ResultsAiX.com

AIX TRAINING GUIDE 5 OF 15 · FREE

Moving Your Email List To The AiX Mailer
The Complete Move, Step By Step

What to export, how to clean it, the exact import screens, keeping every unsubscribe in place, rebuilding forms and automations, and a calm first month of sending from your own site.

Kevin Fahey · ResultsAiX.com

Moving your email list sounds like a big job. It is really a short list of small jobs, done in the right order, and the ResultsAiX Mailer was built to make each one safe.

When you finish this guide, your subscribers, tags, custom fields and history will live in your own WordPress database, everyone who ever unsubscribed will stay unsubscribed, your sign-up forms and automations will be running on your own site, and your first sends will go out in a way inbox providers love.

Every screenshot is a real ResultsAiX Mailer screen, shown with our demo business, Brightline Coaching, moving its list across from its current email platform.

What you will have by the end of this guide

- A complete export from your current email platform, cleaned and ready
- Your unsubscribes and bounces protected before a single person is imported
- Every subscriber imported with their tags, custom fields, sign-up date and status
- Your forms and automations rebuilt in the Mailer
- A sending service connected and a gentle 4-week plan for your first sends
- A moving-day checklist you can tick off as you go

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PART 1

The Move At A Glance

Here is the whole move in five steps. Each one has its own part in this guide, and you can take a break between any two of them.

Prepare sending service, domain and Safe Mode ready → **Export** subscribers, tags, unsubscribes and bounces → **Protect** import unsubscribes and bounces first → **Import** subscribers, mapped field by field → **Rebuild** forms, automations and your first sends

Why Moving To Your Own Site Is Worth It

- **Your list is yours.** Subscribers, lists, broadcasts and stats live in your own WordPress database, on your own hosting.
- **Everything is unlimited.** Subscribers, emails, lists, tags and automations. Your sending service's plan sets your volume, and that is all.
- **One set of people across every tool.** The same person who opts in on your page, joins your webinar and buys your product is one subscriber, with one history.

How Long It Takes

Step	Typical Time
Getting ready (Part 2)	An hour, plus a few hours for DNS records to show
Exporting and cleaning (Parts 3 and 4)	30 to 60 minutes
Importing (Parts 5 to 8)	Minutes for a few thousand people. A large file runs in the background while you work on other things.
Forms and automations (Parts 9 and 10)	An afternoon for most businesses

First weeks of sending (Part 12)	4 weeks of gradually growing sends

PART 2

Get Ready Before You Export

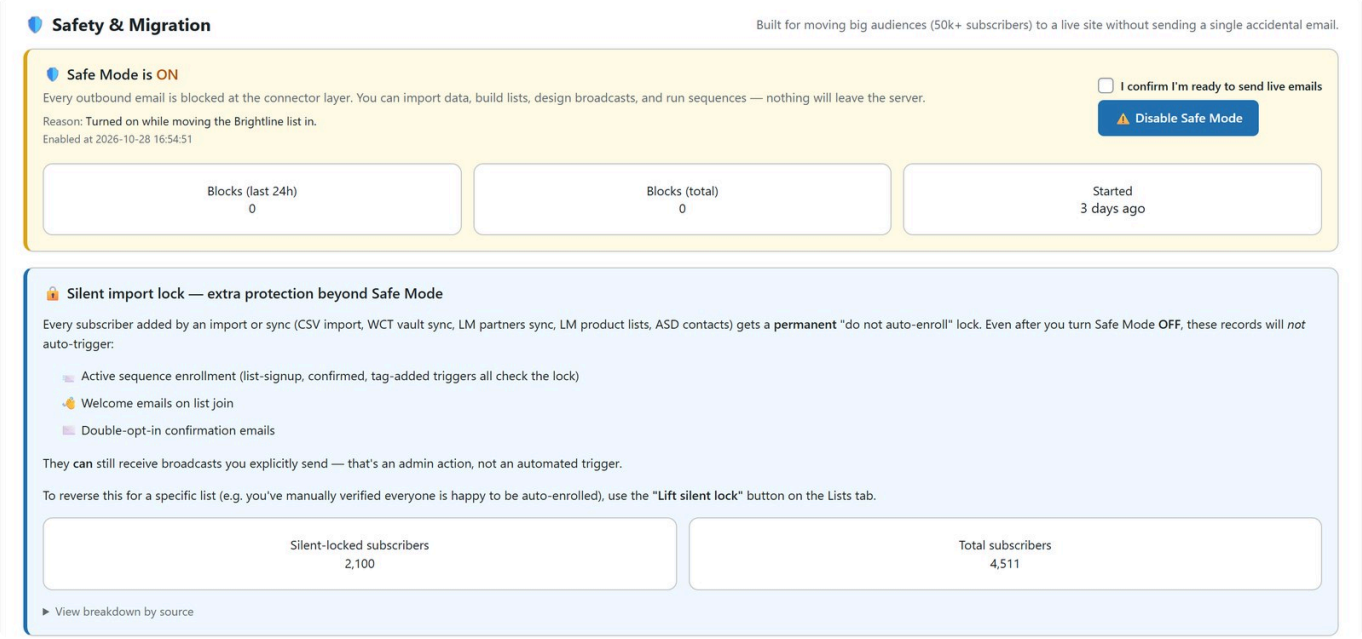
A few things set up first make moving day calm. None of them takes long.

1. **Install and license the Mailer.** Upload the plugin, activate it and paste your licence key. Guide 1 shows the routine for every ResultsAiX plugin.
2. **Set your sender profile.** Under **Settings**, then **Sender Profiles**, set your From name, From email on your own domain, Reply-To and your postal address. The address goes in the footer of every email automatically.
3. **Start your sending service setup.** Choose your service and add its DNS records now, so they are verified by the time you need them. Guide 2 helps you choose, Guide 3 sets up SMTP2GO, and Guide 4 explains SPF, DKIM and DMARC.
4. **Check Safe Mode is on.** Go to **AiX Mailer**, then **Safety**.

Safe Mode: Your Moving-Day Safety Net

While Safe Mode is on, every outgoing email is held back: broadcasts, automation emails, welcome emails and opt-in confirmations. You can still do everything else, including importing, building lists and segments, writing broadcasts and building automations. Every email it holds is logged with the address and time, so you can see for yourself that nothing went out during the move.

On a new install the Mailer often switches Safe Mode on by itself, and an amber banner sits at the top of every Mailer screen while it is on, so you always know. When you are ready to send, you switch it off on the Safety tab by ticking a confirmation box first.



Safe Mode and the silent import lock.

> **Good to know**
>
> The Safety tab also runs a **pre-flight check** of your server: memory, execution time, upload size, free disk space and whether WordPress cron is running. Glance at it before a big import.

PART 3

What To Export

Every email platform has an export, usually under Contacts, Subscribers or Audience, and usually as a CSV file. Export more than you think you need. A column you do not use costs nothing, and a column you left behind is hard to get back once you have closed the old account.

Export	Why	Where It Goes In The Mailer
All subscribers	Every active subscriber, with every column the export offers.	The Imports tab.
Tags or lists	How you grouped people: interests, lead magnets, purchases.	Tags (comma-separated tags split automatically), or a list chosen at import.

Unsubscribed people	Everyone who ever asked to leave, so they stay out for good.	The suppression list, imported first.
Bounced or cleaned addresses	Addresses that no longer receive mail.	The suppression list, imported first.
Spam complaints	Anyone who marked your email as spam, if your platform lists them.	The suppression list, as complained.
Custom fields	Phone, company, affiliate ID, anything you collected.	Custom fields, created during the import.
Dates	Sign-up date and unsubscribe date.	First contact and unsubscribed date.
Sign-up details	Sign-up IP address, the page they joined on, the source.	IP, Signup URL and Source fields.
Engagement	Last open or click, a lead score or rating, if offered.	A score field, or a tag such as "engaged-before-move" you add yourself (Part 4).
Your email content	Copies of your welcome series and best broadcasts.	Paste them into the Mailer's editor or Email Library.
Your forms	A screenshot of each form and its fields.	Rebuilt in the Forms tab (Part 9).
Your automations	A note or screenshot of each one: trigger, emails and waits.	Rebuilt in the Automations tab (Part 10).

