



IT technicians · Zoho One optimization



Zoho Campaigns

User and Administrator Manual

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Index — English version

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1. Introduction and access

1.1 About this manual

This manual describes the Zoho Campaigns features available to users and the functions reserved for organization administrators, as available in September 2026.

Interface labels may vary slightly depending on your account language and plan.

1.2 What is Zoho Campaigns?

Zoho Campaigns is Zoho's email and multichannel marketing platform. It lets you manage contacts, design and send email, SMS and WhatsApp campaigns, automate marketing journeys and measure results. It integrates natively with Zoho CRM, Zoho Forms, Zoho SalesIQ and the main e-commerce platforms.

- Newsletters and product or service announcements
- Event and webinar invitations, with automatic reminders
- Welcome and loyalty sequences
- Abandoned cart reminders and post-purchase follow-ups
- Win-back campaigns for inactive customers

1.3 Interface versions

Zoho is gradually rolling out Zoho Campaigns 3.0, a redesigned interface with unified navigation, a new email builder and native support for email, SMS and WhatsApp. New accounts use version 3.0; existing accounts are being migrated gradually.

This manual follows version 3.0. If your account still uses the classic interface, the features are the same but their menu location may differ.

1.4 Signing in

1. Go to <https://campaigns.zoho.com> (or <https://campaigns.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select Campaigns.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — Install the Zoho Campaigns mobile app to follow campaign results and receive alerts on the go.

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2. Interface and navigation

2.1 Main modules

Module	Purpose
Dashboard	Overview: recent campaigns, audience growth, key metrics
Campaigns	Email, SMS and WhatsApp campaigns: creation, scheduling, statistics
Audience	Contacts, lists, segments, fields, statuses and custom views
Forms	Signup forms and preference pages
Automations	Automated journeys (workflows) and autoresponders
Library	Templates, images, videos, PDFs, GIFs and WhatsApp templates
Analytics	Per-channel dashboards, campaign and contact reports
Settings	Organization, users, domains, channels, integrations

2.2 Campaign list

- Filter by status: draft, scheduled, in progress, sent
- Statistics shown directly in the list (opens, clicks, bounces)
- Quick actions: duplicate, edit, reschedule, delete, view report
- Search by campaign name, subject or tag

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3. Contact management

3.1 Adding contacts

Method	When to use it
Manual entry	A few contacts at a time
CSV / XLSX import	Transferring an existing list (columns mapped to fields)
Zoho CRM sync	Leads, contacts or custom views synced automatically
Signup form	Direct subscription from your website
Integrations	Zoho Forms, SalesIQ, Shopify, WooCommerce, Google Contacts, API

3.2 Importing a list, step by step

1. Audience > Contacts > Import.
2. Choose the source (file, copy-paste, Zoho CRM or another app).
3. Map each column to a Zoho Campaigns field; create any missing custom fields.
4. Choose the destination list or create a new one.
5. Specify the consent type (express or implied) and where the addresses were collected.
6. Confirm. An import report shows contacts added, updated and rejected.

Caution — Never import a purchased or rented list. It harms your domain reputation and violates Canada's Anti-Spam Legislation (CASL).

3.3 Contact record

- Standard and custom fields (name, company, city, language, etc.)
- Status: active, unsubscribed, hard bounce, complaint, inactive
- Engagement timeline: activity across email, SMS and WhatsApp
- Associated deals (Zoho CRM) and purchase history
- Lists and segments the contact belongs to
- Contact Scoring, if enabled

3.4 Views and clean-up

- Create filtered custom views (e.g., contacts in a given region)
- Merge duplicates and fix invalid addresses
- Delete or archive long-inactive contacts
- Export contacts to CSV

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4. Lists, segments and tags

4.1 Lists or segments?

Item	How it works
List	Static group of contacts; changes only when contacts are added or removed
Segment	Dynamic group updated automatically based on criteria (fields, behaviour, CRM data)
Tag	Free-form label to classify contacts (e.g., “customer-2026”, “webinar-sept”)

4.2 Creating a segment

1. Audience > Segments > New Segment.
2. Choose the source: one or more lists, or all contacts.
3. Add criteria: contact field, activity (opened, clicked, did not open), date, purchases, Zoho CRM data.
4. Combine criteria with AND / OR and check the resulting contact count.
5. Save. The segment updates automatically before each send.

Nuagix tip — A segment of contacts who “opened at least one campaign in the last 90 days” is ideal for important sends: it improves deliverability and engagement.

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5. Signup forms and preferences

5.1 Creating a signup form

1. Forms > Signup Form > New.
2. Choose the type: embedded, popup, floating bar or hosted page.
3. Add fields (mandatory email, first name, interests, language) and the consent checkbox.
4. Link the form to a list and enable Double Opt-in.
5. Customize the thank-you message and confirmation email.
6. Copy the embed code for your website, or share the hosted page link.

