



IT technicians · Zoho One optimization



Zoho Mail

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 Mail features available to users and the functions reserved for administrators, as available in September 2026.

Available features vary by edition (Mail Lite, Mail Premium, Zoho Workplace, Zoho One) and by your organization's configuration.

1.2 What is Zoho Mail?

Zoho Mail is Zoho's ad-free, privacy-focused business email solution. It brings together email on your own domain, calendar, contacts, tasks, notes and bookmarks, as well as Streams, a collaboration space built around email. Administrators have a full console to manage domains, users, security policies, retention and migration.

1.3 Signing in

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

Nuagix tip — Install the Zoho Mail mobile app and the OneAuth app on day one: you will be ready if multi-factor authentication becomes mandatory.

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2. Interface and navigation

2.1 Interface elements

Element	Purpose
App bar (left)	Mail, Calendar, Notes, Contacts, Tasks, Bookmarks, Streams
Folder pane	Inbox, Drafts, Sent, Spam, Trash, folders and tags
Message list	Messages in the active folder, with sorting, quick filters and conversation view
Reading pane	Message content; right, bottom or in a tab
Work tabs	Several emails, drafts or events open at the same time
Search	Advanced search by sender, subject, date, attachment, folder
Settings	Gear icon: personal mailbox preferences

2.2 Customizing the display

- Light or dark theme, colors and display density
- Reading pane position and Conversation View
- Interface language and time zone: Settings > Preferences
- Pin folders as favorites
- Keyboard shortcuts that can be enabled (press ? for the list)

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3. Reading and writing emails

3.1 Writing an email

1. Click New Mail.
2. Enter recipients (To, Cc, Bcc); suggestions come from your contacts.
3. Write the subject and message; add attachments or WorkDrive links for large files.
4. Choose the signature, then click Send, or the arrow to schedule the send (Send Later).

Nuagix tip — Enable Undo Send in settings: a few seconds are often enough to avoid a wrong-recipient mistake.

3.2 Composing features

- Email templates for frequent replies
- Quick replies and Zia suggestions
- Read receipt requests
- Encrypted email, depending on edition and settings
- Mail Merge from a contact list
- Attach files from WorkDrive, Google Drive, OneDrive or Dropbox

3.3 Handling incoming messages

- Reply, reply all, forward or forward as attachment
- Mark as read, important (flag) or for follow-up
- Snooze a message so it comes back later
- Convert an email into a task, event or note
- Share an email in Streams to discuss it with colleagues

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4. Folders, tags and filters

4.1 Folders and tags

- Folders: a message is in only one folder; subfolders possible
- Tags: several colored tags per message, for cross-cutting classification
- Shared folders: share a folder with colleagues, read-only or editable
- Archive: remove a message from the inbox without deleting it

4.2 Creating a filter

1. Settings > Filters > Add Filter.
2. Name the filter and choose when to apply it (incoming or outgoing emails).
3. Set the conditions (e.g., Sender contains “@supplier.ca”).
4. Choose the actions: move to a folder, add a tag, mark as read, forward.
5. Save; apply it to existing messages if needed.

Nuagix tip — Create a filter for supplier invoices that files them in an “Accounts Payable” folder and adds a tag: nothing gets lost in the inbox.

4.3 Advanced search

1. Click in the search bar, then on the advanced options icon.
2. Specify sender, recipient, subject, period, folder or presence of attachments.
3. Save the search to reuse it (search folder).

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5. Signatures, auto replies and aliases

5.1 Creating a signature

1. Settings > Signatures > New Signature.
2. Enter your name, title, company, phone and website; add the logo if needed.
3. Associate the signature with a sending address (primary or alias).
4. Choose the position (above or below quoted text).

Note — The administrator can enforce a uniform company signature for all users.

5.2 Auto reply (out of office)

1. Settings > Auto Reply / Out of Office.
2. Enter the start and end dates.
3. Write the message in French and English, with a contact person's name.
4. Choose who to reply to: everyone, contacts only, or different messages for internal and external senders.

Nuagix tip — Write your auto reply in both languages: it is common and appreciated in Quebec.

5.3 Aliases and sending addresses

- Email Alias: another address delivered to your mailbox (e.g., info@ or firstname@), created by the administrator
- Send Mail As: choose the sending address in the From field
- Forwarding: Settings > Forwarding, if the organization's policy allows it
- External accounts: read another POP or IMAP mailbox in Zoho Mail

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6. Delegation, groups and shared mailboxes

6.1 Delegating your mailbox

1. Settings > Delegation.
2. Add the delegate colleague.
3. Choose the rights: mailbox access, Send As or Send on Behalf.
4. Share your calendar or certain folders if needed.