> **Tip**
>
> Many platforms give you separate files for subscribed, unsubscribed and cleaned (bounced) people. Keep them separate. The subscribed file goes into the import, and the other files go into the suppression list.

Engagement Is Worth Its Own Column

The Mailer's engagement data starts with your first send from it, so engagement from your old platform does not arrive on its own. If your platform can filter by "opened or clicked in the last 90 days", export that group separately. You will add a tag to it in Part 4, and it becomes the first group you email in Part 12.

PART 4

Cleaning The File

Open the export in a spreadsheet such as Excel or Google Sheets. Ten minutes here makes the import perfect.

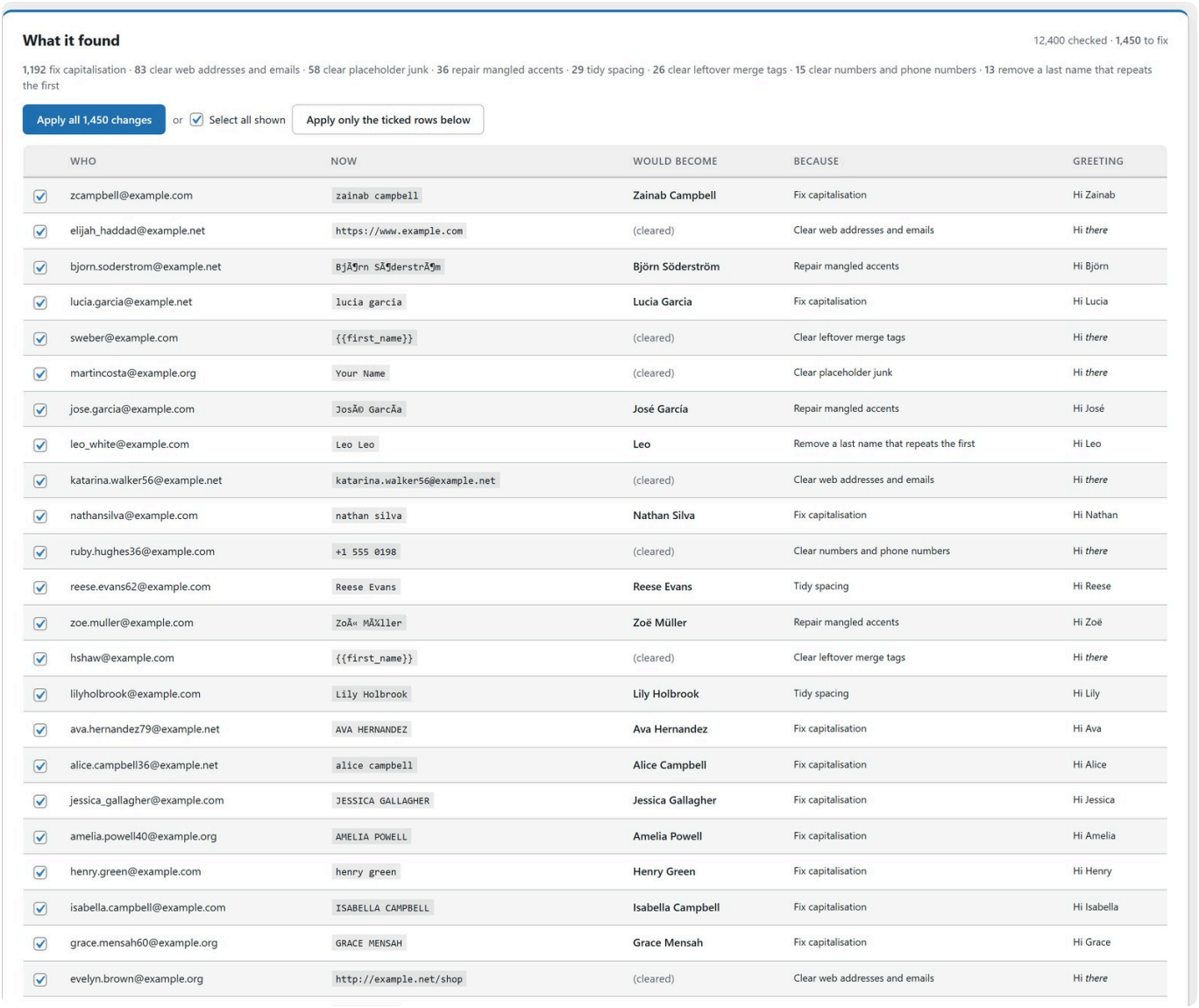
1. **Head the email column Email,** with one address per row.
2. **Name the other columns plainly.** The Mailer recognises these headings on its own: Firstname, Lastname, Name, Country, Signup Country, Tags, Status, Signup Date, Date Added, Unsubscribe Date, IP Address, Signup URL, Source, Phone and Company. Any other column becomes a custom field automatically, and you can change any mapping on the import screen.
3. **Put tags in one column,** separated by commas, for example *workbook, webinar, momentum-client*. There is no limit to how many tags one person can carry.
4. **Add an engagement tag.** If you exported your recently engaged people separately, add a column called Tags with a value such as *engaged-before-move* for them, or add it during their import.
5. **Remove obvious junk rows,** such as test addresses and your own team, if you do not want them on the list.
6. **Save as CSV UTF-8.** Both Excel and Google Sheets offer it. UTF-8 keeps accented names such as Zoë and José exactly right.

The Columns The Mailer Understands

Mailer Field	What It Does
Email	The only column you must map. Matching people is done on email.
First name, Last name	For personal greetings. A single Full name column is split into first and last.
Country	A country name or 2-letter code, stored as a code you can filter on.
Tags	Comma-separated tags, split into individual tags, merged with any tags the person already has.
Status	Subscribed, unsubscribed, bounced or unconfirmed, carried across (Part 7).
Signup date	Becomes the person's First Contact, so their real history comes with them.
Unsubscribe date	Marks the person as unsubscribed.
IP address, Signup URL, Source	Where and how they joined.
Score	A lead score or rating from your old platform, in up to three named score fields.
Custom field	Anything else. Name it once and it works as a merge code such as {{company}}, an audience filter and a form field.

Good to know

The Mailer's **Tidy Names** screen can clean names in bulk after the import, for example "SARAH" or "sarah" becoming "Sarah", with a preview of every change and an undo. So you do not need to fix names by hand in the spreadsheet.



What it found

12,400 checked · 1,450 to fix

1,192 fix capitalisation · 83 clear web addresses and emails · 58 clear placeholder junk · 36 repair mangled accents · 29 tidy spacing · 26 clear leftover merge tags · 15 clear numbers and phone numbers · 13 remove a last name that repeats the first

Apply all 1,450 changes | or | Select all shown | Apply only the ticked rows below

