GETTING
STARTED
WITH ZOHO CAMPAIGNS

ZOHO
Campaigns

GETTING STARTED WITH ZOHO CAMPAIGNS

A User Guide

Welcome to Zoho Campaigns! This guide will help you create and send your first email campaign. In addition to sending an email campaign, you'll learn how to create your first mailing list, import Subscribers, and measure your email campaign results.

Besides, this Getting Started guide, you'll find the **Zoho Campaigns User Guide** and many other additional resources at zoho.com.

Table of content

How do I signup for Zoho Campaigns?

To open a free trial account with Zoho Campaigns, go to https://www.zoho.com/campaigns and use the signup form to create an account. If you would like to upgrade to one of our subscription plans, please visit https://www.zoho.com/campaigns/pricing.html. If you already have an account with zoho.com. you can make use of your existing email address and password to log in to Zoho Campaigns.

For more information, call us at

      USA: +1 (888) 900 9646,

      UK: +44 (20) 35647890,

      Australia: +61-2-80662898,

      India: +91-44-67447000

You can also write to us at support@zohocampaigns.com.

Exploring the Zoho Campaigns homepage

Once you log into your Zoho Campaigns account, you'll land on our welcome page, where you can start creating a mailing list or proceed with your email campaign. In fact, there are a lot of things to check out on this page:

1) Navigation Toolbar – On the left side of the screen, this toolbar contains tabs for quick access to various features of Zoho Campaigns.
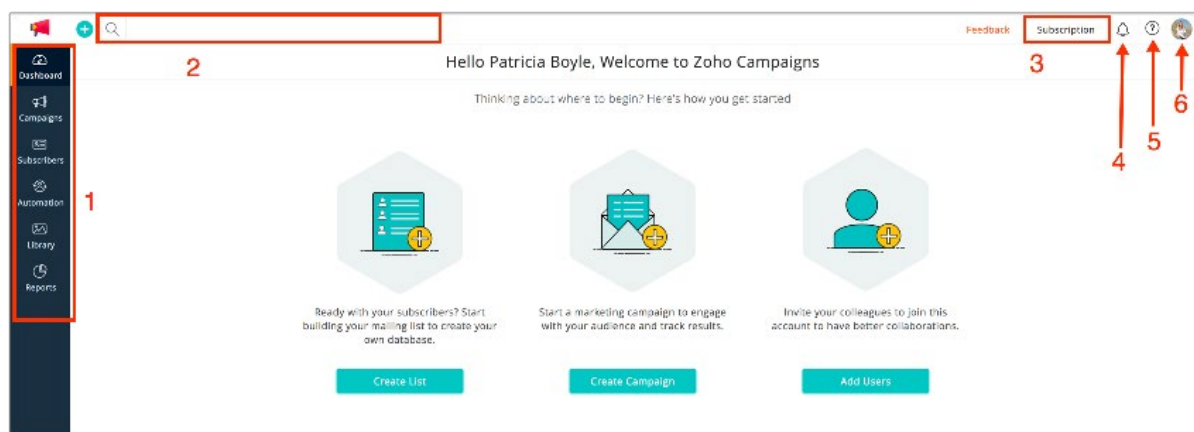
2) Global Search - This enables a user to search for information across the entire product. The global search feature shows results that contain your search terms, then displays related data based on campaigns, lists, subscribers, and more.

3) Subscription – This opens up the subscription plan menu. Here, users can upgrade to a suitable subscription plan that matches their needs.

4) Receive Notifications – Here, you can set the options to receive notifications when your email campaign is sent, reviewed, paused, or canceled. You can also receive notifications when contact imports are complete, canceled, or remain incomplete.

5) Get Help – This is a quick link to access our help guides, knowledge base, blogs, and user community. We encourage users to start conversations in our user community and share their best practices for using Zoho Campaigns.

6) View your Profile – Here you can view your profile information such as email address, user ID, and account info.

ZOHO Campaigns

Account Setup

Once you sign up to Zoho Campaigns account, you need to add your company and personal information. You can also send invites to other users to create an account with Zoho Campaigns.

