



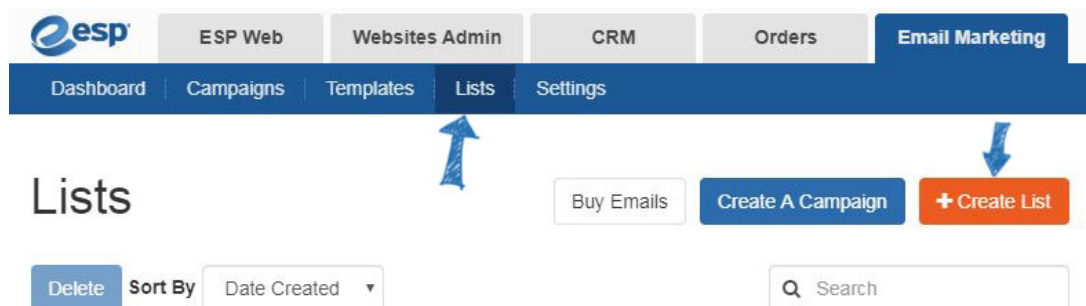
## Creating and Managing Email Marketing Lists

Jennifer S - 2021-09-29 - 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.

### 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.

There are four ways to add contacts to an email marketing list:

- [Use a Dynamic List](#)
- [Add from CRM](#)

- [Import a List](#)
- [Add an Individual Contact](#)

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## 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.

Campaign List 2020

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

Enter Individual Name

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

Cancel Add (0)

Q Doe x Date Added

Number of Contacts: 27

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

**John Doe**  
 jdoe@asicentral.com  
 4800 Street Rd  
 Feasterville-Treose 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.

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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.

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**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.

The first screenshot shows a mapping interface for email fields. At the top, there are buttons for 'Entity', 'Resource', 'Suggestions', and 'Skip'. Below are three input fields: 'Contact Home Email', 'Contact Work Email', and 'Contact Other Email'. A table below shows the 'Email' column with three rows: 'jdoe1@abc.com', 'jdoe2@abc.com', and 'jdoe3@abc.com'.

The second screenshot shows a mapping interface for contact titles. At the top, there are buttons for 'Entity', 'Resource', and 'Skip'. Below is a dropdown menu labeled 'Select a field to import to...'. A large green box contains the text 'Contact Title' and 'Edit Skip' buttons. Below this is a table with the 'Title' column containing 'CEO', 'COO', and 'President'.

The third screenshot shows a mapping interface for phone fields. At the top, there are buttons for 'Entity', 'Resource', 'Suggestions', and 'Skip'. Below are seven input 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'. A table below shows the 'Phone' column with three rows: '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.

The first screenshot shows a mapping interface for contact ID. At the top, there are buttons for 'Entity', 'Resource', and 'Skip'. Below is a dropdown menu labeled 'Select a field to import to...'. A large green box contains the text 'Contact ID' and 'Edit Skip' buttons. Below this is a table with the 'User Id' column, which is currently empty.

The second screenshot shows a mapping interface for contact first names. At the top, there are buttons for 'Entity', 'Resource', and 'Skip'. Below is a dropdown menu labeled 'Select a field to import to...'. A large green box contains the text 'Contact First Name' and 'Edit Skip' buttons. Below this is a table with the 'First Name' column containing 'John', 'Jane', and 'Jennifer'.

The third screenshot shows a mapping interface for contact last names. At the top, there are buttons for 'Entity', 'Resource', and 'Skip'. Below is a dropdown menu labeled 'Select a field to import to...'. A large green box contains the text 'Contact Last Name' and 'Edit Skip' buttons. Below this is a table with the 'Last Name' column containing 'Doe', 'Doe', and '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.

- 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.

### Managing Lists

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

ESP Web
Websites Admin
CRM
Orders
**Email Marketing**

Dashboard
Campaigns
Templates
**Lists**
Settings

*(A blue arrow points to the 'Lists' menu item.)*

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

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
		-