WHO	NOW	WOULD BECOME	BECAUSE	GREETING
zcampbell@example.com	zainab campbell	Zainab Campbell	Fix capitalisation	Hi Zainab
elijah_haddad@example.net	https://www.example.com	(cleared)	Clear web addresses and emails	Hi *there*
bjorn.soderstrom@example.net	BjÃ¶rn SÃ¶derstrÃ¶m	Björn Söderström	Repair mangled accents	Hi Björn
lucia.garcia@example.net	lucia garcia	Lucia Garcia	Fix capitalisation	Hi Lucia
sweber@example.com	{{first_name}}	(cleared)	Clear leftover merge tags	Hi *there*
martincosta@example.org	Your Name	(cleared)	Clear placeholder junk	Hi *there*
jose.garcia@example.com	JosÃ© GarcÃa	José García	Repair mangled accents	Hi José
leo_white@example.com	Leo Leo	Leo	Remove a last name that repeats the first	Hi Leo
katarina.walker56@example.net	katarina.walker56@example.net	(cleared)	Clear web addresses and emails	Hi *there*
nathansilva@example.com	nathan silva	Nathan Silva	Fix capitalisation	Hi Nathan
ruby.hughes36@example.com	+1 555 0198	(cleared)	Clear numbers and phone numbers	Hi *there*
reese.evans62@example.com	Reese Evans	Reese Evans	Tidy spacing	Hi Reese
zoe.muller@example.com	ZoÃ« MÃ¼ller	Zoë Müller	Repair mangled accents	Hi Zoë
hshaw@example.com	{{first_name}}	(cleared)	Clear leftover merge tags	Hi *there*
lilyholbrook@example.com	Lily Holbrook	Lily Holbrook	Tidy spacing	Hi Lily
ava.hernandez79@example.net	AVA HERNANDEZ	Ava Hernandez	Fix capitalisation	Hi Ava
alice.campbell36@example.net	alice campbell	Alice Campbell	Fix capitalisation	Hi Alice
jessica_gallagher@example.com	JESSICA GALLAGHER	Jessica Gallagher	Fix capitalisation	Hi Jessica
amelia.powell40@example.org	AMELIA POWELL	Amelia Powell	Fix capitalisation	Hi Amelia
henry.green@example.com	henry green	Henry Green	Fix capitalisation	Hi Henry
isabella.campbell@example.com	ISABELLA CAMPBELL	Isabella Campbell	Fix capitalisation	Hi Isabella
grace.mensah60@example.org	GRACE MENSAH	Grace Mensah	Fix capitalisation	Hi Grace
evelyn.brown@example.org	http://example.net/shop	(cleared)	Clear web addresses and emails	Hi *there*

Tidy names in bulk, with a preview.

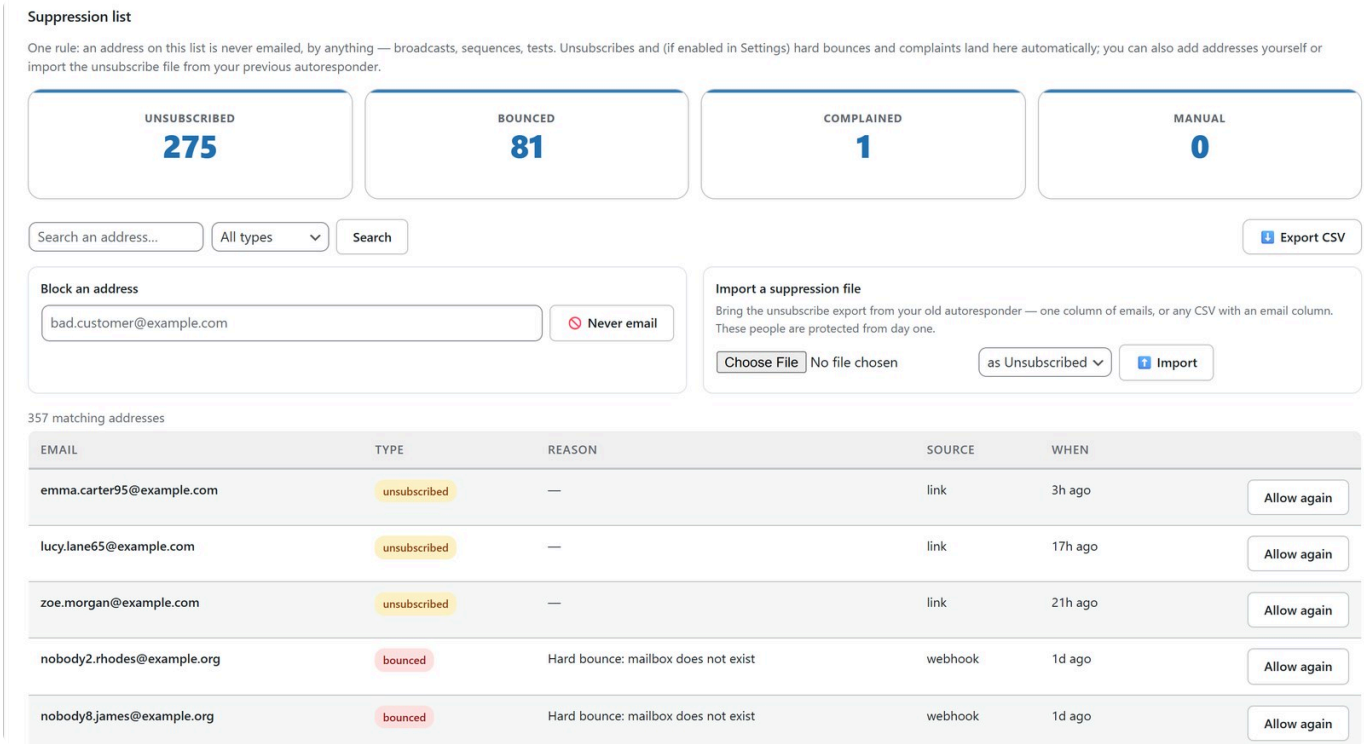
PART 5

Unsubscribes And Bounces First

This is the step that makes your move feel professional to every reader. Before you import a single subscriber, bring across everyone who ever unsubscribed, bounced or complained. From that moment they are protected: no import, list, segment or automation can ever email them.

1. Go to **AiX Mailer**, then **Deliverability**, and scroll to **Suppression list**.
2. Click **Import** and choose your unsubscribed file. Any CSV layout works, because the email column is found automatically.
3. Choose the type the addresses are recorded as: unsubscribed, bounced or complained.
4. Repeat for your bounced or cleaned file, and for complaints if you have them.

The suppression totals at the top update straight away, split by reason. You can search any address, add one by hand with **Never email**, and export the whole list as a CSV any time.



Import your unsubscribes and bounces first.

Why first?

When you import your subscriber file in the next part, anyone on the suppression list is skipped automatically and counted separately as Suppressed. So even if an old export still includes someone who left, they never come back onto your list.

Your List, On Your Own Site, Unlimited

The ResultsAiX Mailer brings your subscribers, tags and history into your own WordPress, with Safe Mode, suppression and a silent import lock protecting every step of the move.

See ResultsAiX Mailer →

PART 6

Importing Into The Mailer

The import has three steps, shown along the top of the screen: **Upload CSV**, **Map columns** and **Import**. Go to **AiX Mailer**, then **Imports**.

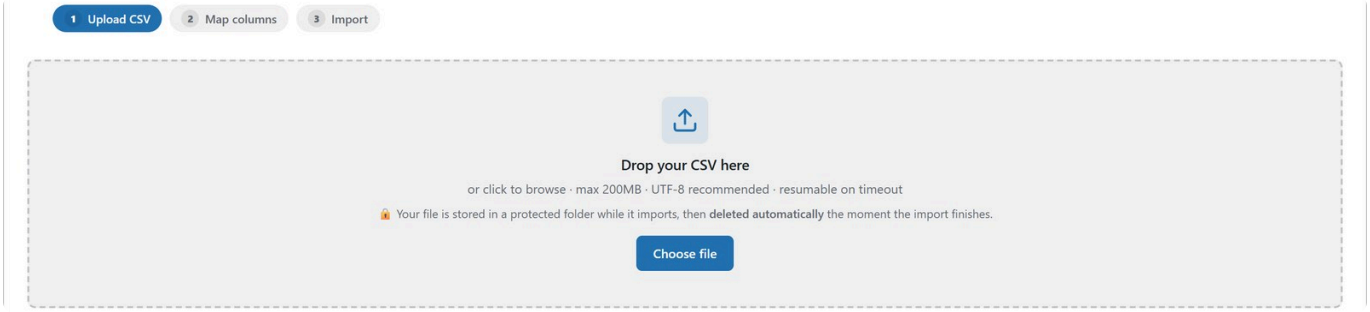


▶ **Watch the video**

ResultsAiX Mailer: Importing Your Lists By CSV Or Automatically

Step 1: Upload Your CSV

Drop your CSV onto the upload area, or click **Choose file**. Files up to 200MB are fine, and large files upload in small pieces with a progress bar, whatever your host's upload limit. Your file is kept in a protected folder only while it imports, then deleted automatically.



