

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.

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Dashboard	Campaigns > Email Campaigns All Campaigns		Favorite this? ♡			
⊊ } Campaigns	FILTER BY	Select All	Q Sort by : Recently Created V			
Contacts	tton V Campaign Status V Campaign Type Created Date Campaign Type	Newsletter May 2023 Draft Created on May 12, 2023 11:34 AM				
		Newsletter April 2023 Traft Created on May 05, 2023 09:31 AM				
Library		Newsletter Feb 2023 Draft Created on Apr 26, 2023 04:11 PM				
Reports		Zylker Draft Created on Jan 25, 2023 02:51 PM				
		Zylker branding Draft Created on Jan 25, 2023 02:50 PM				
		Newsletter Dec 2022				



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**.

🚰 Campaigns		Create Campaign		×	e 🔡 Q 🕀
) Dashboard	Campaigns > Email Campaigns				
Campaigns		Campaign Name *			
Contacts	Regular e			Save and Proceed	Zoho Mee
Automation Ecommerce			AIB		
Library Clark	Create a regular ema your target au	il campaign to Send I dience emai	two different versions of your I campaign to see which one performs best	Let your contacts know what's new in your website through campaigns, without them visiting it.	Promote your webina Zoho Meeting thro campaign

- 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**.

Create Campaign			×
Campaign Name *			
Topic Name*	Select a topic	\sim	
	() Categorize your contacts under different topics to send them the right emails. Learn More		
		Sav	ve 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.

	Campaigns >	Regular Campaigns > Untitle	ed Campaign		
Dashboard	Untitled Compaign				
⊊∲ Campaigns	←	Draft Created on Sep 21, 2	2021 03:43 PM	Jouer	
R Contacts		TOPIC	Categorize your cont	tacts under different topics to send the	em the right emails.
Automation					
୍ମିଙ୍କ Ecommerce ରିଭି		SUBJECT	Give a suitable subject	ct line to this campaign.	
Library D Reports		SENDER	Who is sending this e	email campaign?	
	RECIPIENT Add the contacts you want to send this email to. Add Recipients				
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ج Automation		SUBJECT		Unclassified	
ेटू Ecommerce				Test list	
Library		SENDER		Create New Folder	

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

Zylker 🖉	Add to folder n Jan/06/2020 01:30 PM				More 🔻
SUBJECT	Give a suitable subject line to this campaign.				
Zylker 🖉	Add to folder n Jan/02/2020 06:43 PM				More 🔻
SUBJECT Give a suitable	subject line to this campaign.				
Subject	Email Marketing Newsletter	\odot	Personalize 🗸		
Preheader					
	Your email's preheader will follow the subject line briefly summarizing the email's content.				
	Save				

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

Zylker Draft Created on Jan/	Add to folder D6/2020 01:30 PM	More 🔻
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	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	v.com v C

(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 custo values.	m field
Sender	SELECT MERGE TAG V SELECT MERGE TAG	~
Alternate Sender Name	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

(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 ORM owner address	
	The sender address field of the campaign will be auto-filled depending on the contact owner's address fetched from Zoho CRM	I.
Sender	\$[CRM:OWNER_NAME]\$	\checkmark
Alternate Sender Name	Sender Name	
Alternate Sender email address	Leom	

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 Name	Sender address will be same for all the recipients.	Ū
Sender email address	Show reply-to address details	С
	Save Cancel	

Zylker C Add to folder Draft Created on Jan/02/2020 06:43 PM		More 🔻
SUBJECT Email Marketi	ng Newsletter	
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	Sender Name 🗸 🗸	
	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	✓	
	Save Cancel	

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

Zylker 🖉 🗈 Draft Created on Jan	Add to folder /06/2020 01:30 PM		More 🔻	
SUBJECT	Zylker Conference		Edit Subject	
SENDER	Sender Address Reply-to Address	Patricia Jones	Edit Sender	
RECIPIENT	Add the contacts you want to send this email to. Add Recipients			

