Email Lists

Last Modified on 01/22/2015 2:53 pm MST

Available to: Solo Basic Pro Enterprise Administrative Users

Need an answer fast?

- Add Contacts
- Export Contacts
- Unsubscribe Contacts
- Create Segments

- Create and Manage Custom Fields
- Select Email Lists in Email Campaigns
- Use Custom Fields in Invites
- Contact Message History

Using Email Lists, you can manage various lists of survey contacts within SurveyGizmo all from one place. Think of it as your survey address book. There are several benefits to using Email Lists to store and manage your contacts:

- Upload your contacts only once
- Easily add contacts to Email Campaigns
- Easily update, edit, and organize your contacts
- Easily manage unsubscribes
- Access a complete message history for each contact in your list across surveys and campaigns
- Create list segments to send targeted invites

You can set up a contact list in whatever way is most useful to you. Ideally, you should create a contact list that encompasses all contacts for a certain target population. Within these lists, you can then create segments to further break down your contacts into small sub-demographic target groups or "segments."

For example, at SurveyGizmo we might have an **All Customers** contact list and within that the following segments might be useful: **Trial Customers**, **Marketers**, **Consultants**, and **Students**. With these segments available, we can selectively send a survey that only applies to our trial customers or for surveys that apply to everybody, we can send separate invites with content that targets those subgroups in an effort to increase response rates.

Please note that Email Lists are only accessible to Admin users in your account.

Standard Contact Fields

The following Standard Contact Fields are available in every list that you create. You can selectively populate these fields as needed. To eliminate confusion, we recommend only using these fields for their intended use. If you have data that you would like to store with your contacts that does not correspond to one of these Standard Contact Fields, we recommend using Custom Contact Fields.

The Email field is the only required field to create a contact this is also the key field or matching field when uploading updates to your contacts' info.

- **Email**
- **First Name**
- **Last Name**
- **Organization**
- **Division**
- **Department**
- **Team**
- **Group**
- **Role**
- **Phone (Home)**
- **Phone (Fax)**
- **Phone (Work)**
- **Address**
- **Suite/Apt**
- **City**
- **Region**
- **Country**
- **Postal Code**
- **Job Title**
- **Website**

Contact Custom Fields

Contact Custom Fields are great for storing data for each of your contacts that does not correspond to one of the Standard Contact Fields. You can use these custom fields in Segment Filtering Rules to further customize your contact lists. Learn how to create and manage Custom Fields.

Custom Fields are also available in both your invites and surveys via Merge Codes, for more info see Using Custom Fields in Email Invites and Surveys.

