

Tutorial

Email Marketing

Contact
Management
Series

Manage your Contacts Effectively

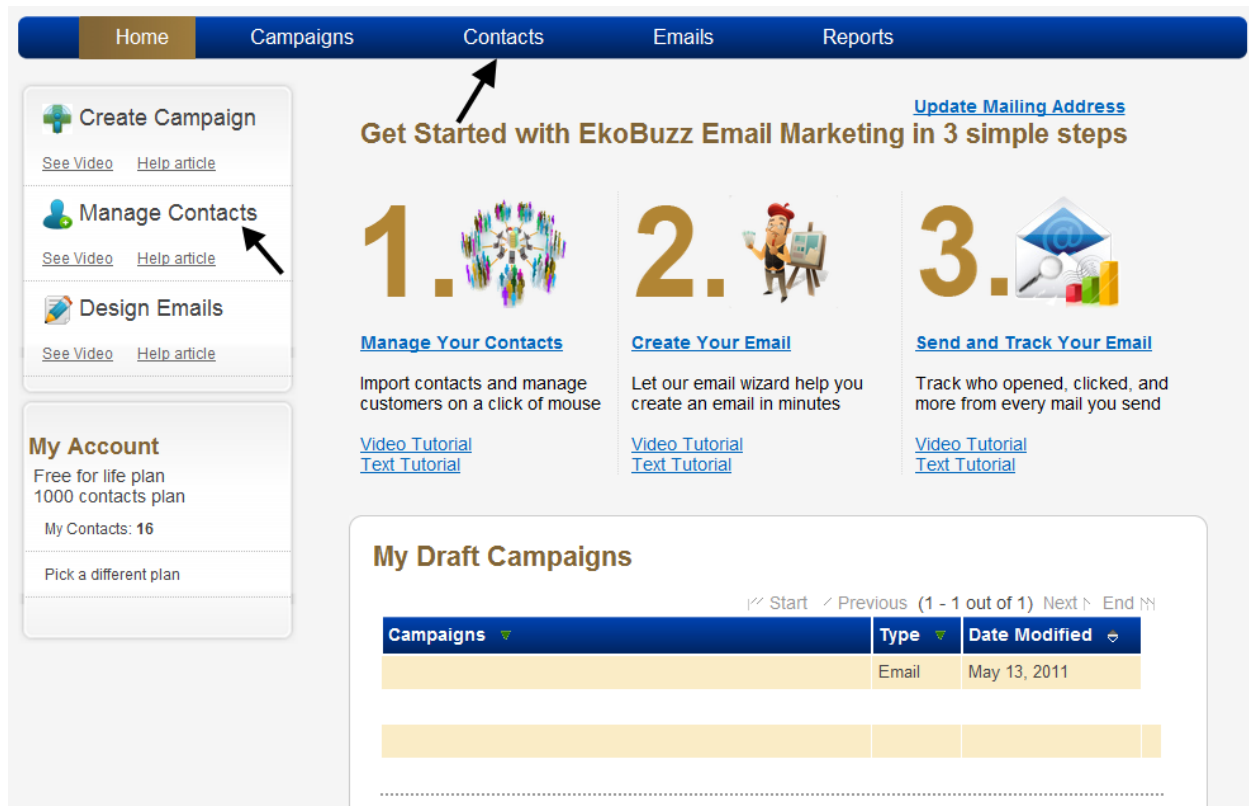


1. Overview

The information you collect about your customers is what allows you to tailor your promotions and customize your offers so that you get the best possible return from your Email Marketing effort. What customer information you need depends on how you can use that information to tailor campaigns, to better target different groups of customers, and therefore get the best possible response from your Email Marketing.

EkoBuzz allows you to segment your contacts on the basis of your needs and helps you achieve your target results in a better and improved way.

To manage contacts click on 'Manage Contacts' option in the left panel on the Home page or click on the Contacts tab:



The screenshot shows the EkoBuzz dashboard interface. At the top, there is a navigation bar with tabs for Home, Campaigns, Contacts, Emails, and Reports. The 'Contacts' tab is highlighted with an arrow. On the left sidebar, there are three main sections: 'Create Campaign', 'Manage Contacts' (which is highlighted with an arrow), and 'Design Emails'. Below these are links for 'See Video' and 'Help article'. The 'My Account' section shows a 'Free for life plan' with '1000 contacts plan' and 'My Contacts: 16'. The main content area features a 'Get Started with EkoBuzz Email Marketing in 3 simple steps' guide. Step 1 is 'Manage Your Contacts', Step 2 is 'Create Your Email', and Step 3 is 'Send and Track Your Email'. Each step includes a brief description and links to 'Video Tutorial' and 'Text Tutorial'. Below this is a 'My Draft Campaigns' section with a table showing one draft campaign.

