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			Ð
🗮 💠 Record: 5 of 5				New 🖶 Edit 🖋 Delete 💢 Print 📇 🗚	ctions 🛪
List: Special Book Bu	yers (60008)			ACTI	VE 🔴
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)					
Name	Department	Title	ም		
Callaway, Jamie			-^ 🔨 🔤		
> Cespedes, Yvonne	Sales	Regional Sales Manager	۴ 🖬		
> Collins, Tim		Assistant Superintendent	۴ 🖬		
> Moran, Ben	PreK-12	Sales Associate	۳. 🔤		
> Simonford, Bridget		Director of Sales	P _K		
			¥	All December >	~
				All Records >	
*					

From the Contacts Module

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

	Record: 1 of 3	1					New	Actions
	Contact	c						Send Notice Re: List
_	Contact							Email Contacts in List
9		lu						Reassign Contacts in List to Another Company
•	Last Name	First Name	Title	Company Name	Abbr Q	Phone	Email	Activate 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@kingsrockscf	
>	Ramos, Luisa		CEO	Brightside Charter School	50015	(916) 878-9841	luisa.ramos@brightsk	Add Activity to Contacts in List Create Leads for 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
	Show All Relat	ted Records 💌						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.

Contac	ct Details	Sales & Ma	rketing					Notices 😣	Tasks 🔽	Emails 🔛	Docs
Company	Info 📋 오		Key Contact	Contact Info			Best Wa	y to Reach			
Photo	Title			Direct Phone	Office Phone	Ext					
	Sales Associate	•			(555) 842-9461	458					
	Department			Mobile Phone	Home / Other						
	PreK-12			(555) 364-9721							
Company >		Locatio	n	Fax							
Pewter And	lerson Publishing			(555) 842-5348							
Address				Phone / Fax Format	Primary						
246 Seventh Ave. Suite 890				(###) ###-####	Office						
				Email			Alt Cont	act Types			
				benmoran@pewterander	son.com		Type	Value			
City		State / Prov	Postal Code	Alt Email							
New York		NY	10001	ben.moran0871@gmail.c	om	2					
Country Postal Format		Web Address									
United States American		www.pewteranderson.com									
Related	Contacts (1)	Linked Cor	mpanies Lists	·(1)		•				Stat	us 🔊
	Book Buyers (60	008)								*	- 15

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	x
Bartholomew	Constance	Facebook	c.barth@fbsales.com	ACTIVE	<u>ٹ</u>	x
Chang	Johnny	Pearl Paint	j_change@pearlpaint.com	ACTIVE	<u>ٹ</u>	×
London	Jack	The Wood School	jacklondon@woodschool.edu	ACTIVE	<u>ٹ</u>	×
Middleton	Margaret	aACME Education Solutions, Inc.	margarwmidd@aacme.com	ACTIVE	<u>ٹ</u>	×
Rosen	Julie	aACME Art School	jrosen@aacmeart.edu	ACTIVE	<u>ٹ</u>	x
Sparks	Jordan	Starbucks	Jordan123@email.com	ACTIVE	<u>ٹ</u>	x
Walcott	Jennifer	Hot Bird Kitchen	jenniferw@hbk.com	ACTIVE	<u>ٹ</u>	x
Wright	Helen	Fashion Institute of Technology	helen_wright@fashiontech.edu	ACTIVE	<u>ٹ</u>	×
			ralid Email Address 🛛 💥 Remove Contact			

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.