

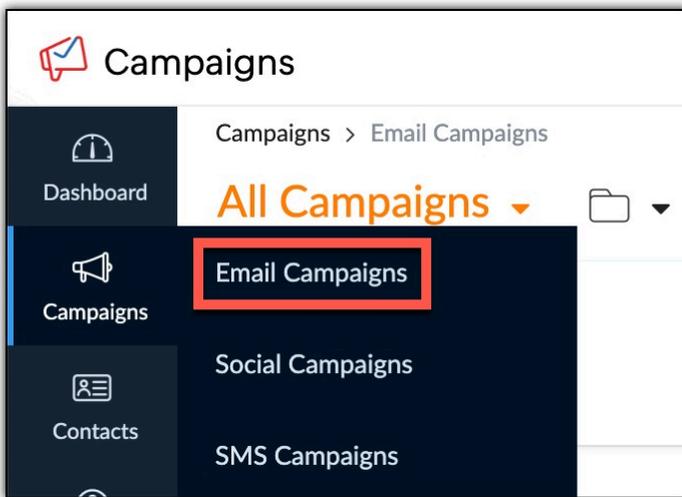


# Create an email campaign

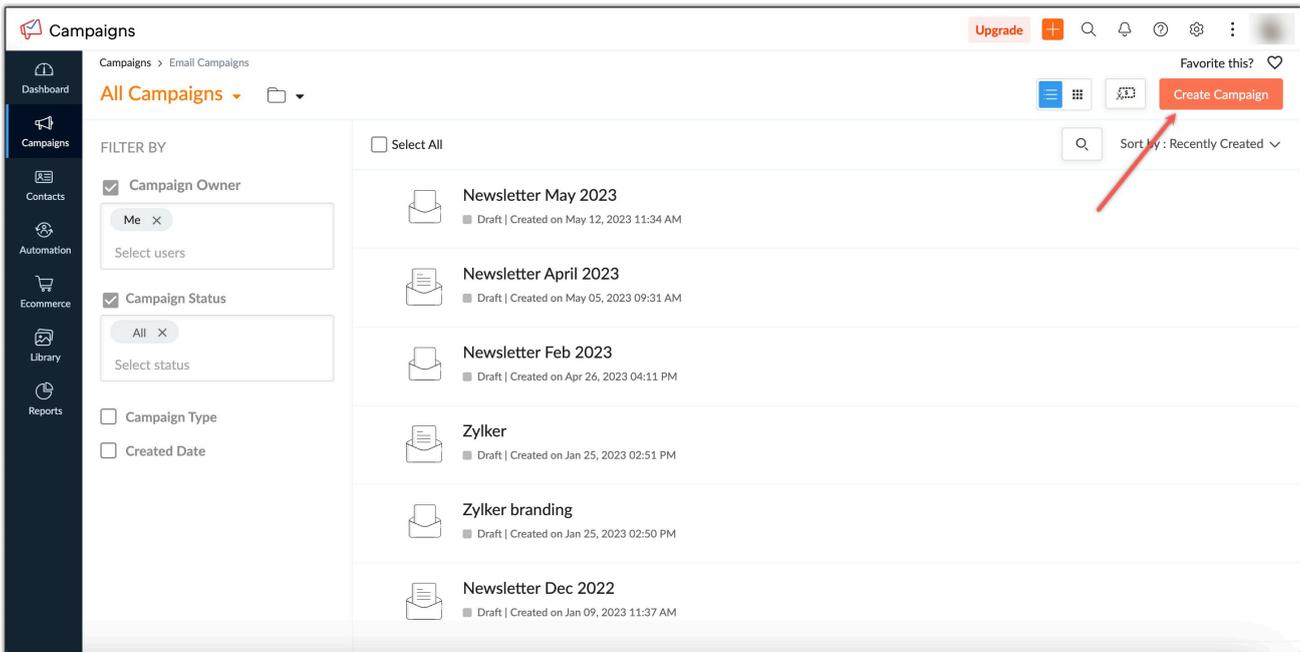
Email marketing is considered the simple and most effective method to reach out to your leads and contacts. The best part is that the return on investment (ROI) is much higher than other marketing channels making it the most affordable way of marketing.

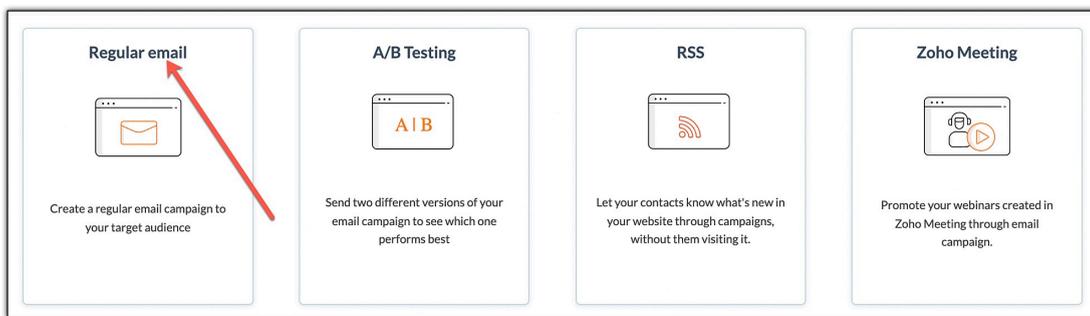
To create and send an email campaign, you'll go through following steps,

