aACE Software

Understanding Email Marketing

Last Modified on 10/23/2023 5:15 pm EDT

This guide explains how to utilize email marketing. It is intended for system administrators.

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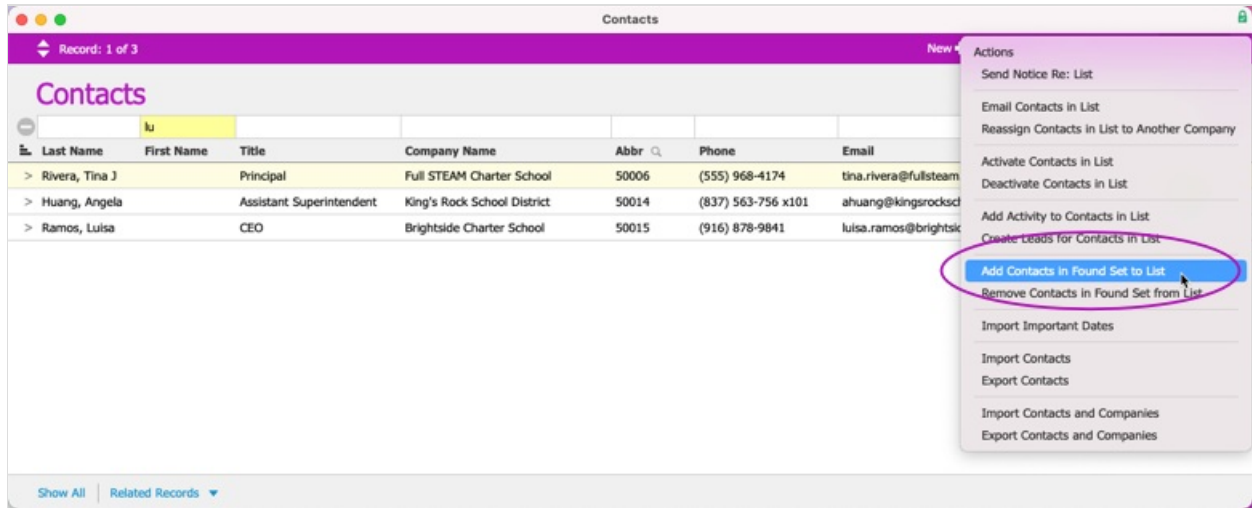
From the Lists Module

At the detail view of a list record, use the Contacts tab to search for and add records:
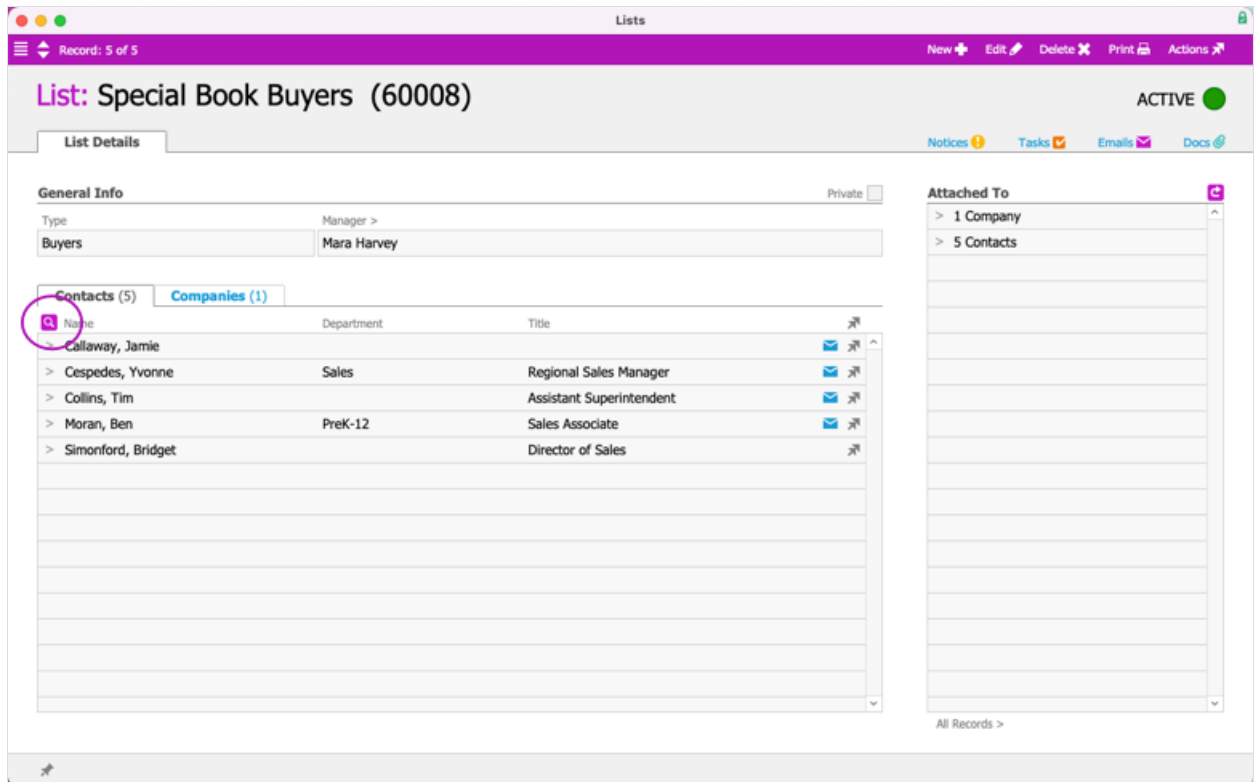
From the Contacts Module