Caution — A delegate with mailbox access sees all your emails. Grant only the rights needed and remove them when no longer useful.

6.2 Groups and shared mailboxes

Element	How it works
Group	Common address (e.g., sales@) distributed to members; each receives a copy
Streams group	Group emails appear in Streams to be discussed and assigned
Shared mailbox	Common mailbox managed by the administrator, accessed by several members, depending on edition
Moderator	Member who approves messages before they go to the group

Nuagix tip — For a customer support address with request tracking, consider Zoho Desk rather than an email group.

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7. Streams: collaborating around email

7.1 Principles

- Share an email with colleagues without forwarding it
- Comment, @mention and like posts
- Assign an email as a task to a colleague
- Streams groups by team or project
- Posts and announcements within a group

7.2 Sharing an email in Streams

1. Open the email and click Share to Streams.
2. Choose a group or colleagues.
3. Add a comment (e.g., "Who can reply to the customer by noon?").
4. Follow the discussion in the Streams app.

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8. Calendar

8.1 Creating an event

1. Calendar > New Event, or click a time slot.
2. Enter the title, date, time, location or meeting link (Zoho Meeting or Zoom).
3. Invite participants; check their availability.
4. Add a reminder, recurrence and attachment if needed, then save.

8.2 Calendar features

- Day, week, month and agenda views
- Multiple calendars (personal, team, time off) with distinct colors
- Calendar sharing with colleagues (free/busy only or details)
- Group calendar and resource booking (rooms, equipment)
- Subscription to external calendars (Quebec holidays, iCal)
- Sync with mobile apps and CalDAV

Nuagix tip — Subscribe the whole team to a Quebec statutory holidays calendar and a team vacation calendar.

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9. Contacts, tasks and notes

9.1 Contacts

- Personal contacts and the organization's address book
- Contact groups (categories) for frequent mailings
- Import from a CSV or vCard file
- Automatic addition of recipients, depending on your settings
- Sync with Zoho CRM if the integration is active

9.2 Tasks and notes

Tool	Use
Tasks	Personal or group tasks with due date, priority, subtasks and reminders
Notes	Quick notes, organized in notebooks, shareable with colleagues
Bookmarks	Web links saved and shared as a team
Email to task	Drag an email into Tasks to create a linked task

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10. Zia, the AI assistant

10.1 Zia features

- Summary of an email or a long conversation
- Writing assistance: generate, rephrase, shorten or change the tone of an email
- Quick reply suggestions
- Natural-language search in the mailbox
- Detection of tasks and dates in messages
- Email translation, depending on edition

Note — Always review Zia's proposed text before sending, especially for customers and official communications. Feature availability varies by edition and organization settings.

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11. Mobile app

11.1 Features

- Mail, calendar, contacts, tasks and Streams on iOS and Android
- Notifications by folder or by sender
- Configurable swipe gestures (archive, delete, snooze)
- Several accounts in the same app
- App lock with passcode or biometrics
- Administrator management (remote wipe, depending on policy)

Note — Zoho Mail can also be used with native email apps through IMAP, POP, ActiveSync or CalDAV, depending on edition and organization policies.

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12. Best practices

12.1 Nuagix recommendations

- Aim for inbox zero: handle, file, archive or convert into a task
- Use filters to automatically sort newsletters and invoices
- Share large files with a WorkDrive link rather than as attachments
- Be wary of urgent emails asking for a payment or a change of banking details: verify through another channel
- Never automatically forward business email to a personal address
- Use a uniform signature with the company's full contact details
- Write your auto replies and templates in French and English

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13. Users and administration roles

13.1 Roles

Role	Rights
Super Admin	Full access: domains, billing, policies, roles
Admin	Manages users, groups, policies and settings delegated by the Super Admin
Member	Uses their mailbox and personal settings
Group moderator	Manages a group's members and approves its messages

13.2 Adding a user

1. Admin Console > Users > Add.
2. Enter the first name, last name and email address on your domain.
3. Set the initial password or send an invitation.
4. Assign the plan, storage and groups.
5. Add the required aliases; for several accounts, use CSV import.

Note — In Zoho One, first add the user in the Zoho One console and assign them the Mail app.

