

MANAGING YOUR CONTACT LIST



emailmanager

Introduction

The first thing we are going to learn is to create a contact list. This guide provides important information about creating and managing your lists on **emailmanager**.

In this guide you will learn to:

- ✓ Create a contact list
- ✓ Organize contact lists
- ✓ Delete a list
- ✓ Delete contacts from a list
- ✓ Move contacts between lists
- ✓ Understand quality of your list
- ✓ Create a “do not disturb” list
- ✓ Create blocking rules
- ✓ Add a contact to your list
- ✓ Import contacts
- ✓ Attract new contacts by using a registration form
- ✓ Manage contact data



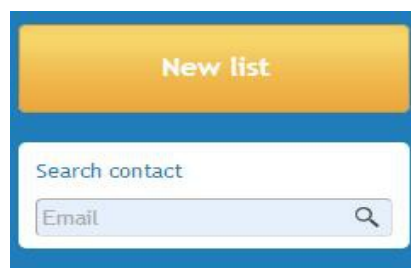
Lists

Lists help to organize your contact information on emailmanager. Each list must specify a unique feature that will be responsible for identifying your contacts. For example: you can create a list to store contacts that directly register from your website, or a list of employees (in case you want to send your campaigns to your staff, companies, or educational campaigns).

How to create a list?

In order to create a contact list on emailmanager, simply follow the steps below:

1. From the top menu, choose: **List**, and then click on the: **New List** button that is located on the left hand side.
2. In the: **New List** dialog box, enter a list name and then click: **Save**.



Renaming

There are two ways to rename a list on emailmanager

1. Click: **Rename** button (a form will be loaded). Then, enter the new list name and click: **Save**.
2. Click: **List name** (by doing so, you will enable editing). Enter a new name and click: **Enter**.

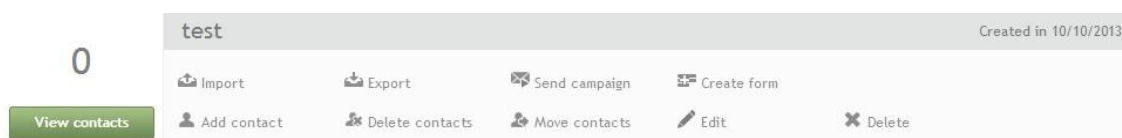


Image – Choosing social networks for advertising campaign.

How to delete a list?

Should you wish to delete a contact list, simply click: **Delete**. But before you do that, note that you can move your contacts to another list or just delete them from the current list.

Moving lists with “List Manager”

In order to move a contact list on **emailmanager**, click the selection checkbox where you can also find filters. After doing so, you will see an option: **Manage Lists**. When you click it, the **List Management** box will open. Then, click the list you wish to change and drag it to a new directory.

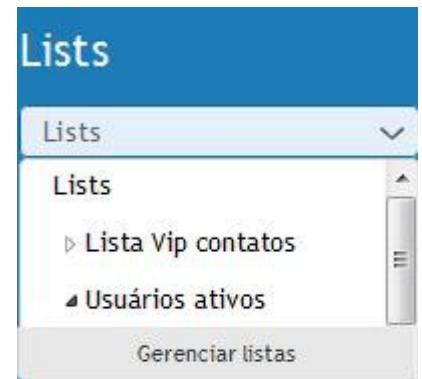


Image - List Management

Importing Contacts

Now that you know how to create lists, you are going to learn how to import a contact list directly to the **emailmanager**. But first of all we need to tell you about the import methods and types of supported formats that are available on our **emailmanager** system.

Import types

Copy and paste

Copy and paste, or manually enter a contact list you wish to import

Importing from computer

You can use CSV or TXT files saved on your computer and upload them into the emailmanager system.

Importing from Gmail

Importing contacts from Gmail can be described as the "authorization request from the user" (ex. the data you enter to access your Gmail account). Select a contact group you wish to import and a list where you are going to store these contacts.

