

How do I create email campaigns using AMS Mailer?

This is the usual way for REAA to use this functionality:

Events > Event Dashboard > Select an Event > Select Registrants > Mail

NAYLOR ASSOCIATION SOLUTIONS

Hello Joe! Today is Monday, July 1, 2024

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Time Adjustments for Appraisers, A Virtual Event

Registrants | Promo Codes | Financials | Setup | Reports | Dashboard

Event Registrant Dashboard

By Name: Filter

By Status:

- All
- Paid
- Invoiced
- CC Due
- Overpaid
- Waitlist
- Opt-Out
- Cancelled

By Type:

- All
- Free Website Profile (NON-MEMBER APPRAISER) (6)
- Licensed Appraiser Member (31)
- Real Estate Affiliate (NON-APPRAISERS ONLY) (2)
- Trainee Appraiser Member (1)

Status	Name	Registrant Type	Balance	Reg Date	Organization
<input type="checkbox"/> Paid	Lynch, Joseph	Licensed Appraiser Member	\$0.00	5/2/2024 5:45 PM	Joseph Lynch Appraisal Services
<input type="checkbox"/> Paid	Grey, Alexis	Licensed Appraiser Member	\$0.00	5/3/2024 10:57 AM	Valley Foothill Appraisals
<input type="checkbox"/> Paid	Holsinger, Samuel	Licensed Appraiser Member	\$0.00	5/8/2024 11:55 AM	--
<input type="checkbox"/> Paid	Parker, Amy	Licensed Appraiser Member	\$0.00	5/8/2024 1:59 PM	Appraise it Today
<input type="checkbox"/> Paid	Chong, Lucas	Licensed Appraiser Member	\$0.00	5/8/2024 7:05 PM	Lucas Chong
<input type="checkbox"/> Paid	Nutt, Bette	Licensed Appraiser Member	\$0.00	5/9/2024 11:48 AM	Valentine Resources, Ltd. Inc.
<input type="checkbox"/> Paid	DiMaggio, Jessica	Licensed Appraiser Member	\$0.00	5/14/2024 1:46 PM	Diablo Valley Appraisal Services
<input type="checkbox"/> Paid	Greenwood, Kimberlee	Licensed Appraiser Member	\$0.00	5/14/2024 5:04 PM	Golden Poppy Appraisal

Help

How do I create a new email campaign?

(The instructions below follow the path of Members > Find Individuals)

Go to Members > Find Individuals

Set the filters for your list

Check the box for "Send to Multichannel Messaging"

Click View Contacts

This will bring up the new AMS Mailer: Create New Mail screen:

AMS Mailer: Create New Mail

[Manage Mailings](#)[Manage Email Templates](#)

Please be aware that the final email list below has been processed to remove duplicate entries and those with messaging preferences disabled. This means that any duplicate email addresses have been eliminated, ensuring a clean and streamlined list for your use.

1. Review Contacts

2. General Settings

3. Design Email

4. Review & Finalize

Full Name	Email	Organization	Member Type
test test			Associate Member
test test			Associate Member
Jason Berry			Associate Member
Ashly White			Associate Member
test test		Affordable Housing Management, Inc.	Associate Member
Crystal Sparkles			Associate Member
Tim testing			Associate Member
Event Join		Naylor	Associate Member
Jillian Martin			Associate Member
Jim Jones			Associate Member

[First](#) [Previous](#) **1** [2](#) [3](#) [4](#) [Next](#) [Last](#)[Previous](#)[Next](#)

Helpful Administrator Links:

[Emails \(JSON\)](#) | [Emails \(CSV\)](#) | [View Email](#)

Here, you can review the list of contacts that the email will be sent to.

After the review is complete, click Next

On the General Settings tab:

AMS Mailer: Create New Mail

[Manage Mailings](#)[Manage Email Templates](#)

1. Review Contacts

2. General Settings

3. Design Email

4. Review & Finalize

General Settings

Friendly Message Name (Internal)

AMS Mailer Notes

Broadcast Date

05/31/2024



Broadcast Time (EST Time)

9:45 PM



From Name

AMS Support

From Email

masie@amsinbox.com

Reply to Email

amssupport@naylor.com

Email Subject

AMS Mailer

[Previous](#)[Next](#)

Friendly Message Name (Internal): This is the email/campaign name that will appear in the "Manage Mailings"

Once the email is created, you can enter your email address at the bottom and click on “Preview In Email” and it will send a Preview/Sample email to that email address.

You can also click on “Preview In Browser” to see the email in your browser window.