13.3 When an employee leaves

1. Reset the password and close active sessions; block IMAP, POP and ActiveSync access.
2. Set an auto reply naming the contact person.
3. Add their address as an alias to a colleague's mailbox, or set up temporary forwarding.
4. Export or retain their mailbox according to your retention policy (backup account, eDiscovery).
5. Deactivate then delete the account to free the license.

Caution — Deleting an account permanently deletes its emails. Check retention and export before any deletion.

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14. Domains and DNS

14.1 Adding and verifying a domain

1. Admin Console > Domains > Add Domain.
2. Prove you own the domain with a TXT or CNAME record at your registrar.
3. Click Verify; the domain becomes active in Zoho Mail.
4. Add domain aliases or secondary domains if needed.

14.2 DNS records

Record	Purpose
MX	Routes incoming mail to Zoho (e.g., mx.zoho.com, mx2.zoho.com, mx3.zoho.com, or their zohocloud.ca equivalent); exact values and priorities shown in the console
SPF (TXT)	Authorizes Zoho servers to send for your domain (e.g., v=spf1 include:zohomail.com ~all); only one SPF record per domain
DKIM (TXT)	Signs outgoing messages; key generated in the console > Domains > DKIM
DMARC (TXT at _dmarc)	Tells receivers what to do with unauthenticated messages (p=none, quarantine, reject) and where to send reports
Verification (TXT/CNAME)	Proves domain ownership

Caution — Changing MX records immediately redirects incoming mail. Do it only after creating all accounts, groups and aliases.

14.3 Rolling out DMARC gradually

- Start with p=none and a report address (rua) for two to four weeks
- Analyze the reports to find services that send on your behalf (newsletters, invoicing, website)
- Add those services to SPF or configure their DKIM
- Move to p=quarantine, then p=reject once everything is compliant

Nuagix tip — Many small businesses forget their invoicing software or website in SPF. Inventory every sender before tightening DMARC.

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15. Groups and shared mailboxes

15.1 Creating a group

1. Admin Console > Groups > Create.
2. Name the group and choose the address (e.g., sales@yourdomain.ca).
3. Add members and moderators.
4. Set who can email the group: everyone, members only, organization only, moderated.
5. Enable Streams for the group if the team wants to discuss and assign emails.

15.2 Useful options

- Group aliases (e.g., sales@ and ventes@ to the same group)
- Group auto reply
- Shared mailboxes for common addresses, depending on edition
- Catch-all address for messages sent to non-existent addresses

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16. Email policies

16.1 Policy types

Policy	Examples of control
Email Restrictions	Attachment size, blocked file types, external sending
Access Restrictions	IMAP, POP, ActiveSync, mobile apps, web access
Account Restrictions	External forwarding, display name changes, external accounts
Forward restrictions	Block automatic forwarding outside the domain
Password and MFA policy	Complexity, expiry, mandatory multi-factor authentication

16.2 Applying a policy

1. Admin Console > Mail Policy.
2. Create a policy or edit the default policy.
3. Configure the desired restrictions.
4. Assign the policy to users or groups (e.g., interns, management).
5. Inform users of changes that affect them.

Nuagix tip — Block automatic forwarding to external addresses: it is a common technique after a password is stolen.

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17. Spam control and email security

17.1 Anti-spam settings

- Allowlist / Blocklist by address, domain or IP address
- Filtering level and spam handling (Spam folder or quarantine)
- Administrator-managed quarantine, with release of legitimate messages
- SPF, DKIM and DMARC checks on incoming messages
- Protection against spoofing and phishing
- Antivirus scanning of attachments

17.2 Responding to phishing

1. Ask users to report the message as phishing rather than delete it.
2. Block the sender or domain in the blocklist.
3. Search for other recipients in the logs and remove the message if necessary.
4. If credentials were entered, reset the password and close sessions.

Caution — Never add a public domain (gmail.com, outlook.com) to the allowlist: it would disable filtering for millions of senders.

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18. Retention and eDiscovery

18.1 Retention policies

1. Admin Console > Security & Compliance > Retention.
2. Create a policy: retention period, scope (organization, groups, users).
3. Choose to keep messages, even those deleted by the user, for the defined period.
4. Enable a Litigation Hold on specific accounts if needed.

18.2 eDiscovery

- Search the organization's retained emails by keyword, sender, period
- Export results for an internal investigation or legal request
- Access limited to authorized administrators; searches are logged
- Available depending on edition

Note — Retention must balance your tax and legal obligations with Law 25's minimization principle. Document the period you choose.

