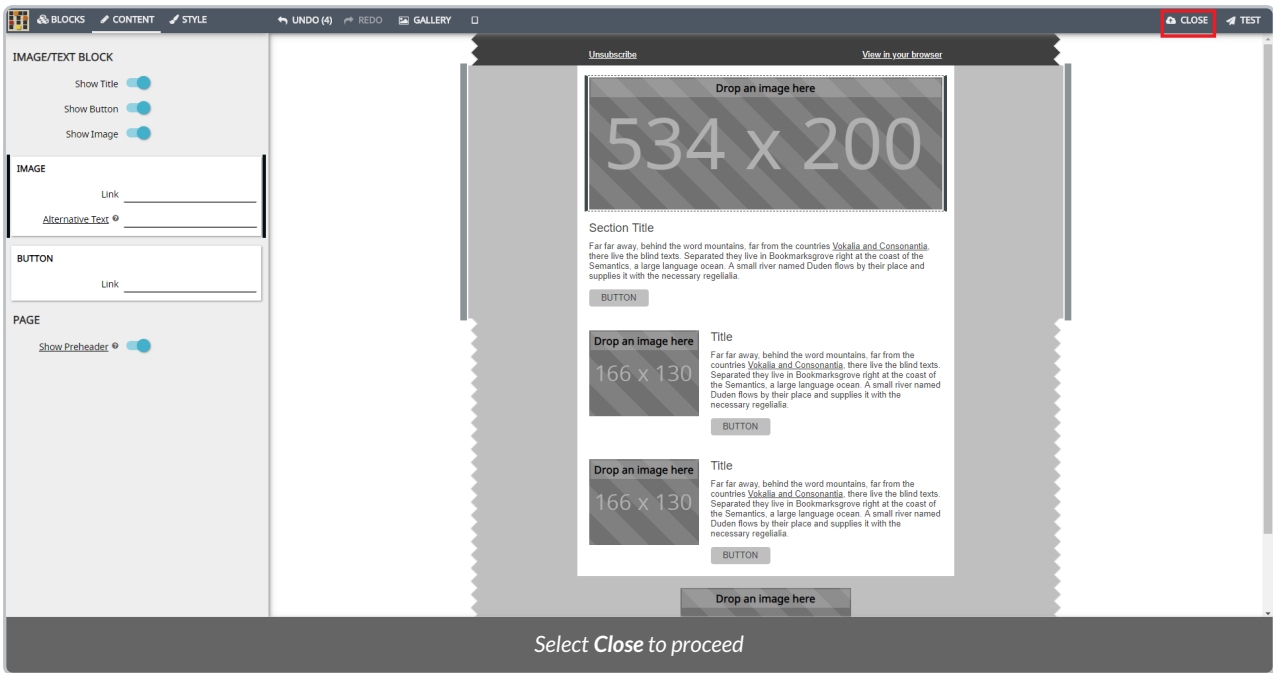
(d)

- **Undo:** while editing your email on (a), go back to your previous edit.
- **Redo:** while editing your email on (a), go forward to your latest edit.
- **Gallery:** see a list of all of your images to be inserted in your emails. You can add new images from your device.
- **Phone icon:** select the phone icon next to *Gallery* to see a preview of how your email will look on mobile devices.

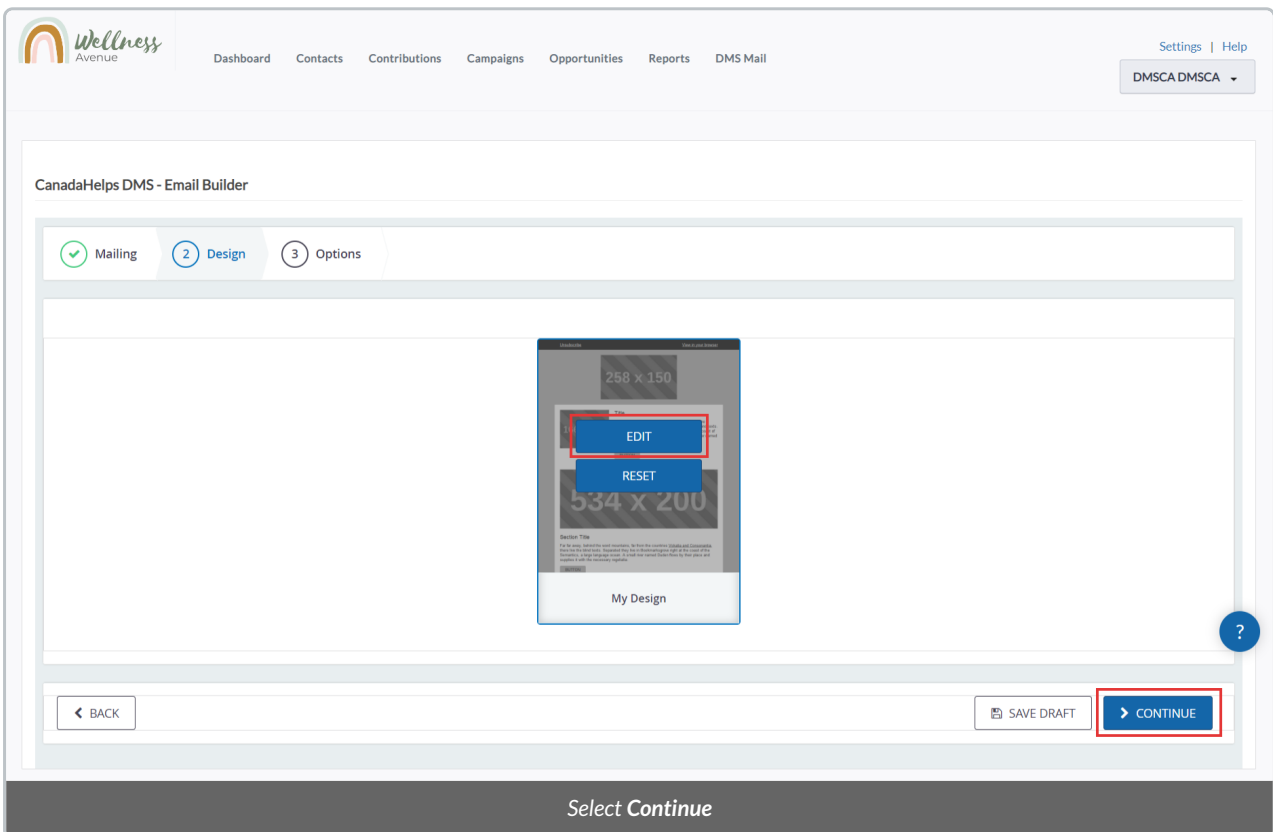
(e)