Creating a New List and Uploading Contacts

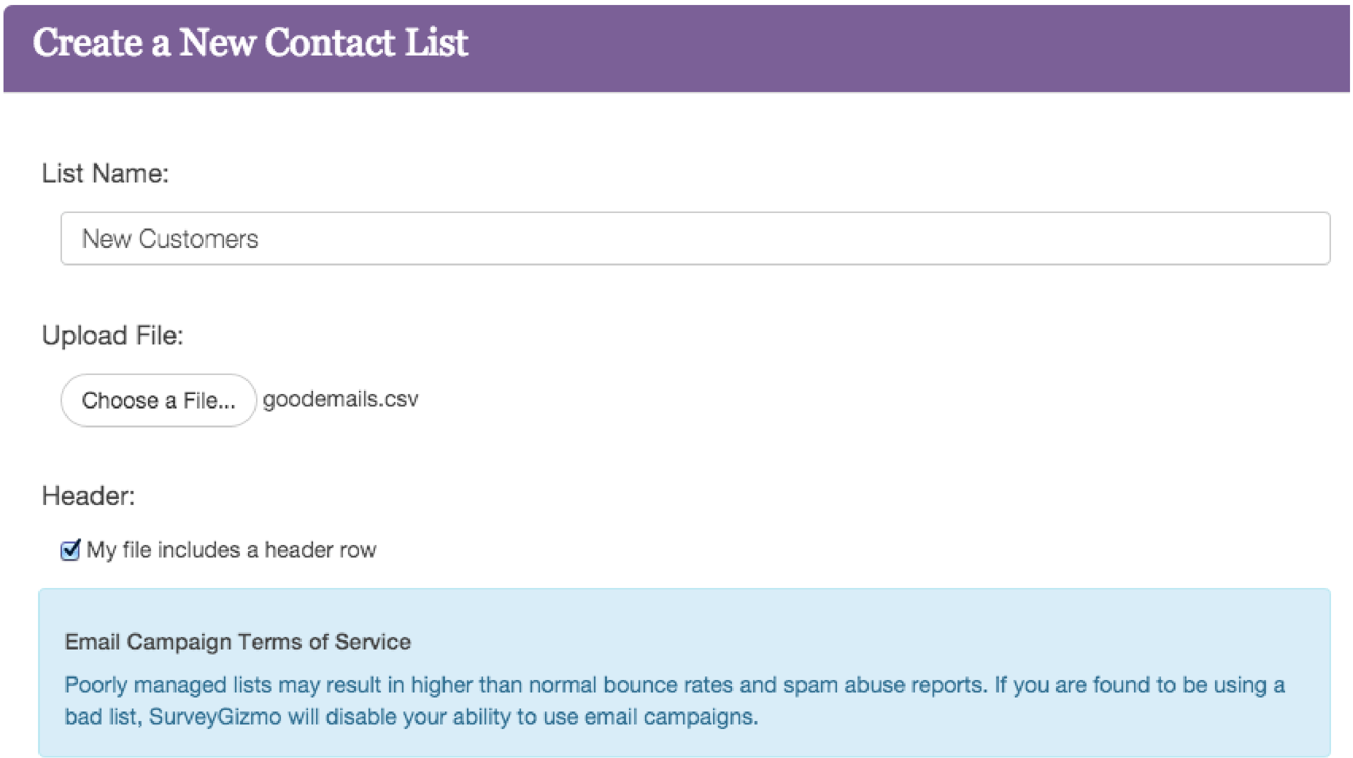
Note if you intend to use Contact Custom Fields you'll need to create the fields first before you uploading your list. Go to the section of this tutorial that covers Creating and Managing Custom Fields for steps on how to set these up.

1. Go to **Accounts** > **Email Lists** and click **Create New List.**

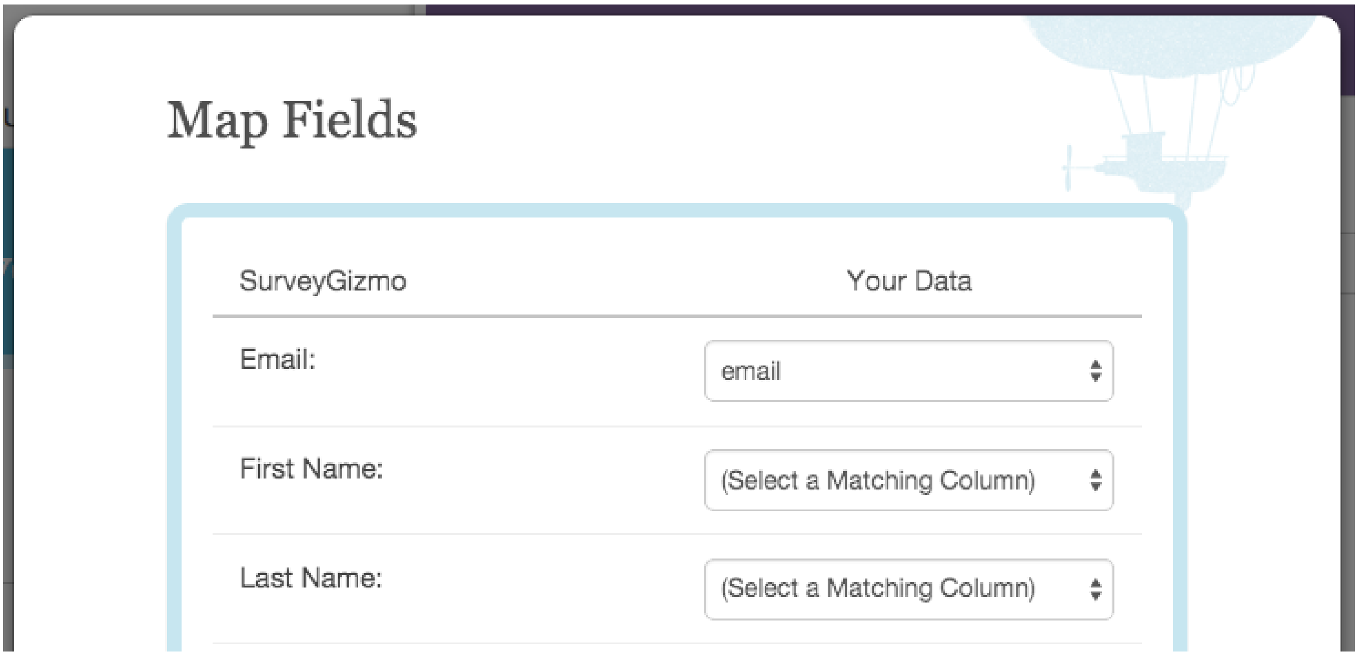
2. Click **Create New List**.