5.2 Double Opt-in

The contact receives an email asking them to confirm their subscription. Only confirmed addresses are added to the list. This provides proof of express consent and reduces fake addresses.

5.3 Preference page

- Lets contacts choose topics and communication frequency
- Offers a partial opt-out instead of a full unsubscribe
- Automatically updates the contact's lists and fields

Note — For more advanced forms (conditional questions, file uploads, payments), use Zoho Forms and its native Zoho Campaigns integration.

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6. Creating an email campaign

6.1 Campaign types

Type	Use
Regular campaign	One-time send to one or more lists or segments
A/B test	Compare two versions (subject, content, sender) and send the winner
RSS campaign	Automatically send new blog posts
SMS campaign	Short, time-sensitive text message
WhatsApp campaign	Rich message based on a Meta-approved template

6.2 Creating a regular campaign

1. Campaigns > Create > Email.
2. Name the campaign (internal name) and enter the subject line and preview text (preheader).
3. Choose the sender name and address (authenticated domain) and the reply-to address.
4. Select recipient lists or segments; exclude lists if needed.
5. Design the content in the builder or from a template.
6. Send a test email and check the desktop and mobile preview.
7. Send immediately or schedule the send.

6.3 Writing a good subject line

- Short (under 50 characters) and specific
- Personalized with first name or company, when relevant
- Avoid all caps, multiple exclamation marks and spam trigger words
- Pair it with preview text that adds information

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7. Content builder and templates

7.1 Drag-and-drop builder

- Blocks: text, image, button, columns, divider, video, social, HTML code
- Saved headers and footers, reusable across all campaigns
- Reusable content blocks for brand consistency
- Per-element styling: borders, padding, colours
- Device-specific visibility: hide an element on mobile or desktop
- HTML editor to import your own code

7.2 Personalization and dynamic content

- Merge Tags: first name, company, custom fields, with a fallback value when the field is empty
- Dynamic content rules: show a different block based on language, region or segment
- Product recommendations for e-commerce

Nuagix tip — Build a French and an English version in the same email, using dynamic content based on the contact's Language field.

7.3 Zia, the AI assistant

- Zia Content Analyzer: spelling, grammar and writing suggestions before sending
- Readability score and subject line tips
- Best send-time suggestions, depending on edition

7.4 Templates and library

- Pre-built templates by theme (newsletter, event, promotion, holidays)
- Save your own branded templates
- Asset library organized by type: images, videos, PDFs, GIFs

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8. Testing, scheduling and sending

8.1 Before sending

- Test email sent to yourself and a colleague
- Inbox Preview across several email clients
- Check for broken links and images without alt text
- Spam score and recommendations
- Check the postal address and unsubscribe link in the footer

8.2 Sending options

Option	Description
Send now	Immediate send
Schedule	Specific date and time, in the chosen time zone
Recipient time zone	Send at the same local time for each contact
Best time (Zia)	Send when each contact is most likely to open
Recurring send	Repeat at a defined frequency

8.3 Campaign review by Zoho

To protect platform deliverability, Zoho may review some campaigns before they go out, especially for new accounts or recently imported lists. Plan for a delay and keep your consent records handy.

8.4 Send frequency

Frequency Capping limits how many messages a single contact can receive over a given period, across all channels. Configure it to avoid overload and unsubscribes.

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9. SMS and WhatsApp campaigns

9.1 SMS campaigns

1. Make sure the SMS channel is set up (credits or an SMS gateway connected by the administrator).
2. Campaigns > Create > SMS.
3. Write a short message, identify your business and add the opt-out option (e.g., “Reply STOP”).
4. Choose contacts who consented to SMS and have a valid number.
5. Send a test, then send or schedule.

9.2 WhatsApp campaigns

1. Make sure the WhatsApp Business account is connected (see the administrator section).
2. Choose or create a message template; it must be approved by Meta.
3. Personalize variables (first name, date, link) and action buttons.
4. Select contacts who agreed to receive WhatsApp messages.
5. Send or schedule, then track deliveries and reads.

Caution — WhatsApp marketing messages are billed by Meta and require explicit consent specific to that channel.

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10. Automations and journeys

10.1 Workflow components

Component	Examples
Trigger	List signup, form submission, date (birthday), purchase, abandoned cart, change in Zoho CRM
Action	Send an email, SMS or WhatsApp message; add to a list; update a field; add a tag; call a webhook
Delay	Wait X hours or days, or until a date
Condition	If the contact opened or clicked, based on a field value, random split
Exit criteria	Remove the contact from the journey (e.g., they purchased or unsubscribed)

10.2 Building a welcome sequence

1. Automations > Workflows > New Workflow (or start from a template).
2. Trigger: "Contact subscribes to the Newsletter list".
3. Action 1: send the welcome email immediately.
4. Delay: 3 days, then condition "clicked in the welcome email".
5. Yes branch: send more advanced content; No branch: send a reminder.
6. Define the exit criteria, then activate the workflow.

