

CLEARPATH CONSULTING, LLC
Zoho One Implementation & Managed Services

Zoho Campaigns

Standard Operating Procedures Manual

List management, email campaign creation, automation workflows, segmentation, deliverability, and CRM sync

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Every procedure in this manual is drawn from Zoho's official documentation, cited by chapter under a Sources heading. Passages that could not be independently verified against a stable, dedicated source are flagged in a Verification Note rather than stated as settled fact.

How to Use This Manual

This manual documents ClearPath Consulting's standard method for configuring and operating each area of Zoho Campaigns. It serves two purposes at once: it is the internal reference ClearPath consultants follow on every engagement, and it is a work sample provided to prospective clients to demonstrate ClearPath's delivery methodology.

Each chapter is organized into numbered sub-sections. Procedures are presented as sequential numbered steps. A green Best Practice box highlights a recommended approach; an orange Common Pitfall box flags a frequent implementation error; a gold Verification Note marks a claim that could not be confirmed against a stable, dedicated Zoho documentation source at the time of writing and should be reconfirmed in the client's live environment before being treated as settled fact. Every chapter closes with a Sources list citing the official Zoho documentation each procedure was drawn from.

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Chapter 1: Account Setup & Sender Authentication

1.1 Organization Account & Workspace Setup

Every ClearPath Campaigns engagement begins with the client's Zoho One or standalone Zoho Campaigns organization account. Zoho Campaigns organizes work into Workspaces, which separate campaigns, contacts, and settings for different brands, departments, or client sub-accounts under a single organization. The organization-level Admin has access to every Workspace automatically and is the only role that can create additional Workspaces, add senders at the organization level, and manage billing.

Before any list or campaign work begins, ClearPath confirms the organization profile is complete: legal company name, physical mailing address, and support contact details. This information is not cosmetic. Zoho Campaigns pulls the organization address directly into the mandatory footer merge tags described in Chapter 6, and an incomplete profile will produce a blank or malformed postal address in every outgoing email, which is itself a CAN-SPAM compliance defect.

BEST PRACTICE

Set up Workspaces before importing a single contact if the client operates multiple brands or business units. Retrofitting Workspace separation after lists and campaigns already exist is significantly more labor-intensive than starting with the correct structure.

During discovery, ClearPath documents which of the client's existing brands or divisions will ultimately need their own Workspace, even for engagements that start with a single Workspace, so the account is provisioned with room to grow rather than requiring a structural migration the first time a second division wants to send its own campaigns. This upfront mapping is a short conversation during kickoff, but it avoids a materially more disruptive rebuild later.

1.2 Sender Email Verification

A sender is the "From" email address a campaign is sent from, and every sender address used in Zoho Campaigns must be individually verified before it can send. Organizations on most plans may register up to five sender addresses. Verification is a closed-loop process: Zoho sends a confirmation email to the proposed sender address, and a person with access to that inbox must click the verification link before the address is activated for sending.

ClearPath registers at least two verified senders on every engagement wherever the client's needs support it: a primary, human-attributed address (for example, a named account manager) for relationship-driven sends, and a distinct no-reply or team address for transactional or bulk announcement content. Segmenting sender identity this way lets reporting distinguish engagement on relationship-driven outreach from engagement on bulk communications, and it gives the client flexibility to retire or reassign one sender identity later without disrupting the other.

Procedure: Add and Verify a Sender Address

1. Navigate to Settings > Manage Senders (listed under the Deliverability section of Settings).
2. Click Add Sender and enter the sender's email address and display name.
3. Send the verification email from the same screen.

4. Open the inbox for that address and click the verification link contained in the email Zoho sends.
5. Confirm the sender now shows a Verified status in Manage Senders before selecting it as a From address on any campaign or workflow.

COMMON PITFALL

Do not use a free public mailbox (Gmail, Yahoo, Outlook.com, etc.) as a sender address for client campaigns. Zoho explicitly does not permit domain authentication for public consumer domains, which caps deliverability and blocks SPF/DKIM alignment. Always send from an address on the client's own registered domain.

1.3 Domain Authentication (SPF and DKIM)

Sender verification confirms that a mailbox exists and belongs to the client; domain authentication is the separate, mandatory step that proves to receiving mail servers that Zoho is authorized to send mail on behalf of the client's domain. Zoho Campaigns implements this through two DNS TXT records: a Sender Policy Framework (SPF) record, which lists Zoho's sending servers as authorized senders for the domain, and a DomainKeys Identified Mail (DKIM) record, which lets receiving servers cryptographically verify that a message was not altered in transit and genuinely originated from an authorized Zoho server.