1. From the *Navigation* toolbar, select **Campaigns** and choose **Email Campaigns**.

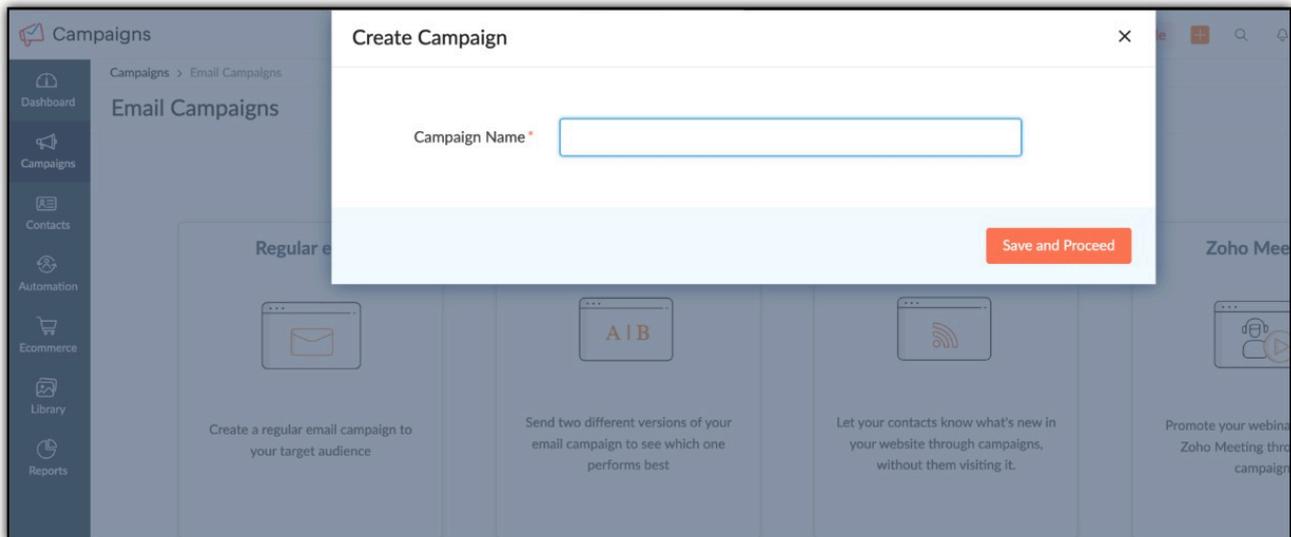


2. Click **Create Campaign** on the top-right and select **Regular email**.





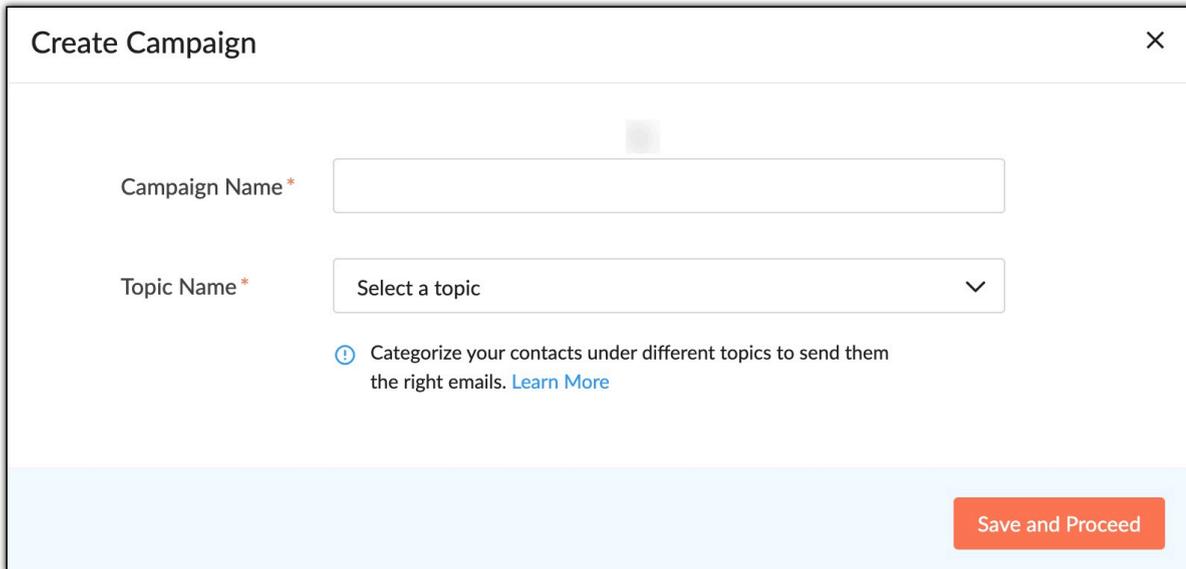
3. Add a campaign name to distinguish it from the other campaigns. If you only have the default topic associated with your account, you can directly click **Save and Proceed**.