Nuagix tip — Test every journey with an internal address before activating it, and document its purpose in the workflow description.

10.3 Autoresponders

For simple needs, an autoresponder sends a series of emails at fixed intervals after signup or based on a date (e.g., customer anniversary).

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11. Reports and analytics

11.1 Campaign metrics

Metric	Meaning
Open rate	Share of recipients who opened the email (interpret with care due to Apple Mail Privacy Protection)
Click rate	Share of recipients who clicked at least one link
Soft / hard bounces	Temporary or permanent delivery failures
Unsubscribes	Contacts who no longer want your emails
Complaints	Contacts who reported your message as spam
Revenue	Sales attributed to the campaign (e-commerce)

11.2 Available reports

- Click Map and per-link report
- Breakdown by device, email client and location
- Dedicated dashboards: email, SMS, WhatsApp, contacts, e-commerce
- Workflow reports: progress and conversion at each step
- Google Analytics and UTM parameter tracking
- Export reports to PDF or CSV

11.3 Acting on results

- Create a segment from contacts who clicked
- Resend the campaign to non-openers with a new subject line
- Push engagement to Zoho CRM so sales reps can prioritize follow-ups

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12. E-commerce

12.1 Available features

- Shopify, WooCommerce, Zoho Commerce and other platform integrations
- Sync of customers, orders and products
- Abandoned cart and post-purchase journeys
- Product blocks and recommendations in the builder
- Revenue tracking per campaign and per workflow

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13. Best practices

13.1 Nuagix recommendations

- Send only to contacts who gave consent, and keep proof of it
- Authenticate your sender domain (SPF, DKIM, DMARC) before your first send
- Clean your lists regularly: bounces, inactive and role-based addresses
- Keep a regular, predictable sending frequency
- For Quebec audiences, write in French by default, with an English version as needed
- Always test on mobile: most emails are opened there
- Measure clicks and conversions rather than opens alone
- Sync Zoho Campaigns with Zoho CRM so sales benefits from engagement data

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14. Roles and user management

14.1 Organization roles

Role	Main permissions
Administrator	Full control: settings, users, domains, integrations, subscription
Manager	Create and send campaigns, manage contacts and workflows
Viewer	View campaigns and reports, without editing
Custom roles	Granular per-module permissions, depending on your plan edition

14.2 Adding a user

1. Settings > Users & Roles > Add User.
2. Enter the email address and choose the role.
3. Restrict access to specific lists or segments if needed.
4. The user receives an invitation to join the organization.

Note — In Zoho One, access to Zoho Campaigns is granted from the Zoho One admin console.

14.3 When an employee leaves

1. Transfer their campaigns, workflows and forms to another user.
2. Replace their address wherever it is used as sender or reply-to.
3. Deactivate the user, then remove their license.

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15. Organization settings

15.1 Organization profile

- Company name, logo, website and time zone
- Full postal address, mandatory in every commercial email
- Default language and date format
- Default footer (contact details, unsubscribe, preferences link)

15.2 General settings

- Default UTM parameters for all channels
- Contact Scoring, off by default in version 3.0
- Cross-channel frequency capping
- Link and open tracking
- Custom tracking domain (branded links)

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16. Sender domain authentication

16.1 Why authenticate?

Major mailbox providers (Gmail, Outlook, Yahoo) require bulk senders to authenticate their domain. Without SPF, DKIM and DMARC, your campaigns may be rejected or sent to spam.

16.2 Authenticating your domain

1. Settings > Sender Domains > Add Domain.
2. Verify domain ownership with the provided TXT or CNAME record.
3. SPF: add the Zoho include to your existing SPF record (only one SPF record per domain).
4. DKIM: add the TXT record with the public key provided by Zoho Campaigns.
5. DMARC: publish at least “v=DMARC1; p=none; rua=mailto:dmarc@yourdomain.com”, then tighten gradually.
6. Return to Zoho Campaigns and click Verify. DNS propagation can take up to 48 hours.

Caution — Never use a Gmail, Outlook.com or Yahoo address as sender: these domains block bulk sends made through third parties.

16.3 Sender addresses

- Add and verify every sender address used
- Prefer a personal or department address (e.g., newsletter@yourdomain.com)
- Use a monitored reply-to address

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17. Deliverability and reputation

17.1 Automatic handling

- Hard bounces automatically excluded from future sends
- Spam complaints treated as unsubscribes
- Suppression lists: addresses and domains never to contact
- Recommended warm-up of new domains (gradual volumes)

17.2 Metrics to watch

Metric	Recommended threshold
Complaint rate	Below 0.1% (never above 0.3%)
Hard bounce rate	Below 2%
Unsubscribe rate	Below 0.5% per campaign

Nuagix tip — If a rate exceeds its threshold, pause sends to inactive contacts and review the list source before the next campaign.

