



Personalize your email

Personalize your email campaigns to give customers relevant and individualised attention. Email personalization will most likely get your campaigns opened and links clicked. Read on to know the various ways you can personalize your email campaigns.

Email Subject line

Personalize your subject -- the easiest shortcut to grab your contacts' attention when they see the email in their inbox. Our easy-to-use merge tags help tailoring the subject to the audience.

Using Emoji in email subject line

This allows you to grab the attention of your contacts by using emojis in your subject lines. It is an effective technique to increase your email open rates and get more contacts engagement. All you've got to do is click the Emoji icon next to the subject text box in the campaign creation flow and select the Emoji you want to use in your subject line.

Using first name in subject line

Use your customer's first name by inserting a merge tag like this,

“ "Hey \${FNAME|Jin}\$, Your Weekly Updates" would look like "Hey Jin, Your Weekly Updates".

It is always suggested to use a standard subject rather than adding only merge tags in the subject line. For example, if you want to send an email to a recipient about an order delivery, then it should look like

“ Hi \${FNAME}\$, Your Shipment is Delivered rather than \${FNAME}\$.

 Here are a few tips:

- Make your subject line crisp and to the point.
- Set a default value in the merge tags. That will act as a replacement if your customers' first names are not updated in the contact list.
- You can also use the last name in subject merge tags.
- Avoid using an email address within the subject line.

Sender Name

Sender Name should always be a recognizable name for the contacts. It is preferable to give your company or brand name in this field.

 Note :

- Avoid using your personal name.
- Never use an email address in your sender name field.

Personalize your recipients

Add your recipients' name, address, and other details by using merge tags. Merge Tags are smart tags that pull recipient specific data directly from your mailing list into your email message. You can also add merge-tags to the subject and/or the content.

Adding Merge Tags to personalize your content

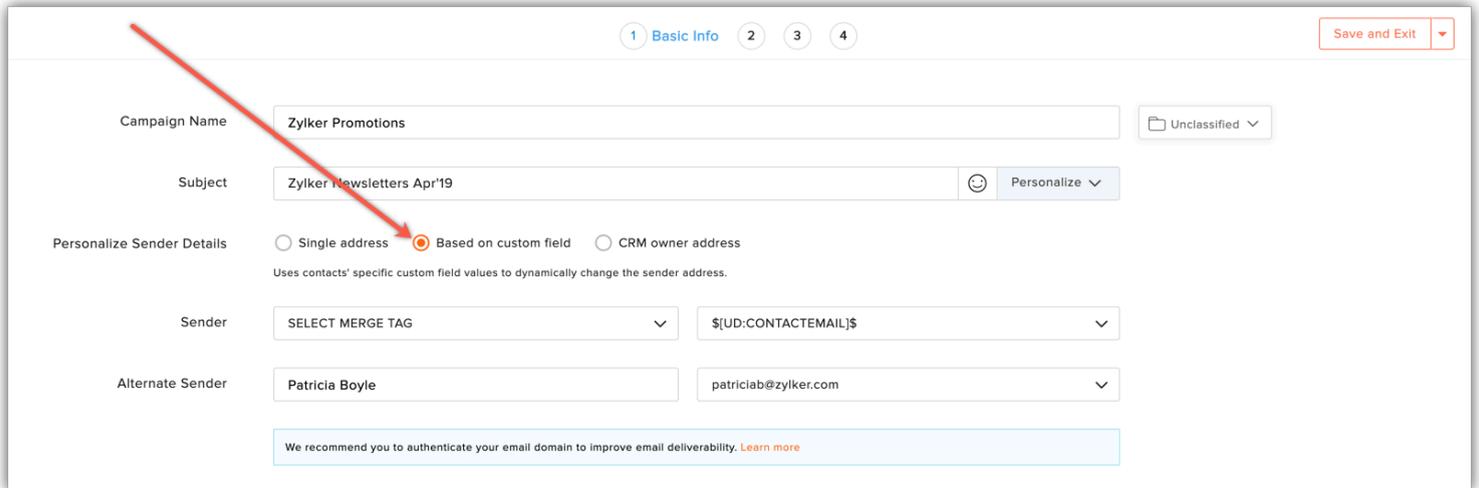
1. Click the intended merge tag.
2. Copy the merge tag related to the first name, last name, or email address.
3. Paste the tag in an appropriate place in the content. (For example, if you want to replace address the recipient by his first name, copy the related merge tag ""\$[FNAME]\$" and paste at the right place in the content.
4. Click Save & Close.

