



## Creating and Managing Email Marketing Lists

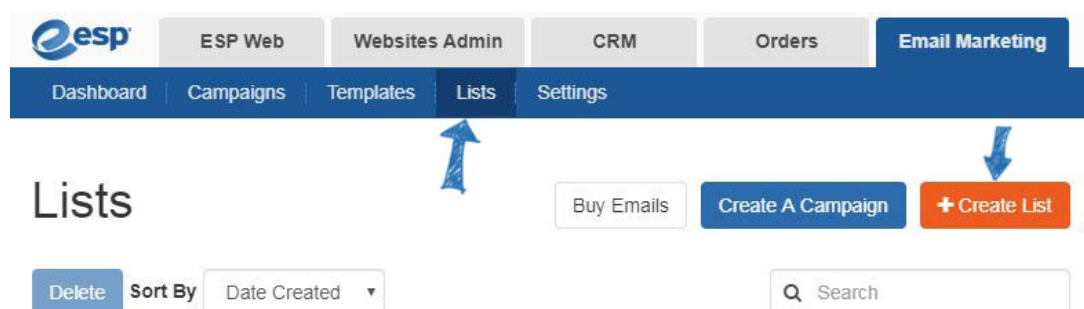
Jennifer M - 2024-03-19 - Templates & Lists

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.

The screenshot shows a dialog box titled 'Name Your New List'. It contains a text input field with the placeholder text 'What would you like to name your list?'. The input field contains the text 'Campaign List 2020'. Below the input field, there is a note: 'Note: All list names must be unique and cannot contain special characters.' At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Create'. A blue arrow points to 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

**Save**

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

**Add from CRM** | **Import 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.

 **Campaign List 2020** ✕

## Add from CRM

**Cancel** **Add (0)**


☐

✕

🔍


📅 Date Added ▼

Number of Contacts: 27



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

●



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

●

**Filters** **Clear Filters**

**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** **Any** **All**  
☐ insurance

**Websites**  
☐ 125724-5n4.logoshop.com  
☐ 125724-bhl.espwebsite.com  
☐ 125724-t57.logoshop.com  
☐ promocompany.espwebsite.com

**Record Owner**  
☐ Asi University

Help & Support

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.

The screenshot shows a dark blue header with the 'esp' logo and the text 'Campaign List 2020'. Below the header, on the left, is the text 'Select a File Format'. To the right of this text are five buttons arranged in two columns: 'CSV', 'IIF', 'vCard', 'Outlook', and '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.

The dialog box has a dark blue header with a close button (X). The main content area is light gray and contains the text 'Upload your Contacts from a single CSV file' and 'Please make sure each column in your CSV contains a heading.' Below this is a checkbox labeled 'Check file for conflicts before importing into CRM' which is checked. At the bottom, there is an 'Upload File' text input, a 'Browse' button with a blue arrow pointing to it, and an 'Upload' button.

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.

The three screenshots show the mapping process for different fields. Each screenshot has a header with 'Entity', 'Resource', 'Suggestions', and 'Skip' buttons.

- Left Screenshot (Email):** Shows a list of email fields: 'Contact Home Email', 'Contact Work Email', and 'Contact Other Email'. Below is a table with the header 'Email' and three rows of email addresses: 'jdoe1@abc.com', 'jdoe2@abc.com', and 'jdoe3@abc.com'.
- Middle Screenshot (Title):** Shows a dropdown menu 'Select a field to import to...' and a large green box labeled 'Contact Title' with 'Edit' and 'Skip' buttons. Below is a table with the header 'Title' and three rows: 'CEO', 'COO', and 'President'.
- Right Screenshot (Phone):** Shows a list of phone fields: 'Contact Home Phone', 'Contact Home Fax Phone', 'Contact Mobile Phone', 'Contact Office Phone', 'Contact Office Fax Phone', 'Contact Other Phone', and 'Contact Orders Fax Phone'. Below is a table with the header 'Phone' and three rows of phone numbers: '555-555-5555', '555-555-5555', and '555-555-5557'.

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

Entity	Resource	Skip
Select a field to import to...		
Contact ID		
Edit	Skip	
User Id		

Entity	Resource	Skip
Select a field to import to...		
Contact First Name		
Edit	Skip	
First Name		
John		
Jane		
Jennifer		

Entity	Resource	Skip
Select a field to import to...		
Contact Last Name		
Edit	Skip	
Last Name		
Doe		
Doe		
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.

Add Contacts to List\*

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

Add from CRM
Import File

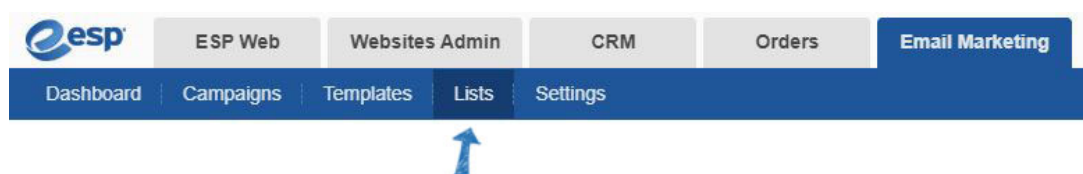
jdoe@abc

John Doe(jdoe@abcco.com)  
John Doe(jdoe@abc.com)  
Create New Contact

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
		-