From Navigation bar, click **Settings.**

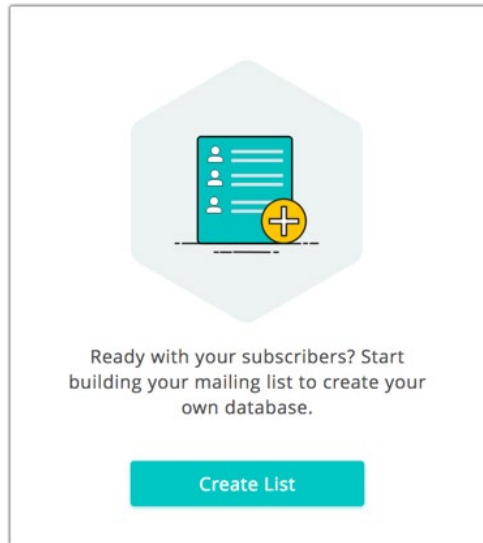**Company Profile –** Add company name, mail address, website address, phone number, and brand logo.

My Profile – Add name, email address, country, region, and city details.

Manage Users – Send invite to add new users in your organization.

For more information, visit Settings help doc in Zoho Campaigns Help.

Creating your First Mailing List

Once you create your Zoho Campaigns account, we'll take you to our welcome page, where you can start with creating your first mailing list or proceed with creating your first email campaign.

To create a mailing list

1. On the Welcome page, click the Create List button. The Create List page will appear. For more information, visit Manage subscribers in Zoho Campaigns Help.

Provide information for these details/options:

Name – This is the name of your mailing list, for internal reference.

Help subscribers join this list – Enable it if you want subscribers to join your mailing list via signup form. Keep it disabled if you want to make your list private.

Tell subscribers how you know them – Let subscribers know why they're receiving this newsletter. This information will be added in the footer section of every email campaign.
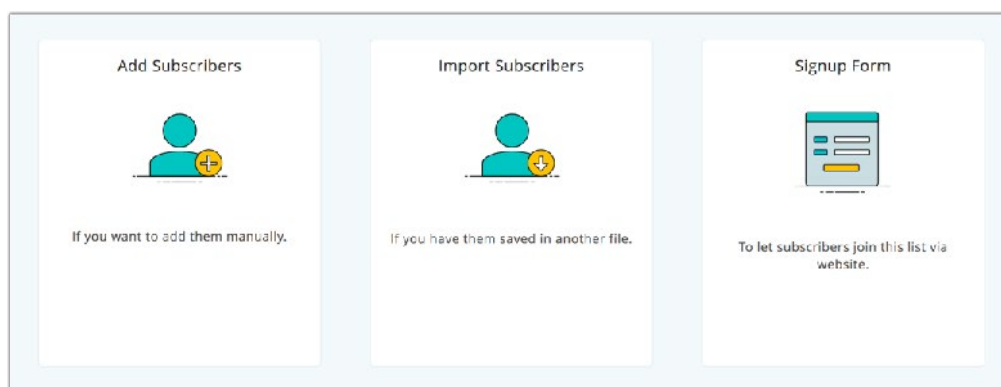
Once your mailing list has been created, you can use multiple methods to add **Subscribers**.

Add Subscribers – Manually add subscribers.

Import Subscribers – Import subscribers from your computer, Zoho CRM, or Google Sheets.
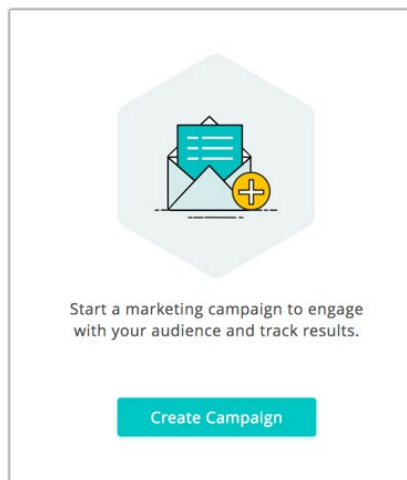
Add Signup Form – Create your own signup form to add subscribers directly from various sources.