Only the organization Admin can access domain authentication settings. Because DNS changes are made outside Zoho — in the client's domain registrar or DNS host (GoDaddy, Cloudflare, Network Solutions, and similar) — this step nearly always requires either direct DNS access from the client or a scheduled screen-share to walk their IT contact through the change.

Procedure: Authenticate a Sending Domain

1. Navigate to Settings > Domain Authentication and click Setup.
2. Copy the SPF record value and the DKIM record value (including the DKIM selector hostname, e.g. 2232._domainkey) exactly as displayed.
3. In the domain's DNS management panel, add a TXT record at the root (@) host containing the SPF value. If a SPF record already exists for the domain, merge the new include statement into the existing record rather than creating a second record — a domain can only have one valid SPF record.
4. Add a second TXT record at the DKIM selector host containing the DKIM value.
5. For organizations outside the default North America data center, confirm the correct SPF include mechanism for the account's region (for example include:eu.zcsend.net for the EU data center, or include:zcsend.in for India) before publishing the record.
6. Return to Settings > Domain Authentication, click Setup, then Verify Domain. Allow up to 24–48 hours for DNS propagation before re-attempting verification if it fails on the first try.

VERIFICATION NOTE

Zoho's public documentation confirms SPF and DKIM as the two authentication mechanisms configured directly in Domain Authentication, and references DMARC only in general deliverability best-practice guidance rather than as a record Zoho itself generates. Confirm current DMARC guidance (policy value and reporting address) directly in the client's DNS host or with Zoho support at the time of engagement, since DMARC is typically layered on by the client's own IT policy rather than provisioned by Zoho.

Domain authentication is scoped per sending domain, not per sender address, so a client sending from two distinct domains (for example, a primary corporate domain and a separate product-line domain) needs the full SPF and DKIM process completed once for each domain independently. ClearPath tracks authentication status per domain in the same pre-launch reference used for sender verification, so a second domain added later does not get overlooked simply because the first one was already confirmed.

1.4 CAN-SPAM and Baseline Compliance

Zoho Campaigns enforces several CAN-SPAM Act requirements structurally rather than leaving them to marketer discretion: the platform will not allow a campaign to send without an unsubscribe mechanism present in the template, and every email footer includes the organization's registered postal address (set in Section 1.1). ClearPath's standard build additionally confirms that the sender's display name and subject line accurately represent the message content, and that the physical address on file is a real, deliverable mailing address rather than a placeholder.

Unsubscribe requests must be honored without delay; Zoho automates this by moving any contact who clicks unsubscribe to the account's Do-Not-Mail list immediately, which blocks further sends to that address from any list in the account. Chapter 6 covers the full mechanics of unsubscribes and bounce handling.

ClearPath treats these platform guardrails as a floor, not a ceiling. A client's own industry (financial services, healthcare, or any sector with sector-specific marketing regulation) may impose disclosure or consent requirements beyond what Zoho enforces automatically, and those additional requirements are captured during discovery and built into the template and list architecture rather than assumed to be handled by the platform alone.

1.5 Pre-Launch Compliance Checklist

Before ClearPath hands a Campaigns account to a client for live sending, every item below is confirmed in the live account rather than assumed from the build plan. This checklist consolidates the individually mandatory steps covered in Sections 1.1 through 1.4 into a single go/no-go gate for launch.

This is deliberately the last checkpoint before any list import or campaign send touches real contacts, and ClearPath does not treat it as optional even on accelerated timelines. A missed domain-authentication step or an incomplete organization profile is inexpensive to fix before the first send and materially more disruptive to fix after a bad first impression has already reached the client's audience.

Procedure: Pre-Launch Sign-Off

1. Confirm the organization profile (legal name, physical address, support contact) is complete and accurate in Settings.
2. Confirm every sending address shows a Verified status in Settings > Manage Senders.
3. Confirm Settings > Domain Authentication shows a Verified status for SPF and DKIM on the sending domain.
4. Confirm no public consumer domain (Gmail, Yahoo, Outlook.com, etc.) is configured as a live sender.
5. Send a test campaign to an internal distribution list and visually confirm the unsubscribe link, postal address, and any required legal footer text render correctly.
6. Confirm the organization's Do-Not-Mail list and any previously suppressed or hard-bounced addresses have been reviewed and are not present in the launch list.

BEST PRACTICE

Run this checklist as a standing agenda item at the final pre-launch client meeting, not silently in the background. Walking the client through each verified item builds their confidence in the deliverable and creates a documented record that compliance fundamentals were checked before go-live.