Supported formats

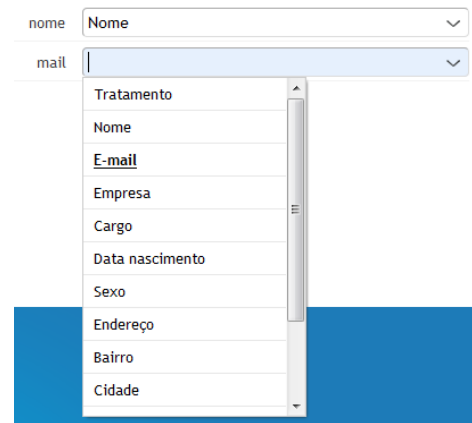
Emailmanager supports CSV and TXT files.

File characteristics

Take a look at the list below:

- ✓ Enter your data according to the criteria.
- ✓ Select delimiters or separators used to import.
- ✓ Select encoding type from the import list.
- ✓ Validate the format of importing data.

- ✓ Link your data to the reference field (field name with a name, date field with a date of birth) and synchronize imported information (note that the fields in the listing are the same to these ones found in the registration form).



The image shows a web form for adding contact information. It features two dropdown menus at the top: 'nome' with 'Nome' selected and 'mail' with a blank selection. Below these is a list of fields to be linked to the contact data. The fields are: Tratamento, Nome, E-mail, Empresa, Cargo, Data nascimento, Sexo, Endereço, Bairro, and Cidade. The 'E-mail' field is highlighted in blue. The entire form is set against a blue background.

Image – Linking contact information

Adding contacts manually

In order to add a contact, simply select a list where you want to store them and click: **Add Contact**. After doing so, a new registration form will be loaded. Then, enter the contact data and click: **Save**.

Contacts search:

We can search contacts using two options below:

1. Select a contact from the checkbox list by entering the contact name.
2. If you want to select contacts with similar characteristics or any particular contact, simply use our segmentation filters that are located at the top of the contacts list.

Grouping contacts accordingly to their status

Use the filter checkbox that allows contacts localization according to their name or email. The contacts filter will group all the information taking into consideration these values: email and contacts.

Deleting contacts:

To delete contacts from a contact list, click: **Delete contacts**. Then you need to confirm it and the contact will be removed.

Bulk actions:

This function applies the same "action" to more than one record. For example: to make an "optin" request for many contacts at the same time, simply use the contacts filter and group the contacts with the "requested removal" status. Click on the contacts within the column and enable them (to enable this option), all fields need to be selected in the **Bulk Actions** checkbox. Then, select the action you wish to implement to these contacts.

Moving contacts between lists

To move contacts between lists, simply select: **Move contacts** and indicate a new list, to which your contacts will be moved.

Move contacts
X

Select a list you want to move your contacts to test.

Select one list
▼

Move
Cancel

Editing contacts:

Select a contact you would like to edit and click: **View**.

Voltar

Editar
Não perturbar
Apagar

Email **xadmin@studio.fot.br**

Nome completo **paulo formiga**

Data de nascimento

Sexo

Dados de contato Editar

Endereço

Bairro

Cidade

Estado

Telefone

Celular

Dados profissionais Editar

Empresa

Cargo

Listas Editar

Injetado (lixo)

Histórico de interações

Data	Interação	Campanha
04/08/2011 09:...	Bounce (Rejeitado no destino)	Newsletter - 04.08.2011
04/08/2011 09:...	Envio	Newsletter - 04.08.2011
28/07/2011 09:...	Envio	Newsletter - 28.07.2011
21/07/2011 09:...	Envio	Newsletter - 21.07.2011
14/07/2011 09:...	Envio	Newsletter - 14.07.2011
07/07/2011 09:...	Envio	Newsletter - 07.07.2011
30/06/2011 09:...	Envio	Newsletter - 30.06.2011
16/06/2011 09:...	Envio	Newsletter - 16.06.2011
09/06/2011 09:...	Envio	Newsletter - 09.06.2011
02/06/2011 09:...	Envio	Newsletter - 02.06.2011