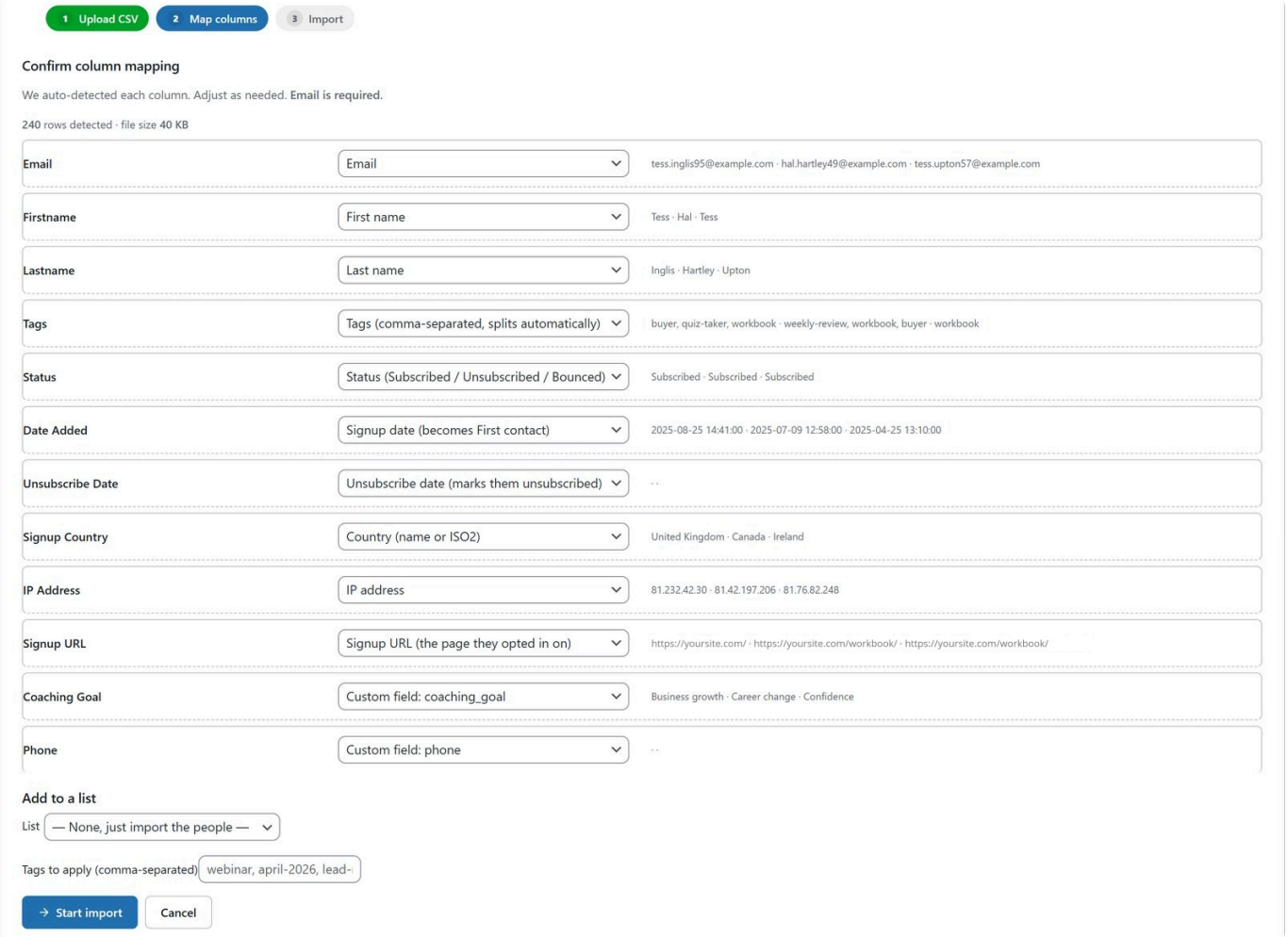
Step 1: drop your CSV.

Step 2: Map Your Columns

The Mailer reads your headings and maps each column for you. Glance down the list: every column shows where it is going, and you can change any of them with its dropdown.

- **Email** must be mapped. Everything else is optional.
- **Add A Custom Field** sits at the bottom of every dropdown. Give it a name (for example Aff ID or Coaching Goal) and it is created on the spot, and remembered for every future import.
- **Ignore this column** skips anything you do not want.

Below the mapping, choose a **list** to add everyone to (an existing list, a new one you name right there, or none), and any **tags to apply** to everyone in this file. Brightline Coaching adds them all to a new list called Moved From Old Platform with the tag *moved-in*, which makes them easy to find later.



Step 2: check where every column goes.

Step 3: Watch It Import

Click **Start import**. A progress bar fills as the rows go in, with five counters:

Counter	What It Means
Processed	Rows read from your file so far.
New people	People whose email was not in your Mailer before.
Already on your list	People you already had. Their details are refreshed and their tags merged, never duplicated.
Suppressed	People on your suppression list, skipped on purpose (Part 5).

Errors	Rows that could not be read, usually a malformed email address.



Step 3: watch it import.

Big files run in the background in chunks. You can close the tab and the import carries on, picked up by WordPress cron. Keep the tab open, or press **Speed up from this tab** on the Imports screen, and it runs at full speed. If many rows in a row cannot be read, the import pauses itself and tells you why, so you can correct the mapping and resume.

> **Tip**
>
> Import a small test file first: twenty rows, including yourself. Check those people on the Subscribers screen, then import the full file. Re-importing is always safe, because people are matched on email and nobody is ever added twice.

PART 7

Status, Consent And History

A good move brings across not just people, but the right status for each one and the history that goes with them.

Status Comes With Them

In Your Export	In The Mailer
Subscribed, Active, Confirmed	Active, ready for your broadcasts.
Unsubscribed, or any unsubscribe date	Unsubscribed, and never emailed.
Bounced, Undeliverable	Bounced.
Unconfirmed, Pending	Pending, which is never included in broadcasts.

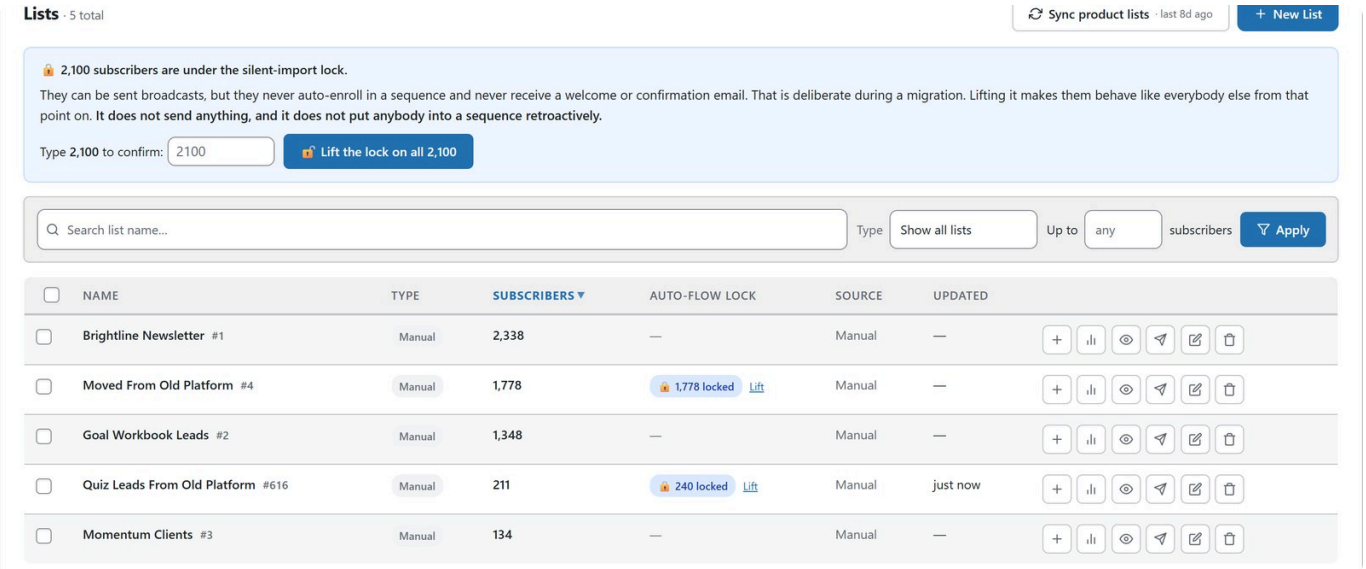
Each person also keeps their real sign-up date as **First Contact**, their sign-up IP, and their source. Someone who joined four years ago shows four years ago, not the day you imported them.