Note: *For more information, visit List Management in Zoho Campaigns Help.*

Creating your First Email Campaign

In this section, you'll learn how to create and send a successful email campaign.

Start a marketing campaign to engage with your audience and track results.

Create Campaign

Name your Campaign

1. On the Welcome page, click the **Create Campaign** button. The Basic Info page will open.

Name	Zylker Newsletters
Subject	Zylker Newsletters - Apr'17
Sender	Patricia Boyle

patricia.b@zylker.com

Is your reply-to address different from sender's address? Set reply-to address

☑ Include recipient's name in 'To' address

Enter these details:

Name – Select an easily recognizable name. For instance, if the Zylker company is sending a monthly newsletter, name the campaign "Zylker Newsletter June 2015", or something similar.

Subject – Come up with a clever or eye-catching email subject line. A great subject line is going to draw many more readers than something boring and dry..

Sender Name and Email Address – Give a name and email address that your recipients can recognize easily. The name could be your company or brand name.

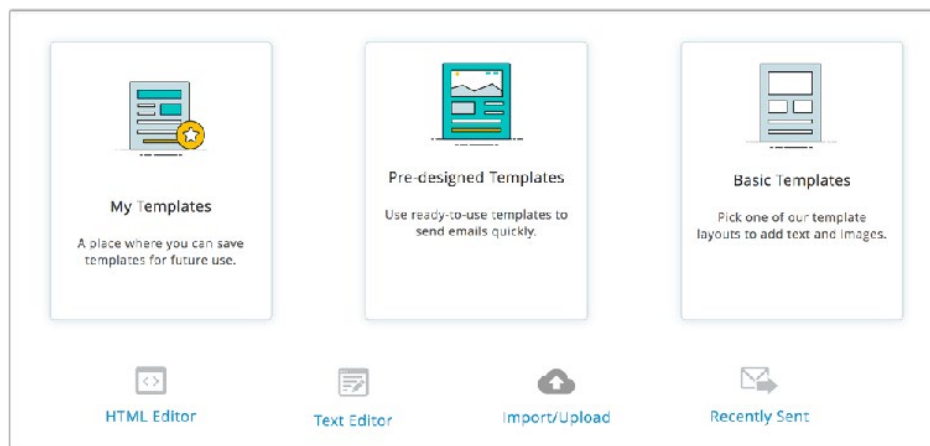**Address recipients by name –** personalize your recipients by addressing them by name.

Use sender details from Zoho CRM – If the recipient was imported from Zoho CRM, you can personalize the sender name based on account owner present in CRM.

Tips : *Avoid using group email addresses such as info@, admin@, support@ as the sender address. Chances are high that emails from these addresses will end up in the spam folder. Try running an AB test on email subject lines to find out which one gets better response.*

Email Body and Content

Zoho Campaigns provides some pre-designed email templates for you to use. Just pick an email template that meets your needs, then make some modifications to personalize it for your company's voice.If this is your first email campaign, we recommend starting with the basic templates. In addition to selecting a template, you can use the Template Editor to add design elements, such as images, text, buttons, anchor tags.

Customize the layout of your emails with ease, using the drop down feature.

If you are already ready with the content or want another ways to add one, we do provide alternate options to add the content.