3. Name your List and choose a file to upload. This can be a CSV, XLS or XLSX file. If you are using a list with special characters (like umlauts or Cyrillic characters) make sure to use an XLS or XLSX.

4. If your file has a header row, a row that labels the data in each column e.g,. Email, First Name, Last Name, etc., check the box and click **Create List.**



5. Map the fields from your spreadsheet to the fields (Standard or Custom) in the SurveyGizmo system and click **Save Fields** when you are finished.



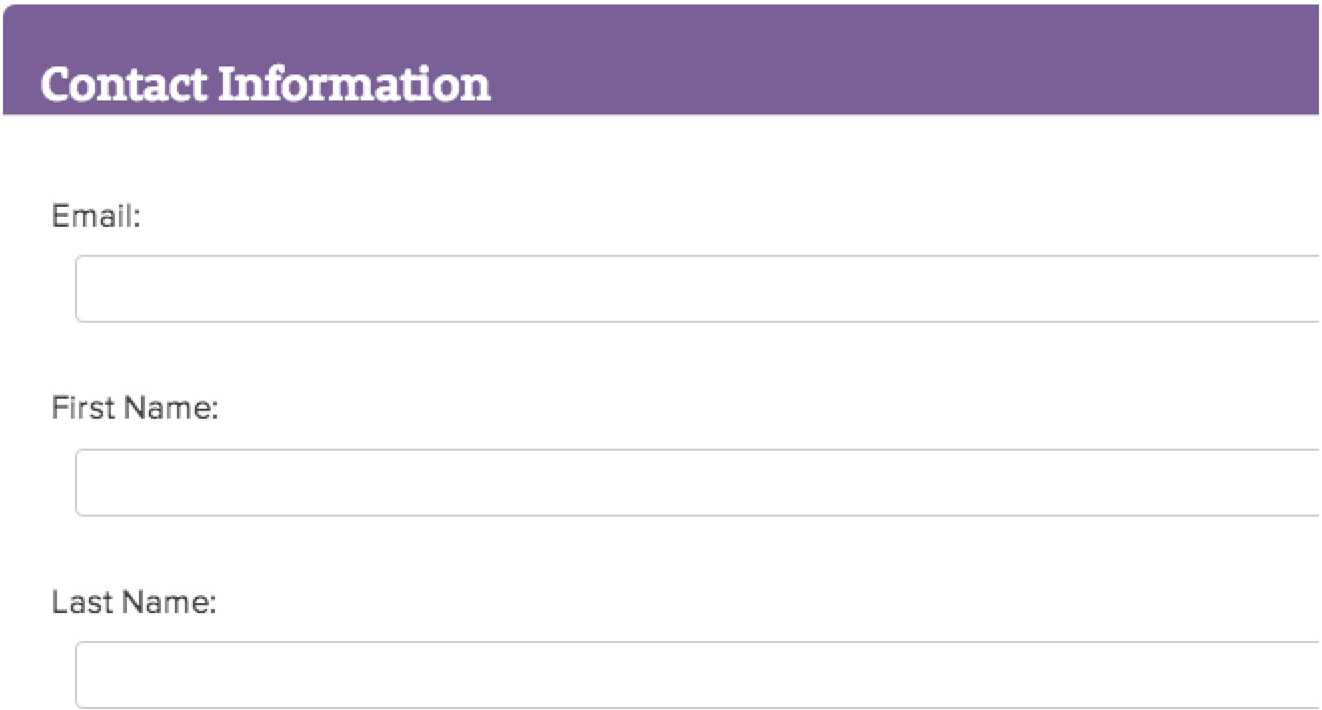
(Optional) Email Confirmation - You can choose to receive an email once the upload is complete. This email will also provide you with any errors that may have occurred such as invalid email addresses that the system has encountered.