Once the email is created, click on Next

On the Review & Finalize tab:

The screenshot shows the 'Review Email' screen in the AMS Mailer interface. At the top, there is a header with a mail icon and the text 'AMS Mailer: Create New Mail'. To the right of the header are two buttons: 'Manage Mailings' and 'Manage Email Templates'. Below the header is a navigation bar with four tabs: '1. Review Contacts', '2. General Settings', '3. Design Email', and '4. Review & Finalize'. The '4. Review & Finalize' tab is currently selected. The main content area is titled 'Review Email' and contains several input fields: 'Friendly Message Name (Internal)' with the value 'AMS Mailer Notes' and a red 'x' icon; 'Broadcast Date' with the value '05/31/2024'; 'Broadcast Time (EST Time)' with a dropdown menu showing '9:45:00 PM'; 'From Name' with the value 'AMS Support'; 'From Email' with the value 'masie@amsinbox.com'; 'Reply to Email' with the value 'amssupport@naylor.com'; and 'Email Subject' with the value 'AMS Mailer'. At the bottom right of the form are two buttons: 'Previous' and 'Finalize'. Below the form is a section titled 'Helpful Administrator Links:' with three links: 'Emails (JSON)', 'Emails (CSV)', and 'View Email'.

Review the email details and click Finalize to send the email out.

If anything needs to be modified, click on the corresponding tab across the top to change

Once the email is ready to send/schedule, click Finalize

After clicking Finalize, the AMS Mailer Notes screen will appear:

The screenshot shows the 'AMS Mailer: AMS Mailer Notes' screen. At the top, there is a header with a mail icon and the text 'AMS Mailer: AMS Mailer Notes'. To the right of the header are two buttons: 'Manage Mailings' and 'Manage Email Templates'. Below the header is a blue bar with the text 'Ready To Schedule AMS Mailer?'. The main content area contains the text 'You are now ready to schedule your upcoming mailing below. Here are some important details for your reference:' followed by a bulleted list: '• You have the option to cancel this mailing up to 5 minutes before its scheduled broadcast time.' and '• Statistics for this mailing will become available for viewing one hour after it has been broadcasted.' At the bottom of the screen are three buttons: 'Make Changes', 'Schedule Mailing', and 'Maybe Later'.

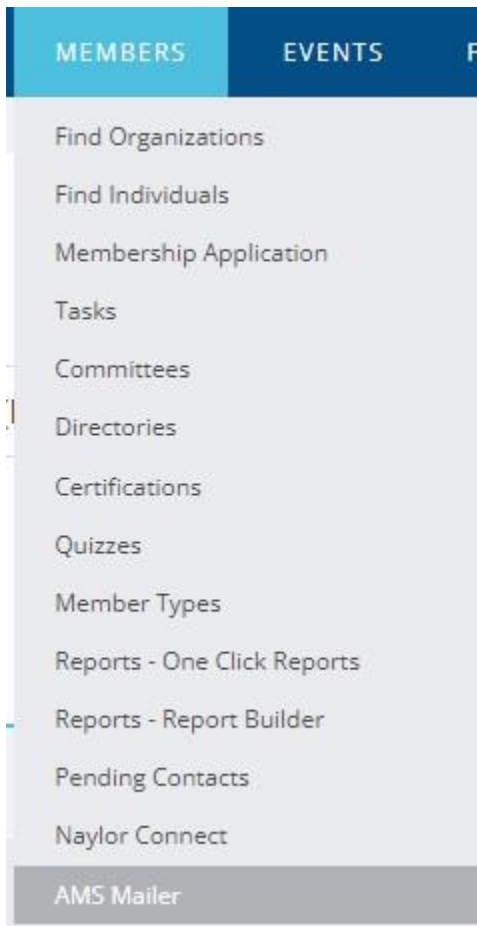
Make Changes: This will route back to the Review Contacts tab and you can click through each tab to make changes before sending out the email

Schedule Mailing: This will send the email out

Maybe Later: Saves the email as a draft

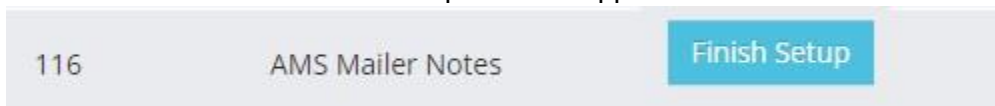
How can I get to email drafts:

Navigate to Members > AMS Mailer



Click on DRAFTS (Last 30 days)

All emails that have not been completed will appear.



Click Finish Setup which will redirect back to the Review Contacts tab

How do I review previously sent emails:

Navigate to Members > AMS Mailer

A list of previous sent emails will appear with two options:



View Details: This will display the AMS-Mailer Statistics **HTML**

Preview: This will display the email in the browser window+

Can I create and save templates?

Navigate to Members > AMS Mailer

Click on the “Manage Email Templates” button

On the Manage Email Templates screen, click on Create Template

Add a Friendly Name

Use the CK Editor to create the template.

If you have HTML from an existing template, click the “Source” button and paste the html in the Source view of the CK Editor

Once the template is created, click on Save HTML Template