 **Note**

- If you plan to import your campaign, copy and paste relevant merge tags in your HTML.
- If you select HTML editor/Text editor, copy and paste relevant tags corresponding to their position within your content.

Personalize sender details using dynamic data

You can personalize your sender details such as from name and email address using custom fields and merge tags. This means a contact will receive the email campaign with the marketers' name and email address rather than a general email address like sales@zylker.com. It's easy to personalize the sender details if you've the contact details such as salesperson/marketers' name and email address in the mailing list.



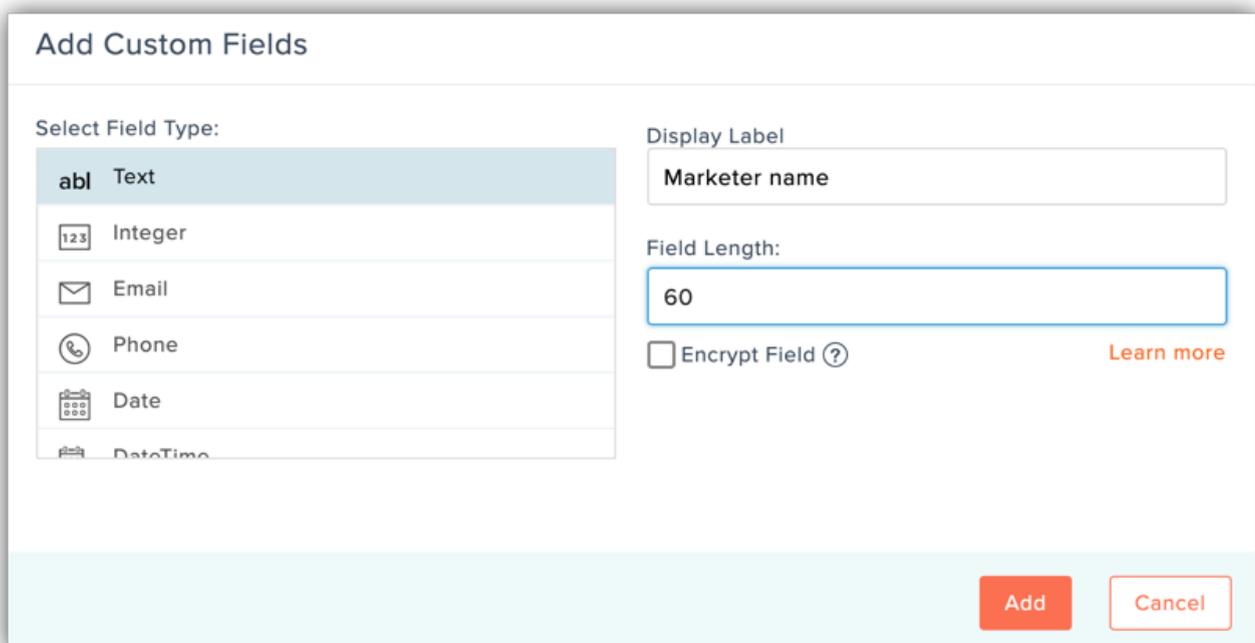
The screenshot shows the 'Basic Info' tab of a campaign configuration interface. A red arrow points to the 'Based on custom field' radio button under the 'Personalize Sender Details' section. The 'Sender' field is set to 'SELECT MERGE TAG' and '\$[UD:CONTACTEMAIL]\$'. The 'Alternate Sender' is set to 'Patricia Boyle' and 'patriciab@zylker.com'. A 'Save and Exit' button is visible in the top right corner.

Before you personalize your sender details, you must add custom fields and create corresponding merge tags for sender name and sender address.