Sources

- Authenticate email domain — help.zoho.com/portal/en/kb/campaigns/getting-started-guide/articles/how-to-authenticate-email-domain
- Sender Policy Framework (SPF) — help.zoho.com/portal/en/kb/campaigns/deliverability-guide/domain-authentication/articles/what-is-sender-policy-framework-spf
- Register (Authenticate Your Sender Domain) — help.zoho.com/portal/en/kb/campaigns/deliverability-guide/domain-authentication/authenticate-your-sender-domain/articles/register
- Unsubscribes — help.zoho.com/portal/en/kb/campaigns/deliverability-guide/reputation-management/articles/what-is-unsubscribes
- CAN-SPAM Act compliance: A complete checklist for email marketers — zoho.com/campaigns/marketingmatchbox/marketingmatchbox/CAN-SPAM-email-marketing.html

Chapter 2: Contact & List Management

2.1 Mailing Lists and List Types

The mailing list is the base organizational unit for contacts in Zoho Campaigns. Every contact must belong to at least one list, and every campaign is sent to one or more lists (optionally filtered by a segment, covered in Section 2.4). Lists are created and managed from Contacts > Manage Lists.

When a list is created, Zoho requires it to be associated with either a purpose (for GDPR-oriented lawful-basis tracking) or a topic (for permission/consent-based marketing, covered in Section 2.2) so that every list in the account is categorized from the outset rather than retrofitted later. Zoho Campaigns supports both single opt-in lists, where a contact is added directly (via import, manual entry, or a signup form) with no additional confirmation step, and double opt-in (confirmed opt-in) lists, where a contact who submits a signup form must click a confirmation link in a follow-up email before being added as an active, mailable subscriber.

Procedure: Create a Mailing List

1. Navigate to Contacts > Manage Lists.
2. Click Create List in the top-right corner.
3. Enter an internal list name.
4. Associate the list with a topic or purpose.
5. Add contacts using one of three methods: manual entry, import (from a computer file, Zoho CRM, or Google Sheets), or a signup form configured to feed the list directly.

BEST PRACTICE

Default new signup-form-driven lists to double opt-in. It produces a smaller but substantially higher-quality and lower-bounce list, which directly protects the sending domain's reputation (see Chapter 6).

ClearPath's standard list architecture keeps the number of active lists deliberately small — typically one list per audience type (Customers, Prospects, Newsletter Subscribers) with segments (Section 2.4) and topics (Section 2.2) layered on top for finer targeting, rather than a sprawling set of narrowly-scoped lists. A large, uncontrolled list count is one of the most common sources of confusion ClearPath encounters when taking over an existing Campaigns account, since it becomes unclear which list is authoritative for a given contact and campaigns risk duplicate sends across overlapping lists.

2.2 Topics and Subscriber Preferences

Topics represent subject-matter interests a contact can opt into independently of any specific list — a contact can be mapped to a topic whether or not they belong to any list at all. Topic selection is mandatory when building any email campaign or workflow, and organizations can create an unlimited number of topics. A single-product business typically maps all topics under one umbrella, while a multi-product or multi-division organization creates a topic tree with different products or service lines and relevant topics nested underneath each.

Contacts manage their own topic subscriptions in two ways: proactively, through a "Manage Preferences" link that Zoho includes in campaign footers, or passively, by selecting topics of interest at signup if the signup form

is configured to expose them. Marketers can also assign topics on the back end during manual contact addition or bulk import.

BEST PRACTICE

Topic-based sending measurably reduces unsubscribe and spam-complaint rates because contacts self-select the content categories they actually want. Build the topic taxonomy with the client during discovery, before the first list import, so contacts are never bulk-assigned to an undifferentiated "all communications" topic.

A well-designed topic taxonomy typically stays to somewhere between three and eight topics for a small-to-mid-size client; beyond that range, the Manage Preferences experience becomes overwhelming for the contact and the marginal targeting benefit tends to diminish. ClearPath reviews the proposed topic list with the client's marketing stakeholder specifically for redundancy — two topics that in practice always get the same content and the same send cadence are candidates for merging into one.

2.3 Importing and Adding Contacts

Contacts can be added to a list individually, in bulk via file import (CSV, TSV, or XLS), by sync from Zoho CRM (Chapter 3), or through a public signup form. During a manual bulk import, Zoho requires the marketer to select a subscription type; when Marketing is selected, the import screen exposes fields to assign one or more topics and to record a Lawful Basis for Communication (for example, consent, legitimate interest, or contract) for the imported batch — tying consent documentation directly to the point of contact entry rather than leaving it implicit.

After an import completes, the Import Summary shows counts of newly added contacts, duplicates, and any records that were ignored, along with the specific reason each ignored record was excluded (most commonly a malformed email address or an existing hard-bounce or unsubscribe record for that address).

COMMON PITFALL

Never import a purchased or rented contact list into Zoho Campaigns. Beyond violating Zoho's own anti-spam policy and CAN-SPAM's implicit consent expectations, a cold, unverified list produces an immediate spike in hard bounces and spam complaints that can trigger a temporary or permanent account suspension, as referenced in Chapter 6.