The Silent Import Lock

Here is a protection that runs quietly for as long as you need it. Everyone created by an import is flagged with the **silent import lock**. A locked subscriber:

- is never automatically entered into an automation,
- never receives a welcome email for joining a list,
- never receives a double opt-in confirmation request.

They do receive the broadcasts you choose to send them, because that is your decision. So you can build your welcome automation the day after the move, and only genuinely new sign-ups from your forms receive it. The Safety tab shows how many people carry the lock, and the Lists tab has a per-list count with a **Lift** button for when you want an imported list to take part in automations. Lifting it only affects what happens from then on.



Imported lists carry the silent import lock.

Consent You Already Hold

If you collected consent on your old platform or on paper, record it in the Mailer too. On the **Subscribers** screen, filter to the people concerned (for example by the *moved-in* tag), use **Select All Matching**, and choose **Mark as consented**. Each person's profile then shows consent on record. New sign-ups record their own consent when they tick the consent box on your forms.

> **Good to know**
>
> Under **Settings**, open and click tracking can be on for everyone, on only for subscribers with consent on record, or off. GDPR mode tracks only people who gave consent, enforces the consent box and confirms every new sign-up by email. Choose what fits the rules where you and your readers are.

PART 8

Checking Your Import

Five minutes of checking gives you complete confidence in your new list.

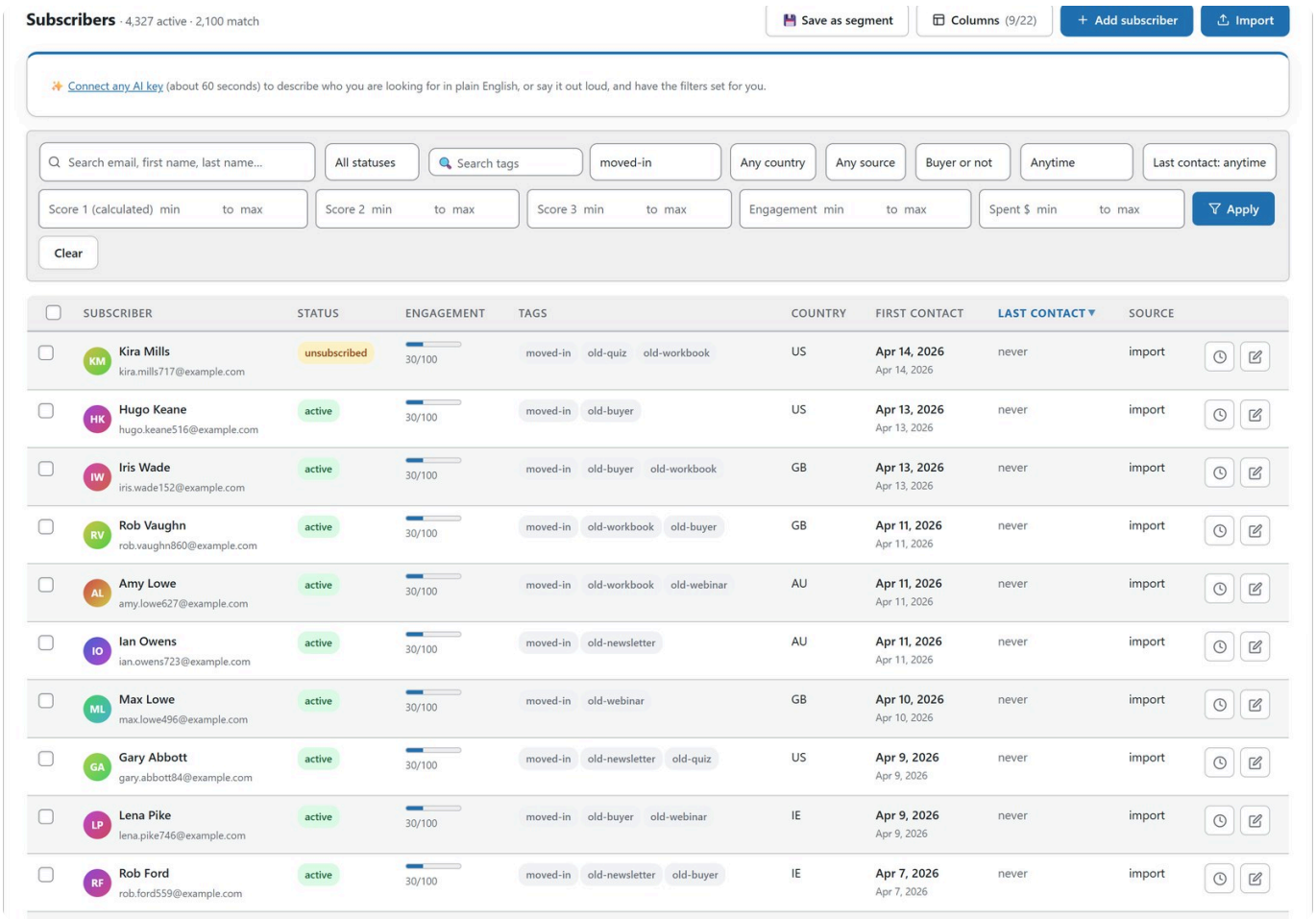
1. **Read the Recent imports table** on the Imports tab: the file, the list, and how many were new, updated and errored.

2. **Open the Subscribers screen** and filter by your import tag. Check a handful of people you know: name, tags, country and First Contact.

3. **Open one profile.** Click a name to slide open the full profile, with their details, tags, custom fields and timeline.

4. **Compare totals.** Active subscribers in the Mailer should match the subscribed count from your old platform, less anyone on your suppression list.

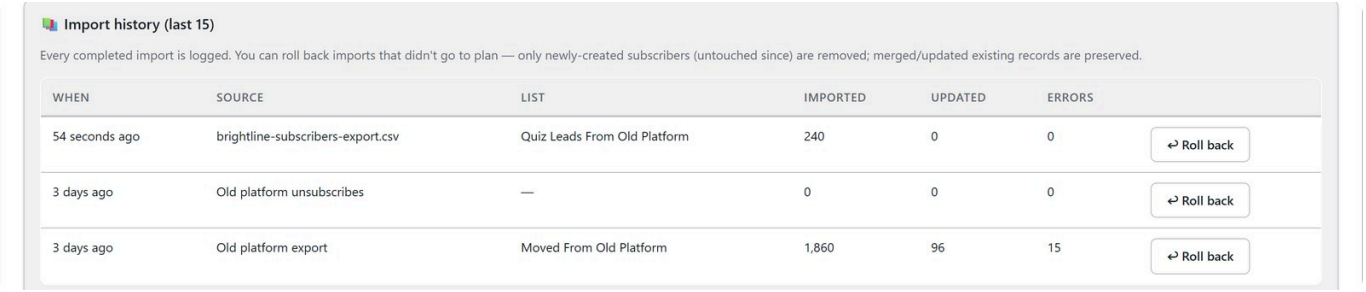
5. **Choose your columns.** The Columns button lets you show up to seventeen columns, including tags, engagement, country, first contact and last contact. Your choice is remembered.



Your imported people, tags and all.