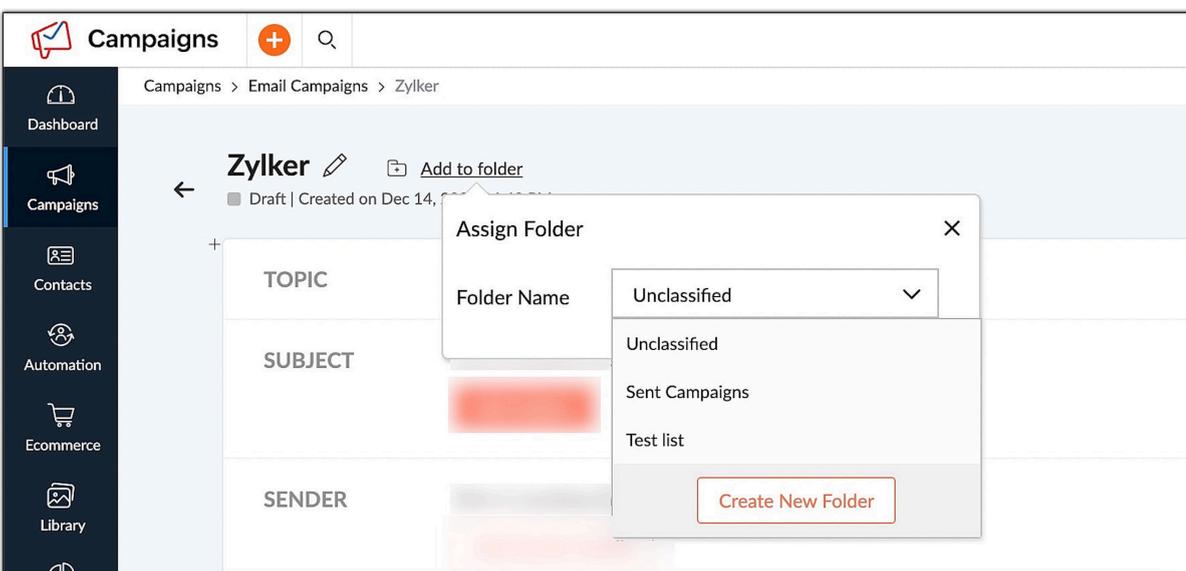
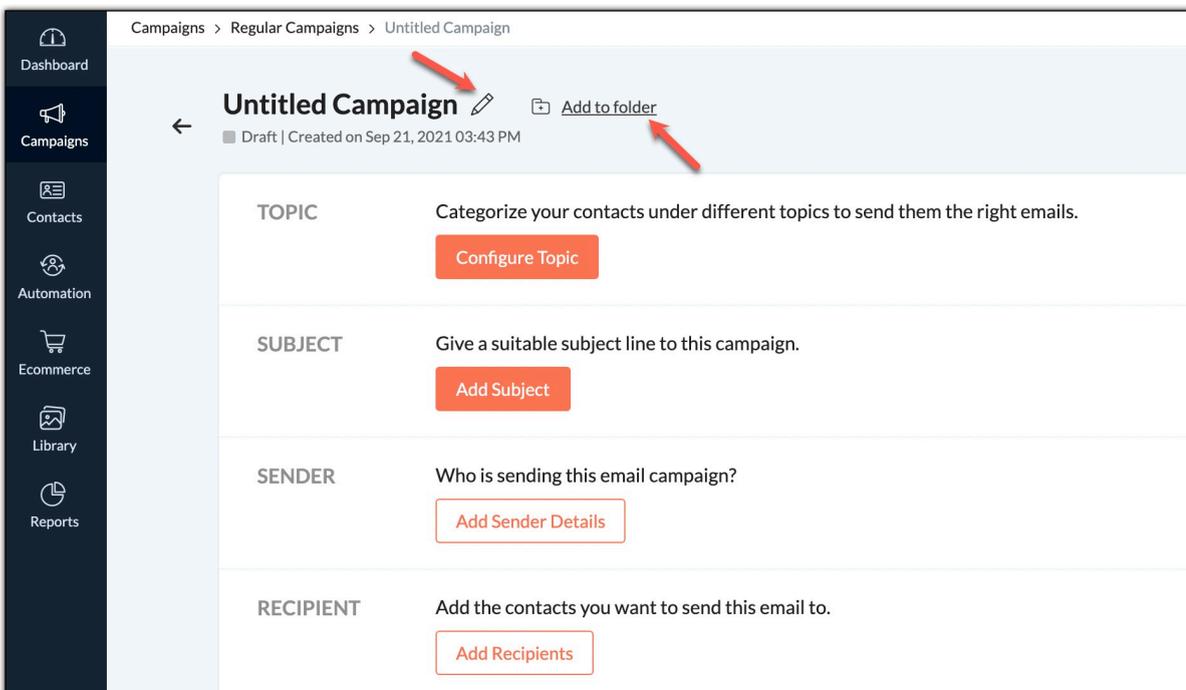
4. However, if you have created multiple topics, select the relevant topic from the dropdown. Selecting a topic helps your contacts know exactly what they will receive from your newsletters. Some common examples of topics with a brief description are:

- **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)

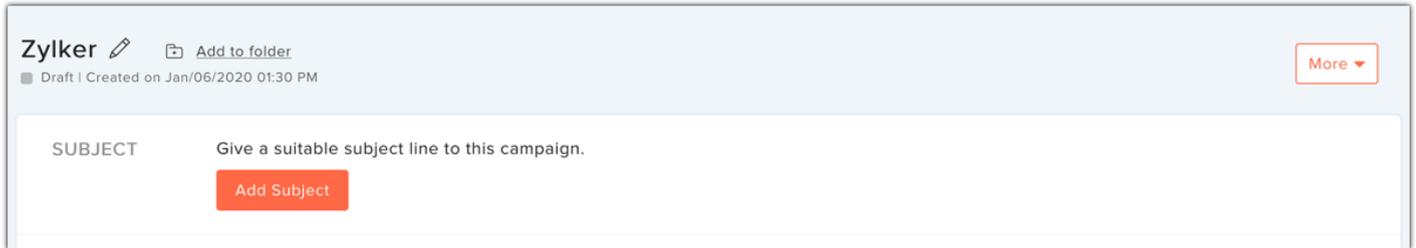
5. Click **Save and Proceed**.



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.

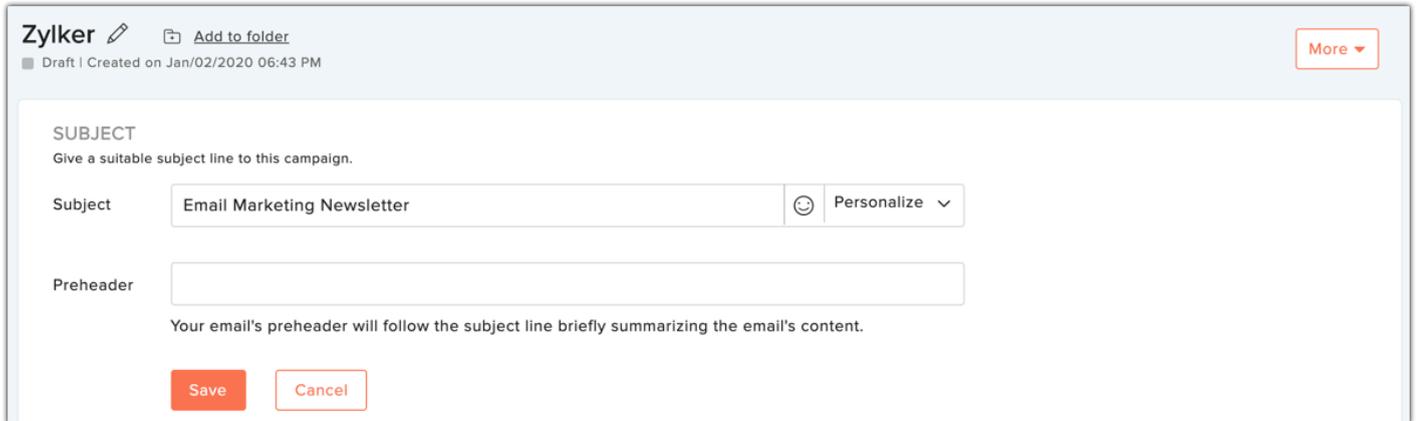


7. Click **Add Subject**. Enter the subject line and the pre-header text of the email and click **Save**.



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■ Draft | Created on Jan/06/2020 01:30 PM

**SUBJECT** Give a suitable subject line to this campaign.  
**Add Subject**



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■ Draft | Created on Jan/02/2020 06:43 PM

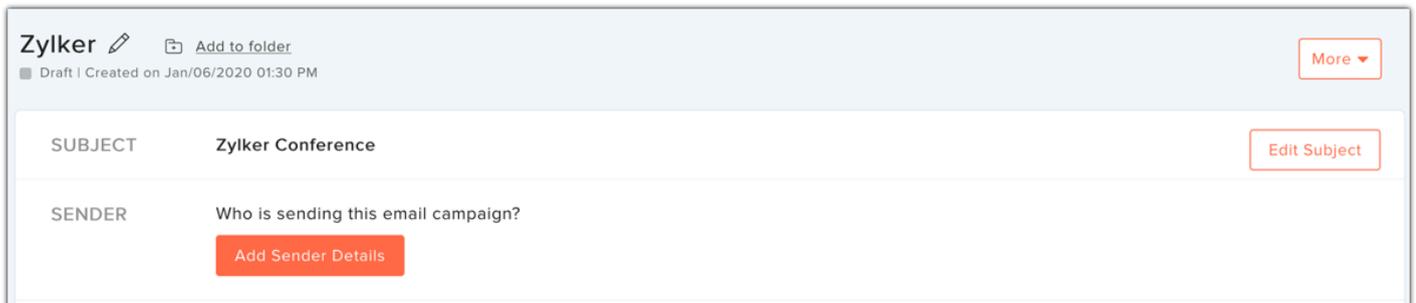
**SUBJECT**  
Give a suitable subject line to this campaign.