For migrations from a prior email platform, ClearPath cleans the source file before import rather than after: standardizing email formatting, removing obvious role-based or catch-all addresses unlikely to belong to a real recipient, and stripping any contact already flagged as unsubscribed or bounced on the prior platform. A clean pre-import file materially reduces the number of records that land in the ignored-contacts list and gives a more accurate first read on true list size and quality.

2.4 List Segmentation

A segment is a saved, reusable filter applied on top of one or more lists to target a subset of contacts for a specific campaign or workflow, without altering underlying list membership. Segment criteria follow a

consistent Field > Modifier > Value structure — for example, Contact Score > is greater than > 50 — and a single segment can combine up to ten such criteria.

Available fields span several categories: list and topic membership; predefined contact fields (name, email, phone, signup date); consent and privacy-policy-agreement fields; social handles; account- and contact-level custom fields; tags, contact source, and contact score; webinar registration and attendance; campaign engagement history (sent, opened, clicked, replied); e-commerce order and spend history; and, where CRM integration is active, synced Deal and Account fields. Modifiers vary by field type and include equality operators, text operators such as contains and starts with, numeric comparison operators, and relative or absolute date operators.

VERIFICATION NOTE

Zoho's documentation describes segment criteria and the 10-criteria limit in detail but does not spell out the exact click path for creating a new segment (e.g., the specific button and screen sequence) in the sources reviewed. Confirm the current in-app path with the client's live account before training end users, since Zoho revises list/segment screens periodically.

ClearPath builds a standard starter set of segments for every managed-services client rather than leaving segmentation to be invented ad hoc per campaign: an Engaged segment (opened or clicked within the last 90 days), a Dormant segment (no opens or clicks in 90–180 days), and a New Subscriber segment (joined within the last 30 days), at minimum. These three alone cover the majority of day-to-day targeting needs and give the client immediately usable building blocks rather than an empty segmentation tool.

2.5 Contact Scoring

Contact Scoring assigns a running numeric score to each contact based on their engagement behavior, giving ClearPath and the client a single, sortable measure of lead warmth that can drive both segmentation (Section 2.4) and workflow actions (Chapter 5). Scoring is configured from Contacts > Contact Scoring > Setup.

Zoho's default scoring model awards points for positive engagement — 10 points for a unique open, 30 points once a contact reaches three or more opens, 10 points for a unique click, 30 points at three or more clicks, plus configurable points for replies, opt-ins, and referrals — and deducts points for negative signals such as unsubscribing or leaving an unfavorable reply. Scores are also awardable through field-based rules (matching a profile attribute like company size or location), fully custom rules, and directly through the Add Score action inside a workflow (Section 5.1).

COMMON PITFALL

By default, contact scores floor at zero even when negative-point rules are configured; a contact's score will not go negative unless the account's "Allow contact score to go below zero" toggle is explicitly enabled. Confirm this setting matches the client's intended scoring model — a floored-at-zero score understates how disengaged a previously active contact has become.

ClearPath typically pairs Contact Scoring with a small number of score-based segments (for example, Hot: 75+, Warm: 30–74, Cold: below 30) rather than exposing the raw numeric score directly to the client's sales team, since a bucketed label is easier for a salesperson to act on at a glance than an unadorned number. Where CRM

sync is active (Chapter 3), the underlying score itself can also be pushed to a mapped CRM field so sales sees lead warmth without needing to log into Campaigns at all.

Sources

- Manage your mailing lists — help.zoho.com/portal/en/kb/campaigns/user-guide/contact-management/list-management/articles/mailling-list-management
- Topic Management — zoho.com/campaigns/topic-management.html
- Can topics be assigned to contacts during manual import? — help.zoho.com/portal/en/kb/campaigns/faqs/topics/articles/can-topics-be-assigned-to-contacts-during-manual-import
- Segment Criteria — help.zoho.com/portal/en/kb/campaigns/user-guide/contact-management/list-segmentation/articles/segment-criteria
- What types of segment criteria can you use? — help.zoho.com/portal/en/kb/campaigns/faqs/contact-management/articles/what-types-of-segment-criteria-can-you-use-e-g-demographics-custom-fields
- Contact Scoring — help.zoho.com/portal/en/kb/campaigns/user-guide/contact-management/contact-scoring/articles/how-to-setup-contact-scoring
- How does contact scoring work in Zoho Campaigns? — help.zoho.com/portal/en/kb/campaigns/faqs/contact-management/articles/how-does-contact-scoring-work-in-zoho-campaigns

Chapter 3: CRM Sync Services

3.1 Sync Architecture Overview

Zoho Campaigns integrates with Zoho CRM through Sync Services, accessed from Contacts > Sync Services. There are two distinct sync mechanisms, and ClearPath standardizes on choosing the right one deliberately rather than defaulting to whichever a client happens to enable first.