1 a 10 de 76 registro(s)

Informações

Situação Ok

Qualidade ★★★★☆

Data de cadastro 15/04/2010 14:48

Origem do cadastro Não registrado

IP do cadastro Não registrado

Dados do último acesso

Navegador Ainda não registrado

Sistema operacional Ainda não registrado

Tipo de leitor Ainda não registrado

Leitor de email Ainda não registrado

1. **General information** – basic data about a contact.
2. **Contact information** – data about contact localization in the system.
3. **Professional information** – ex. data about a place your contacts work.
4. **Lists** – displays lists that a contact is assigned to

5. **History interactions** – displays a list of contact interactions that contains data about: date, time etc.
6. **Contact Information** – registration status that depends on contact interactions (ex. date registration data) .

To change any information, simply select the type of data you want to change and enable it by clicking: **Edit**.

Do not disturb list:

It allows to add a contact to the **Do Not Disturb** list manually (at the top of the contact data, click: "Do Not Disturb")

Understanding contact status:

This option provides information about current contact status related to sent campaigns. The ranking comes from the information that is based on the interactions (content acceptance or rejection) or errors that occur when sending a campaign.

Ok – a contact is able to receive campaigns.

Temporary error – the email generated an error that was classified as temporary (this email still receives your campaigns).

Permanent error – it is the validator result of previous status. When diagnosing the same status 5 times in a row, its status changes automatically.

Removal request – it appears when a contact has requested the cancellation of receiving campaigns.

Report abuse – when a contact clicked on the link denouncing the campaign as abusive.

Nonexistent – when the address you entered is invalid.

Quality of lists and contacts

The list or contact qualification is based on user interactions with the number of sent campaigns.

Attracting new customers by using registration form

Registration forms are codes or plug-ins that are responsible for sending and saving the subscriber's registration data into emailmanager database. If you do not have much experience with website codes, we recommend that you ask a webmaster who will be able to help you. Take a look at the available forms on emailmanager:

Website designed in HTML – you just need to copy the source code and paste it in your website.

Wordpress and Joomla! - Download the available plug-in first and select one of the options: Joomla or Wordpress. To integrate your solution



Receive our newsletter

Nome

Email

follow our guide that you can find at the top of the download option. Then, add the plug-in to the requested directory and enable it.

Using more than one list

All the information about contacts that register by using integration forms can be stored on one or more lists. Every user indicates the process of storing information while registering (so you can choose to store information on one or more lists):

- ✓ When filling the registration form, the contact will be automatically registered on each list.
- ✓ A contact can only select one list.
- ✓ A contact can select more than one list.

Advanced settings – There are returned data, storage and system behaviour. These settings can be configured:

Character set – encodes and decodes sent information. On the **emailmanager** platform, we recommend that you use the UTF-8 unicode.

Enter URL – configures a subscriber redirection after filling forms. Indicates a page, to which the subscriber will be redirected in case of either: error, or successful data transmission.

Configuration: – Select whether you want a user to confirm his registration through an email.

“Do Not Disturb” list

All contacts that requested an "optout" option (clicked a cancellation link) are listed on the "Do Not Disturb" list.

How to block a contact?

To add a contact to the "Do Not Disturb" list, click: **Block Contact**. Enter the email you want to block and click: **Save**. The contact will be added to the "Do not disturb" list and it will not be registered in your database as an “active” contact.