Subject   Personalize ▾

Preheader   
Your email's preheader will follow the subject line briefly summarizing the email's content.

**Save** **Cancel**

8. Click **Add Sender Details** and enter the sender name.



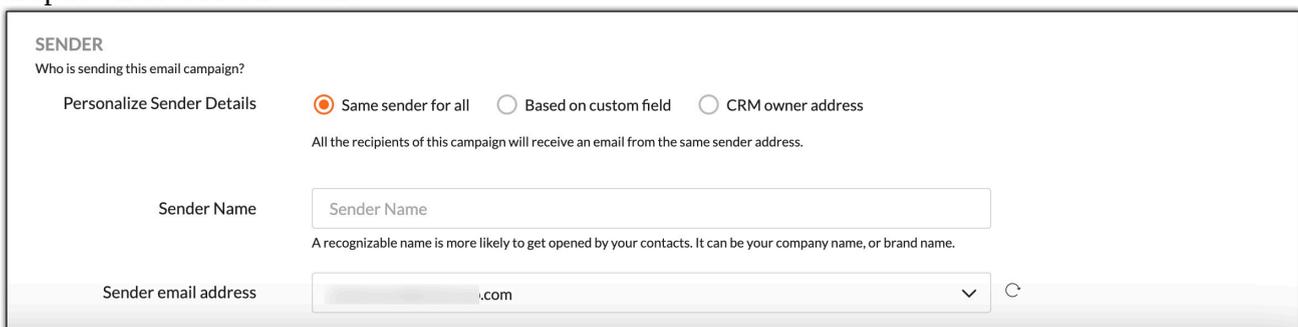
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**SUBJECT** Zylker Conference Edit Subject

**SENDER** Who is sending this email campaign?  
**Add Sender Details**

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.



**SENDER**  
Who is sending this email campaign?

Personalize Sender Details  Same sender for all  Based on custom field  CRM owner address  
All the recipients of this campaign will receive an email from the same sender address.

Sender Name   
A recognizable name is more likely to get opened by your contacts. It can be your company name, or brand name.

Sender email address  ▾ 

(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.

**SENDER**  
Who is sending this email campaign?

Personalize Sender Details  Same sender for all  Based on custom field  CRM owner address

The sender address in the campaign received by the contacts will dynamically vary based on the contact's specific custom field values.

Sender

Alternate Sender Name

A recognizable name is more likely to get opened by your contacts. It can be your company name, or brand name.

Alternate Sender email address .com

(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.

**SENDER**  
Who is sending this email campaign?

Personalize Sender Details  Same sender for all  Based on custom field  CRM owner address

The sender address field of the campaign will be auto-filled depending on the contact owner's address fetched from Zoho CRM.

Sender

Alternate Sender Name

A recognizable name is more likely to get opened by your contacts. It can be your company name, or brand name.

Alternate Sender email address .com

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

**SENDER**  
Who is sending this email campaign?

Personalize Sender Details  Same sender for all  Based on custom field  CRM owner address

Sender address will be same for all the recipients.

Sender Name  ⓘ

Sender email address

[Show reply-to address details](#)

**Zylker** [Add to folder](#)  
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**SUBJECT** Email Marketing Newsletter Edit Subject

**SENDER**  
 Who is sending this email campaign?

**Personalize Sender Details**  Same sender for all  CRM owner address  
 Sender address will be same for all the recipients.

**Sender Details**

[Hide reply-to address details](#)

**Reply Tracking**

**Reply-To**  Single address  CRM owner address  
 Reply-to address will be same for all the recipients.

**Reply-to Address**

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

**Zylker** [Add to folder](#)  
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**SUBJECT** Zylker Conference Edit Subject

