Zoho Corporation

Create an email campaign

Email marketing is considered the simple and most effective method to reach out to your leads and contacts. The best part is that the return on investment (ROI) is much higher than other marketing channels making it the most affordable way of marketing.

To create and send an email campaign, you'll go through following steps,

1. From the *Navigation* toolbar, select **Campaigns** and choose **Email Campaigns**.
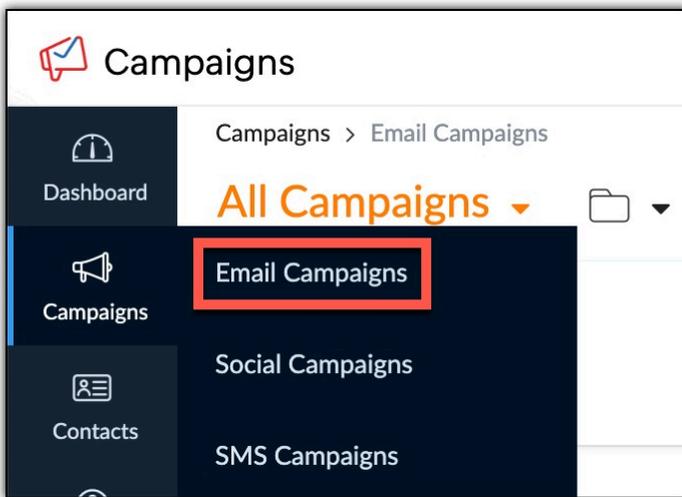
2. Click **Create Campaign** on the top-right and select **Regular email**.
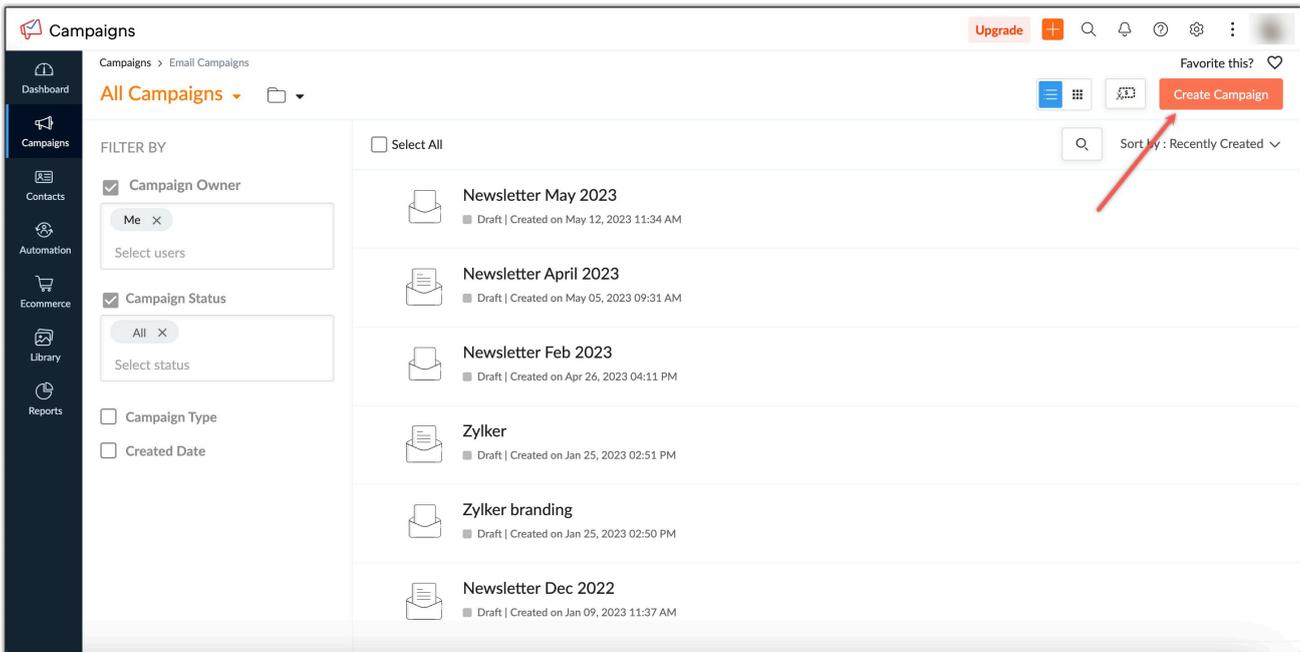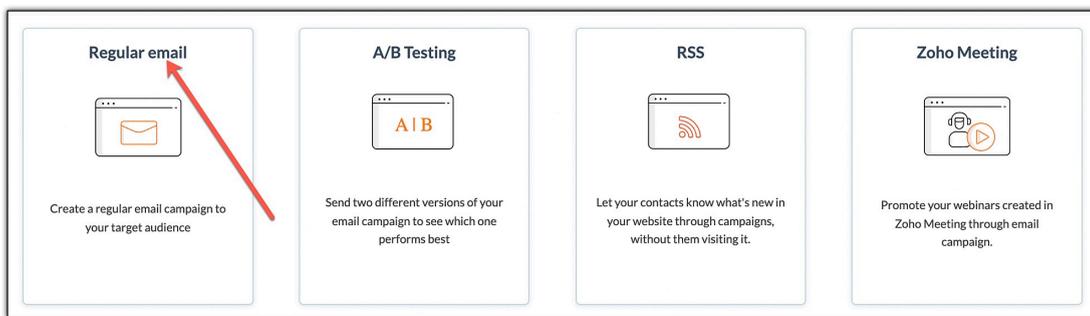
3. Add a campaign name to distinguish it from the other campaigns. If you only have the default topic associated with your account, you can directly click **Save and Proceed**.
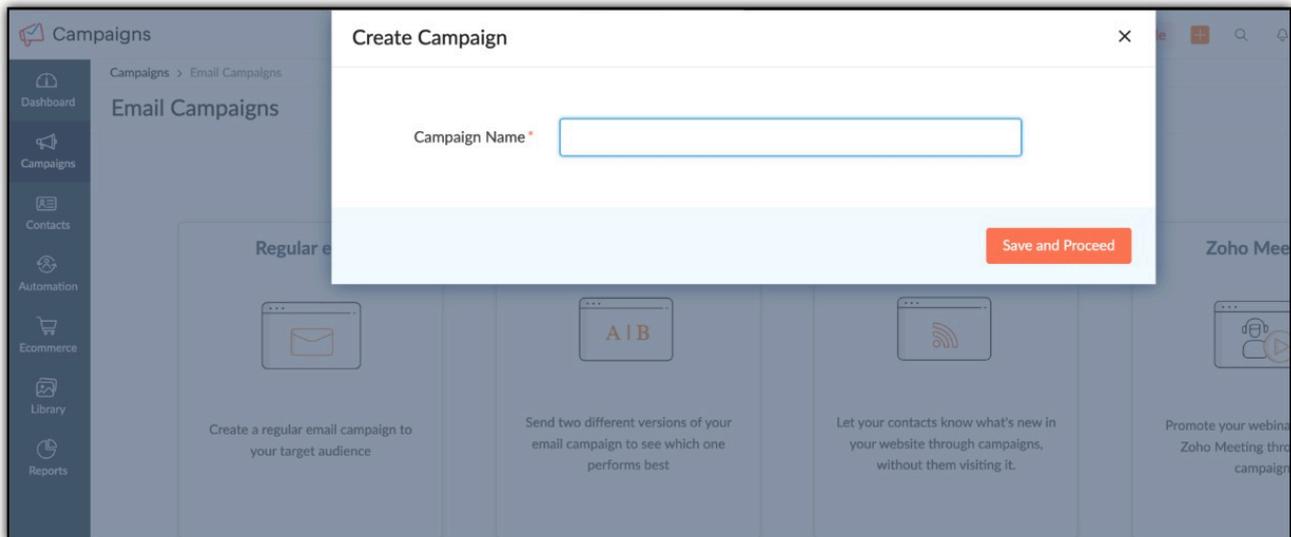
4. However, if you have created multiple topics, select the relevant topic from the dropdown. Selecting a topic helps your contacts know exactly what they will receive from your newsletters. Some common examples of topics with a brief description are:

   - **Product Updates** (Getting your contacts started with your product and feature updates)
   - **Latest news, offers, and discounts** (To inform your contacts about promotions and advertisements related to any new offers, sales, or discounts)
   - **Conferences and events** (To inform your contacts about user conferences and promotional events about any upcoming features or new products)
   - **Weekly Digest** (To let your contacts know about weekly updates regarding the latest and upcoming features in your products)

5. Click **Save and Proceed**.
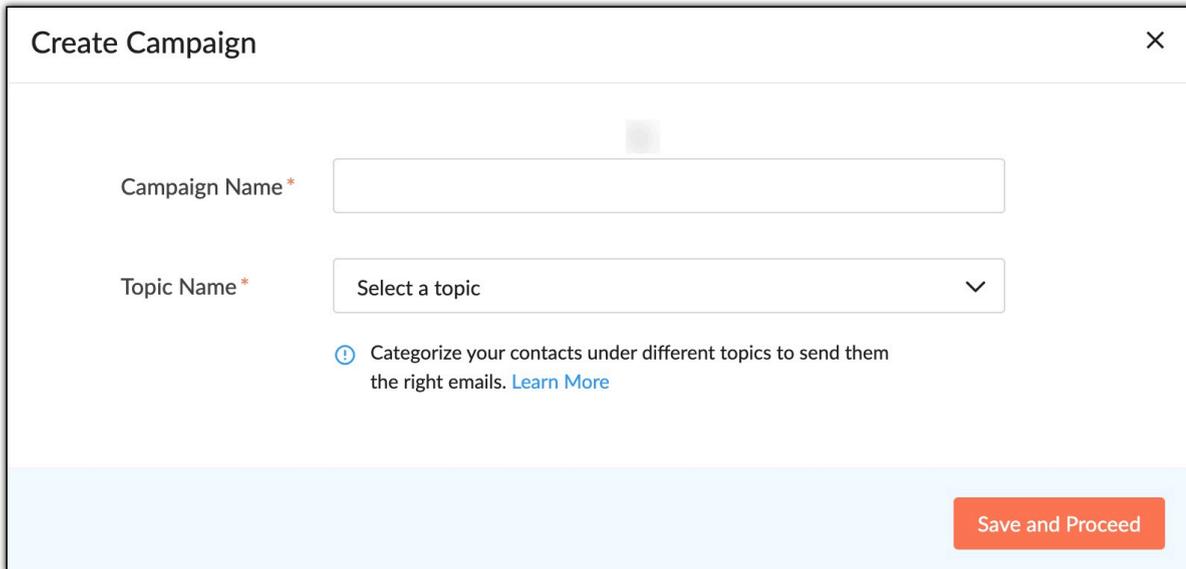