Campaigns	Type	Date Modified
	Email	May 13, 2011

2. Creating contacts

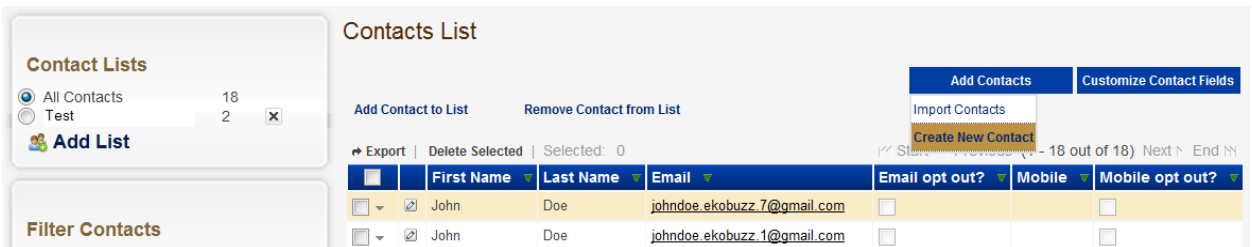
Contacts can be created in EkoBuzz in 3 different ways:

1. Type-in Contact Details
2. Importing contacts through a CSV file
3. Synchronizing Contacts from your website

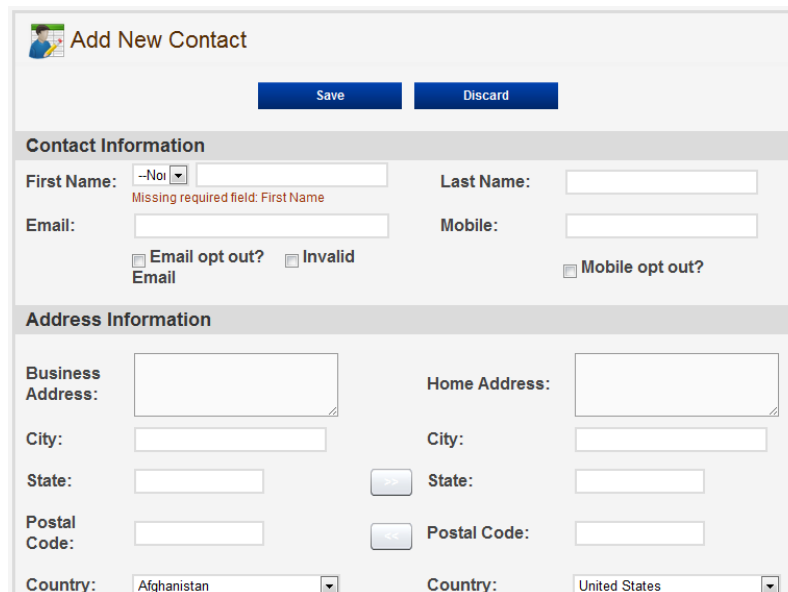
2.1 Type-in Contact Details

The following steps guide you to create a new contact in your EkoBuzz account :

1. Click on 'Manage Contacts' option in the left panel on the Home page or click on the Contacts tab.
2. Hover your pointer on 'Add Contacts' button and you will see a drop down list open. Select 'Create New Contact' from the list.



3. Once you select create a new contact it navigates to a page where you can enter all the details of the new contact to be added



4.

5. Finally click on 'Save' button to save the details of the contact.

2.2 Import Contacts

To import contacts into your EkoBuzz account it is necessary that your contacts be stored in a .csv file format. To learn how to save your contacts in .csv format go to [How to save as CSV](#) (This will be a link) tutorial.

