



Creating and Managing Email Marketing Lists

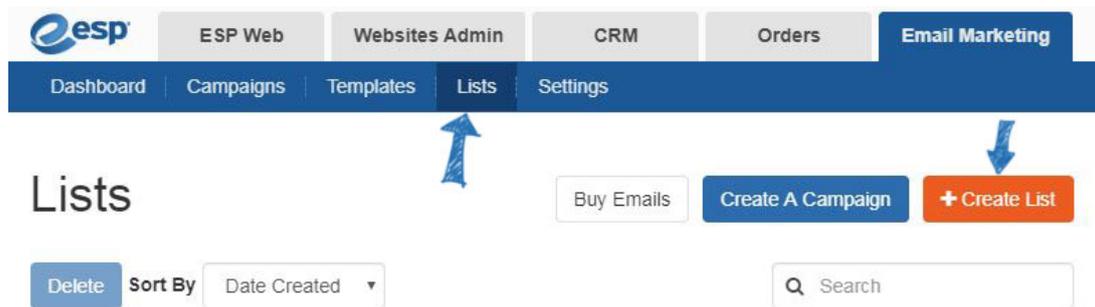
Jennifer M - 2024-03-19 - Templates & Lists

Email Marketing enables you to create recipient lists using contacts from your CRM or by uploading a file with contact information. In the Lists area, you can also manage your lists using the available options. When creating an email marketing list, if two contacts have the same email address, only the first contact will be added to the list. This automatic functionality ensures that duplicate email addresses are not added to the same list.

What would you like to do?

Create a List

To create a new list, click on the Create A List button from the Email Marketing Homepage or within the Lists section, click on the Create List button.



Enter a name for the new list and then click on the Create button.

Add Contacts to an Email Marketing List

Use a Dynamic List

Dynamic lists enable you to create rules for adding contacts to a list. For example, if you

are promoting a local event and want to ensure that all contacts within a specific postal code are included, you can click on the Add New Rule link and then use the dropdown to select postal code. To expand the area, use the Match Any Option, click on the Add New Rule, and add another postal code.

The contacts assigned this list will be controlled dynamically through rules that will search your CRM. You will not be able to add individual contacts manually.

Create Rule

Match Type Match all Match any

[+Add New Rule](#)

Preview List

Save

Choosing "And" means that contacts must fit all rules. Choosing "Any" means that contacts must fit at least one of the rules. For example, let's say you wanted to send out an email campaign to your healthcare contacts. You have the contact tagged in CRM, but some are tagged as "medical" and others have a "healthcare" tag. You have the option to use only one tag, both tags, or either tag.

Click on the Add New Rule link and then use the dropdown to select "Tags". Then, you can type the tag name, "medical", in the box and then click on the Preview List button. All contacts which have been tagged with "medical" will appear in the list. Next, click on the Add New Rule link again, select Tags from the dropdown, and type "healthcare" in the box. Then, click on the Preview List button. Now, only contacts that have been tagged with both "medical" and "healthcare" will be shown. To include contacts that have been tagged as either "medical" or "healthcare", select the "Any of these tags" option. Then, click on the Preview List button again to see all contacts that contain at least one of the tags you have entered.

Dynamic List by Tags [< Back](#)

Note: All list names must be unique and cannot contain special characters.

Dynamic List
The contacts assigned this list will be controlled dynamically through rules that will search your CRM. You will not be able to add individual contacts manually.

Create Rule

Match Type Match all Match any

[+Add New Rule](#)

Preview List

Save

Note: Individual cannot be managed on dynamic lists.

Add from CRM

Click on the Add from CRM button.

Note: All list names must be unique and cannot contain special characters.
 Dynamic List
The contacts assigned this list will be controlled dynamically through rules that will search your CRM. You will not

Add Contacts to List*

Add contacts to your list by entering individual Contacts, adding from your CRM or Importing a File.

All available contacts will be displayed. You can use the search, sort, and filter features to locate the contacts you would like to add to your list. Hover on a contact and click on the checkbox to select it. Then, click on the Add button.

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Add from CRM

Number of Contacts: 27

Jane Doe
janedoe@asicentral.com
4800 Street Rd
Feasterville-Trevoze PA, 19053
United States

John Doe
jdoe@asicentral.com
4800 Street Rd
Feasterville-Trevoze PA, 19053
United States

Letter

A B C D E F G H I
J K L M N O P Q R S
T U V W X Y Z

Tags

insurance

Websites

125724-5n4.logoshop.com
 125724-bhl.espwebsite.com
 125724-t57.logoshop.com
 promocompany.espwebsite.com

Record Owner

Asi University

You can repeat this process as many times as you like to create your list.

Import a List

To import a contact list, click on the Import File button. Select the format of the file you want to import. The file must contain a contact first name, contact last name, and email address.

Note: If you are using a CSV format, make sure the first row contains a header for each column.

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Select a File Format

CSV IIF

vCard Outlook

Google

After you click on a file format, click on the Browse button to navigate to the file on your computer. Select the file, click on open, and then click on the Upload button.

Upload your Contacts from a single CSV file

Please make sure each column in your CSV contains a heading.

Check file for conflicts before importing into CRM

Upload File Browse Upload

Map the fields from the file using the available options for company and contact information. The system will sometimes assign an option for a field, but you may also have to map some fields.

Entity Resource Suggestions Skip

Contact Home Email

Contact Work Email

Contact Other Email

Email

jdoe1@abc.com
jdoe2@abc.com
jdoe3@abc.com

Entity Resource Skip

Select a field to import to...

Contact Title

Edit Skip

Title

CEO
COO
President

Entity Resource Suggestions Skip

Contact Home Phone

Contact Home Fax Phone

Contact Mobile Phone

Contact Office Phone

Contact Office Fax Phone

Contact Other Phone

Contact Orders Fax Phone

Phone

555-555-5555
555-555-5555
555-555-5557

If there is a field in the uploaded file which you do not want to map, click on the Skip option.

User Id	First Name	Last Name
	John	Doe
	Jane	Doe
	Jennifer	Doe

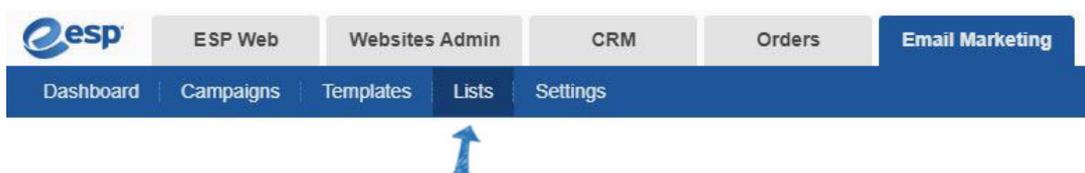
Add an Individual Contact

You are also able to enter an individual from the CRM by typing the contact's name in this box.

You can also use the Create New Contact option at the bottom of the dropdown to enter a new contact. Contacts added through this section will also be added into the CRM.

Manage Lists

After a list is created, it will be available in the Lists section.



To delete a list, click on the garbage can icon within the list row or select the list(s) using the checkbox and then click on the Delete button.

Lists

Delete

Sort By

Date Created



<input type="checkbox"/>	List Name ↕	Recipients ↕
<input type="checkbox"/>	Campaign List 2020	3 Recipients
<input type="checkbox"/>	New list	0 Recipients
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