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

From the Contacts module, you can leverage Quick Search (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) and Advanced Search (https://aace6.knowledgeowl.com/help/understanding-advanced-search-functionality) 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 Actions option to 'Remove Contacts in Found Set from List'. 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.
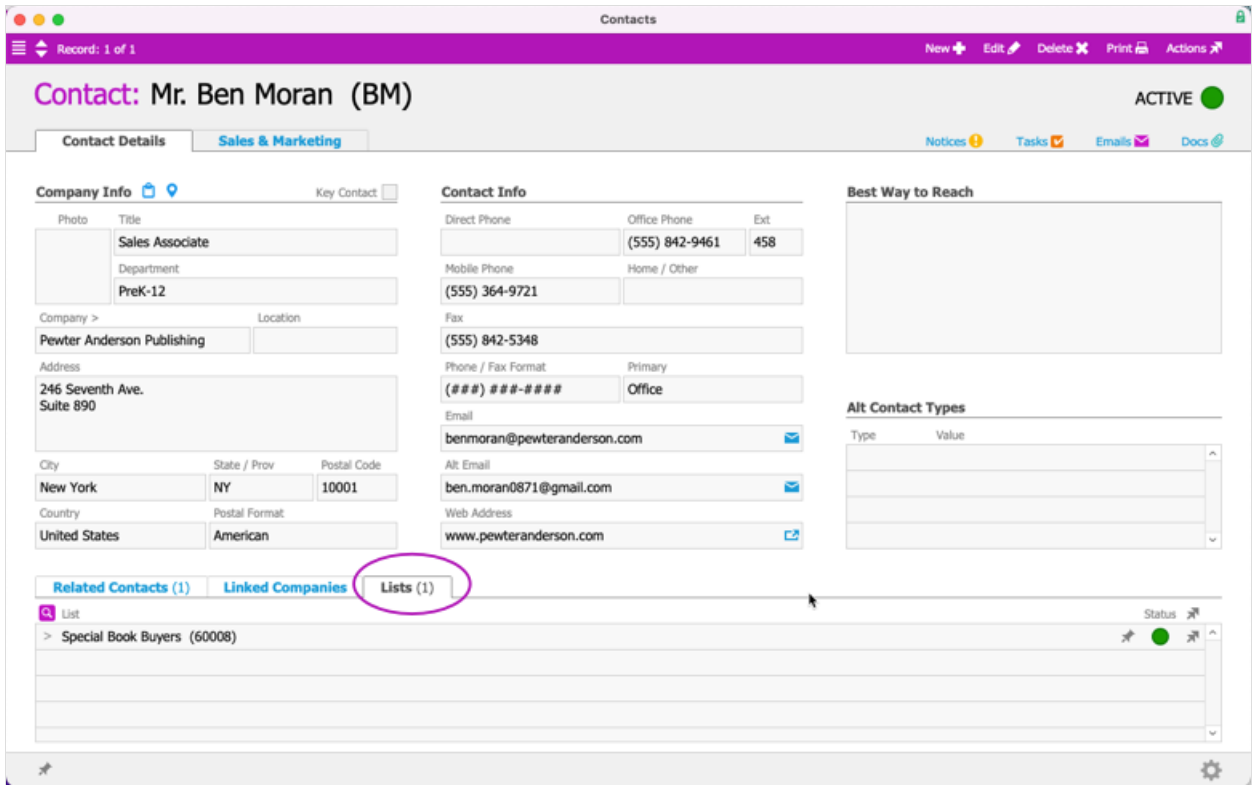
Step 2: Sync Your List with Your Email Marketing Solution