Undo Is One Click

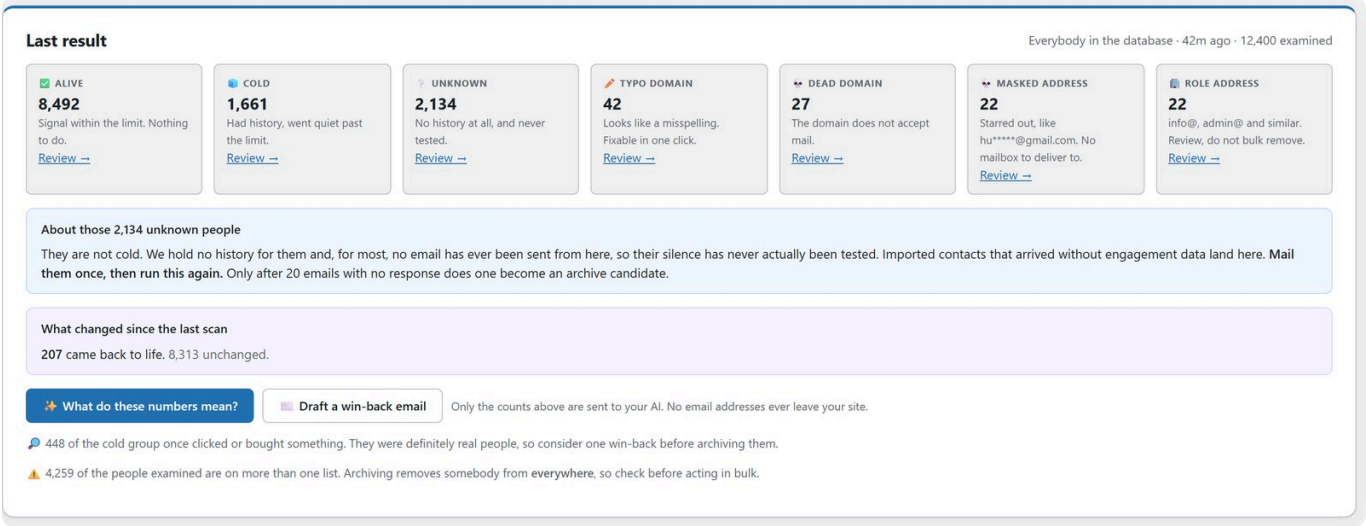
If a file went in with the wrong mapping, open the **Safety** tab, find it in the import history and click **Roll back**. It removes only the people that import created who have never been emailed, never opened or clicked, and not been added to another list since. Anyone who existed before is left exactly as they were. Then fix the mapping and import again.



Every import, with a one-click Roll back.

Verify Leads Before Your First Send

The **Verify Leads** screen checks your whole list on your own site and sorts it into clear groups: alive, cold, unknown (no history yet, which is where a freshly moved list lands), typo domains such as gmial.com with a one-click spelling fix, dead domains, masked addresses and role addresses such as info@. Fixing typo domains alone often recovers real people.



Verify Leads before your first send.

See ResultsAiX Mailer →

PART 9

Rebuilding Your Forms

Your sign-up forms are how new people join, so rebuild them early and point them at the Mailer. Go to **AiX Mailer**, then **Forms**, and click **New Form**.

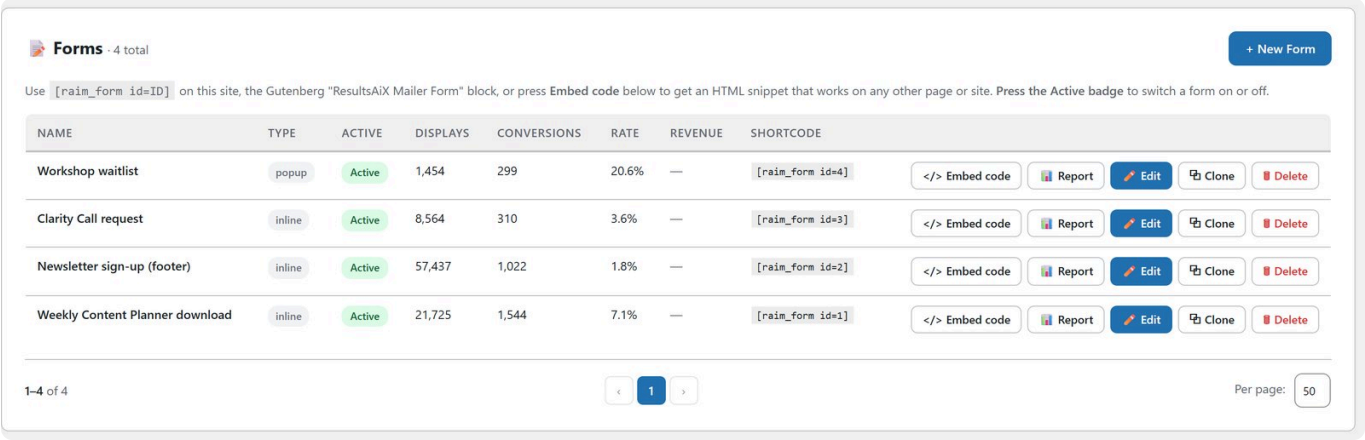
1. **Design it** with the live preview beside the editor: heading, button text, colours, layout and width.

2. **Choose the fields.** Email is required. Add first name, any custom field and, if you want it, a GDPR consent checkbox with your own wording.

3. **Choose what happens on submit:** which lists they join, which tags they get, and whether to show a message or go to your thank-you page.

4. **Choose the opt-in policy:** follow the list setting, force double opt-in on, or force it off. A lead magnet download is a natural place for instant access.

5. **Place it.** Use the shortcode, the ResultsAiX Mailer Form block in the WordPress editor, or the HTML embed code, which works in any page builder and even on another website.



Your forms, rebuilt and counting sign-ups.

Each form counts its displays and conversions, so you see your conversion rate from day one. For popups, slide-ins, sticky bars and content lockers, ResultsAiX Engage is the dedicated tool, connected to the same Mailer lists and tags.

> **Tip**
>
> Give each form its own tag, such as *joined-workbook-page*. Months from now you will know exactly which page brought in your best customers.

See ResultsAiX Engage →

PART 10

Rebuilding Your Automations

Automations are the emails that run without you: your welcome series, your lead magnet delivery, your follow-ups. Rebuild them on the Mailer's visual canvas under **Automations**, or start from one of the **25 Prebuilt Automations** and make it yours.

Match Each Old Trigger To A Mailer Trigger

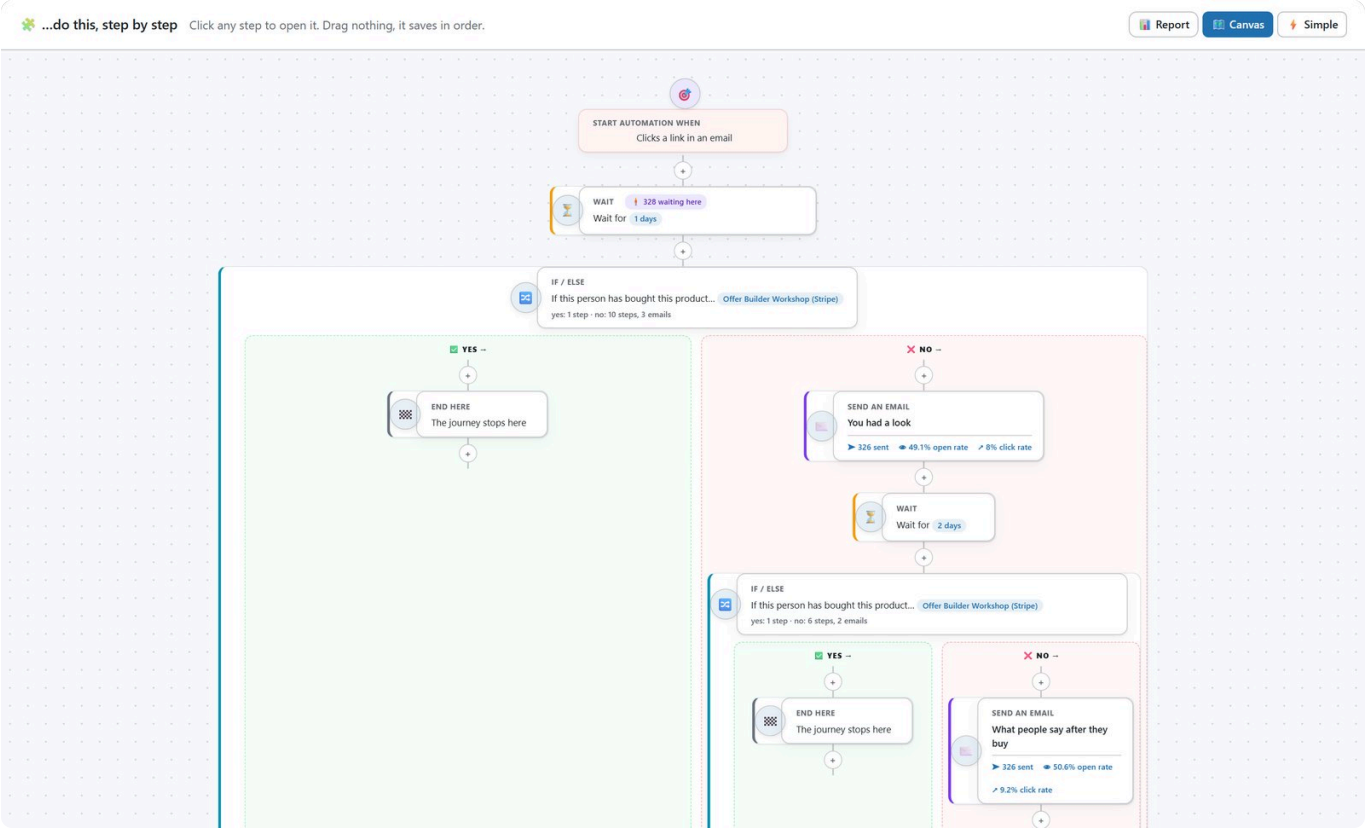
Your Old Automation Starts When	Mailer Trigger
Someone joins a list	Joins a list (any list, or one list)
Someone confirms their subscription	Confirms their subscription
A tag is added	Gets a tag
A form is submitted	Submits a form
A purchase is made	Makes a purchase (optionally one product)
Someone opens an email	Opens any email
Someone clicks a link	Clicks a link in any email (optionally a link containing a phrase)
You add people yourself	Manually enrolled only