HTML 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.
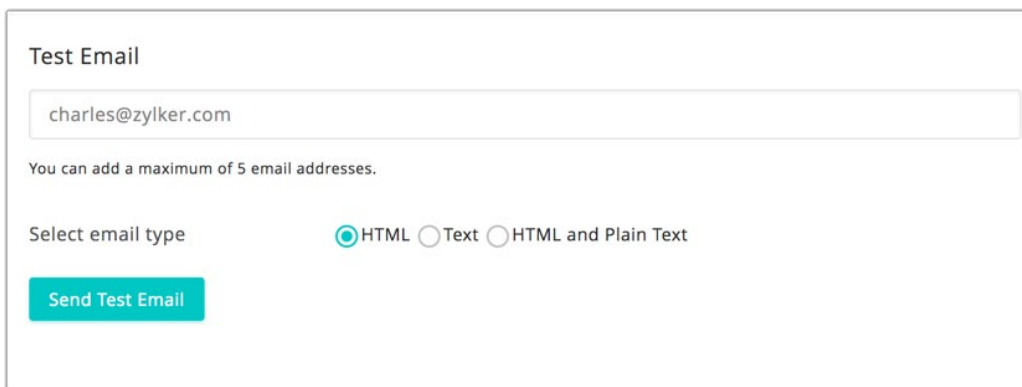
Text Editor - Theses are simple emails without images or logos. The purpose is to send your message without losing any content. Plain-text emails have a very high degree of deliverability (no lost content).

Import/Upload - With this option, you can import the HTML content for the email. Browse and select the HTML file along with the related images and upload them. You can either import from your desktop or from cloud services such as Zoho Docs, Google Drive, Dropbox, etc.

Recently Sent – If you have already sent email campaigns, you can use the content from a previous campaign as a templates for your new campaign.

Preview and Test your Email

Before you send email newsletters to your subscribers, read it aloud to yourself several times. Then, send a test email to a few of your colleagues for review. Ask them to proofread the email, check for grammatical mistakes, alignment issues, and test links to verify that they are redirected to the correct page.

Select your email recipients

To send your campaign, you need a list of subscribers receive the emails. If you have your contact database saved in your desktop or on a Google spreadsheet, you can import those subscribers and save them as a mailing list.

Promote your Campaign on Social Media

Share your email campaign on social media. Simply link your Zoho Campaigns account to your social media accounts (i.e., Facebook, Twitter, LinkedIn, Google Plus, and Pinterest).

Advanced Options

Track URLs using Google Analytics – If you want to extract more data from your email campaign, make sure data tracking services such as Google Analytics and Website Automation are selected.

If you know how many people open theemail campaign and how many of them click the links, you'll have better insights into what works and what doesn't when you send your next campaign.

Monitor Plain-text Campaigns – You can track plain-text campaigns by inserting links in your email content. Select the checkbox to enable link tracking for your email content.

Character Encoding – Select the appropriate character encoding to match your language script.
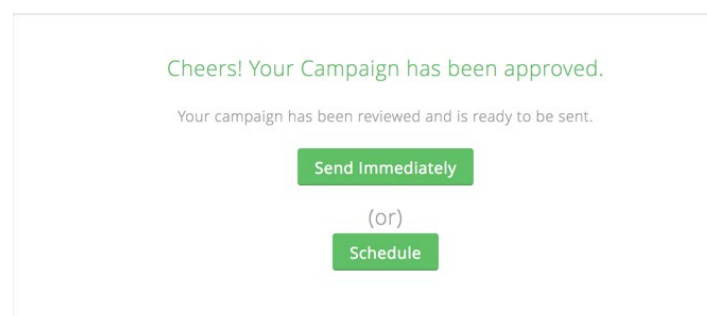
Header and Footer Theme – Add background color, change the font style/ size, and personalize the header and footer for your email campaign by selecting a theme from the dropdown menu.

Sending your Email Campaign

Before launching your email campaign, use the Send for Review option to ensure that your email campaign reaches the recipient's inbox, not the spam folder. Our moderators check your subject line, mailing list, and content for anti-spam compliance. bring you the most exposure and attention.

Measure Campaign Results

Assessing your campaign results will help you optimize future emails. Start with monitoring the real-time data such as opens and clicks. Based on this data, analyze what went right and what didn't. Figure out some other things to try for your next campaign.

You can monitor and get information on the following data:

1) Total number of emails sent

2) Total opens and clicks received

3) Total number of unsubscribes and complaints

4) Campaign reach on social media

5) Campaign opens based on locations

Once you have several campaigns under your belt, this data will help your targeting strategies become more refined and effective.