Immediate Sync is a lightweight, near-real-time mechanism: new or updated CRM records that match its configuration typically appear in Zoho Campaigns within five to ten minutes, with minimal setup. Periodic Sync is the more powerful and more heavily configured option: it runs on a daily, weekly, or monthly schedule; it supports Leads, Contacts, Accounts, Deals, and custom modules (with the caveat that Account and Deal records only sync where they carry an associated contact); and it supports filtered, criteria-based sync rather than an all-or-nothing feed.

ClearPath's rule of thumb: reach for Immediate Sync only for a simple, single-list, no-filtering use case — for example, every new CRM Contact should land on the general newsletter list, full stop — and reach for Periodic Sync as soon as the client needs any filtering, any consent gating, or any routing of different CRM segments to different Campaigns lists. In practice, the large majority of ClearPath's CRM Sync builds end up on Periodic Sync, because even a seemingly simple requirement ("only sync Contacts, not Leads") is itself a filtering condition that Periodic Sync's criteria model handles but Immediate Sync does not expose.

VERIFICATION NOTE

Zoho's documentation confirms that unsubscribe status specifically writes back to Zoho CRM: a synced contact is updated to Opt-out status in CRM once they unsubscribe from the organization in Campaigns. It does not, in the sources reviewed, confirm whether other engagement data — opens, clicks, replies — writes back to CRM automatically as part of the sync itself, versus requiring a separate workflow or webhook (Chapter 5, Section 8.3) to push that data across. Confirm the current scope of write-back behavior in the client's own CRM-Campaigns integration settings before representing full engagement sync as automatic.

3.2 Setting Up Periodic Sync

Periodic Sync is the standard choice for any client using Campaigns as their primary nurture and newsletter tool alongside Zoho CRM, because it lets ClearPath scope precisely which CRM records land in which mailing list, on which cadence, and under what consent condition.

ClearPath's standard build documents each configured sync in a short internal reference sheet — source module, criteria, destination list, frequency, and consent handling — kept alongside the client's engagement notes. Because an organization can run up to ten active syncs simultaneously (Section 3.2), a written map of what each one does becomes essential fairly quickly, particularly on accounts with several lists feeding different nurture programs.

Sync frequency deserves its own deliberate decision rather than a default. A daily sync suits most ongoing nurture use cases, since it keeps Campaigns close enough to real time for time-sensitive follow-up without approaching the account's monthly sync-initiation cap. A weekly or monthly cadence is usually sufficient for

slower-moving segments — an annual customer newsletter list, for instance — where near-real-time freshness has no practical benefit and a lower-frequency schedule conserves the organization's limited sync initiations for the syncs that actually need them.

Procedure: Configure a Periodic Sync

1. Navigate to Contacts > Sync Services and click New Sync.
2. Select Periodic Sync.
3. Choose the source module: Leads, Contacts, Accounts, Deals, or a custom module.
4. Choose to sync All records of that module, or apply Criteria to filter which records qualify (for example, Lead Status equals Qualified).
5. Optionally apply an existing CRM custom view instead of, or in addition to, criteria.
6. Select the destination mailing list in Zoho Campaigns.
7. Set the Consent Status handling for synced records — Consent Required or Consent Expressed — to control whether unconsented CRM records are held back from active marketing status.
8. Configure how opted-out contacts and converted Leads should be handled on subsequent sync runs.
9. Set the sync frequency and run time, and choose whether to sync all historical records or only records created/modified from a specific date forward.
10. Complete field mapping between CRM fields and Campaigns contact fields, then save to start the sync.

COMMON PITFALL

An organization can maintain a maximum of 10 active periodic syncs and is capped at 50 sync initiations per month. On accounts with several Workspaces or segmented nurture lists, map out the full set of needed syncs before building the first one — hitting the cap mid-project forces a redesign of the sync architecture.

3.3 Filter-Based and Criteria Sync

Rather than syncing an entire CRM module into a single undifferentiated list, ClearPath's standard pattern is to build narrow, criteria-filtered syncs that route each qualifying segment of CRM records into its own purpose-built Campaigns list — for example, a sync scoped to Deal Stage = Closed Won feeding a Customers list, run alongside a separate sync scoped to Lead Status = Open feeding a Prospect Nurture list. This keeps segmentation logic anchored in CRM data the sales team already maintains, rather than duplicating it as a second, manually-maintained set of Campaigns segments.

