easycontact® by DELUXE

Questions? Contact us at 1-888-740-0552

How to Create and Edit Lists

Lists are used to group together recipients so you can send emails to some contacts but not all of them. For example, you may wish to have separate lists for "Current Customers" and "Potential Customers".

To create a new contact list:

→ Click the "Manage Contacts" tab near the top of the EasyContact application screen, or, from the EasyContact Main Menu screen, select the "Add & Manage" link under the "Contacts" heading in the grey box to the right, then choose **Create/Edit Lists** from the list of choices on the left side of the screen.

→ To add a new list, go to the "Create a New List" section at the bottom of the screen and enter the name of the list in the "List Name" box. Then, click **Apply**.

→ To add contacts to a new list, click **Add Contacts** from the list of choices on the left side of the screen to add contacts one at a time. Or, choose **Import Email Addresses** to add groups of contacts from popular email programs or spreadsheets.

To edit contacts in an existing list:

→ To edit contacts within a list, click **Create/Edit Lists** from the list of choices on the left side of the screen, then click on the list name. The "Search Results" section will appear below. Click on the contact name you wish to edit. You will be taken to the "Edit Contact" screen where you can change contact information, change the list(s) that contact is assigned or send an opt-in email.

To delete a list:

→ To delete a list, click on the "Delete" icon in the far-right column (the red "minus" sign). If there are contacts assigned to the list, you will be asked to confirm that you want to delete the list.

To rename a list:

➡️ To rename a list, click on the "Rename" icon in the far-right column (the tiny "pencil" icon). A box will appear allowing you to enter a new name for the list.

To segment a list:

➡️ In the email wizard you can segment your list for a specific email. To add rules that will further refine your mailing list, click on the checkbox to the left of **I want to segment my contacts**. You can then set up rules based on parameters such as city/location or other contact information. Once saved, these segmentation rules will be displayed in your "Email Summary" results, and can be edited as you like in the future.