Zoho Corporation

List management

List management in Zoho Marketing Automation allows you to create List under which you can categorize or segregate your Contacts based on desired criteria. This article provides a detailed view of contacts with respect to lists.

How to create a list?

To create a list:

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Bashboard	Hello Patricia!					ntire duration lar 20, 2024 to Jun 28, 2024	V V C
ළි Contacts 📎							
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よ Journeys >	Contact Captured	Raw leads	Marketing rea	ady	Marketing qualified		Sales ready
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🗒 Library			Raw leads				
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		м	arketing engaged	0%	0 Days	0	
			0				
		M	arketing qualified	0%	0 Days	0	
			0				
			Sales ready	0%	0 Days	0	
Get started with MA			0				
Next: Connect your Website							

- 1. From the *Navigation Toolbar*, choose **Contacts** and select **Lists**.
- 2. Click **Create List** in the top-right corner.

😴 Marketing Automation	Q Search by name, email, and phone			\$ ¢ 🕡
	Contacts > Lists			Create list
🛎 Contacts 🗸 🗸	E ALL LISTS			
Contacts Dashboard	36 Lists created	C Unclassified	✓ What are you searching for?	
View Contacts	LISTS	CONTACTS	UNSUBSCRIBES	
Lists				
Segments	Bulk import Created on Dec 06, 2022 at 01:15 PM by I	1,99,999	0	:
Topics				

- 3. Fill out a name for your list. This is for internal reference.
- 4. You can also define criteria based on which contacts are added to a list. For example, if you want to add Contacts to a list whose email addresses are from Gmail, you can set up the criteria as shown below. This option is not dynamic, it will not automatically add new contacts to the list or remove contacts from the list based on criteria after the list has been created.

Name			
Gmail Contacts			
Add contacts on criteria (i)			
Criteria*	Modifier*	Value*	
Contact Email	 ✓ contains 	✓ @gmail.com	+

Lists best work for existing Contacts present in your Zoho Marketing Automation account. If you want to add new Contacts to a List, you can either do that when creating a contact (Contacts -> View Contacts) or by going to the List itself and adding the Contacts there.

How to add contacts to list?

Once your list has been created, you can use multiple methods to add contacts:

Contacts > List Zylker event 2023				
CONTACTS STATS CONTACTS ASSOCIATED JOURNEYS ASSOCIATED CAMPAIGNS ADVANCED SETTINGS				
There are no contacts added in the list. Please add cont	acts via options given below.			
°			ψîφ	
Single Contact	Upload from computer	Import from cloud	Build Criteria	
Choose this option to add contacts manually.	Choose this option to upload your contacts from csv or xls.	Choose this option to import contacts from cloud services	Choose this option to add contacts based on criteria from existing contact database	

- <u>Add Contact</u> Manually add a contact.
- <u>Upload from computer</u> Add contacts from files saved on your computer.
- <u>Import Contacts</u> Import contacts from your computer, Zoho CRM, or Google Sheets.
- Build criteria You can also define criteria based on which contacts are added to list. This option is not dynamic, it will not automatically add new contacts to the list or remove contacts from the list based on criteria after the list has been created.

Assign Topics

You can associate the contacts in a list with a topic.

- 1. From the *Navigation Toolbar*, choose **Contacts** and select **List**.
- 2. Click the list you wish to edit.
- 3. Open the list and select the required contacts.
- 4. Click the **More Actions** icon and then click **Assign Topics**.

CONTACTS STATS CONTACTS ASSO	CIATED JOURNEYS ASSOCIATED C	AMPAIGNS ADVANCED S	ETTINGS				
2,00,000 Contacts							
CONTACT EMAIL	DATE OF BIRTH	PHONE	LEAD SCORE	LEAD STAGE	MOBILE	Assign topics	
harish.suryanarayanan@gmail.com	Oct 03, 2023	+917373464000	99	Sales ready		Remove topics Export Contacts	F
dalia@hvol.thandora.com	Oct 03, 2023	-	25	Marketing engaged		Mass Update	Ар

- 5. A pop-up will appear where you can a choose topic. You can also choose multiple topics by choosing another topic after the first one.
- 6. Click the **Proceed** button to confirm.

Delete list

Sometimes, you may feel a list is no longer needed. Although you can delete a list, you don't necessarily have to delete the contacts in the list. You can delete just the list and still maintain the contacts that were in the list.

To delete a list:

- 1. From the *Navigation Toolbar*, choose **Contacts** and select **Lists**.
- 2. Hover over the list you wish to delete.
- 3. Click the **More Actions** icon at far right, then click **Delete**.

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Dashboard	Contacts > Lists			Create list
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Contacts Dashboard	37 Lists created	Ē U	nclassified V What are you searching	g for?
View Contacts	LISTS	CONTACTS	UNSUBSCRIBES	
Lists				
Segments	Zylker event 2023 Created on Mar 14, 2023 at 04:09 PM by	1	0	:
Topics				Export
Lead Qualification	Created on Mar 09, 2023 at 10:11 PM by	0	2,11,690	Delete
Stread Generation				Clear list
战 Journeys >	Created on Mar 08, 2023 at 07-15 PM hv	0	0	Clone
Marketing Planner >				

- 4. A pop-up will appear where you can delete the list.
- 5. Click the **Delete** button to confirm.
- **Note:** You can select the checkbox to delete the contacts that are associated with this list. Please note that this option will delete these contacts from all the other lists or segments as well.