**SENDER** Sender Address Patricia Jones   
 Reply-to Address  Edit Sender

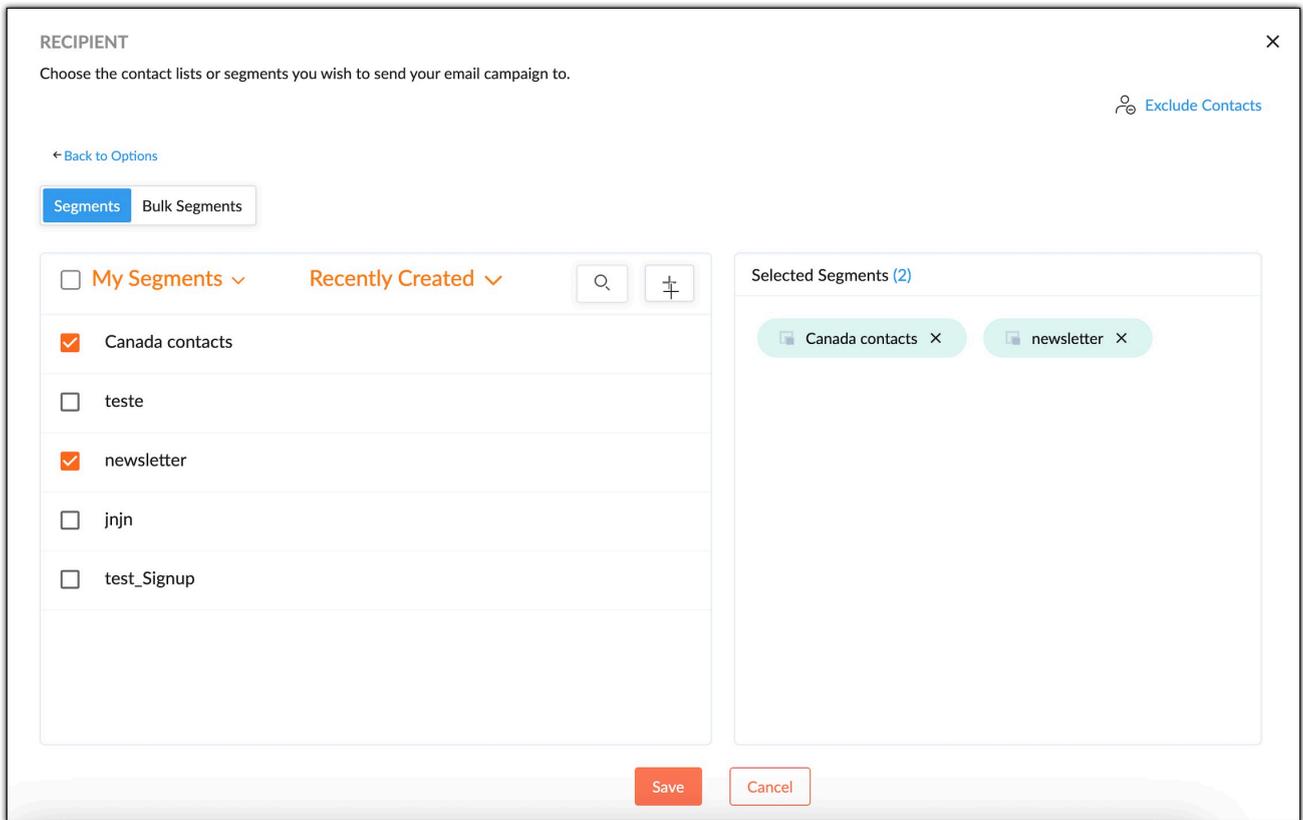
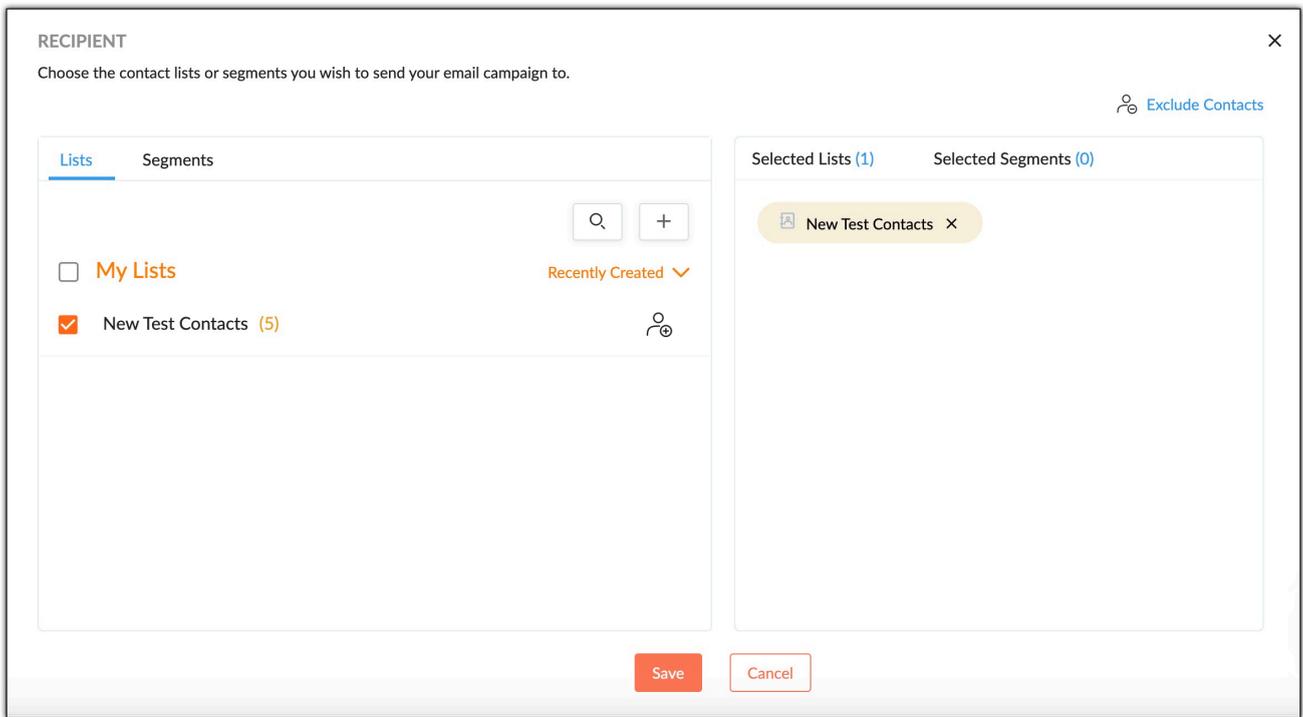
**RECIPIENT** Add the contacts you want to send this email to.