Understanding the Dashboard

Once you send an email campaign successfully, you can go to dashboard. The dashboard gives you an overall summary of your account activity in an easily digestible way..

In this section, we'll take you through different aspects of your dashboard and how it can help you understand various data points in your account.

My Data - This view is unique to each Zoho Campaigns user, and only that user can view it. In this view, you can take a look at the number of sent email campaigns, mailing lists, subscribers, and automations for your account.

All Data - This view gives you the accumulated data from all accounts in your organization.

Customizing your dashboard

You can customize your dashboard with your favorite widgets and choose what you want to see in the main display. In this section, we'll go over each widget and its purpose.

To customize your dashboard:

1. From the Navigation toolbar, choose Dashboard.

2. Click the Settings icon in the top-right corner.

3. Select at least one of these options:

Choose dashboard page – Select the dashboard page you'd like to customize.

Adding widget – Drag and drop your favorite widgets from the Unselected Blocks panel on the right.

Moving widget – Click and drag a widget to the desired position.

Removing widget - Click and drag the widget to the Unselected Blocks panel.

4. Click Save.

Recent Campaigns

This shows the performance of your recently sent campaigns through metrics such as the number of recipients, opens, and clicks. Click the View Reports button to see an in-depth analysis of each email campaign.

Email Campaigns Status

The Email Campaigns section is where you can find the email campaigns you've sent, scheduled, and drafted. Additionally, you can create email campaigns, social campaigns, or advanced campaigns by clicking the Create button in the upper-right corner.

Lists and subscribers

Here, you can find the number of mailing lists, subscribers present in your account, recently added subscribers, active syncs running, and the number of segments.

Social Campaigns

This is where, you can see the number and status of your Post and Page campaigns.

Automation

In the automation section, you can view autoresponder data, workflow data, and website automation information. This section gives you an overview on active and inactive automation flows, as well as the goals you've achieved through website automation.

Your Plan

This is where you can see your current subscription plan along with the plan limits and usage for the month. Click on the plan to see the full details of your plan on the Subscription page.

Recent Activities

This tells you the recent activities in your account, From the creation of a new mailing list, to a successfully sent email campaign that was sent successfully, you can view all of your account's activities.

Zoho Campaigns in Foreign Languages

If you need, you can switch your Zoho Campaigns account to one of these languages:

- Dutch
- French
- German
- Hungarian
- Italian
- Japanese
- Portugeuese
- Spanish
- Chinese

Installing Zoho Campaigns App on Mobile Devices

The Zoho Campaigns App offers on-the-go email marketing for your iPhone/iPod Touch and android devices. Receive notifications on campaign review, access campaign activities mailing lists/subscribers.

You can install Zoho Campaigns application on your iPhone:

- Download and install the Zoho Campaigns application from the App Store

To install Zoho Campaigns app on android devices, visit Google Play Store from your Android Device. For more information, visit **Zoho Campaigns for Mobile Devices** in our help section.

Additional Resources

These pages will help you understand more specific aspects of the Zoho Campaigns app..

Zoho Campaigns – User Guide

Zoho Campaigns – Deliverability Guide

Zoho Campaigns – Knowledge Base
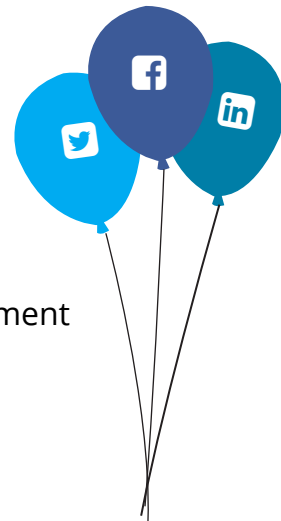
Zoho Campaigns – eBooks

Contact us:

Zoho Corporation
4141 Hacienda Drive
Pleasanton,
California 94588, USA

+1 (888) 900 9646 (USA)
+44 (20) 35647890 (UK)
Support@zohocampaigns.com

Please feel free to share this document

You can find more details and step by step instruction on our Online Help
Visit https://www.zoho.com/campaigns/ to sign up for a free account!