Clone list

If you would like to have the same list, but with a different name for different purpose, you can clone an existing list within a couple of clicks rather than creating a new list. Once the list gets cloned, you can rename it.

- 1. From the Navigation Toolbar, choose Contacts and select List.
- 2. Click **More Actions** icon at far right and click **Clone**. Your list will be cloned.

1 List created	🛱 All Folders 🛛 🗸	What are you searching fo	or?
LISTS	CONTACTS	UNSUBSCRIBES	
zylker Created on Oct 05, 2023 at 10:57 PM by	0	0	:
			Export
			Delete Clear list
			Clone

3. To rename the cloned list, click on it. Hover over the list name at top left, a pencil icon will appear beside it. Click on it and rename the list.

Export contacts

You can export the contacts of a list to create a backup data. You can choose the fields, file format that you want to export.

To export contacts of a list:

- 1. From the *Navigation Toolbar*, choose **Contacts** and select **Lists**.
- 2. Open the list that you want to export. Select all contacts.
- 3. Click the **More Actions** icon at far right, then click **Export Contacts**.

CONTACTS STATS CONTACTS ASSO	CIATED JOURNEYS ASSOCIATED	CAMPAIGNS ADVANCED	SETTINGS				
2,00,000 Contacts							
CONTACT EMAIL	DATE OF BIRTH	PHONE	LEAD SCORE	LEAD STAGE	MOBILE	Assign topics	
	Oct 03, 2023		99	Sales ready		Remove topics	F
	Oct 03, 2023	-	25	Marketing engaged	· · /	Mass Update	Ap

4. A pop-up will appear where you need to fill out the following information:

- Filter by Date Select date and time and choose if you want to export all contacts or based on added/updated time.
- *Select Fields* Choose the fields you wish to export.
- *File Name and format* Give a suitable name and choose the file format you wish to use. Click on .CSV to change the file format to .XLS or .TSV or .JSON.
- Click **Export**.

Search			
Contact Email	First Name		
Last Name	Lead score		
Lead stage	Phone		
Mobile	Added time		
Lead source	Country		
✓ Title	Date of Birth		
inter file name*		.CSV	
Jse the default password?			
🔾 Yes 💿 No			

Clear List

You can delete the contacts of a list while keeping the list intact. To clear contacts of a list:

- 1. From the Navigation Toolbar, choose Contacts and select Lists.
- 2. Hover over the list that you want to clear.
- 3. Click the **More Actions** icon at far right, then click **Clear list**.

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Bashboard	Contacts > Lists	Create list
් Contacts ~		Create list
Contacts Dashboard	37 Lists created Duclassified V What are you searching for?	
View Contacts	LISTS CONTACTS UNSUBSCRIBES	
Lists		
Segments	Zylker event 2023 1 0 Created on Mar 14, 2023 at 04:09 PM by 1 0	:
Topics		Export
Lead Qualification	0 2,11,690	Delete
$\stackrel{\bullet}{\bigtriangledown}$ Lead Generation \rightarrow		Clear list
ය. Journeys >	Created on Mar 08 2023 at 07:15 PM by 0 0	Clone
Harketing Planner >		

4. A pop-up will appear. Click **Clear Contacts** to confirm.

Mass update fields

You can update a specific field for bulk contacts in a simple and quick way. To mass update contacts of a list:

- 1. From the *Navigation Toolbar*, choose **Contacts** and select **Lists**.
- 2. Open the list for which you wish to mass update the contacts.
- 3. Select the required contacts using checkboxes present to left of each contact.
- 4. Click the **More Actions** icon at far right, then click **Mass Update**.

CONTACTS STATS CONTACTS AS	SOCIATED JOURNEYS ASSOCIATED	CAMPAIGNS ADVANCED	SETTINGS				
2,00,000 Contacts							
CONTACT EMAIL	DATE OF BIRTH	PHONE	LEAD SCORE	LEAD STAGE	MOBILE	Assign topics	
	Oct 03, 2023		99	Sales ready	-	Remove topics Export Contacts	F
	Oct 03, 2023	-	25	Marketing engaged		Mass Update	Ap

- 5. Fill out the following information:
 - Select the field from drop-down menu you wish to update.
 - Specify a value for the field to be updated or you can check the *Clear field value* checkbox to remove the values associated with the field.
 - Click the **Proceed** button to complete the mass update.

Mass update	fields	×
Select Field*		
Select field		~
Clear field v	alue	
Proceed	Cancel	

Other Bulk operations in Lists

You can do other bulk operations within a particular list *for the contacts present in that list*. These actions are the same as the bulk operations present under the <u>View Contacts section</u> with the only difference being that these actions are performed on the contacts present in a list instead of for all the contacts.