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

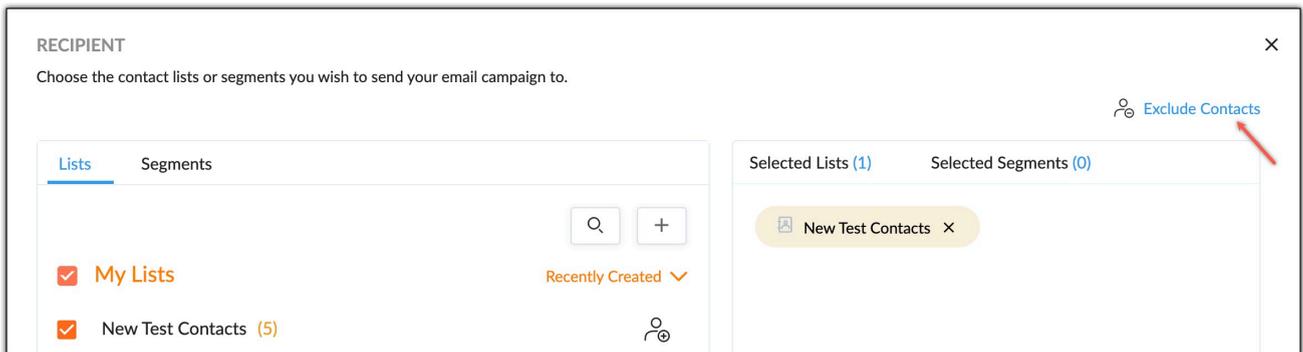
**RECIPIENT** ✕  
 Add the contacts you want to send this email to.

**Lists**  
 Send campaign to your contacts stored in a mailing list

**Segments**  
 Send campaign to a targeted audience based on already created segments



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



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**.

### Exclude contacts from receiving this campaign

You can exclude contacts from this campaign based on mailing lists or the campaigns they've received.

