Sending a DMS Mail to Contacts

Last Modified on 11/21/2024 7:24 pm EST

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.**

 Prefer to watch a **guided walk-through** of the DMS Mail tool? Check out our **Communicating with your Donors Webinar**!
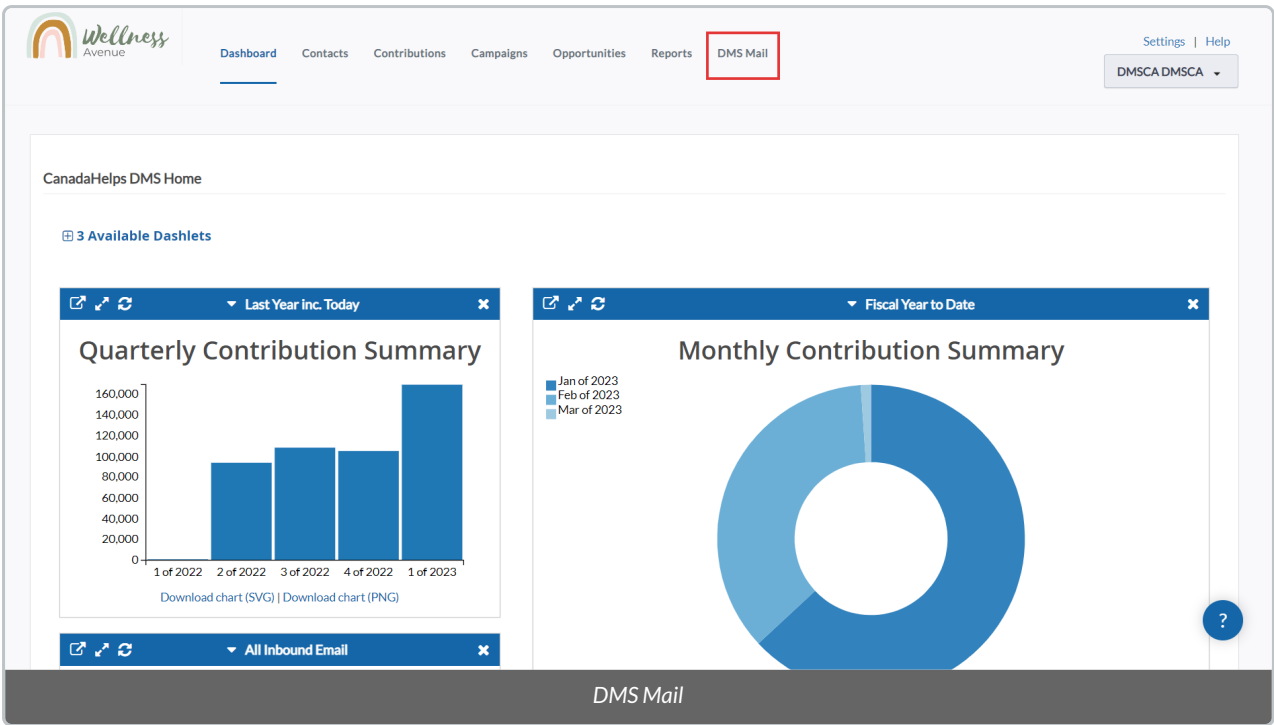
Considerations

- 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

DMS Mail

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

New Mailing

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.*

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.

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.

Stage 1

- *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.
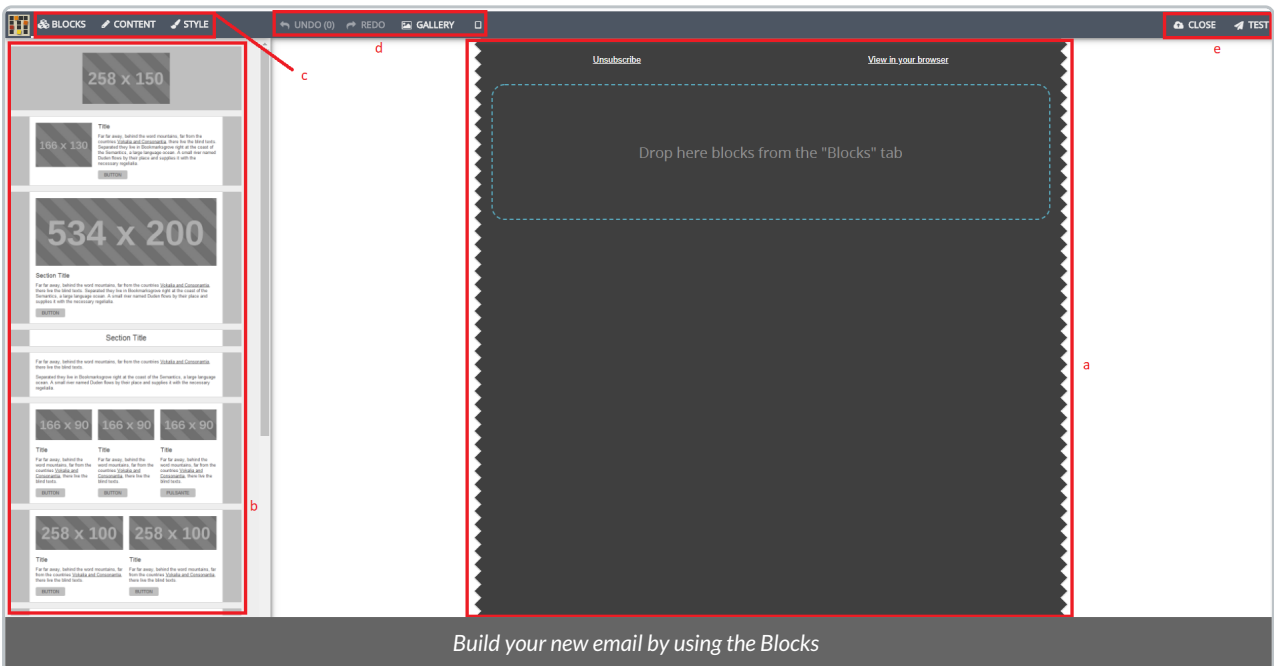
Stage 2 - Design