CRM custom views can be reused across multiple periodic syncs, which lets a single, sales-maintained view (for example, "Active Territory: Southeast") drive several downstream Campaigns lists without CRM users needing any awareness of the Campaigns configuration behind it.

This pattern also gives ClearPath a clean way to keep the sales and marketing definitions of a segment in sync over time: because the routing logic lives in a CRM field or view rather than duplicated inside Campaigns, a sales-side change to what counts as, say, an "Active Territory: Southeast" record automatically reflects in the downstream Campaigns list on the next sync run, with no separate update required inside Campaigns itself.

Criteria complexity has a practical ceiling worth respecting: a sync built against a single, clearly-defined field (Lead Status equals Qualified) is easy for anyone on the client's team to audit at a glance, while a sync layering

several nested conditions together becomes progressively harder for someone other than its original builder to reason about later. Where a genuinely complex qualification rule is unavoidable, ClearPath prefers to build that logic once as a CRM custom view or a CRM workflow-maintained field, and point the sync at that single field, rather than replicating multi-condition logic inside the sync configuration itself.

3.4 CRM-Based Merge Tags and Data Flow

Once a sync is active, fields brought over from Zoho CRM become available as merge tags inside the Campaigns template editor, letting a single email template pull in live CRM data — account name, deal stage, assigned owner, or any mapped custom field — per recipient at send time. This is what allows a nurture email template to read naturally personalized ("Hi Jonathan, following up on your Georgia Water Tanks quote...") without the marketer manually customizing each send.

Because these are CRM-sourced fields, their accuracy in a campaign is only as good as the underlying CRM data hygiene and the sync's field mapping. ClearPath verifies mapped merge tags against live CRM records during QA, before a template using CRM personalization goes to a full list, to catch blank or mismatched fields before they reach recipients.

ClearPath also uses the fallback-value syntax described in Section 4.4 defensively on every CRM-sourced merge tag, not just on core contact fields. A CRM custom field that is populated for most Contacts but blank for a meaningful minority will otherwise leave a visibly empty gap in the email for exactly that minority of recipients, which reads as sloppier than not personalizing at all.

3.5 Monitoring and Troubleshooting Sync

Sync history and logs for each configured sync are available from Contacts > Sync Services > Active Syncs, which shows a detailed record of every sync run and lets an admin download the list of ignored contacts for a given run along with the specific reason each record was skipped.

The most common causes of records failing to sync are contacts missing a mandatory field — Campaigns requires first name, last name, and email at minimum, and a CRM-originated sync additionally expects a company name — and criteria-based syncs configured against a single-value field where the underlying CRM field was later removed or renamed, which silently breaks the sync's matching logic going forward. When a client reports that expected CRM records are not appearing in a Campaigns list, ClearPath's standard diagnostic sequence is: confirm the sync is still Active, review the sync's ignored-contacts log for the affected records, and confirm the criteria field referenced by the sync still exists and is populated on the CRM side.

COMMON PITFALL

Deleting a contact in Zoho CRM does not automatically remove that contact from a Campaigns mailing list unless the sync's advanced deletion-handling options were explicitly configured to do so. Review this setting deliberately during sync setup rather than assuming CRM deletions propagate to Campaigns by default.

ClearPath schedules a brief sync health check as a recurring managed-services task — reviewing Active Syncs status, spot-checking the most recent ignored-contacts log, and reconciling record counts against a rough CRM-side expectation — rather than waiting for a client to notice missing contacts before investigating. A sync

that silently stopped running or started skipping the majority of records is otherwise easy to miss for weeks, since Zoho does not proactively alert an admin when a sync's match rate drops.

Sources

- Set up sync with Zoho CRM — help.zoho.com/portal/en/kb/campaigns/user-guide/integrate-with-zoho-crm/articles/how-to-setup-sync-with-zoho-crm
- Can Zoho CRM contacts be synced into a mailing list in Zoho Campaigns? — help.zoho.com/portal/en/kb/campaigns/faqs/contact-management/articles/can-zoho-crm-contacts-be-synced-into-a-mailing-list-in-zoho-campaigns
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- How can you view the sync histories or logs? — help.zoho.com/portal/en/kb/campaigns/faqs/integrate-with-zoho-crm/new-crm-integration-model/articles/how-can-you-view-the-sync-histories-or-logs
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Chapter 4: Campaign Creation & Email Design

4.1 Campaign Types and the Creation Workflow

Campaigns are created from Campaigns > Email Campaigns > Create Campaign. The core, standard campaign type is the Regular email — a single email sent to a chosen list and topic — which is the type ClearPath uses for the large majority of client newsletters, announcements, and one-off promotions. Every campaign is required to be tagged to both a Campaign Name (internal reference) and a Topic Name (Section 2.2) before proceeding to design.

