# Understanding Email Marketing

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aACE+ Email Marketing allows you to generate contact lists in aACE, then upload that information to an email marketing solution such as Mailchimp or VerticalResponse.

Email marketing is typically focused on individuals, so some solutions may reject generic email addresses such as "info@yourdomain.com". For this reason, when building your list, you'll use contacts, but not companies.

## Step 1: Create and Populate a List

Navigate to Menu > CRM & Sales > Lists, then create a new record. Populate the list with contacts from either the Lists or Contacts modules:

From the Lists Module

At a list record's detail view, use the Contacts panel to add records:

List: Special	Book Buyers (Buye	rs-501)				A	стіv	'E
List Details						Notices 🕴 Emails 🎽		Docs
General Info		Private 🗴		Contacts Compan	ies			
Туре	Manager >		(	Name	Department	Title		×
Buyers	Scot Hanson			<ul> <li>Callaway, Jamie</li> </ul>	Purchasing	Procurement Coordinator		×
				Cespedes, Yvonne	NE Sales	Regional Sales Manager	$\sim$	×
Attached To	al Info Manager > ; Scot Hanson Manager >	C		<ul> <li>Collins, Tim</li> </ul>	Administration	Assistant Superintendent	$\sim$	×
> 1 Company		^		Moran, Ben	PreK-12	Sales Associate	$\mathbf{\sim}$	×
> 5 Contacts				Simonford, Bridget	Acquisitions	Director of Acquisitions	$\sim$	×
All Records >		~						

From the Contacts Module

Locate the needed records in list view, then click Actions > Add Contacts in Found Set to

#### List:

	Record: 3 of							Nev	Actions Send Notice Re: List
•	Contact	S Unsorte	d						Email Contacts in List Reassign Contacts in List to Another Company
-		First Name	Title	Company Name	Abbr 🔍	List Name	Phone	Email	Activate Contacts in List
>	Rivera, Tina J	7	Principal	Full STEAM Charter School	50006		(310) 555-5230	tina.rive	Deactivate Contacts in List
>	Huang, Angela		Assistant Superintendent     CEO	King's Rock School District	50014		(323) 555-2387	ahuang	Delete Contacts in List
									Add Activity to Contacts in List Create Leads for Contacts in Fist Add Contacts in Found Set to List Remove Contacts in Found Set from List Import Important Dates
									Import Contacts Export Contacts Import Contacts and Companies Export Contacts and Companies

From the Contacts module, you can leverage Quick and Advanced Search capabilities to quickly build a list. For example, for geo-targeted campaigns you could do an advanced search for all California contacts. You can also update lists using the "Remove Contacts in Found Set from List" action. When you use these actions, the Lists Selector window enables you to update contacts in multiple lists at one time.

In addition, from a contact record detail view, you can use the Lists portal to review currently assigned lists, remove them, or add new ones:

Coordinator	Key Contact	Contact Info						
					Best Way to Reach			
curement Coordinator		Direct Phone	Office Phone	Ext				
			(212) 532-1234					
partment		Mobile Phone	Home / Other					
chasing								
	cation	Fax						
ting		(212) 532-1256						
		Phone / Fax Format	Primary					
		. ,			Alt Contact Types			
			om	$\sim$	Type value			
		Alt Email						
	at			- 3				
American		www.myco.com		12				
anda Universitation								
Linked Con	ipanies Lists							
Buyers (Buyers-501)	$\sim$	/					_	us 🛪
							* •	
	Loc ting State / Prov NY Postal Form American acts Linked Com	Location ting State / Prov Postal Code NY Postal Format American acts Linked Comparties Lists	Location Fax (212) 532-1256 Phone / Fax Format (212) 532-1256 Phone / Fax Format (2##) ##+### Email jamie.callaway@agisllc.o State / Prov Postal Code NY 10001 Postal Format Web Address www.myco.com acts Linked Comparties Lists	Location Fax Fax (212) 532-1256 Phone / Fax Format Phimary (##) ########### Email jamie.callaway@agislic.com Alt Email Postal Format Web Address Www.myco.com acts Linked Comparties Lists	Location Fax Fax (212) 532-1256 Phone / Fax Format Primary (###) ###### Email Faul Faul State / Prov Postal Code Alt Email NY 10001 Postal Format Web Address Www.myco.com C2 acts Linked Comparies Lists	Location Fax (212) 532-1256 Phone / Fax Format Primary (##) ##+### Email jamie.callaway@agisllc.com NY 10001 Postal Format Web Address Www.myco.com C3 acts Linked Comparties Lists	Location Fax (212) 532-1256 Phone / Fax Format Primary (###) ##### Email jamic collaway@agislic.com State / Prov Postal Code NY 10001 Postal Format Web Address American www.myco.com C2 Acts Linked Comparties Lists	Location Fax (212) 532-1256 Phone / Fax Format Primary (##) ##+### Email Email State / Prov Postal Code At Email Postal Format Web Address Www.myco.com 2 American Www.myco.com 2 State St