Adding Contacts

If you need to add more contacts to your list you can do using these quick steps:

Adding a Single Contact

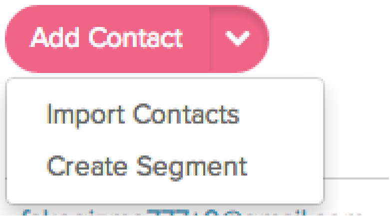
Go to the list you would like to add to and click **Add Contact**. Populate the contact fields including any Custom Contact Fields (if you have them set up) and click **Save Contact**.



Bulk Adding Contacts via Import

1. Go to the List you would like to add to.

2. Click the arrow next to **Add Contacts** and select **Import Contacts**.



3. Select a new file to upload by clicking **Choose File** and indicate whether your CSV has a header row.

4. Choose whether you would like to **Add/Update Contacts** or **Unsubscribe Contacts.**

> **Add/Update Contacts** - This option will add any contacts that are not already present in your list, and/or will update any contacts currently in your list with updated information
>
> **Unsubscribe Contacts** - This option will unsubscribe any matched contacts found in the newly uploaded CSV from the existing contacts in your list.

5. Click **Import File** and then map your fields then click **Save Fields**.

Exporting Contacts

If you would like to export your Email List, go to the List you would like to export. At the bottom of the list click to either **Export as CSV** and **Export as XLS**.

Your exported contact list will include all of your Email List fields as well as the following fields:

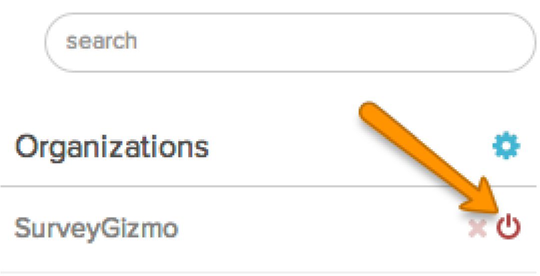
- **ID** - Contact's id
- **Status** - Contact status either **Active** or **Unsubscribed**
- **Addedby** - **Manual** or **Import** depending on the method by which the contact was added
- **Dateadded** - Date contact was added to the list
- **Unsubbed on** - Date contact was unsubscribed

	A	B	C	D	E	F
1	id	status	addedby	dateadded	unsubbed on	Email
2	100211832	Active	Manual	10/30/12 13:40		bri.hillmer@s
3	100211831	Active	Manual	10/30/12 13:35		bri@sgizmo.
4	100210794	Unsubscribe	Manual	10/18/12 13:57	10/20/12 12:11	bri@sgizmo.
5	100210924	Unsubscribe	Manual	10/18/12 17:11	10/20/12 12:04	email2@ema
6	100210981	Active	Manual	10/19/12 11:41		email@emai
7	100129931	Active	Manual	10/17/12 17:58		jack@email.
8	100129930	Active	Manual	10/17/12 17:58		jane@email.
9	100129932	Active	Manual	10/17/12 17:58		javier@emai
10	100129929	Active	Manual	10/17/12 17:58		joe@email.c

Unsubscribing Contacts

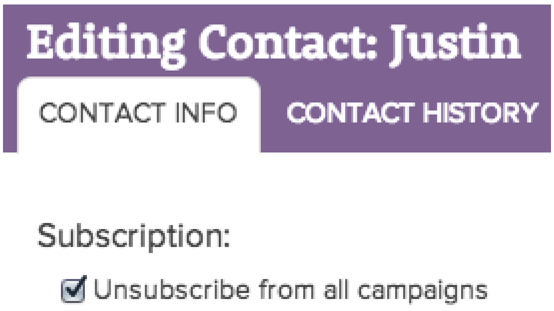
Unsubscribe a Single Contact from a single list

Select the list from which you would like to unsubscribe the contact from. In the row for your contact, you'll see the icon below, give it a click and verify you want to unsubscribe that contact.