The Campaign Name is internal only and never appears to recipients, so ClearPath's naming convention encodes the send date, audience, and purpose (for example, 2026-08-Newsletter-AugustUpdate) rather than a generic label. On an account running several concurrent nurture programs and one-off sends, a consistent naming convention is what keeps the Sent Campaigns report (Chapter 7) navigable months into an engagement.

The recipient-selection step that follows campaign creation is where the list (Chapter 2) and any applied segment (Section 2.4) are chosen, and ClearPath treats this step with the same care as the content itself: a well-designed email sent to the wrong segment is a bigger operational miss than a middling email sent to the right one. Confirming the intended list and segment combination before moving into template design, rather than only checking it again right before send, catches a mistargeted audience early enough that it costs nothing to correct.

Procedure: Start a Regular Email Campaign

1. Navigate to Campaigns > Email Campaigns and click Create Campaign.
2. Select Regular Email.
3. Enter the Campaign Name and select the Topic Name.
4. Click Save and Proceed to move into list/recipient selection and then template design.

4.2 The Drag-and-Drop Template Editor

Once a campaign moves past recipient selection, the design step opens Zoho's drag-and-drop editor, which builds the email from modular content blocks rather than requiring hand-written HTML. Available blocks include Text, Image, Spacer, combined Image-and-Text, Button, Columns, Table, Divider, Boxed Text, raw Insert HTML, interactive Widgets, Dynamic Content, Attachments, Polls, Video, Footer, and ICS calendar-invite blocks. A formatting toolbar sits alongside the canvas for font, weight, alignment, merge-tag insertion, hyperlinks, list formatting, indentation, inline images, and special characters.

The Dynamic Content block deserves particular attention: it lets a single template render different content blocks to different recipients based on segment or field criteria, so one master template can serve several audience segments without ClearPath maintaining a separate template per segment. This is the mechanism ClearPath reaches for when a client wants one newsletter send with a regionally or industry-specific call-to-action block layered on top of otherwise shared content.

BEST PRACTICE

Keep the design to a single-column, block-based layout wherever the brand allows it. Multi-column

layouts render inconsistently across the wide range of email clients Zoho's own client/device reporting tracks (see Chapter 7), and simpler layouts consistently show fewer rendering complaints in post-send device reports.

4.3 Templates: Saved, Pre-Designed, Basic, and Code

The template selection screen offers several starting points. Saved Templates are the organization's own previously built and stored designs, intended for recurring campaign formats. Pre-Designed Templates are Zoho-provided, ready-to-use layouts built around common business scenarios. Basic Templates are minimal blank layouts built purely from the drag-and-drop components in Section 4.2, intended as a clean starting point for a fully custom build. Beyond these three, a marketer can drop into the raw HTML Code Editor, use a bare Plain Text Editor, import or upload an existing HTML file from a computer or connected cloud storage account, or reuse a recently sent campaign as the starting point for a new one.

ClearPath's standard delivery pattern is to build one polished, brand-matched Saved Template per client during onboarding — header, footer, color palette, and typography locked to brand guidelines — so that every subsequent campaign starts from that template rather than being rebuilt from a blank canvas.

The HTML Code Editor and file-upload paths exist primarily for clients migrating an existing, already-coded template from a prior email platform, or for agencies that maintain their own HTML build pipeline outside Zoho. ClearPath uses these paths sparingly: a hand-coded template bypasses the drag-and-drop editor's built-in responsive behavior, which means the marketer takes on full responsibility for mobile rendering, dark-mode behavior, and cross-client compatibility that the native editor otherwise manages automatically.

When ClearPath does build the initial Saved Template for a client, the build always starts from a Basic Template rather than a Pre-Designed Template, even though the pre-designed options are faster to adapt superficially. A pre-designed template's underlying block structure is optimized for Zoho's generic example content, and retrofitting it to a specific brand's layout preferences tends to accumulate more leftover structural artifacts than building cleanly from a blank, brand-specified layout from the outset.

A finished Saved Template is reviewed with the client before it becomes the standing default for every future campaign, specifically checking rendered appearance against the client's actual brand guideline document (colors, logo usage, typography) rather than against the marketer's memory of the guideline. Locking in an unreviewed template as the default means every subsequent campaign inherits the same brand inconsistency, silently, until someone eventually notices.

4.4 Personalization with Merge Tags

Merge tags insert per-recipient data into a template at send time. Predefined contact merge tags cover core fields such as first name (`{FNAME}`) and last name (`{LNAME}`), and support a fallback syntax — `{FNAME|Customer|Guest}` — that substitutes a default value when the field is blank for a given contact, rather than leaving a visible gap in the email. Organization-level tags cover mandatory compliance elements: the unsubscribe link, the organization's postal address, and links to an attached privacy policy or company imprint.

