Understanding Email Marketing

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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:

•••		Lists			â
🗮 💠 Record: 5 of 5				New 🕂 🛛 Edit 🖋 Delete 🗙 Print 🖶	Actions 🛪
List: Special Book Bu	uyers (60008	3)		AC	TIVE 🔴
List Details				Notices 😣 🛛 Tasks 🔽 Emails 🎽	Docs 🥝
General Info			Private	Attached To	e
Туре	Manager >			> 1 Company	^
Buyers	Mara Harvey			> 5 Contacts	
Contacts (5) Companies (1)					
Nahe Nahe	Department	Title	Fr.		
Callaway, Jamie	Color	Designal Coles Manager	··· • • • • • • • • • • • • • • • • • •		
> Cespedes, tvonne	Sales	Regional Sales Manager	¹ K 🖬		
> Collins, Tim		Assistant Superintendent	[™] K ≅		
> Moran, Ben	PreK-12	Sales Associate	۴ 🖬		
> Simonford, Bridget		Director of Sales	٣ĸ		
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From the Contacts Module

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

	Contacts New Parameters						
Record: 1 or	3					IVEV -	Actions Send Notice Re: List
	ls Iu						Email Contacts in List Reassign Contacts in List to Another Company
Last Name	First Name	Title	Company Name	Abbr Q	Phone	Email	Artivate Contacts in List
> Rivera, Tina J		Principal	Full STEAM Charter School	50006	(555) 968-4174	tina.rivera@fullsteam	Deactivate Contacts in List
> Huang, Angela		Assistant Superintendent	King's Rock School District	50014	(837) 563-756 x101	ahuang@kingsrocksct	
> Ramos, Luisa		CEO	Brightside Charter School	50015	(916) 878-9841	luisa.ramos@brightsk	Add Activity to Contacts in List
							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 <u>Quick Search (https://aace6.knowledgeowl.com/help/using-the-</u> <u>quick-search-bar</u>) and <u>Advanced Search (https://aace6.knowledgeowl.com/help/understanding-advanced-search-functionality</u>)</u> 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.

e Location	Direct Phone Mobile Phone (555) 364-9721	Office Phone (555) 842-9461 Home / Other	Ext 458					
e Location	Mobile Phone (555) 364-9721	(555) 842-9461 Home / Other	458					
Location	Mobile Phone (555) 364-9721	Home / Other						
Location	(555) 364-9721							
Location								
	Fax							
	(555) 842-5348							
	Phone / Fax Format	Primary						
	(###) ###-####	Office						
	Email			Alt Conta	ict Types			
	benmoran@pewterand@	erson.com	~	Туре	Value			
State / Prov Postal C	ode Alt Email							
NY 10001	ben.moran0871@gmail	.com	2					
Postal Format	Web Address	Web Address						
American	www.pewteranderson.c	om	C2					
	State / Prov Postal C NY 10001 Postal Format American	Phone / Fax Format (###) ###-### Email benmoran@pewterande State / Prov Postal Code At Email ben.moran0871@gmail Postal Format Web Address American Use and State (1)	Phone / Fax Format Primary (###) ###-#### Office Email Email benmoran@pewteranderson.com Alt Email NY 10001 Postal Format Web Address American www.pewteranderson.com	Phone / Fax Format Primary (###) ###-#### Office Email Email bernmoran@pewteranderson.com Image: Comparison of the second of the	Phone / Fax Format Primary (###)#### Office Email Email benmoran@pewteranderson.com Image: Comparison of the co	Phone / Fax Format Primary (###)##### Office Email Email benmoran@pewteranderson.com Image: Contact Types State / Prov Postal Code Alt Email Image: Contact Types Postal Format Image: Contact Types Postal Format Image: Contact Types American Image: Contact Types	Phone / Fax Format Primary (###)##### Office Enail Enail benmoran@pewteranderson.com Image: Contact Types State / Prov Postal Code Alt Email Image: Contact Types Postal Format Image: Contact Types Postal Format Image: Contact Types American Image: Contact Types	Phone / Fax Format Primary (###) ##### Office Email Email benmoran@pewteranderson.com Image: Comparing the second the seco

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:

First Name Constance	Company	Email	Status	Uploaded	×
Constance	Facebook				
	I UCCOUR	c.barth@fbsales.com	ACTIVE	<u>ٹ</u>	×
Johnny	Pearl Paint	j_change@pearlpaint.com	ACTIVE	<u>t</u>	×
Jack	The Wood School	jacklondon@woodschool.edu	ACTIVE	<u>t</u>	×
Margaret	aACME Education Solutions, Inc.	margarwmidd@aacme.com	ACTIVE	<u>ٹ</u>	×
Julie	aACME Art School	jrosen@aacmeart.edu	ACTIVE	<u>ٹ</u>	×
Jordan	Starbucks	Jordan123@email.com	ACTIVE	<u>ٹ</u>	×
Jennifer	Hot Bird Kitchen	jenniferw@hbk.com	ACTIVE	<u>ٹ</u>	×
Helen	Fashion Institute of Technology	helen_wright@fashiontech.edu	ACTIVE	<u>.</u>	×
	Jonny Jack Margaret Julie Jordan Jennifer Helen	Johnny Pearl Paint Jack The Wood School Margaret aACME Education Solutions, Inc. Julie aACME Art School Jordan Starbucks Jennifer Hot Bird Kitchen Helen Fashion Institute of Technology	Johnny Pearl Paint j_change@pearlpaint.com Jack The Wood School jacklondon@woodschool.edu Margaret aACME Education Solutions, Inc. margarwmidd@aacme.com Julie aACME Art School jrosen@aacmeart.edu Jordan Starbucks Jordan123@email.com Jennifer Hot Bird Kitchen jenniferw@hbk.com Helen Fashion Institute of Technology helen_wright@fashiontech.edu	Johnny Pearl Paint j_change@pearlpaint.com ACTIVE Jack The Wood School jacklondon@woodschool.edu ACTIVE Margaret aACME Education Solutions, Inc. margarwmidd@aacme.com ACTIVE Julie aACME Art School jrosen@aacmeart.edu ACTIVE Jordan Starbucks Jordan123@email.com ACTIVE Jennifer Hot Bird Kitchen jenniferw@hbk.com ACTIVE Helen Fashion Institute of Technology helen_wright@fashiontech.edu ACTIVE	Johnny Pearl Paint j_change@pearlpaint.com ACTIVE 1 Jack The Wood School jacklondon@woodschool.edu ACTIVE 1 Margaret aACME Education Solutions, Inc. margarwmidd@aacme.com ACTIVE 1 Julie aACME Art School jrosen@aacmeart.edu ACTIVE 1 Jordan Starbucks Jordan123@email.com ACTIVE 1 Jennifer Hot Bird Kitchen jenniferw@hbk.com ACTIVE 1 Helen Fashion Institute of Technology helen_wright@fashiontech.edu ACTIVE 1

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.
- 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.