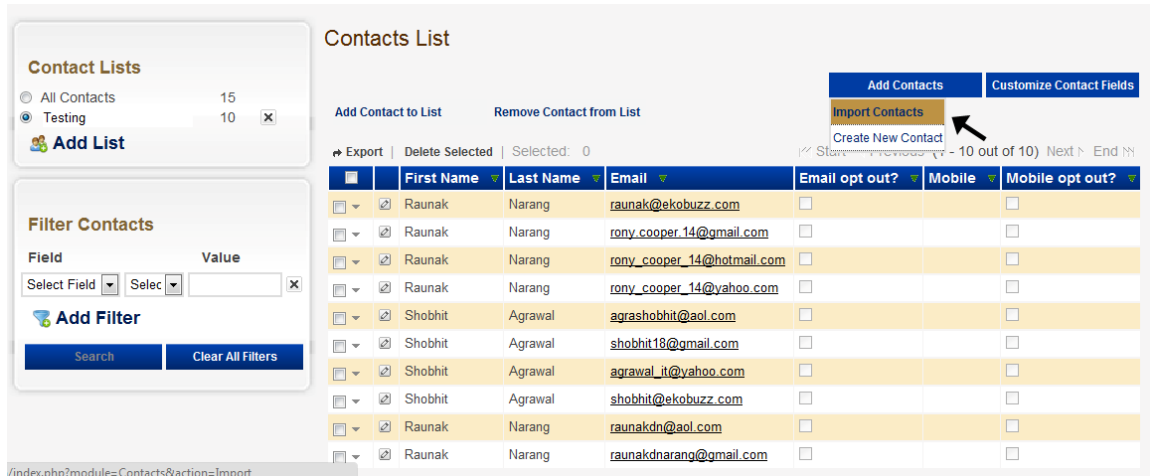
In order to import your contacts into your EkoBuzz account your CSV file is recommended to be in the following format:

	A	B	C	D
1	First Name	Last Name	Email Id	
2	John	Doe	johndoe.ekobuzz.1@gmail.com	
3	John	Doe	johndoe.ekobuzz.2@gmail.com	
4	John	Doe	johndoe.ekobuzz.3@gmail.com	
5	John	Doe	johndoe.ekobuzz.4@gmail.com	
6	John	Doe	johndoe.ekobuzz.5@gmail.com	
7				

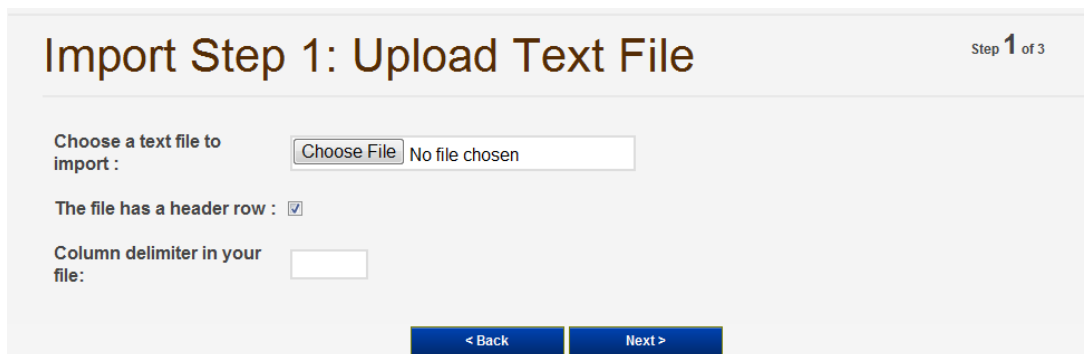
This CSV file can contain any custom detail you want to add. EkoBuzz provides a functionality of filtering contacts on the basis of custom fields which are needed specifically by a user. So by adding the required columns in such CSV files and then importing it in your account allows you to filter contacts based of the information present in those columns.

The following steps guide you to import your contacts which are in .csv format into your EkoBuzz account:

1. Click on 'Manage Contacts' option in the left panel on the Home page or click on the Contacts tab.
2. Hover your pointer on 'Add Contacts' button and you will see a drop down list open. Select 'Import Contacts' from the list.



3. Once you click on 'Import Contacts' you see a page open which displays Step 1 of 3. Step 1: Select a file which has all your contacts. Here you also need to mention if there is a header row in your file. It is recommended to have a header row always. In the column delimiter option put a comma ',' (optional).
4. Once you are done with this click on Next button.



5. Step 2: In this step you need to provide import criteria as per your requirement.
 - In the 1st point you need to mention if custom mapping is required.
 - In the 2nd point you can select various fields for which duplicates cannot be created.
 - In the 3rd point make sure that the database field matches your column field in your CSV file.