Add custom field

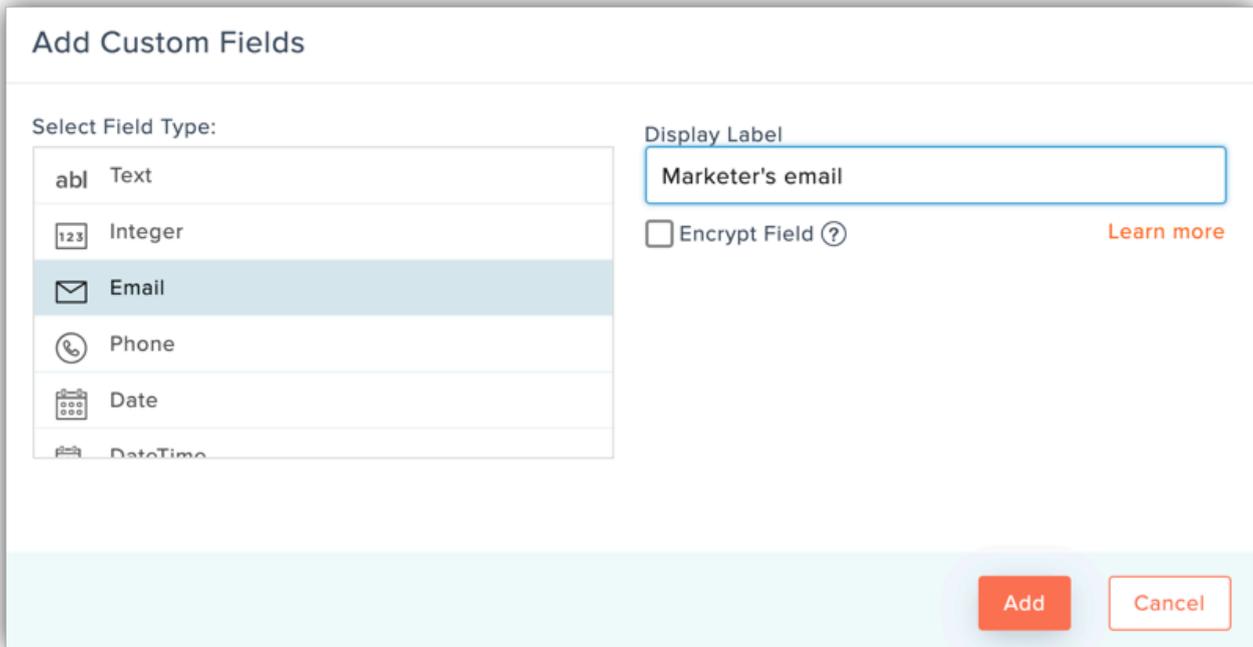
To add custom fields that you can use for sender name and email address,

1. From Navigation toolbar, choose Settings and select Custom Fields.
2. Click Add New and select Contact Field from top-right corner of the screen.
3. To add custom field for *sender name*, select field type as **Text** and give a name define the field length.



The screenshot shows the 'Add Custom Fields' dialog box. The 'Text' field type is selected. The 'Display Label' is 'Marketer name' and the 'Field Length' is '60'. There is a 'Learn more' link and 'Add' and 'Cancel' buttons at the bottom.

4. To add custom field for *sender address*, select field type as **Email Address** and give a name.



The screenshot shows a dialog box titled "Add Custom Fields". On the left, under "Select Field Type:", there is a list of field types: Text (with 'abl' icon), Integer (with '123' icon), Email (with an envelope icon and highlighted), Phone (with a phone icon), Date (with a calendar icon), and DateTime (with a calendar icon). On the right, under "Display Label:", there is a text input field containing "Marketer's email". Below this, there is an unchecked checkbox labeled "Encrypt Field" with a help icon, and a "Learn more" link. At the bottom right, there are two buttons: "Add" (orange) and "Cancel" (white with orange border).

5. Click **Add**.

The custom fields are added successfully and now you'll create the corresponding merge tags for the newly added custom fields. You'll select these merge tags while personalizing the sender details.