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:
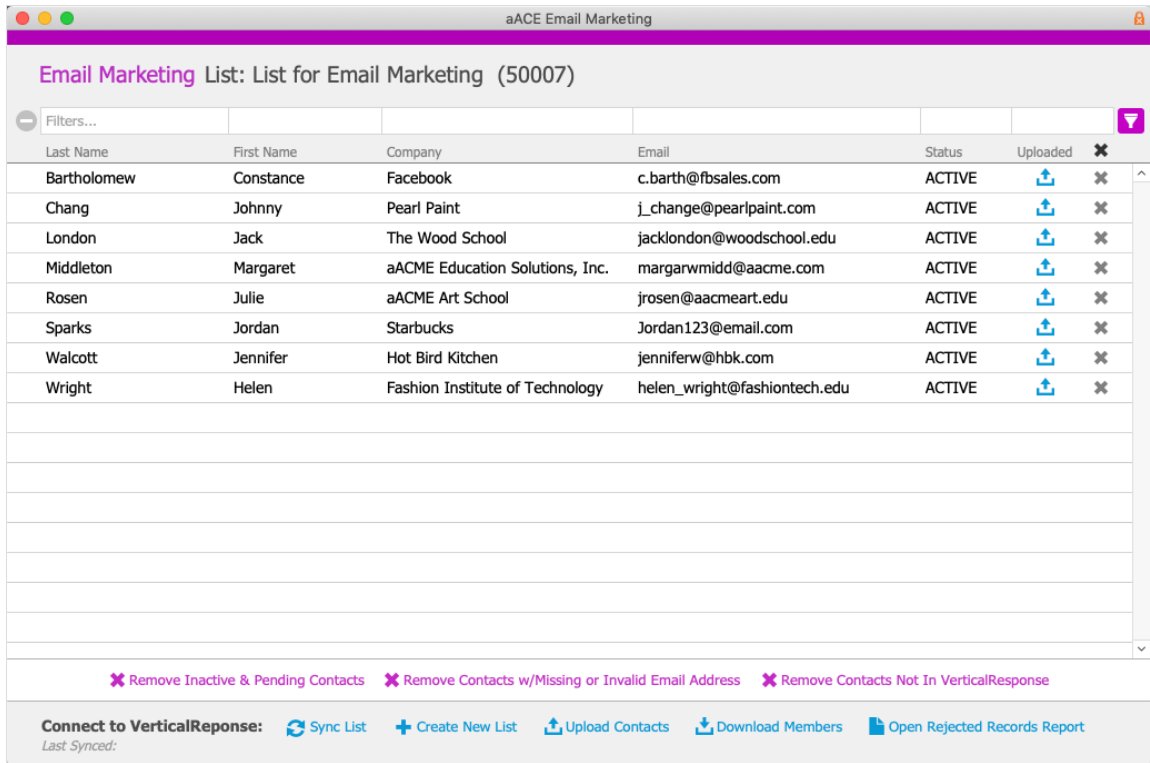
Removing Contacts

From the email marketing dialog, you can remove contacts from a list:

- Remove an individual contact — Click the Remove icon (✖) on the right side of that row.
- Remove multiple contacts — Use the Quick Search tools to filter the list, then click the Remove icon (✖) *above* the list.

Links in the footer also allow you to easily remove inactive & pending contacts, contacts without a valid email address, and contacts not already in your email marketing solution

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 the email addresses. 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.

Sync Processes

Click the Sync List link to have aACE 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.
2. 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 who have previously unsubscribed, contacts whose email addresses have were undeliverable, etc.

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