Build It, Step By Step

1. Click **New Automation** and give it a name you will recognise.
2. Pick the trigger from the table above.
3. Add steps: **Send An Email**, **Wait**, **If / Else** branches and tags. Paste in your old emails and polish them with the AI if you like.

4. Use **Send a test** from inside the automation to see each email in your inbox.

5. Set it to Active. From then on, every new person who matches the trigger enters at step one.



Rebuild each automation on the canvas.

People Who Were Part-Way Through

Thanks to the silent import lock, imported people never fall into a new automation by accident. When you do want someone in a flow, for example everyone who was half-way through your old welcome series, filter them on the Subscribers screen, tick them, and choose **Enroll In Automation**. It is always your explicit choice.

See ResultsAiX Mailer →

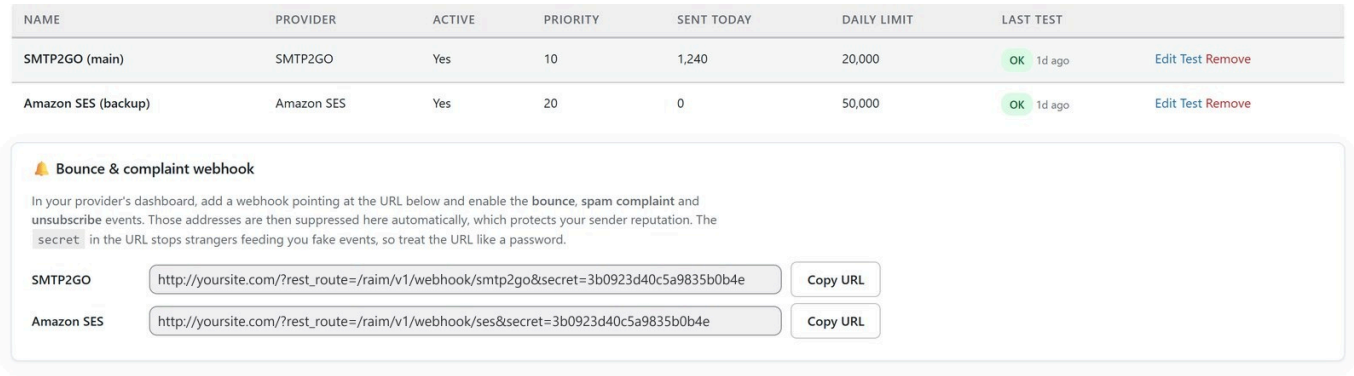
PART 11

Connecting Your Sending Service

The Mailer hands your emails to a professional sending service, which delivers them. It works with SMTP2GO, Amazon SES, Brevo, Mailgun, Postmark, SendGrid, Resend, SparkPost, Mailjet, Elastic Email,

your own SMTP server and WordPress mail. Guide 2 helps you choose, and Guide 3 walks through SMTP2GO from sign-up to first send.

1. Go to **AiX Mailer**, then **Sending**, and click **Add Sender**.
2. Choose your service, paste its API key or SMTP details, and save.
3. Click **Test**. A test email arrives in your inbox within moments.
4. Copy the **bounce and complaint webhook** URL shown below the table into your service's webhook settings, with the bounce, spam complaint and unsubscribe events switched on. From then on, bounces and complaints are suppressed automatically.
5. Add a second service if you like, with a higher priority number, as an automatic backup.



Connect your service and its webhook.

Then run the check on the **Deliverability** tab: SPF, DKIM, DMARC and MX for your sending domain, with a score out of 100. When it passes, switch Safe Mode off on the Safety tab. You are ready to send.

Move In Once, Send Without Limits

Broadcasts, automations, forms, segments and reports, all on your own WordPress, with unlimited subscribers and your choice of sending service.

Explore ResultsAiX Mailer →

PART 12

Your First Weeks Of Sending

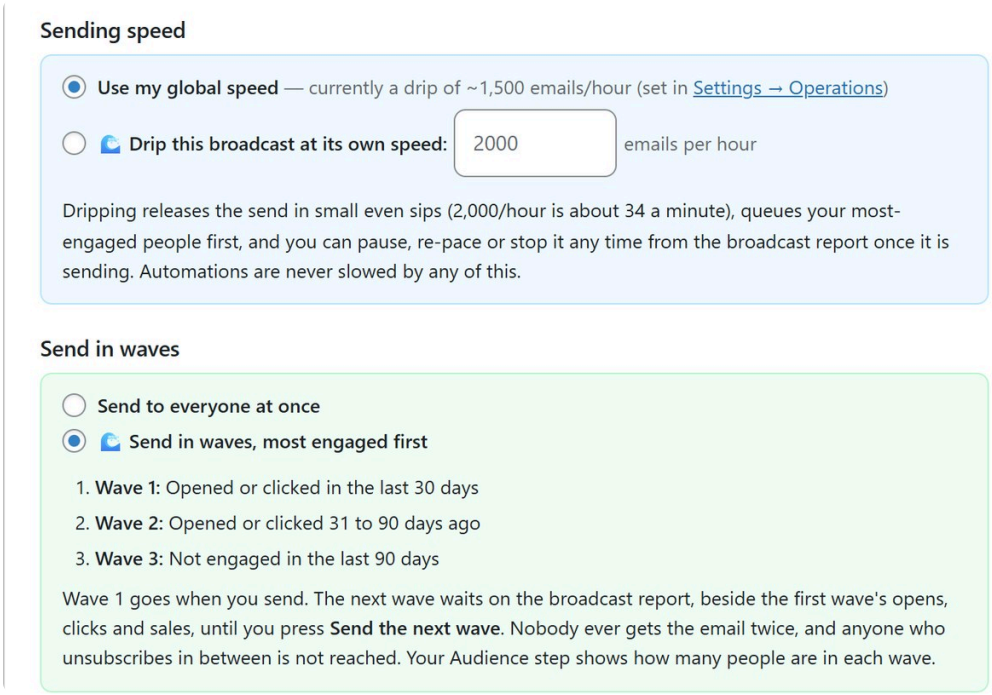
Your list knows you, but your new sending setup is new to inbox providers. The best first month starts with your most engaged readers and grows week by week. Guide 4 explains the why in detail. Here is the how, for a moved list.