- **Test:** Preview how your email will look like in HTML or text, or **send a test email** to yourself, someone else, or to a Group.
- **Close:** exit this interface.

8. Once your email is ready, select **Close** to proceed.



9. Hover over your Template and select **Edit** to update it if needed. When ready, select **Continue** to be brought to Stage 3, or **Save Draft** if you want to continue later.



Options Stage (3)

At this Stage, you can finalize the email settings and schedule when to send it.

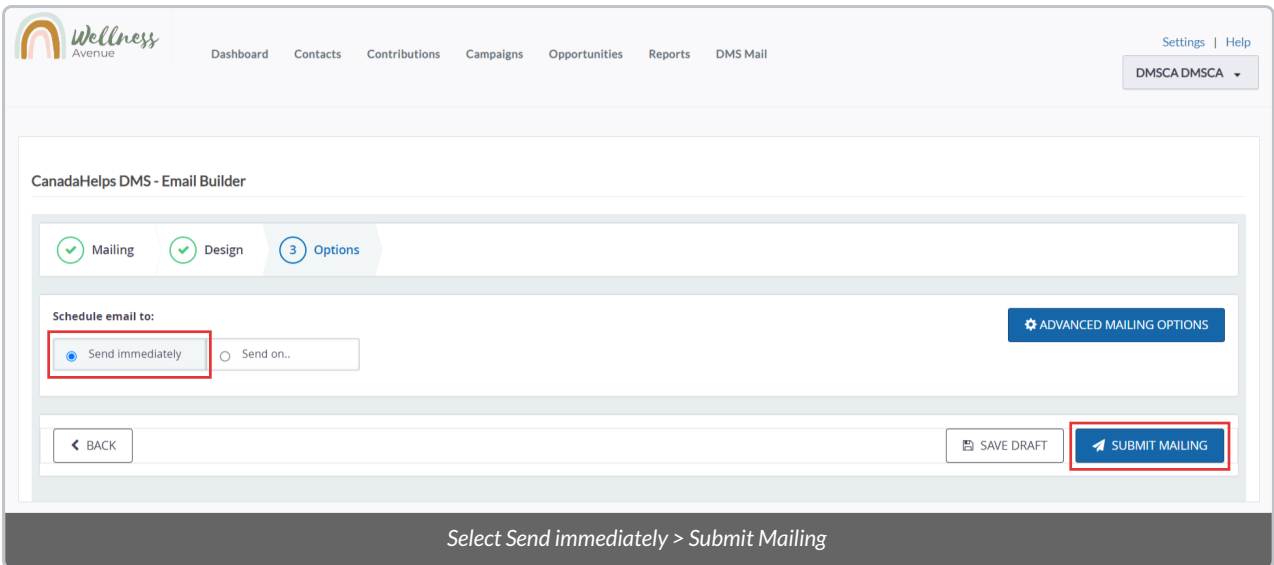
Note: you must have an **Unsubscribe** link in your email template in order to send it to your Contacts.

10. Select **Advanced Mailing Options** to configure:

The screenshot shows the 'CanadaHelps DMS - Email Builder' interface. At the top, there is a navigation bar with the 'Wellness Avenue' logo and menu items: Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. On the right, there are links for 'Settings | Help' and a dropdown menu for 'DMSCA DMSCA'. The main content area is titled 'CanadaHelps DMS - Email Builder' and features three tabs: 'Mailing' (checked), 'Design' (checked), and 'Options' (active, with a '3' in a circle). Below the tabs, there is a 'Schedule email to:' section with two radio buttons: 'Send immediately' (selected) and 'Send on...'. A red box highlights a blue button labeled 'ADVANCED MAILING OPTIONS' with a gear icon. At the bottom of the form, there are three buttons: 'BACK', 'SAVE DRAFT', and 'SUBMIT MAILING'. A dark grey footer bar at the bottom of the interface contains the text 'Stage 3 - Sending Options'.

- **Attachments:** add one file up to 3 MB.
- **Responses:** use default responses if a Contact replies to the received email or configure new ones by contacting your Onboarding Specialist. Select **Track Replies** if you want to store all email responses in a different email address.
- **Tracking:** leave these checked if you want to track Click-Through-Rates (CTRs) and Opened emails.
- **Publication:** leave **Public Pages** selected if you want the email to be viewed by all of your selected Contacts or Groups.

11. To send the Bulk Email right away, select **Send immediately**, then **Submit Mailing**.



12. Select **Send on** and your desired date and time and **Submit Mailing** to send the Bulk Email at a future date and time.