Create merge tag

1. From Navigation toolbar, choose Settings and select Merge Tags.
2. Click **Create** and select **Contact Custom Tag** from top-right corner of the screen.
3. This will prompt a new window.
4. In this window, do the following:

- **Contact custom field** - Select the field that you created for sender name and sender address.

The screenshot shows a form titled "Add Contact Custom Merge Tag". It contains four main sections:

- Contact Custom Fields:** A dropdown menu with "marketer email" selected. An information icon (i) is to the right.
- Merge Tag:** A text input field containing "AMEMAILADDRESS". Below it, a preview shows "Your Tag will look like \${UD:AMEMAILADDRESS}\$". An information icon (i) is to the right.
- Mail Default Value:** An empty text input field. An information icon (i) is to the right.
- Social Default Value:** An empty text input field. Below it, a preview shows "Your Tag will look like \${UD:AMEMAILADDRESS!}\$". An information icon (i) is to the right.

At the bottom right, there are two buttons: "Save" (orange) and "Cancel" (white with orange border).

- **Merge tag** – This is a tag replaced by the data from your contact details. You can have merge tags as **`\${UD:ACCOUNTMANAGER}\$`** for sender name and **`\${UD:AMEMAILADDRESS}\$`** for sender

address.

The screenshot shows a form titled "Add Contact Custom Merge Tag". It contains four main sections, each with an information icon (i) to its right:

- Contact Custom Fields:** A dropdown menu with "marketer name" selected.
- Merge Tag:** A text input field containing "ACCOUNTMANAGER". Below it, a preview shows "Your Tag will look like \${UD:ACCOUNTMANAGER}\$".
- Mail Default Value:** An empty text input field.
- Social Default Value:** An empty text input field. Below it, a preview shows "Your Tag will look like \${UD:ACCOUNTMANAGER||}\$".

At the bottom right, there are two buttons: "Save" (orange) and "Cancel" (white with orange border).

Personalize sender details using Zoho CRM Data

Using Zoho Campaigns, you can send an email campaign with a personalized sender name and email address of a Contact/Lead owner who is associated with that record in CRM.

What is alternate sender name and sender email?

If the Contact/Lead owner's name/email address is not present in Zoho CRM, then you can add value in Alternate sender name and email which will be used to send the campaign.

 **Note:** To avail this enhancement, the user must have integrated Zoho Campaigns with their Zoho CRM account and have at least one active sync running.

Using Zoho CRM data to personalize the content

You can also use CRM based merge tags, which automatically pull information from your CRM account. All you need to do is add relevant merge tags in your campaign content. The merge tags pull specific data from CRM based on how the information is requested within the email content.

The screenshot shows the 'Basic Info' tab of a Zoho Campaigns configuration page. At the top, there are four numbered tabs: 1 Basic Info, 2, 3, and 4. A 'Save and Exit' button is in the top right corner. The form contains the following fields:

- Campaign Name:** Zylker Promotions
- Subject:** Zylker Newsletters Apr'19
- Personalize Sender Details:** Three radio buttons: 'Single address', 'Based on custom field', and 'CRM owner address' (which is selected and highlighted by a red arrow). Below these is the text: 'Uses contact owner's address from Zoho CRM to fill the sender details automatically.'
- Sender:** Two dropdown menus. The first contains the merge tag '\$[CRM:OWNER_NAME]\$'. The second contains '\$[CRM:OWNER_EMAIL]\$'.
- Alternate Sender:** Two dropdown menus. The first contains 'Patricia Boyle'. The second contains 'patriciab@zylker.com'.

At the bottom of the form, there is a light blue box with the text: 'We recommend you to authenticate your email domain to improve email deliverability. [Learn more](#)'.

This means you need to be cautious in placing the merge tags in an appropriate way. If a record field has missing data, you can provide a default value to replace the missing information in email content. For instance, if the merge tag for account manager's name is `[$[CRM:CONTACTOWNER]]`, you can add a default value and social default value similar to this `[$[CRM:CONTACTOWNER | Patricia Boyle | Patricia]]`.