Unsubscribe a Single Contact from all lists

Select a list that contains the contact you want to unsubscribe from all lists. Click the contact's email address in the list then check the **Unsubscribe from all campaigns** option. This will remove them from all email campaigns where they were added using the **Use Existing List** option. If an email address was manually added to a campaign, it will not be unsubscribed from that campaign when using this option.



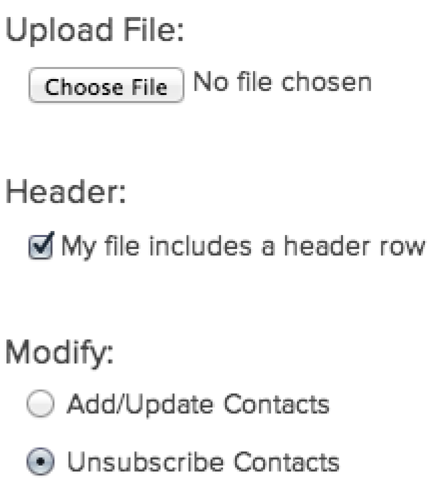
Bulk Unsubscribe Contacts

1. Export your current list and subset to the list of contacts you wish to unsubscribe (email address is the only necessary field).

2. Go to the list from which you would like to unsubscribe the contacts from and click the arrow next to **Add Contacts** and select **Import Contacts**.

3. Indicate whether your file has a header row.

5. Select **Unsubscribe Contacts** under **Modify** and click **Import File.**

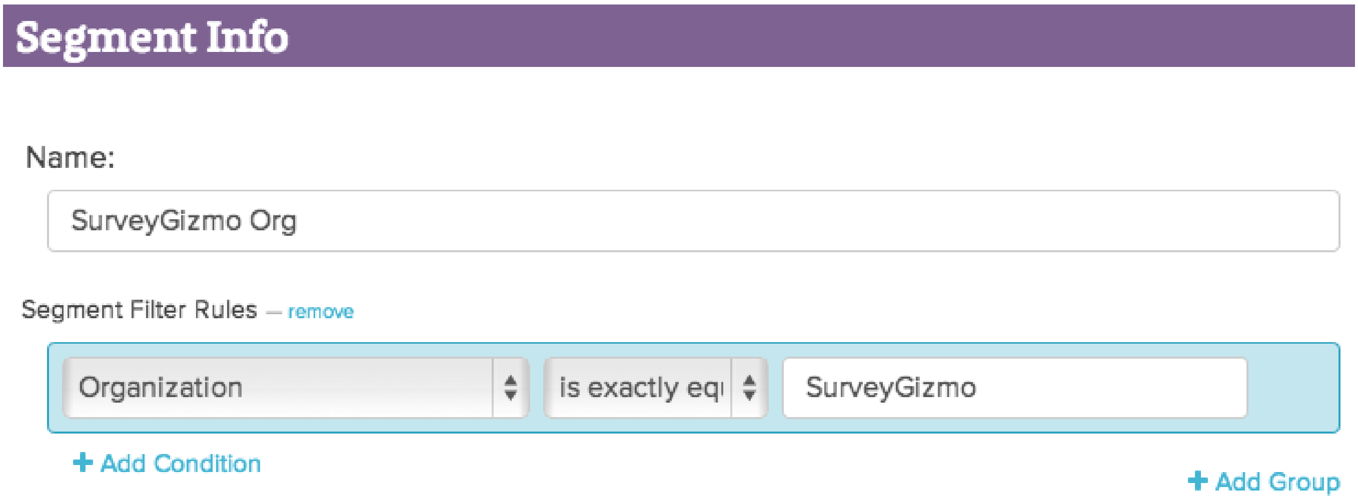


When a contact clicks the unsubscribe link in email campaigns their status will also update to Unsubscribed in Email Lists if they were added using the **Use Existing List** option. Contacts cannot be deleted from these lists, they remain unsubscribed so that they cannot be added back into the list by accident.

