

The first thing that good marketers do is set up their contact architecture.

How leads are organized in different lists? What kind of fields they're collecting? Are they collecting date fields, text fields, drop downs? So all that thought process comes into play when you start your marketing journey.

I'm going to show you in this video how you can create lists on VBOT, how to properly organize them, and how you can also create your own custom fields.

So let's dive right into it.

On your left panel under your contacts, you're going to go to your list section.

And here you're going to see every single list I have, including the dates of creation, how many contacts, their status, and a whole bunch of drop downs on the right side.

This is where you can manage the fields.

You see a form attached to every single list.

Every time you create a list, we associate a form with it for your convenience.

So this way you have a gateway.

People can join and opt in to these lists.

We give you codes so you can add on your site for these forms.

And we even provide some analytics on how many people are part of these lists.

What I would like to do right now is start from scratch and create lists.

I'm going to give it a name and call it maybe a master list.

This is where I would like to perhaps add all my dream fields that I'd like to collect.

Now there's a list description here, which could be for my reference.

Now I want you to differentiate between two types of lists.

We have internal lists, which are only for our own internal use.

The clients will never really see these lists.

And you can name them anything you want that you will understand in the future.

If you have a front facing list, which could take part in your future preferences page, this is where you can organize pretty much how people would like you to communicate with them.

So for instance, they could ask you to communicate with them only for product updates, for new blog posts.

You can organize your lists here.

And to put this in perspective, whatever list name I have and description, you are part of this list because dot dot dot.

Just by activating this option right here, the spun and creating the list.

In the future, as you send out emails and you include this short code, your contacts, they could literally access this page and they could say, you know what, I don't want to be part of this master list or I want to be part of this master list.

So it's very important to kind of think about this.

What would you like to include on this page? And to give it the proper name and the proper opt in description.

So people know exactly what they're signing up for, okay? If it's a master list, I'm assuming it's internal.

So I will go ahead and just turn this off and save.

Again, to clarify, this page will only be shown on the footer of emails if you choose to include it throughout your communications.

Once I've created this master list, the next thing I have to do is to go inside my form builder and we call it form builder, but it's actually form and field customizer at the same time.

By default, VBOT added a first name, last name, email and phone.

And you can see they have some options to expand, change labels.

And I can even delete some of these fields if I don't want them.

Okay, the default phone is really important because this is how you can communicate with your customers via Twilio SMS.

So it's really important to keep the phone field and you can see how it is a smart auto detect of the geolocation.

So if somebody loads this form and they happen to be in the United States, we're going to append the United States code to that list or to that form.

If you don't like this, you can simply disable it.

Choose if it's required or not and you're good.

Let's say you want to add some items, right? Common things, for instance, company name.

You have options on the left so you can tap into some default fields we provide.

You can also recycle fields that you've created using fields by lists.

And you can even create new custom fields from scratch.

I always start by looking to my custom fields.

If I want to maybe add company name, I'm going to search for that.

Oops, company.

And here we go.

Of course, I could have gone to my custom fields and I could have added it here.

But why do that if I can just find it right in here? I can also add number of employees if this is a qualifying question for you.

Now note, so far I have two text fields, an email field.

This is really important.

It's required.

You cannot remove this field, but you can just make it not required if you'd like.

And I have company name and a dropdown.

Let's say I want to down the road offer some date based automations or I want to run some segmentation based on sign updates, or perhaps very customized dates, for instance, renewal dates of products.

If one with somebody would like to get their membership kicked in or something like that.

We have a date field right here, which is quite important to note.

We often see people make the mistake of using text fields as date fields.

That doesn't work, primarily because there are a lot of filters that are built around dates.

For example, you can do things such as 30 days before 30 days after within 30 days time and so on.

Right.

So knowing your date fields and adding them as date type is really important.

When would you like to start service? We have file uploads.

And also I want you to know the birthday field is almost like a limited date field.

A lot of breaking motor stores, they use it so they don't ask for the year.

If you want to do birthday reminders and yearly birthday notifications, choose the birthday field on your forms.

We do have a smart country, state and city.

Now this one, you can see these are grayed out, primarily because it's also a geodetect.

And we've loaded all the countries, states and cities of the world.

So if I click country, now I can choose states and then I can choose city.

Let me show you how this sort of looks like.

Now I've loaded exactly my geolocation, my state and my city.

This is why it's all related to each other.

First load the country, then the states, then the cities.

If you don't want it to be smart field this way, obviously you can just go ahead and create them as a custom field.

And that should take care of it.

So it's really important for you to kind of identify what kind of fields you're building on your master list, what kind of data bring it over and just adding them on that one main list that you have.

Once you do that, just make sure that you save and you are pretty much good to go.

In the next section, I'm going to be diving deeper into how your form settings are set up, how you can embed them and so on.