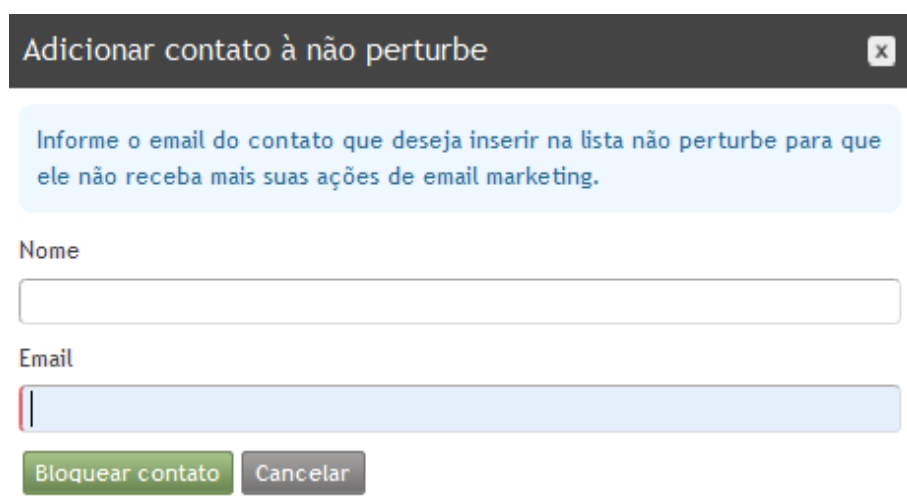
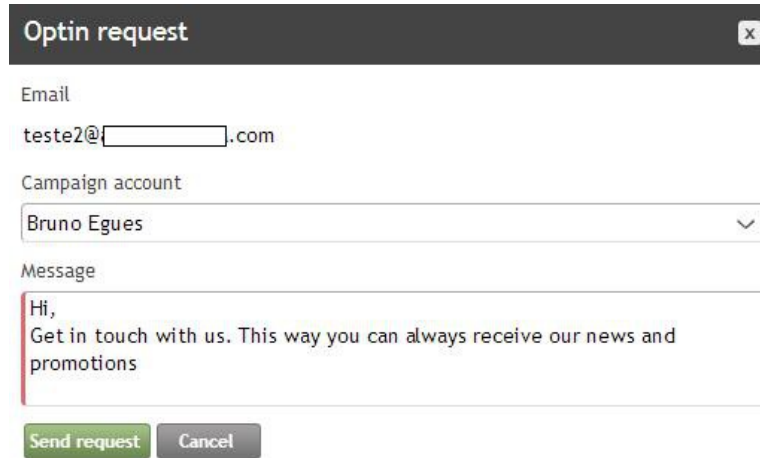


Image - Blocking a contact

"Optin" request

Sends an invitation to the subscribers that requested removal and encourage them to return to the **active contact** list. We would like to inform that our responsibility is to take care of the interpersonal relationships on the web. Therefore, we control all of the optin requests that you send from the emailmanager platform (based on ABEMD regulation code). The maximum number of requests is 5.



Optin request

Email
teste2@[] .com

Campaign account
Bruno Egues

Message
Hi,
Get in touch with us. This way you can always receive our news and promotions

Send request Cancel

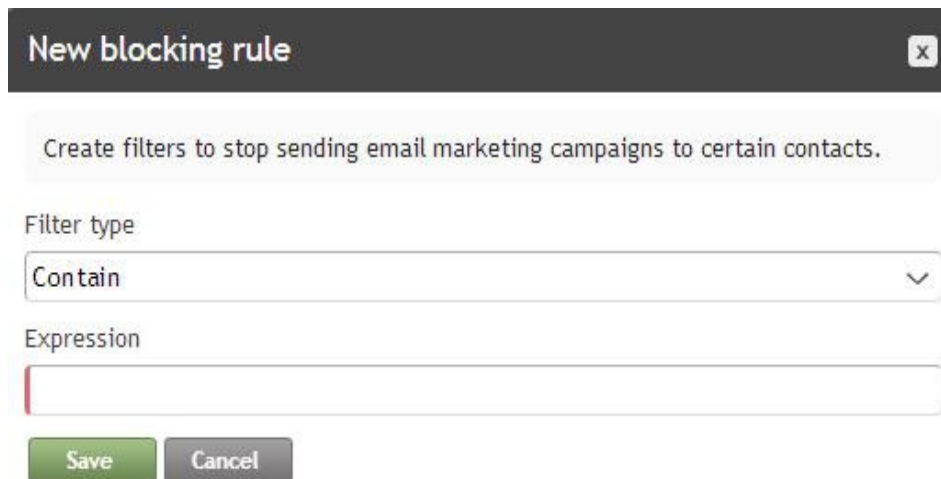
Image - optin request

Blocking rules

It allows to create a filter that automatically stops any future campaigns from being sent.