Changing the <u>subscription type</u>:

- 1. From the Navigation Toolbar, choose Contacts and select Lists.
- 2. Open the list in which you wish to mass update the subscription type of the contacts.
- 3. Select the required contacts using checkboxes present to left of each contact.
- 4. Click on **Change subscription type** icon.
- 5. Choose the **Subscription type** for the contacts.
- 6. Click **Proceed**.

~	Lists Website and App Signups						Add Co	ntacts ~
	CONTACTS STATS CONTACTS ASSO	CIATED JOURNEYS ASSOCIATED	CAMPAIGNS ADVANCE	D SETTINGS				
	2 out of 16489 Contacts Selected						· 📰 · 🔟	:
	CONTACT EMAIL	MOBILE	FIRST NAME	LAST NAME	LEAD SCORE	Change subscription typ LEAD STAGE	PHONE	
				Ratledge	0	Raw leads		Oct 23, 2
				Roan	0	Raw leads		Oct 23, 2

Deleting the contacts:

- 1. From the Navigation Toolbar, choose Contacts and select Lists.
- 2. Open the list in which you wish to delete the contacts.
- 3. Select the required contacts using checkboxes present to left of each contact.
- 4. Click on **Delete** icon at far right.
- 5. Confirm by clicking **Delete Contacts** button in the confirmation dialog box.

~	Uists Website and App Signups						Add Contacts ~
	CONTACTS STATS CONTACTS ASSOC	CIATED JOURNEYS ASSOCIATED	CAMPAIGNS ADVANCE	D SETTINGS			
	2 out of 16489 Contacts Selected					×	? -
	CONTACT EMAIL	MOBILE	FIRST NAME	LAST NAME	LEAD SCORE	LEAD STAGE	PHONE
				Ratledge	0	Raw leads	Oct 23, 2
		6		Roan	0	Raw leads	Oct 23, 2

Note: If you delete contacts from a particular list, these contacts will also be deleted from other lists they were a part of.

Assigning/Removing Tags:

- 1. From the *Navigation Toolbar*, choose **Contacts** and select **Lists**.
- 2. Open the list in which you wish to mass update the tags for the contacts.
- 3. Select the required contacts using checkboxes present to left of each contact.
- 4. Click on **Tag** icon 2 at far right.
- 5. If you want to assign tags to contacts, choose **Assign tags** option and if you want to remove tags from contacts, choose **Remove tags** option.
- 6. From the list of tags, **Select the tags** you want to assign or remove.
- 7. Click **Proceed**.

~	Lists Website and App Signups						Add Contae	cts ~
	CONTACTS STATS CONTACTS ASSOC	CIATED JOURNEYS ASSOCIATED	CAMPAIGNS ADVANCE	D SETTINGS				
	2 out of 16489 Contacts Selected					2		
	CONTACT EMAIL	MOBILE	FIRST NAME	LAST NAME	LEAD SCORE	LEAD STA Assign tags	PHONE	
				Ratledge	0	Remove tags Raw lea		Oct 23, 2
				Roan	0	Raw leads		Oct 23, 2

Contacts Stats

The Contacts Stats page contains all of your imported contacts' details. You can view a generated report on your contacts after the import is complete.

To view the stats:

- 1. From the Navigation Toolbar, choose Contacts and select Lists.
- 2. Click the list you want to see, you will land on the list's **Contacts Stats** page.

Contacts 6,012	UNSUBSCRIBES 6	BOUNCES O	
CONTACT GROWTH STATS			TIMELINE CUMULATIVE
6.000			
5,500			
5,000			
4,500			
4,000			
원 3,500			
통 3,000			
2,500			
2,000			
1,500			
1,000			
500			
0	Mon 02		
	Duration		

In the <u>Contacts Stats</u> page, you can view the number of newly added, unsubscribed, and bounced contacts. You can also view the associated lists and journeys, contact stage, contact source and location. Just click one of the numbers to view the related contact details.

Why are some of my contacts ignored?

There are a few reasons why you may see some contacts excluded from your list:

- Bounced Mail was undeliverable to the contacts or the email address doesn't exist.
- Blocked- Contacts blocked by Zoho Marketing Automation.
- Do-Not-Mail Contact has been moved to do-not-mail registry.
- Role-based email addresses Contact address is generic. For example, info@, administrator@, careers@, service@, or support@.
- Duplicate Entries Contact is present more than once in the file.
- Invalid Pattern Contact has an email address in an invalid format. For example, "johngmail.com", "jane@aol", or "ted@zylkercom".
- Empty Email Contact's email address field is empty.
- Other Errors Contacts categorized as miscellaneous and don't fall into the above mentioned categories.

Why aren't group email addresses accepted while importing?

Zoho Marketing Automation restrict the import of group email addresses and email addresses which has a '+' symbol such as <u>info@zylker.com</u>, <u>support@zylker.com</u>, <u>support#help@zylker.com</u>, <u>test+1@zylker.com</u>, <u>admin@zylker.com</u>, and <u>help@zylker.com</u>. These email addresses have a high probability of email getting landed in the spam folder.