

# **Contact Views**

In Zoho Marketing Automation, you can filter <u>contacts</u> using predefined views so you're able to work on a particular set of contacts. These filters not only provide easy access to basic views but also save time creating <u>segments</u> for these views.

Currently, we have eight views & filters, and they are:

- All Active Contacts
- Marketing
- Non-marketing
- Unsubscribed (Marked by Recipient)
- Unsubscribed (Marked by Sender)
- Bounced
- Blocked
- Invalid

ŀ	Contacts All Active Contacts
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	Marketing 📩
	Non-marketing
	Unsubscribed (Marked by Recipient)
	Unsubscribed (Marked by Sender)
	Bounced
	Blocked
	Invalid

# View-based actions and permissions

This table shows the view name and a list of actions that can be performed in each view.

CONTACT	DEFINITION	EXPORT	DELETE	CHANGE	MASS UPDATE ACTIONS
VIEWS				SUBSCRIPTION TYPE	

All Active Contacts	Marketing & non- marketing contacts	1	<i>✓</i>	J	J
Marketing	Subscription type is marketing	1	1	1	J
Non-marketing	Subscription type is non- arketing marketing		<i>,</i>	V	V
Unsubscribed (Marked by Recipient)	Unsubscribed by the contact	J			
Unsubscribed (Marked by Sender)	Unsubscribed by you or your users	V	J		
Bounced	Hard bounced email addresses	1			
Blocked	Blocked domain	1			
Invalid	Invalid email address	1			

The last column labeled Mass Update Actions can be done when you select the contacts, and it includes the following <u>bulk actions</u>:

- Add to list
- Remove from list
- Assign Tags
- Remove Tags
- Assign Topics
- Remove Topics
- Mass Update

The *Contacts* tab will appear for all the views, and the *Contacts by Stage* tab will appear for *All Active Contacts*, *Marketing*, and *Non-marketing* views.

## Accessing the filters

To access these filters:

Ŕ	Several Marketing Automation						
	Dashboard		Hello then!				
ŀô	Contacts	>					
\$	Lead Generation	<b>₩</b> >	OVERALL				
- <del>1</del> 0	Journeys	>	Contact Captured	Raw leads			
;;;]	Marketing Planner	>	5,22,386	5,21,713			
ţ,	Marketing Campaigns	>					

- From the *Navigation Toolbar* on the left, click **Contacts** and select **View Contacts**.
- At the top-left, you should see a view name called All Active Contacts or Marketing Contacts.
- Click the view name to access the filters.
- Click a different filter to go to that view.

#### **All Active Contacts**

This filter displays the list of all the active contacts in your account. Active contacts includes contacts from marketing and non-marketing filters. These are the contacts whom you engage with on a regular basis by sending them marketing campaigns like email campaigns. Contacts that are unsubscribed, bounced, blocked, and invalid aren't considered active contacts.

#### Marketing

As the name states, this filter displays all the contacts whose <u>subscription type</u> is **Marketing**. You'll mainly engage with these contacts for your marketing needs.

#### **Non-marketing**

This filter lists all the contacts whose subscription type is **Non-marketing**. These contacts haven't provided you with permission to engage with them.

### **Unsubscribed (Marked by Recipient)**

This filter shows the contacts who've unsubscribed of their own accord from your marketing emails, campaigns, and SMSs via the unsubscribe link provided. Their subscription type is **Unsubscribed**.

### Unsubscribed (Marked by Sender)

This filter lists the contacts who've been unsubscribed by you or other users of your Zoho Marketing Automation account. They could've been marked as unsubscribed while creating a new contact, via import, bulk update, or via journeys. Their subscription type is **Unsubscribed**.

### Bounced

This filter lists the contacts whose email addresses have suffered <u>bounces</u>. An email address can be bounced for a variety of reasons, such as:

- Recipient email address does not exist.
- Domain name does not exist.
- Typos render the email address invalid. (For example, gnail.com instead of gmail.com)
- Recipient email server has blocked delivery.
- The email address is inactive.
- The email account has been closed.

Only the contacts whose email addresses have suffered hard bounces will be listed in this view. If an email address has soft bounced, there are chances for the email to get delivered to that address in the subsequent retries. Hence, soft bounced email addresses won't be listed. Learn more about hard and soft bounces <u>here</u>.

## Blocked

This filter is used only when a Zoho Marketing Automation user requests we block contacts whose email addresses are of a particular domain so existing contacts are blocked and future contacts of this domain don't get added.

# Invalid

Whenever you create a contact in Zoho Marketing Automation, the system will do a real-time validation of the email address to see if it is valid or not. If it's an invalid email address, the system will flag it so you can't save the contact unless a valid email address is provided.

However, there are instances where the validity check gets bypassed and the contacts get added. It can be via a sync from a different Zoho application such as Zoho CRM, via import, or — very rarely — when you manually add a contact. In such cases, the system will do a check after the addition of these contacts and move them to the *Invalid* view automatically.

### Setting a view as the default

7	Several Marketing Automation						
	Dashboard	Hello then!					
ŀ	Contacts						
ॐ	Lead Generation >	OVERALL					
66	Journeys >	Contact Captured	Raw leads	Marketing ready			
) E	Marketing Planner >	5,22,386	5,21,713	3			
¥°	Marketing Campaigns						

Set a view of your choice as the default, so each time you go into the *View Contacts* module, this view always appears:

- From the *Navigation Toolbar* on the left, click **Contacts** and select **View Contacts**.
- At the top-left, click the specific view name to access the list of filters.
- Hover over the desired filter and click the **more actions** button (the three vertical dots).
- Click on **Set as default view**.