6. Once you are done filling the details click on Import Now button.

Import Step 2: Confirm Fields Step 2 of 3

1. Save as Custom Mapping:

2. Verify duplicate entries against selected indexes

Index(es) used: Email

Index(es) not used: Last Name, First Name, Deleted Deleted, Last Name Deleted, Reports to ID, Last Name Assigned to Other Email

3. * Indicates required field

Database Field	Header Row	Row 1	Row 2
First Name: *	First Name	John	John
Last Name: *	Last Name	Doe	Doe
Email: *	Email Id	johndoe.ekobuzz.1@gmail.com	johndoe.ekobuzz.2@gmail.com


7. Once you click the Import Now button you will see a small window loading your contacts into your EkoBuzz account .

3. * Indicates required field

Database Field	Header Row	Row 1	Row 2
First Name: *	First Name	John	John
Last Name: *			Doe
Email: *		mail.com	johndoe.ekobuzz.2@gmail.com

Loading...

Import Started:
Thu Mar 31 2011 12:30:15 GMT-0400
(Eastern Daylight Time)



In the list below, select the Notes:

- Either Last Name
- If Full Name is ma
- If Full Name is ma
- Fields ending in A the database.

ch field in the system. When you are finished, click **Import Now**:

me and Last Name when inserted into the database.

together with the main Address Street Field when inserted into

8. The application will navigate to a page where you need to confirm your import and you have an option to add the imported contacts to a particular list created earlier. You also have an option to undo your last import.

Import Results

Step 3 of 3

Successfully Imported 5 [Add to contact list](#)



Undo Last Import

Finished

Last Imported Contacts

Start Previous (1 - 5 out of 5) Next End

First Name	Last Name	Email	Office Phone	Address
John	Doe	johndoe.ekobuzz.3@gmail.com		
John	Doe	johndoe.ekobuzz.4@gmail.com		
John	Doe	johndoe.ekobuzz.5@gmail.com		
John	Doe	johndoe.ekobuzz.1@gmail.com		
John	Doe	johndoe.ekobuzz.2@gmail.com		

EkoBuzz provides a functionality through which it is possible to identify the duplicate contacts in your new list which are already there in your EkoBuzz account. You can manage even this situation by segregating them into different contact list or the same contact list.

Import Results

Step 3 of 3

Successfully Imported 3 [Add to contact list](#)

Duplicates Found 5 [Download duplicates](#) | [Add to contact list](#)



Undo Last Import

Finished

Last Imported Contacts

Start Previous (1 - 3 out of 3) Next End

First Name	Last Name	Email	Office Phone	Address
John	Doe	johndoe.ekobuzz.6@gmail.com		
John	Doe	johndoe.ekobuzz.7@gmail.com		
John	Doe	johndoe.ekobuzz.8@gmail.com		

- Once you are done with everything that is required click on the Finished button.

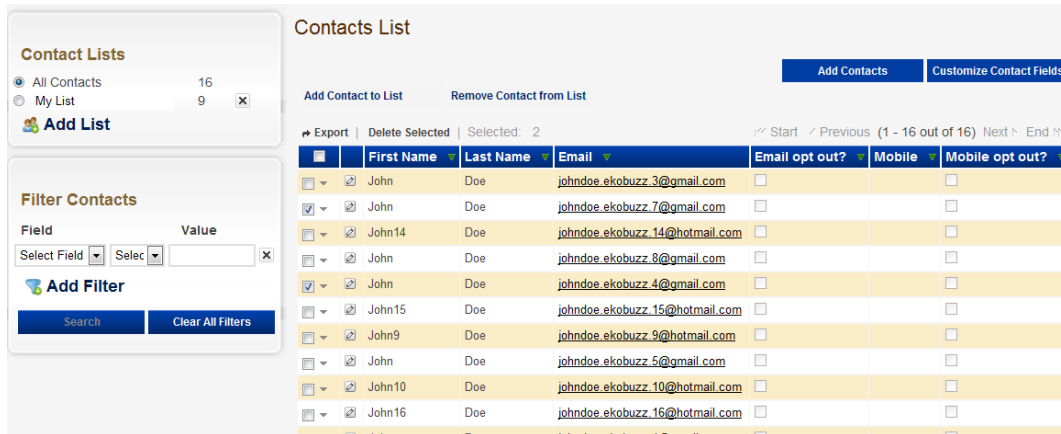
2.3 Synchronize contacts from you website

EkoBuzz APIs can be used to sync registrations on website, CRMs and custom databases with contacts in your EkoBuzz account.