Creating Segments

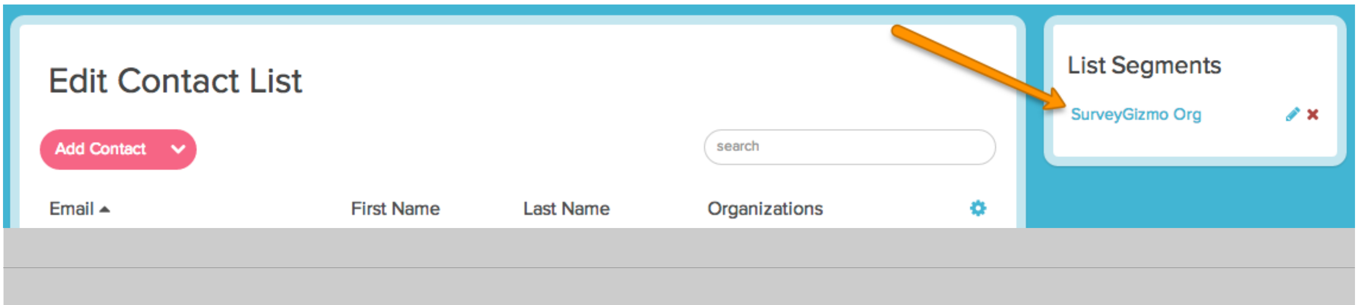
What is a Segment? Great question! A segment is a subset of your Email List based on a specific filter. This is usually a demographic characteristic such as males aged 18-35. You can use segments to quickly set up different invites targeted towards various key groups of your target population!

Go to the list you would like to segment and click the arrow next to **Add Contacts** and click **Create Segment**. Name your segment and set up your **Segment Filter Rules**.



Once you have a segment set up your Segment dashboard will look much like your Contact List dashboard. In addition to all the functionality available in the Contact List dashboard, you'll have the ability to edit your segment including the segment name and the Segment Filter Rules.

You can also always access your segment by going to the list and clicking the name of the Segment from the **List Segment** box.



Creating and Managing Custom Fields

Custom Fields are anything other than the Standard fields that you would like to include in your list. So for example, let's say you always need a Customer ID available when customizing your surveys, and all your contacts will have one, you can create a Custom Field called Customer ID.

To create a new Custom Field

1. Go to **Account** > **Email Lists** and click **Manage Custom Fields** below your email lists.

2. Enter your **Custom Field Name** - Custom Field Names will be saved as *lowercase with no spaces* (this is to accommodate their use in Merge Codes in your surveys and email invites, for more info see Using Custom Fields in Email Invites and Surveys).

3. Select a **Field Type**, **Text, Date/Time, Currency, Number, or Yes/No** (The type setting is present only for labeling and organization purposes), and click **Save Fields**.

To edit and delete a Custom Field

Edit: If you would like to edit a Custom Field, just make the change in the Custom Field Name field and click **Save Fields.**

Delete: To delete a custom field, just click the red x next to the Custom Field Name.