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

RECIPIENT Add the contact	ts you want to send this e	email to.			×
	0 0 0 0 0 0	Lists Send campaign to your contacts stored in a mailing list	202 	Segments Send campaign to a targeted audience based on already created segments	

				Exclude Cont
Lists Segments			Selected Lists (1) Selected Segments (0)	
		Q +	New Test Contacts ×	
My Lists		Recently Created \checkmark		
New Test Contacts (5)		°€		
		Save	Cancel	
CIPIENT pose the contact lists or segments	you wish to send your email camp	aign to.		Se Exclude Cont
CIPIENT pose the contact lists or segments Back to Options	you wish to send your email camp	aign to.		Cont Cont
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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	r email campaign to.			×
innenden nach denneden niere in s				Contacts
Lists Segments		Selected Lists (1)	Selected Segments (0)	
	Q +	New Test Cont	acts ×	
My Lists	Recently Created 🗸			
New Test Contacts (5)	° €⊕			

https://help.zoho.com/portal/en/kb/campaigns/user-guide/email-campaigns/create-campaign/articles/how-to-create-an-email-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 conta	acts from receiving this campaign	
You can exclude	e contacts from this campaign based on mailing lists or the campaigns they've receive	d.
Ca	ampaigns	
AND	NewWistiaCampaign 🗙	
	Search and select	
🔤 🔽 Ma	ailing Lists	
	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 <u>topic</u> 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. <u>Learn more</u>
- If any exclusion criteria are applicable for the contact, it will be removed from the recipient list.
- If the contact belongs to the <u>Unsubscribe</u> category it'll be excluded from the recipient list.

14. Click **Create Content** to design the content of your email campaign.

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Δ	Campaigns >	Email Campaigns > Zylke	2r						
Dashboard		TOPIC	Newsletter 2023!			Edit 7	Горіс		
⊊} Campaigns		SUBJECT	This is a test email			Edit Sul	bject		
Contacts		SENDER	Sender Address Patricia (.com) Reply-to Address .com			Edit Se	nder		
ोस्स Ecommerce यि Library		RECIPIENT	New Test Contacts Map contacts that are not associated to any topics to the Purpose2 topic. Click here to view the total recipients count.		Ed	it Recipi	ients		
Reports		CONTENT	Create the content of your campaign.						
			Create Content						

- 15. Select a template from one of our options available:
 - Saved Templates
 - Pre-designed Templates
 - Basic Templates

Saved Templates	Pre-designed	Templates	Basic Templates
Use templates that you've saved previously.	Use our pre-design personalize the send emails	ned templates, content, and quickly.	Pick one of our plain and simple layouts and add just text and images to your content.
$\overline{\langle \rangle}$			
HTML Code Editor	Plain Text Editor	Import/Upload HTML	Recently Sent
Create your campaign content by manually adding HTML codes	Create and send a simple email without any image or logo.	Import/upload your HTML and CSS files, and use them for your content.	Use the template from a recently sent campaign.

- 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 socia	l media
FACEBOOK Connect Facebook	
TWITTER	
Connect Twitter	
TUMBLR Connect Tumblr	
Connect LinkedIn	
	Select the media where you'd like to promote the campaign.
	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	
INTEGRATIONS	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. <u>Know more about why your email campaign is being reviewed.</u>

	-
Review and launch	
The email campaign will be reviewed by our complia	nce team before it is sent to the recipients. Why?
Once the campaign is reviewed, it'll get triggered base	ed on send settings chosen below.
Send Immediately Send Late	er
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

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.	
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' Tin	me Zone Recipients' Optimal Open Time
We'll launch your campaign on the date Send campaign inhatches at specified Your campaign wi and time you specify. on the recipient's on the recipient's	ill be launched based Your campaign will be launched based s time zone. on the time your recipients are more likely to open it. ikely to apen it.

(i) Related Articles:

Know more about why your email campaign is being reviewed.