Please contact support@ekobuzz.com for details about these APIs and help to setup the same.

3. Deleting contacts

1. Click on 'Manage Contacts' option on the Home page left menu or click on the Contacts tab.
2. Select the contacts you want to delete from your account.



Contact Lists

- All Contacts 16
- My List 9
- Add List

Filter Contacts

Field: Select Field Value: []

Add Filter Search Clear All Filters

Contacts List

Add Contacts Customize Contact Fields

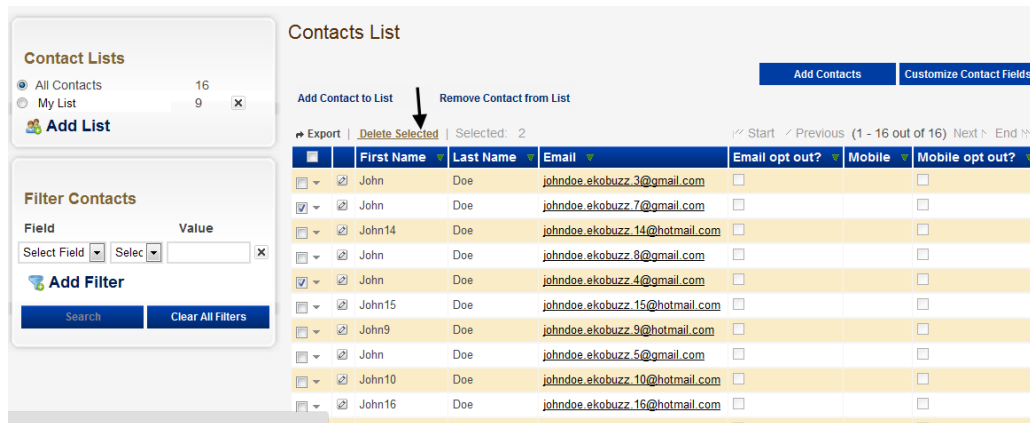
Add Contact to List Remove Contact from List

Export Delete Selected Selected: 2 Start Previous (1 - 16 out of 16) Next End

	First Name	Last Name	Email	Email opt out?	Mobile	Mobile opt out?
<input type="checkbox"/>	John	Doe	johndoe.ekobuzz.3@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	John	Doe	johndoe.ekobuzz.7@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John14	Doe	johndoe.ekobuzz.14@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John	Doe	johndoe.ekobuzz.8@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	John	Doe	johndoe.ekobuzz.4@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John15	Doe	johndoe.ekobuzz.15@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John9	Doe	johndoe.ekobuzz.9@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John	Doe	johndoe.ekobuzz.5@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John10	Doe	johndoe.ekobuzz.10@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John16	Doe	johndoe.ekobuzz.16@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>

Note: Please refer to List Management Tutorial to remove contacts from a contact list.

3. Click on 'Delete Selected' link to delete the selected contacts.



Contact Lists

- All Contacts 16
- My List 9
- Add List

Filter Contacts

Field: Select Field Value: []

Add Filter Search Clear All Filters

Contacts List

Add Contacts Customize Contact Fields

Add Contact to List Remove Contact from List

Export Delete Selected Selected: 2 Start Previous (1 - 16 out of 16) Next End

	First Name	Last Name	Email	Email opt out?	Mobile	Mobile opt out?
<input type="checkbox"/>	John	Doe	johndoe.ekobuzz.3@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	John	Doe	johndoe.ekobuzz.7@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John14	Doe	johndoe.ekobuzz.14@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John	Doe	johndoe.ekobuzz.8@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	John	Doe	johndoe.ekobuzz.4@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John15	Doe	johndoe.ekobuzz.15@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John9	Doe	johndoe.ekobuzz.9@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John	Doe	johndoe.ekobuzz.5@gmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John10	Doe	johndoe.ekobuzz.10@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	John16	Doe	johndoe.ekobuzz.16@hotmail.com	<input type="checkbox"/>		<input type="checkbox"/>

About the company: EkoBuzz provides web based, on-demand email, mobile and social marketing. Besides executing these campaigns, EkoBuzz assists customers in building opt-in leads and convert them to paid customers.

For any further assistance and help, please contact EkoBuzz support at support@ekobuzz.com