Selecting Lists and Segments in Your Email Campaigns

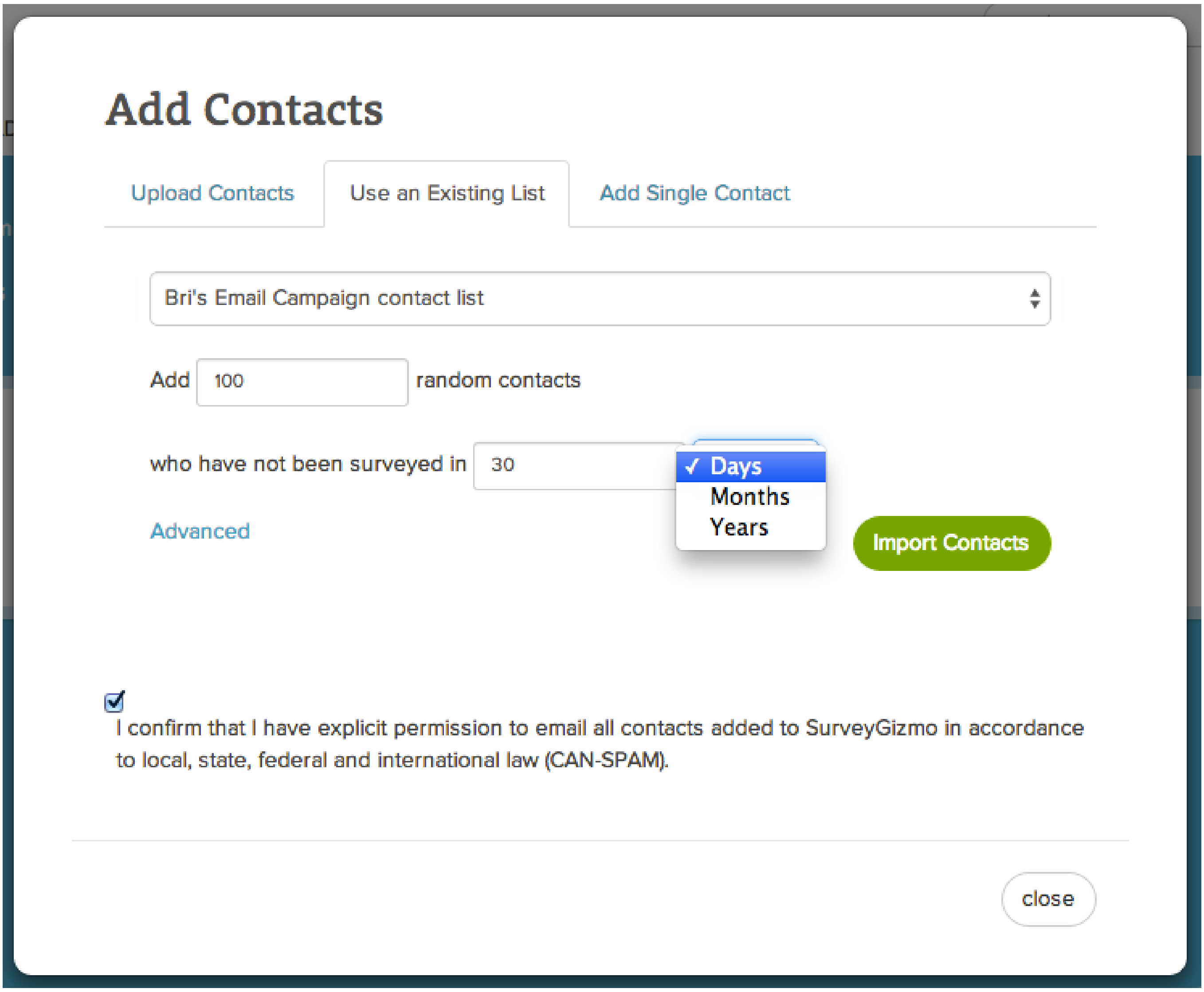
Now that you've set up all yours lists, you're probably wondering how to go about adding these lists to your email campaigns.

1. Go to **Share** and create a new or edit your existing email campaign.

2. Go to the **Contacts** tab, then **Add Contacts**.

3. Go to the **Use an Existing List** tab and select a list or segment from the dropdown menu.

4. (Optional) Click the **Advanced** link below the dropdown. From here you can choose to invite only a random number of contacts who have not been surveyed in a specified number of Days, Months or Years. This is great to prevent over surveying your contacts!



Using Custom Fields in Email Invites and Surveys

Your contacts' Custom Field data is available for use via Merge Codes in your email invites and surveys.

The basic structure for a Custom Field Merge Code is: **[contact("customfieldname")]** where **"customfieldname"** is replaced with the actual custom field name you created in your contact list. For example, if you have a Custom Field in your Contact List called **"customerid"** then the corresponding Merge Code would be **[contact("customerid")]**.

For more info on merge codes, visit our Merge Codes tutorial.

Email Invites

Custom Field Merge Codes are available for use within your email campaign invites. For email invites, use the dropdown menu below the body of the invite to **Select a Merge Code** in the text of your invite.

Surveys

You can also use your contacts' Custom Field data within your survey using the same Merge Code. For example, use these Merge Codes in question titles, default values, hidden value fields and more!

If you'd like to set up logic using these fields, set up a hidden value to store these fields to use later to set up logic conditions. To learn about hidden values visit our Hidden Values tutorial.

The Merge Code helper within email campaign invites is the only location where these Merge Codes are available. But you can easily construct these Merge Codes yourself! Just remember the basic structure of the Custom Field Merge Codes and you should be all set!

Message History

For each contact in your list a unique Message History is stored. This is a complete history for this contact for all surveys and invites relative to the list.

To access a Contact's Message History, go to the list where that contact is stored and find your contact click the email address to edit the contact. Go to the **Contact History** tab.