6. Click the **Edit** icon on the top-left in case you want to change the name of your campaign . Click **Add to folder** to add the campaign to a folder if you want.
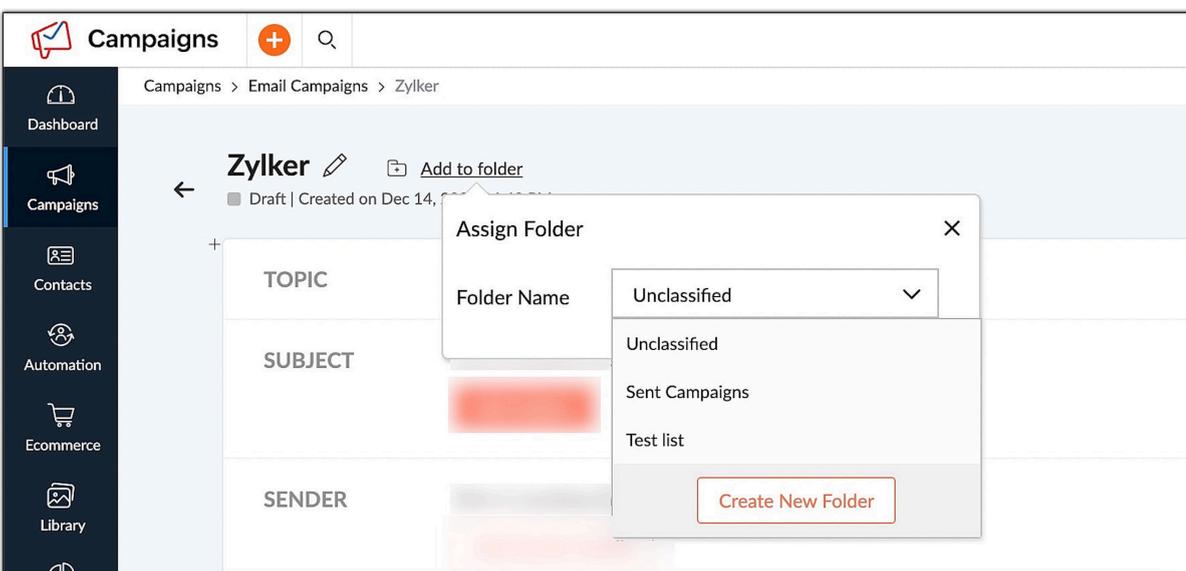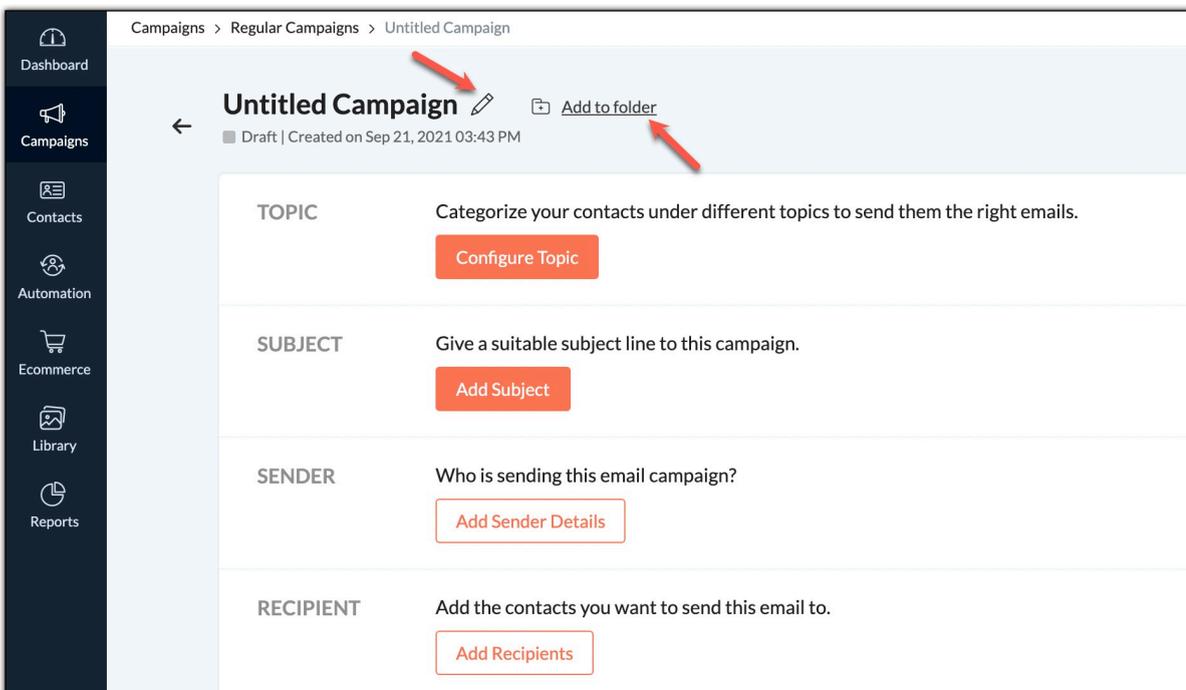
7. Click **Add Subject.** Enter the subject line and the pre-header text of the email and click **Save**.
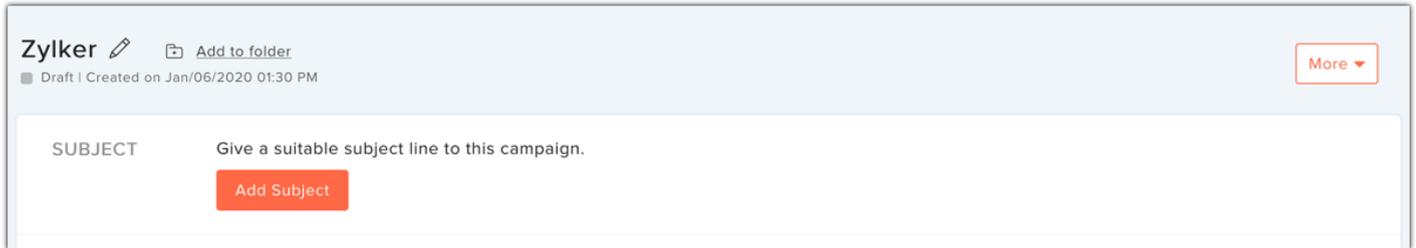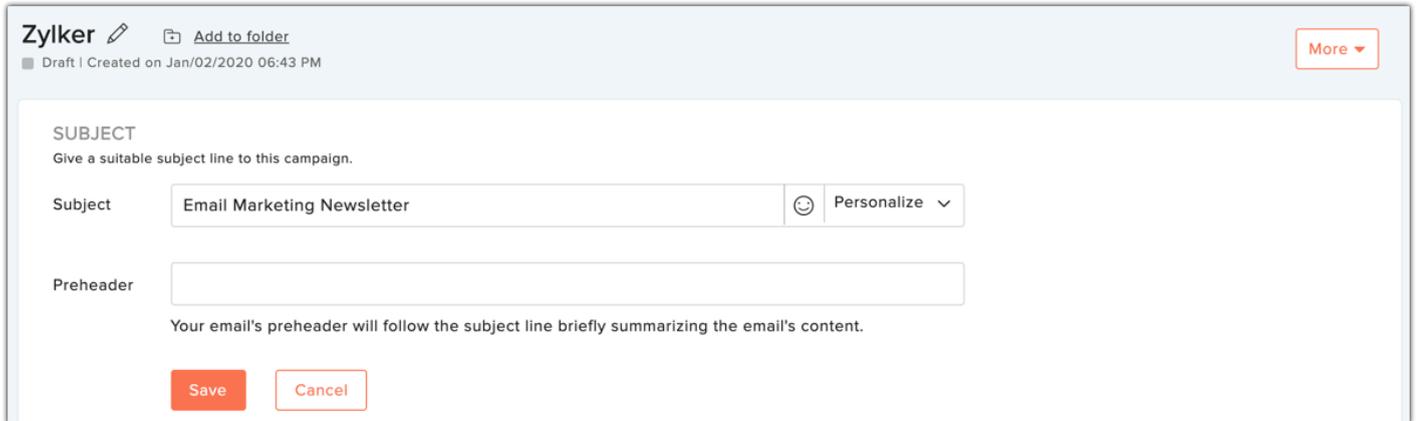
8. Click **Add Sender Details** and enter the sender name.
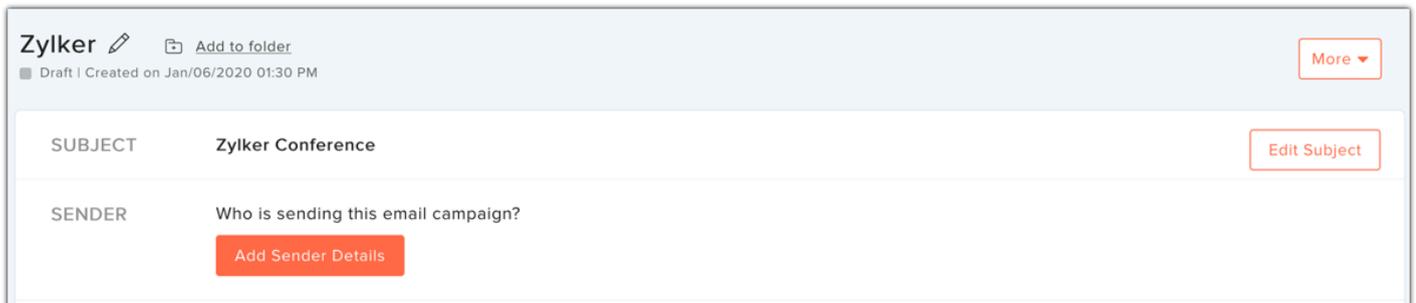
You can also personalise the sender details by selecting either of the following:

(a) **Same sender for all** – You can enter the sender name and select the sender email address from the dropdown or add a new one.
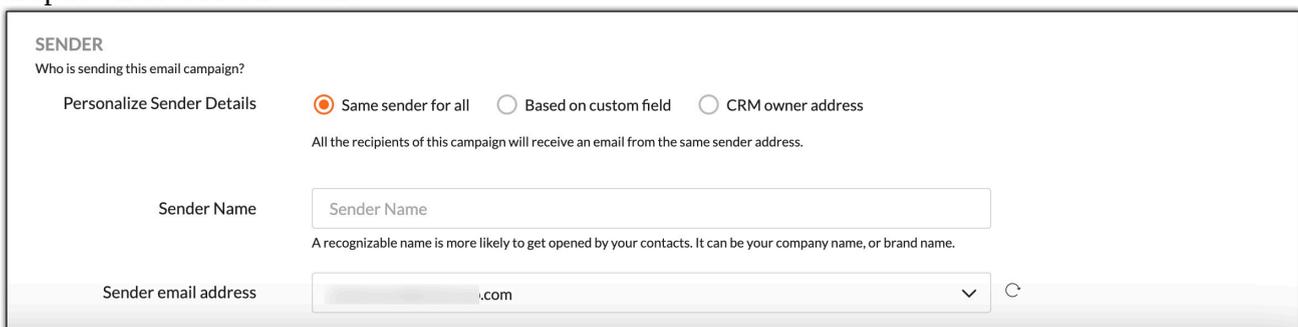
(b) **Based on custom field** – When you import contacts, the contact owner's details (name, email address, etc.) will be stored in specific fields. You can select the corresponding fields from the dropdown and add them as merge tags. This way, your recipients will receive emails only from the respective contact owners, helping to maintain the credibility of your emails. Emails from known sources are more likely to generate higher engagement. You can provide the alternate sender name and email address if any of these fields do not have any value.