Creating a new rule:

In order to create a blocking rule, click: **Blocking rules**--> **New rule** and select: **Type of Filter** (condition that you are going to create) and enter the blocking parameter (information that will stop your campaign).



New blocking rule

Create filters to stop sending email marketing campaigns to certain contacts.

Filter type
Contain

Expression

Save Cancel

Image - creating blocking rule

How do rules work?

Take a look at the description below. It displays a rule that you can use to set up a filter.

Contains – blocks a contat(s) that has (have) specific parameters.

End with – blocks a contact that ends with the parameter we set up.

Start with – blocks a contact that begins with the adjusted parameter.

Exactly – Where a description is exactly equal to the agreed value.

Expression – The argument that will block a contact. It can be a "name" or any other parameter.

Editing a rule

In order to edit or change the rule condition, simply select it on the list and click: **Edit**. Change its value and confirm by clicking: **Save**.

Deleting

Select a rule from the list you want to delete and click: **Delete**. The rule will be excluded if it has not been used as a parameter of your previous campaigns.

Export and Print

These options are used to export or print information about contacts. Available exportation formats: **CSV, PDF, TXT** and **HTML**.

What can I export and print?

You can export and print all contact data that is registered on the emailmanager system and stored on any contact list

Exporting: step by step

To export all of your data from a list, simply choose: **Export** (use filters to export an individual or collective data). Then, enable the information you want to view (click: **Export report**) and export it (remember to choose a format too).

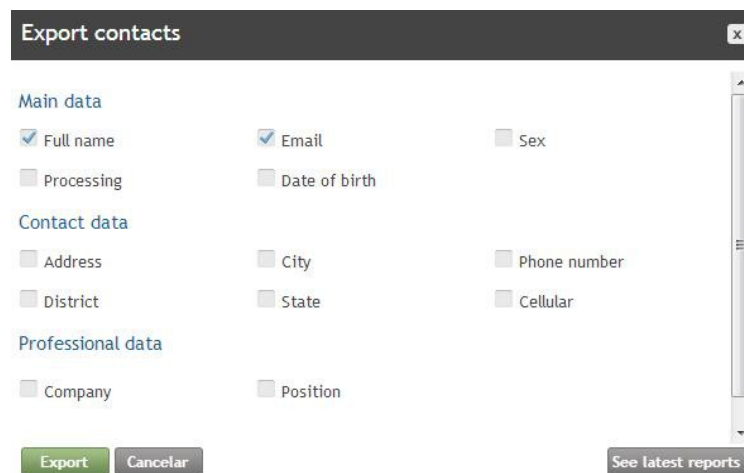


Image - Selecting data to export

Export history

Click: **Export** in order to export the history. When a new dialog box is loaded, click: **Latest report** (can be found in the footer).

Once you have done so, the export list will open and you will be able to see your exports in order (time & date). If you want to download a report, simply click: **Download**.



Date	User	
10/10/2013 11:24	Admin	Download
10/10/2013 10:37	Admin	Download

Image – Export history

Close

Printing: step by step

To print all data from the list, select: "Print". Bear in mind that, all data that you wish to print can be refined with our filters.

Contact database

Qualifies and groups all of your contact information.

Summary:

Displays a number of lists, contacts and a status of registered contacts (contacts with permanent errors, nonexistent, reports of abuse and removals required).

Database monitoring

This report displays a histogram of inactive actions taken by contacts in your database. You also can use a legend to display or disable chart information.

TIP!

“Always monitor your contact data periodically and NEVER buy or acquire lists from third parties.”