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18. Compliance: CASL and Quebec Law 25

18.1 Canada's Anti-Spam Legislation (CASL)

- Express or implied consent before any commercial electronic message; implied consent is time-limited
- Clear sender identification and valid contact details
- Simple unsubscribe mechanism, processed within 10 business days
- Keep proof of consent (date, source, wording shown)

18.2 Law 25 (Quebec)

- Inform contacts of the purpose of collecting and using their data
- Restrict list access to users who need it
- Set a retention period and delete inactive contacts when it ends
- Document data transfers outside Quebec (data center choice)

18.3 Compliance features in Zoho Campaigns

- Consent type and consent source fields at import
- Double Opt-in in forms
- Mandatory unsubscribe and preference links in every email
- Do-not-mail list and suppression lists
- Contact activity log

Note — This manual is not legal advice. Confirm your obligations with your legal advisor.

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19. Integrations

19.1 Zoho integrations

Application	Typical use
Zoho CRM	Two-way sync of leads and contacts, custom views, campaign activity in the CRM
Begin	Contact sync for small teams
Zoho Forms	Add respondents to a list, with consent
Zoho SalesIQ	Add visitors and chats to the right segment
Zoho Commerce	Customers, orders and abandoned carts
Zoho Analytics	Advanced marketing reports and cross-app dashboards
Zoho Marketing Automation	More advanced multichannel journeys, if needed

19.2 Setting up Zoho CRM sync

1. Settings > Integrations > Zoho CRM > Configure.
2. Choose the modules to sync (Leads, Contacts) and, if needed, a custom view.
3. Map CRM fields to Zoho Campaigns fields.
4. Choose the destination list and sync frequency.
5. Enable pushing activity (opens, clicks, unsubscribes) back to the CRM.
6. Run a first sync and check the results.

Caution — Unsubscribes must sync back to the CRM: an unsubscribed contact must never be re-imported as active.

19.3 Third-party integrations and API

- Shopify, WooCommerce, Google Contacts, Eventbrite, social networks
- Zapier and Zoho Flow to connect other apps
- Zoho Campaigns REST API (OAuth 2.0): contacts, lists, campaigns, reports
- Webhooks: workflow action to call an external system

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20. SMS and WhatsApp channel setup

20.1 SMS channel

1. Settings > Channels > SMS.
2. Buy Zoho SMS credits or connect your own SMS gateway (gateway portal).
3. Set the sender ID and default opt-out text.
4. Send a test SMS.

20.2 WhatsApp channel

1. Settings > Channels > WhatsApp > Connect.
2. Link your WhatsApp Business account (Meta) and verified number.
3. Create your message templates and submit them for Meta approval.
4. Define which users may send WhatsApp campaigns.

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21. Subscription and credits

21.1 Billing models

- Plan based on number of contacts (unlimited sends depending on edition)
- Email credits for occasional senders
- SMS credits and WhatsApp fees billed separately
- Zoho Campaigns is included in Zoho One and Zoho Marketing Plus

21.2 Tracking usage

Settings > Subscription shows the current plan, contacts used and remaining credits. Unsubscribed or bounced contacts may count toward the limit; clean them up regularly.

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22. Deployment checklist

22.1 Before the first campaign

- ☐ Users added and roles assigned
- ☐ Organization profile and postal address completed
- ☐ Sender domain authenticated (SPF, DKIM, DMARC)
- ☐ Sender and reply-to addresses verified
- ☐ Zoho CRM sync configured and tested
- ☐ Contacts imported with consent type and source
- ☐ Signup form with Double Opt-in published
- ☐ CASL-compliant preference page and footer
- ☐ Branded email template created
- ☐ Welcome workflow activated and tested
- ☐ UTM parameters and Google Analytics tracking configured
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Campaigns setup, integration and training. Book a Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

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Appendix

A. English-French glossary

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A. English-French glossary

A.1 Interface terms

English (interface)	French
Campaign	Campagne
List	Liste
Segment	Segment
Tag	Étiquette
Signup Form	Formulaire d'inscription
Double Opt-in	Double confirmation
Preference Page	Page de préférences
Preheader	Texte d'aperçu
Merge Tag	Balise de fusion
Dynamic Content	Contenu dynamique
Workflow	Parcours automatisé
Autoresponder	Réponse automatique
Exit Criteria	Critère de sortie
Frequency Capping	Plafonnement de fréquence
Hard Bounce	Rebond permanent
Soft Bounce	Rebond temporaire
Complaint / Spam Report	Plainte
Suppression List	Liste de suppression
Sender Domain	Domaine expéditeur
Contact Scoring	Pointage des contacts

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