(c) **CRM owner address** – You'll be able to view this option only if you have an active Zoho CRM integration associated with your account. If you select this option, the name and email address of the contact owner in CRM will be automatically fetched. In case the contact owner's details are not fetched for any contact, they'll receive the email from the alternate sender name and email address.

9. Click **Show reply-to details**. Enable reply tracking, enter a reply-to address and click **Save**.

10. Click **Add Recipients** to select the contacts who will receive this email campaign.

11. Select either mailing lists or segments and click **Save.**

RECIPIENT ✕

Choose the contact lists or segments you wish to send your email campaign to.

👤 Exclude Contacts

| Lists | Segments |

🔍   ＋

☐ **My Lists**   Recently Created ⌄

☑ New Test Contacts (5)   👤⊕

Selected Lists (1)   Selected Segments (0)

🖼 New Test Contacts ✕

Save   Cancel

RECIPIENT ✕

Choose the contact lists or segments you wish to send your email campaign to.

👤 Exclude Contacts

← Back to Options

| Segments | Bulk Segments |

☐ **My Segments** ⌄   **Recently Created** ⌄   🔍   ╪

☑ Canada contacts

☐ teste

☑ newsletter

☐ jnjn

☐ test_Signup

Selected Segments (2)

🖼 Canada contacts ✕   🖼 newsletter ✕

Save   Cancel

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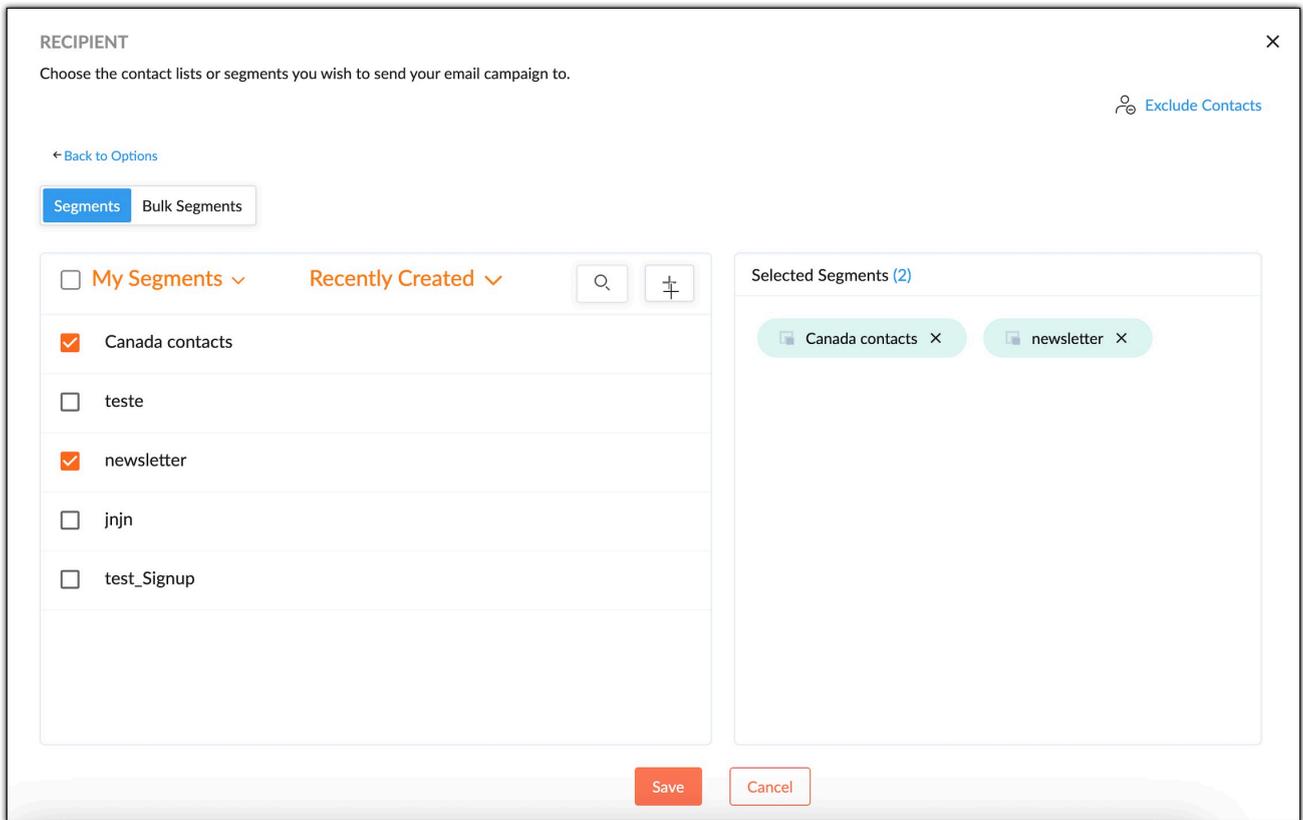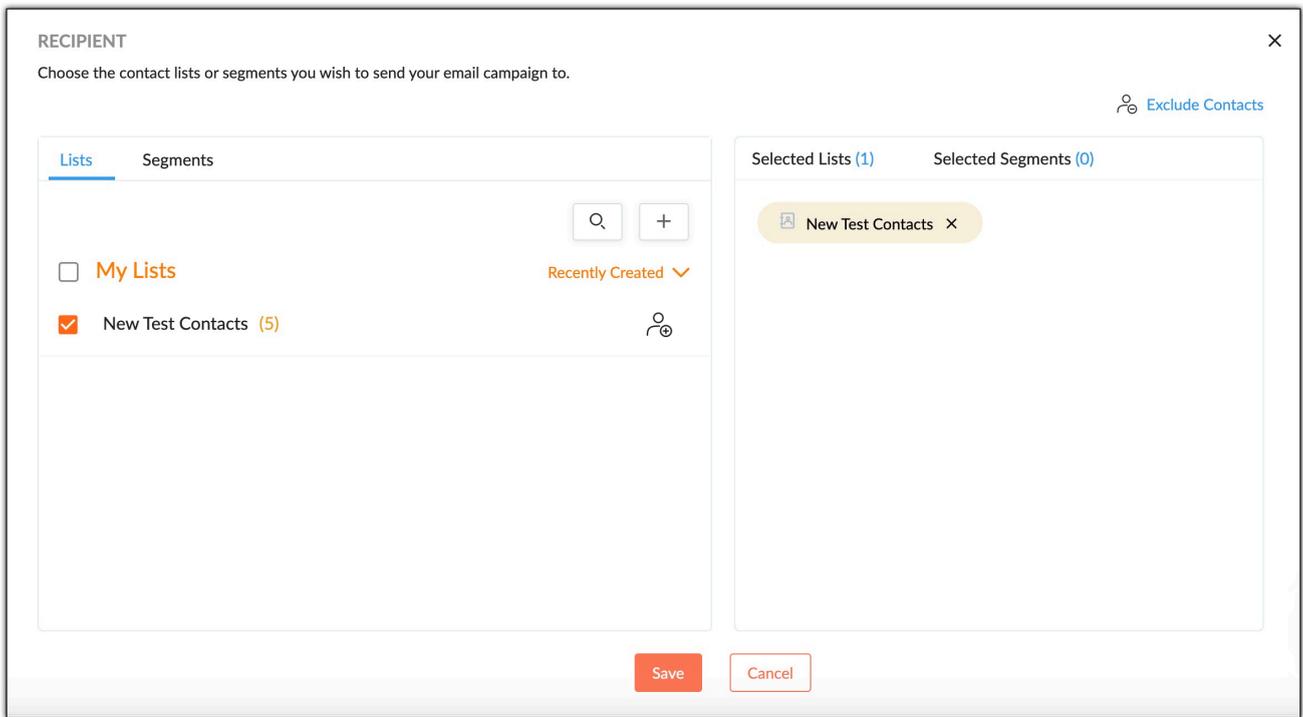
12. Click **Exclude Contacts** to exclude specific contacts from receiving the campaign.

RECIPIENT ✕

Choose the contact lists or segments you wish to send your email campaign to.

👤 Exclude Contacts

| Lists | Segments |

🔍   ＋

☑ **My Lists**   Recently Created ⌄

☑ New Test Contacts (5)   👤⊕

Selected Lists (1)   Selected Segments (0)

🖼 New Test Contacts ✕
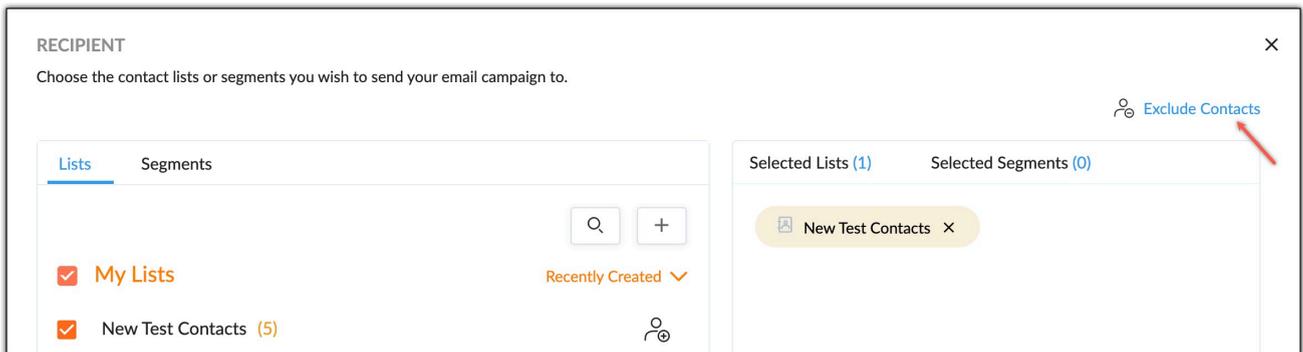
13. You can exclude contacts based on a campaign that you've sent to them previously or the mailing list in which they are in. Select the email campaign and / or mailing list and click **Save**.