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 HMTL 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.

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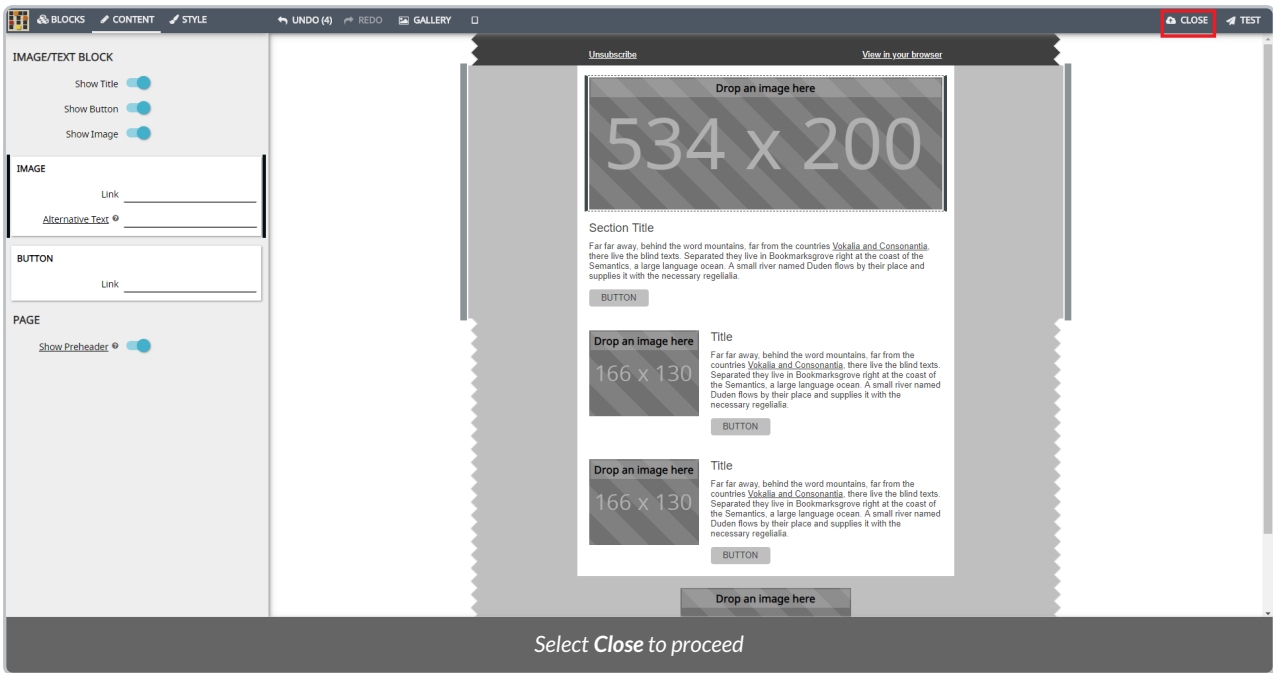
9. Hover over your Template and select **Edit** to update it if needed. When ready, select **Continue** to be brought to Stage 3, or **Save Draft** if you want to continue later.