# Step 2: Sync Your List with Your Email Marketing Solution

In the Lists module, locate the desired list. From the detail view, click Actions > Open Email Marketing. This opens a dialog for interfacing with your email marketing solution, with several tools for managing your marketing list:

Filters						
Last Name	First Name	Company	Email	Status	Uploaded	×
Bartholomew	Constance	Facebook	c.barth@fbsales.com	ACTIVE	<u>.</u>	×
Chang	Johnny	Pearl Paint	j_change@pearlpaint.com	ACTIVE	<u>ئ</u>	×
London	Jack	The Wood School	jacklondon@woodschool.edu	ACTIVE	<u>ئ</u>	×
Middleton	Margaret	aACME Education Solutions, Inc.	margarwmidd@aacme.com	ACTIVE	<u>ئ</u>	×
Rosen	Julie	aACME Art School	jrosen@aacmeart.edu	ACTIVE	<u>ئ</u>	×
Sparks	Jordan	Starbucks	Jordan123@email.com	ACTIVE	<u>ئ</u>	×
Walcott	Jennifer	Hot Bird Kitchen	jenniferw@hbk.com	ACTIVE	<u>ئ</u>	×
Wright	Helen	Fashion Institute of Technology	helen_wright@fashiontech.edu	ACTIVE	£	×
	Inactive & Pending Contacts	₭ Remove Contacts w/Missing or Inv	alid Email Address 🛛 💥 Remove Contacts	Not In Vortical		

### Removing Contacts

From this dialog, you can remove contacts from a list, but cannot add them. To remove an individual contact, click the Delete icon ( **\***) on the right side of that row. To remove multiple contacts, use the Quick Search tools to filter the list, then click the Delete icon above the list.

Other batch removal options in the footer include:

- Remove Inactive & Pending Contacts
- Remove Contacts with Missing or Invalid Email Address.
   Note: The "invalid email address" criteria only evaluates basic email address format conventions. For example, it would remove a contact such as "johnsmith@yourcompany" because it is missing a domain suffix (e.g. ".com" or ".net"). This feature does *not* test email addresses to determine if they are real,

active, and able to receive messages. After uploading the list and running an email campaign, your email marketing solution should be able to determine which addresses were undeliverable. At that point, you could remove those addresses from your email marketing list, then re-sync.

• Remove Contacts Not In [Email Marketing Solution]

### Sync Processes

Click the Sync List link to automatically perform the following sequence of processes:

- 1. Create New List Creates a new list in your email marketing solution, using the current list's Abbreviation and Name.
- Upload Contacts Transfers the contact information (i.e. First Name, Last Name, Company, and Email Address) for each contact in the current aACE list to your email marketing solution, creating an aACE Team Member record for each contact and linking it to the list.
- 3. Download Members Downloads the contact information for each Member in the email marketing solution. Any Members that have been removed from the email marketing list will be removed from the aACE list. You will also see Members that were added to the marketing list from other sources.
- 4. Open Rejected Records Report Displays a comma-delimited report indicating any contacts which could *not* be uploaded, including contacts that have previously unsubscribed, contacts whose email addresses have were undeliverable, etc.

You can also perform these processes individually by clicking the links in the footer.