Note:

There may be a difference between the number of contacts you've selected and the number of contacts to whom the email campaign will be sent. This is because some of the contacts you've selected may not qualify to receive the email campaign. Some reasons why a contact may fail to qualify include:

- The [topic](#) associated with the contact is different from the topic selected while creating the email campaign.
- The contact comes under the non-marketing category, resulting in being excluded from the recipient list. [Learn more](#)
- If any exclusion criteria are applicable for the contact, it will be removed from the recipient list.
- If the contact belongs to the [Unsubscribe](#) category it'll be excluded from the recipient list.

14. Click **Create Content** to design the content of your email campaign.
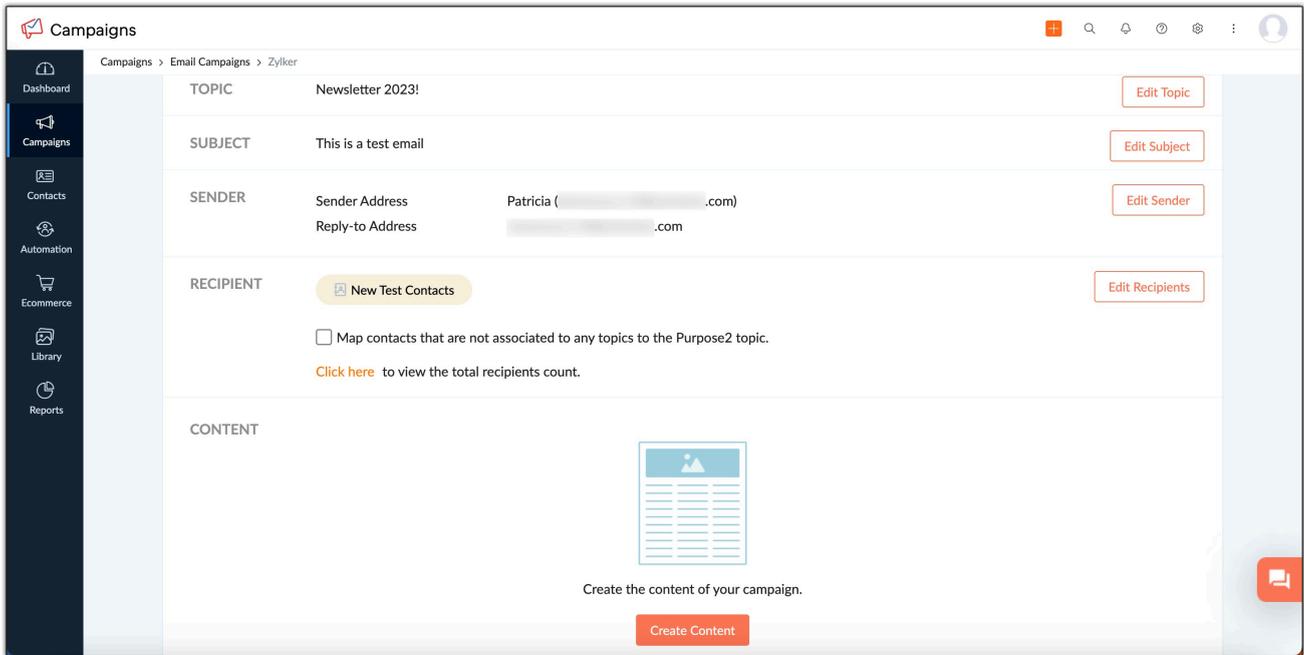
15. Select a template from one of our options available:
    - Saved Templates
    - Pre-designed Templates
    - Basic Templates
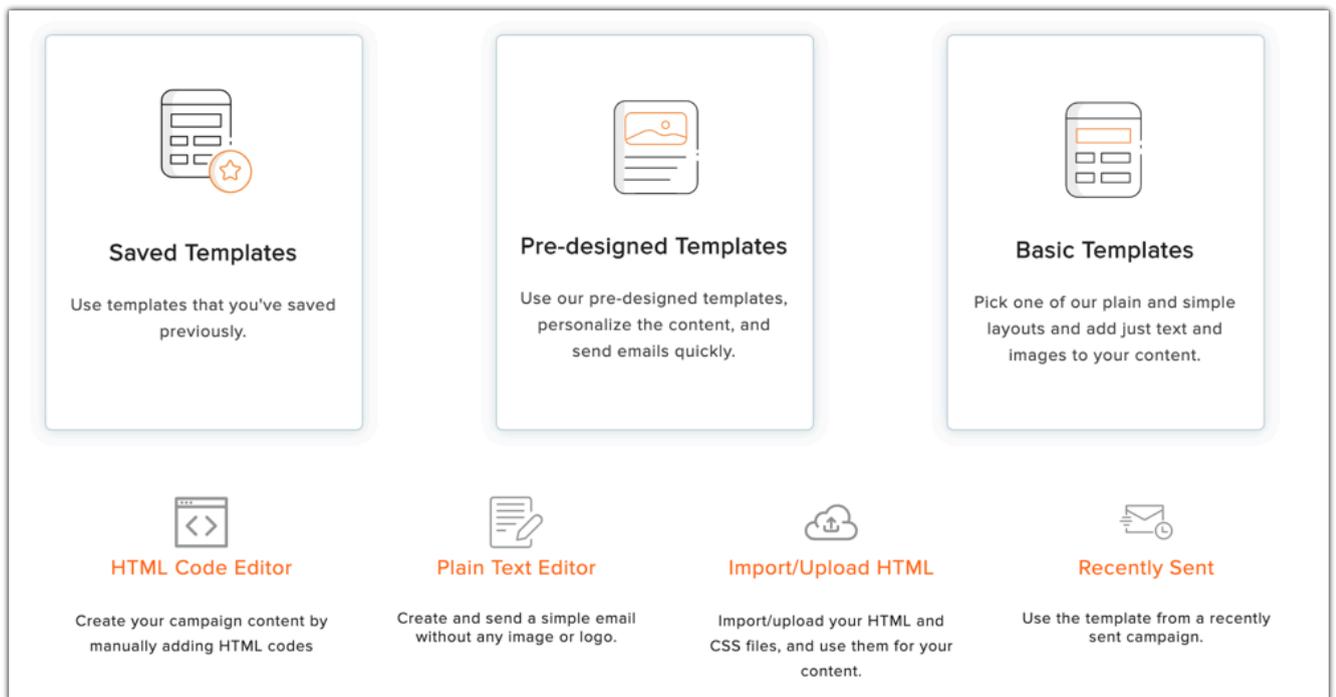
16. Additionally, you can also choose to add content from :
    - **HTML Code Editor** - Select this if you want to send your campaign with visual images and logos. The recipient of your campaign must be using a browser/email client and device that support this format. Learn the techniques to render your content properly on Outlook.
    - **Plain Text Editor** - These are simple emails without images or logos. The purpose is to send your message without losing any content. Plain-text campaigns have a very high degree of deliverability (no lost content).