Select **Continue**
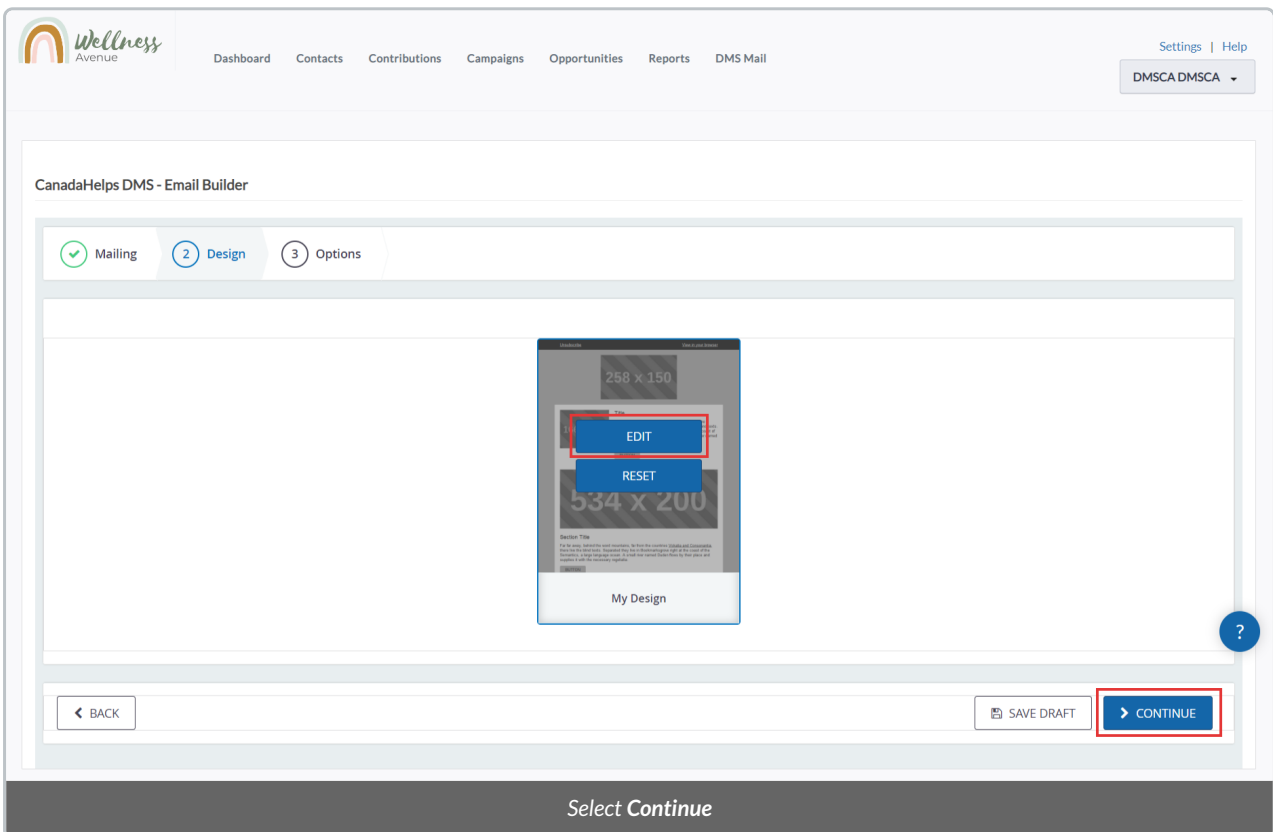
Options Stage (3)

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

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

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.**

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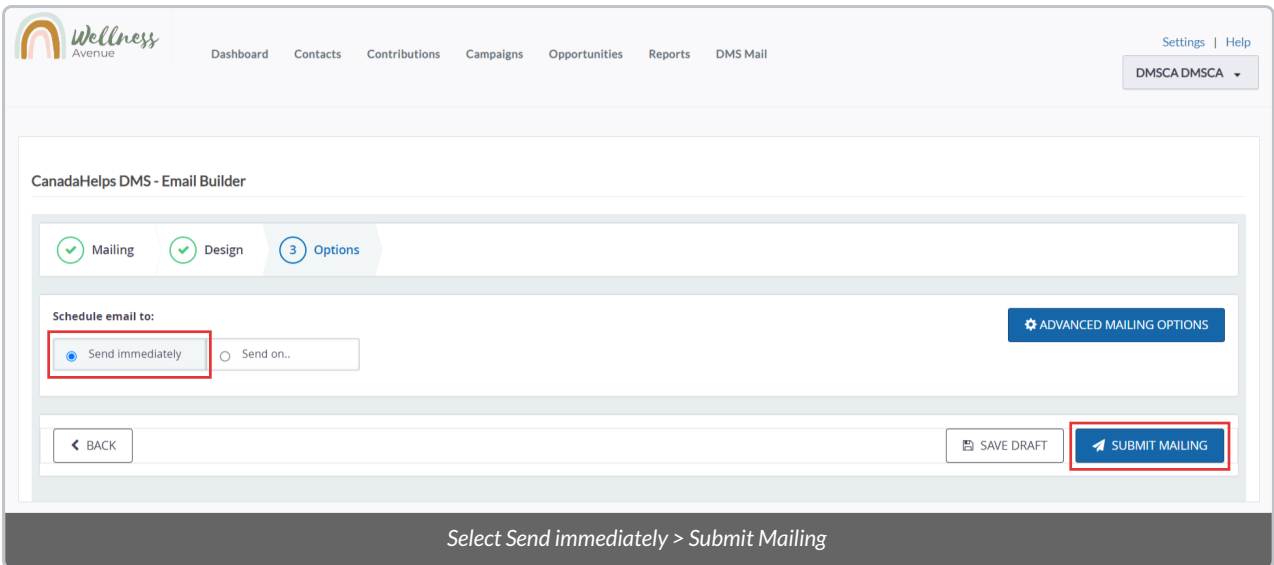
12. Select *Send on* and your desired date and time and *Submit Mailing* to send the Bulk Email at a future date and time.

Select Send on... + your preferred time then Submit Mailing