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19. Email migration

19.1 Supported sources

Source	Method
Gmail / Google Workspace	Migration via Google service account or IMAP
Microsoft 365 / Exchange	EWS or IMAP migration
Other server (web host, cPanel)	IMAP or POP migration
PST or EML files	Upload in the console or via the migration tool
Contacts and calendars	CSV, vCard or iCal import

19.2 Migration steps

1. Create accounts, groups and aliases in Zoho Mail.
2. Admin Console > Migration > Add Migration; choose the source and enter the settings.
3. Map source and destination accounts (CSV file for several accounts).
4. Start the migration and track progress per account.
5. Switch the MX records, then run the migration again for the latest messages.
6. Set up users' devices and close the old service after verification.

Nuagix tip — Schedule the MX switch on a Friday afternoon and plan a Zoom support session on Monday morning.

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20. Integrations

20.1 Zoho integrations

Application	Typical use
Zoho CRM	See customer data in email and link exchanges to records
Zoho WorkDrive	Attach files by link and save attachments
Zoho Cliq	Share an email in a conversation or channel
Zoho Desk	Convert an email into a support ticket
Zoho Books	View a customer's invoices and payments
Zoho Projects	Create a project task from an email
Zoho Meeting	Add a meeting link to events

20.2 Other integrations

- eWidget: show Zoho or third-party apps directly inside Zoho Mail
- Marketplace extensions (Zoom, Trello, Asana and more)
- Email clients: Outlook, Apple Mail, Thunderbird via IMAP, POP or ActiveSync
- SMTP relay for printers, applications and websites, depending on edition
- Zoho Mail REST API (OAuth 2.0) and Zoho Flow

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21. Security and compliance

21.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Access restriction by IP address
- TLS encryption in transit, encryption at rest and S/MIME encrypted email, depending on edition
- Mobile device management and remote wipe
- Audit logs: sign-ins, administrator actions, Email Logs
- Hosting in the Canadian data center (zohocloud.ca)

21.2 Reviewing logs

1. Admin Console > Reports or Logs.
2. Choose the log: login history, administrator actions, sent and received emails.
3. Filter by user, period or IP address.
4. Export the log if needed for analysis or an investigation.

21.3 Privacy and Quebec Law 25

- Appoint a person in charge of the protection of personal information and publish their contact details
- Set a consistent retention period for email
- Limit delegate and administrator access to what is strictly needed
- Enable multi-factor authentication for everyone, administrators first
- Document confidentiality incidents, such as a compromised account

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

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22. Editions and licenses

22.1 Editions

Edition	For whom
Mail Lite	Basic business email, storage depending on the chosen plan
Mail Premium	More storage, retention and eDiscovery, backup, white labeling
Zoho Workplace Standard / Professional	Mail with WorkDrive, Cliq, Writer, Sheet, Show and Meeting
Zoho One	Mail included with the full set of Zoho apps

22.2 Tracking usage

Admin Console > Subscription shows the edition, licenses used and storage per user. Mail Lite and Premium licenses can sometimes be combined as needed. Remove licenses from deleted accounts.

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23. Deployment checklist

23.1 Before going live

- ☐ Domain added and verified
- ☐ Users, aliases and groups created
- ☐ Email and password policies defined
- ☐ Multi-factor authentication enabled
- ☐ Migration of old mailboxes (Gmail, Microsoft 365 or IMAP) completed
- ☐ MX records switched and incoming mail tested
- ☐ SPF and DKIM configured, DMARC at p=none
- ☐ Uniform company signature deployed
- ☐ Anti-spam settings and quarantine configured
- ☐ Retention policy defined (Law 25)
- ☐ Mobile apps and email clients configured
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Mail 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
Email / Mail	Courriel
Inbox	Boîte de réception
Drafts	Brouillons
Spam	Pourriels
Trash	Corbeille
Folder	Dossier
Tag	Étiquette
Filter	Filtre
Signature	Signature
Auto Reply / Out of Office	Réponse automatique
Email Alias	Alias
Delegation	Délégation
Group	Groupe
Send Later	Envoyer plus tard
Snooze	Reporter
Admin Console	Console d'administration
Mail Policy	Politique de courriel
Retention	Rétention
Allowlist	Liste d'autorisation
Audit Log	Journal d'audit

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