- **Import / Upload HTML** - With this option, you can import the HTML content for your email. You can browse and select the HTML file as well as any related images, and then upload them.
- **Recently Sent** - You can choose a **recently sent** campaign

17. Add your content and click **Proceed** . You also have the option to **Preview and Test** your email campaign.

18. You can send a test mail to view how the message will look in the recipients' inbox. Click **Send test email** .
19. Select email addresses to which you want to send your test email. You can select upto 5 email addresses and click the **Send Test Email** button.

20. Click **Inbox Preview** to view how your email will look in different email clients and devices.
21. Add a header and footer for your Campaign by clicking **Change** .
22. If you want to promote your email campaign on various social media, click **Connect Account** .
23. Select the social media platform where you would like to promote your campaign and click **Save** .

24. Click **Show Advanced Options** to configure tracking, integrations and calendar for your email campaign.
25. You can choose to track plain text URL, track URLs using Google Analytics and track video views in Wistia. Just enable the toggle button to start tracking.
26. **Configure** response actions for those contacts who have responded to the email campaign.

27. Click **Configure** to add this campaign as an event to your Office 365 Calendar.

TRACKING	Track URLs using Google Analytics ⬜ ⓘ		
	Track your video views in Wistia ⬜ ⓘ		
	Reply Tracking - **Disabled** ⓘ		
INTEGRATIONS	🔗 **CRM** | ▭▭▭▭▭▭▭		
	Create Campaign in CRM 🔵		
	Update Campaign Member Status in CRM 🔵		
	Show All		
RESPONSE ACTIONS	Setup follow-up actions for contacts and have the actions triggered automatically when contacts open or make a click in the campaign.		Configure
CALENDAR	Add as an event in Office 365 Calendar 🔲		Configure

28. Finally, click **Review and launch** where you can send your email campaign for review and it will be sent instantly after the review is done. Keeping your email campaign out of spam folders is our goal.
   [Know more about why your email campaign is being reviewed.](#)

Review and launch

The email campaign will be reviewed by our compliance team before it is sent to the recipients. Why?
Once the campaign is reviewed, it'll get triggered based on send settings chosen below.

🔘 **Send Immediately**   ⚪ **Send Later**

| **Send it right away** | **Send in Batches** |
| Send campaign once it gets reviewed | Send campaign in batches at specified intervals. |

Review and launch

29. You can also choose to send the campaign at a later date. You can also send them in batches. If you choose to schedule your campaign, you will be given three options to send your campaign.
   - Send it at a fixed time and time zone
   - Send in batches at specific intervals
   - Send it based on your recipients' time zone

- Send it at your recipients' optimal open time

Review and launch

The email campaign will be reviewed by our compliance team before it is sent to the recipients. **Why?**

Once the campaign is reviewed, it'll get triggered based on send settings chosen below.

○ Send Immediately   ● **Send Later**

Fixed Time and Time Zone	**Send in Batches**	**Recipients' Time Zone**	**Recipients' Optimal Open Time**
We'll launch your campaign on the date and time you specify.	Send campaign in batches at specified intervals.	Your campaign will be launched based on the recipient's time zone.	Your campaign will be launched based on the time your recipients are more likely to open it.

ⓘ Related Articles:

[Know more about why your email campaign is being reviewed.](#)