Campaigns

AND

Mailing Lists

NewWistiaCampaign X  
Search and select

Search and select

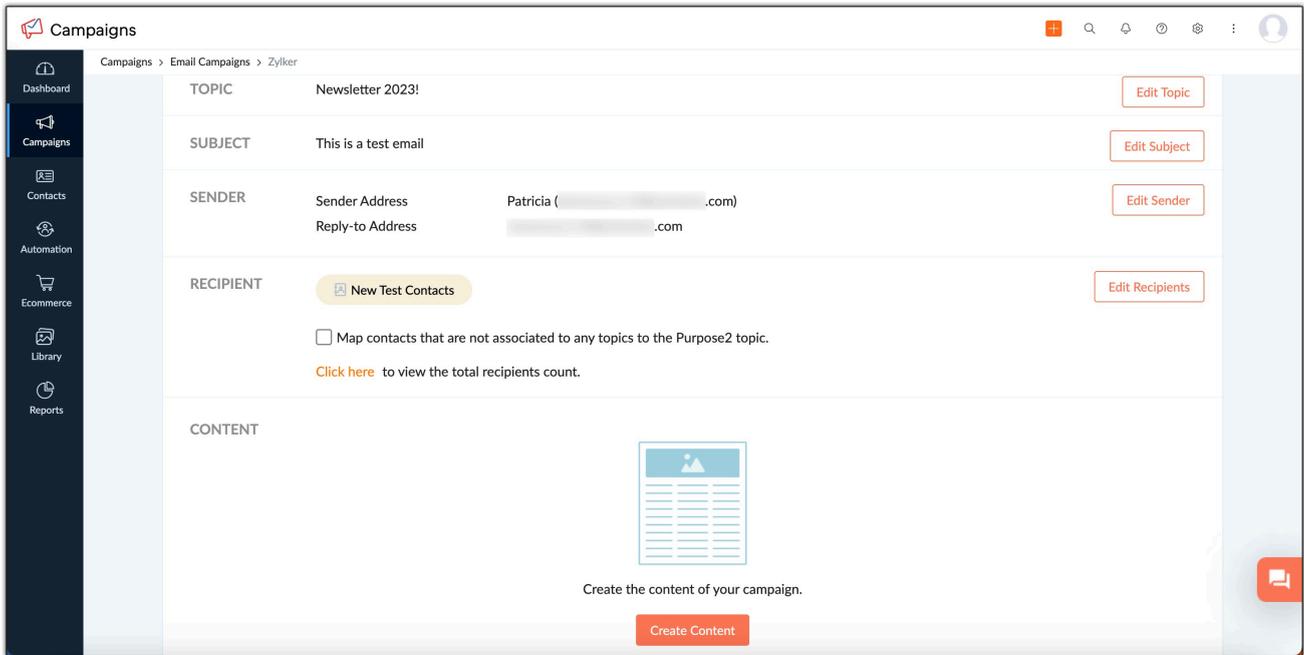
Save Close

**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:

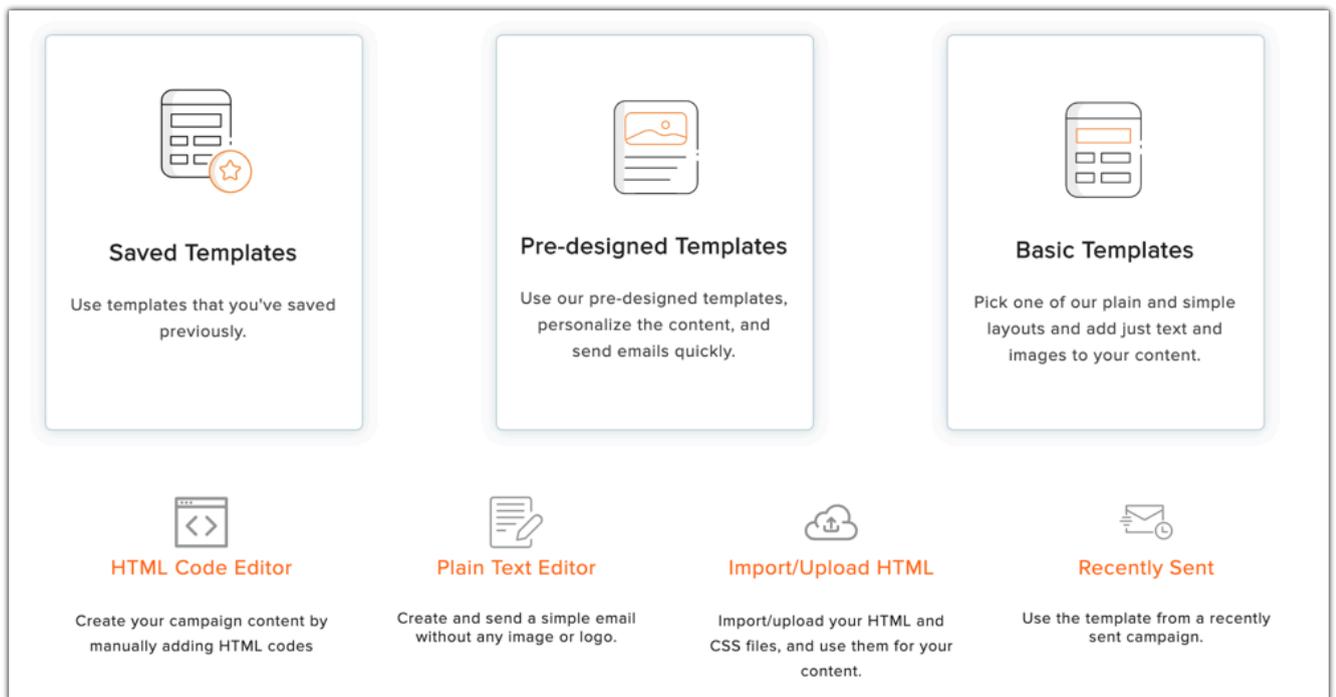
- The [topic](#) associated with the contact is different from the topic selected while creating the email campaign.
- The contact comes under the non-marketing category, resulting in being excluded from the recipient list. [Learn more](#)
- If any exclusion criteria are applicable for the contact, it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

✕

## Send Test Email

Search and select email addresses

You can add a maximum of 5 email addresses.

Select email type     HTML     Text     HTML and Plain Text

Send Test Email

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** .

### Promote your campaign on social media

<p>FACEBOOK</p> <p style="text-align: right; color: #0070c0;">Connect Facebook</p>	 <p>Select the media where you'd like to promote the campaign.</p>
<p>TWITTER</p> <p style="text-align: right; color: #0070c0;">Connect Twitter</p>	
<p>TUMBLR</p> <p style="text-align: right; color: #0070c0;">Connect Tumblr</p>	
<p>LINKEDIN</p> <p style="text-align: right; color: #0070c0;">Connect LinkedIn</p>	

Save

Cancel

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.

The screenshot shows a configuration page with four main sections:

- TRACKING:** Includes three toggle switches: "Track URLs using Google Analytics" (off), "Track your video views in Wistia" (off), and "Reply Tracking - Disabled" (off).
- INTEGRATIONS:** Shows a CRM integration with two toggles: "Create Campaign in CRM" (on) and "Update Campaign Member Status in CRM" (on). A "Show All" link is also present.
- RESPONSE ACTIONS:** A text description: "Setup follow-up actions for contacts and have the actions triggered automatically when contacts open or make a click in the campaign." A "Configure" button is on the right.
- CALENDAR:** A text description: "Add as an event in Office 365 Calendar" with a calendar icon. A "Configure" button is on the right.

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.](#)

The screenshot shows the "Review and launch" section with the following content:

- Review and launch** (Section Header)
- 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.
- Two radio buttons:  **Send Immediately** and  **Send Later**
- Two selection boxes:
  - Send it right away**: Send campaign once it gets reviewed
  - Send in Batches**: Send campaign in batches at specified intervals.
- A red arrow points to the **Review and launch** button at the bottom left.

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

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

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