Who To Email First

Everyone you import starts with no Mailer engagement, because engagement is counted from emails sent by the Mailer. So you choose the first group yourself, from what you know:

- **First:** the people tagged *engaged-before-move* (Part 4), your newest sign-ups, and your customers.
- **Next:** everyone else who joined in the last year.
- **Gradually:** older and quieter people, a few hundred at a time.

As soon as people open and click your Mailer emails, the Mailer takes over: every broadcast's Audience step shows who opened or clicked in the last 30 days, 31 to 90 days ago, or not in 90 days, and **Send in waves, most engaged first** sends to them in that order, with you deciding when each next wave goes.



Your first sends: engaged people first.

Your Pace

Set a steady pace under **Settings**: an hourly ceiling for broadcast emails (for example 1,500 an hour), and a sending window if you want one. On the Sending tab, tick **Warm up** on your new connection and pick a pace (Conservative, Standard, Fast or Custom), and the queue spreads big sends over the days for you.

Week	Who Receives Your Emails	What To Watch
Week 1	Your engaged-before-move tag, new sign-ups and customers. A warm "we have moved, here is what to expect" email, then your best content.	Replies, opens and your own test copies arriving in the inbox.
Week 2	Everyone who opened in week 1, plus people who joined in the last year, in waves.	List Health: bounces under 2%, complaints under 0.1%.
Week 3	Your regular sends, plus 200 to 300 older people mixed into each.	Which older batches open, so they can grow.
Week 4	Your normal rhythm to engaged and warm people, with a short re-engagement series for the quiet group.	Google Postmaster Tools steady and Compliant.

WEEK 1

Say Hello

- Safe Mode off, test send received
- "We have moved" email to your best readers
- Tag openers and clickers
- Answer every reply

WEEK 2

Widen Gently

- Send in waves, most engaged first
- Add last year's sign-ups
- Read List Health after each send
- Welcome automation live for new sign-ups

WEEK 3

Bring In The Older List

- 200 to 300 older people per send
- Run Verify Leads on the cold group
- Grow the batches that respond
- Start your weekly broadcast rhythm

WEEK 4

Your New Home

- Regular sends from the Mailer
- Re-engagement series for the quiet group
- Old platform in read-only mode
- Weekly look at Postmaster Tools

Tip

Your first email from the Mailer is a lovely chance to reconnect. Tell readers you have moved your email to your own website, remind them what they will get and how often, and ask one simple question they can reply to. Replies are one of the best signals a new sending setup can earn.

PART 13

Running Both Side By Side

Many people keep their old platform open for a few weeks while the Mailer takes over. It is a calm way to move, and it lets you switch at your own pace.

Job	How To Handle It During The Move
New sign-ups	Point your forms at the Mailer as soon as they are rebuilt (Part 9). From that day every new subscriber joins your own list.
Broadcasts	Send each broadcast from one platform only, so nobody receives it twice. Move broadcasts to the Mailer in the order of Part 12.
Automations	Let people who are part-way through an old automation finish there. New sign-ups enter the Mailer's version.

Unsubscribes	Before you close the old account, export its unsubscribes once more and import them into the Mailer's suppression list, so everyone who left during the move stays out.
Late sign-ups	Export anyone who joined the old platform after your main export and import them too. Re-importing is safe, because people are matched on email.
Other platforms	If you collect leads or sales on other platforms, WP Sync can pour new subscribers straight into your Mailer lists from its connected apps, with a one-click backfill of everyone already on a source list. Synced contacts arrive under the silent import lock too.

See WP Sync →

When To Close The Old Account

Once your forms point to the Mailer, every automation has a Mailer version, and a few weeks of broadcasts have gone out from your own site, do a final export of everything (including unsubscribes) for your records, import the last unsubscribes, and close the old account. Your list is home.

PART 14

Your Moving-Day Checklist

Tick these off in order. Each one is a small job, and together they are the whole move.

Before Moving Day

Check	Done When
Mailer installed and licensed	The licence panel under Settings shows Active.
Sender profile complete	From name, From email on your domain, Reply-To and postal address set.

Sending service set up	Your domain is verified in the service, and the Mailer's test arrives.
Domain authenticated	The Deliverability tab shows SPF, DKIM, DMARC and MX passing.
Safe Mode on	The Safety tab shows Safe Mode on.

On Moving Day

Check	Done When
Everything exported	Subscribed, unsubscribed, bounced and complaint files saved, plus your engaged group.
File cleaned	Plain headings, tags in one column, saved as CSV UTF-8.
Suppression imported first	Unsubscribed, bounced and complained addresses are in the suppression list.
Test import	A 20-row file imported and checked.
Full import	Recent imports shows the file with new, updated and error counts.
Totals match	Active subscribers match your old subscribed count, less suppressed people.
Consent recorded	Mark as consented used for people whose consent you hold, if that applies to you.

After Moving Day

Check	Done When
Forms rebuilt	Every sign-up form on your site points to the Mailer.
Automations rebuilt	Your welcome series and follow-ups are Active in the Mailer.
Webhook connected	Bounce, complaint and unsubscribe events switched on at your sending service.
Postmaster Tools	Your domain is verified at postmaster.google.com.
Pace set	Hourly ceiling set, and warm-up on for a new connection.
Safe Mode off	Switched off on the Safety tab when you are ready to send.
First "we have moved" email	Sent to your most engaged people first.
Final unsubscribe import	The old platform's last unsubscribes imported before you close it.

PART 15

Questions People Ask

Will my subscribers have to confirm again?

No. Imported people are never sent a double opt-in confirmation request. They keep their status from your old platform and receive the broadcasts you choose to send them.

Do my tags come across?

Yes, in full. A comma-separated tags column is split into individual tags with no limit per person, and importing merges with any tags someone already has.

Can I import more than one file?

Yes, as many as you like. People are matched on email, so someone who appears in two files is one subscriber with the tags from both.

How big a list can I move?

Any size. Subscribers are unlimited, files up to 200MB upload in small pieces, and big imports run in the background in chunks.

Will my automations start emailing everyone I import?

No. The silent import lock keeps imported people out of automations, welcome emails and confirmation requests. You add them to an automation yourself when you want to, or lift the lock on a list.

I also sell on other platforms. Can those buyers join my list automatically?

Yes. WP Sync connects other platforms to your Mailer lists, so new buyers and leads flow in on their own.

Every Tool On One Key

The ResultsAiX Bundle puts the Mailer, WP Sync, Engage and every other ResultsAiX plugin on one licence key, so your list, funnels and sales all live on your own site.

See The ResultsAiX Bundle →

PART 16

What To Read Next

This is Guide 5 of 15 free AiX Training Guides, each with its own free PDF. With your list moved, Guide 6 shows you the automations that turn it into a business that runs while you sleep.

1 Getting Started With ResultsAiX →
2 The Complete SMTP Service Guide →
3 Setting Up SMTP2GO From Start To Finish →
4 Email Deliverability: Reach The Inbox →
5 Moving Your Email List To The AiX Mailer *(you are here)*
6 Email Automations Playbook →
7 How To Grow Your Email List With ResultsAiX →
8 How To Build Sales Funnels, Start To Finish →
9 How To Move Your Membership To ResultsAiX →
10 Running Customer Support With AI →
11 Launching A Product With Affiliates And JV Partners →
12 ResultsAiX For 6 And 7 Figure Marketers →
13 WP Conversion Tracker: Track Every Click And Every Sale →
14 WP Sync: Connect All Your Tools Without A Monthly Automation Bill →
15 Automated Webinars That Sell →

Your First Step, Today

Log in to your current email platform and export three files tonight: your subscribers, your unsubscribes and your bounces. Save them somewhere safe. With those in hand, the rest of the move is a few calm sessions on your own site.

Keep Going

All 15 AiX Training Guides are free on the ResultsAiX blog, each with its own PDF.

Docs: resultsaix.com/docs · Training videos: resultsaix.com/training

ResultsAiX.com

by Kevin Fahey