Where CRM sync (Chapter 3) is active, imported and synced CRM fields become available as additional custom merge tags, letting a template pull CRM data like account name or deal stage directly into the message body.

ClearPath's standard practice is to build a fallback value into every merge tag used in a client-facing template, not only the name fields — including CRM-sourced tags per Section 3.4 — so a gap in the underlying data never surfaces to the recipient as a visibly broken sentence. A generic but natural-reading fallback ("there" for a missing first name, or "your account" for a missing CRM account name) preserves a professional tone even for the minority of contacts with incomplete records.

COMMON PITFALL

Merge tags do not resolve in test sends — a test email will typically render the raw tag or a placeholder rather than real data. Always send a live preview to a real segment of a few contacts, or use Zoho's contact-based preview feature, to confirm merge tags and fallback values render correctly before a campaign goes to the full list.

4.5 Testing and Pre-Send Quality Assurance

Zoho Campaigns provides a Test Email function inside the campaign's Content step: select a recipient email address from the dropdown and send a live test to it to see how the message will actually deliver. As noted in Section 4.4, merge tags do not resolve in a standard test send — the raw tag code displays instead of live data — so ClearPath's QA process pairs the Test Email feature with a send to a small internal test list of real contacts (with real field data populated) specifically to validate personalization before a full send.

A separate Preview and Test view renders the campaign as it will appear across desktop and mobile, and Zoho's Inbox Previews feature extends this further, rendering the email against specific combinations of email client, browser, and device (for example, Gmail, Outlook, and an iPhone) so rendering problems are caught before the send rather than reported by a recipient afterward.

Procedure: Standard Pre-Send QA Pass

1. Send a Test Email to the ClearPath internal QA address and visually confirm layout, images, and links.
2. Send the same campaign to an internal contact list populated with real field values to confirm merge tags and fallback values resolve correctly.
3. Review the campaign in Preview and Test (or Inbox Previews, where available) across at least one desktop client and one mobile client.
4. Use Download HTML to check total message size and confirm the email will not be clipped by Gmail's display-size limit.
5. Confirm the correct topic, sender, and recipient list/segment are selected before scheduling or sending.

For a client's first several campaigns, ClearPath also has a second team member independently review the QA pass before send — a fresh set of eyes catches a wrong merge-tag fallback, a mismatched topic, or an incorrect list far more reliably than the person who built the campaign reviewing their own work. Once a client relationship matures and the template and process are well-established, this second review is typically scaled back to higher-stakes sends only (large lists, first sends to a new segment, or campaigns with legal or compliance-sensitive content).

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Chapter 5: Automation Workflows

5.1 Workflow Architecture: Triggers, Process, and Actions

Zoho Campaigns' automation builder lives under Automation > Workflows. Every workflow is assembled from three structural building blocks. Triggers start the automation on a specific event — a signup form submission, a contact entering a list, a tag being applied, or a date-based condition. The Process layer governs the logic contacts move through once triggered, including flow-control elements (Random Split, Merge) and condition elements (Simple, Multiple, and Email Activity conditions) that branch contacts down different paths. Actions are what actually happens to a contact at each stage — sending an email or SMS, waiting a defined period, updating a contact field, or pushing data into Zoho CRM.

Before a workflow can go live, every element must be connected with no open ends, every condition branch must terminate in an action or exit, and campaign content used inside the workflow must clear Zoho's standard compliance review. Only once these are satisfied does the Activate control in the top-right corner become available.

ClearPath diagrams every automation on a simple flowchart before building it inside Zoho — trigger, each decision point, each action, and every exit — and reviews that diagram with the client stakeholder before touching the builder. This upfront step catches the two most common design gaps early: a condition branch with no defined outcome, and a contact path that never reaches a defined exit or suppression point, both of which are far cheaper to fix on paper than inside a partially built live workflow.

5.2 Workflow Categories and Templates

Rather than starting from a blank canvas, Zoho offers six workflow category templates as starting points — Welcome and Onboarding, Nurture, Re-engagement, Customer Retention, E-commerce, and Conditional — each pre-populated with a sensible trigger/action skeleton for that use case. A Custom Workflow option is also available for building an automation from scratch when none of the templates fit.

ClearPath maps each client's requested automations to the closest matching category during the discovery phase, before any building begins, so the proposal and the eventual build stay in the same vocabulary Zoho itself uses. A client asking for "a series of emails after someone downloads our guide" is, in Zoho's own terms, a Welcome and Onboarding workflow; naming it that way from the outset keeps scope discussions grounded in what the platform can actually configure.

BEST PRACTICE

Start every new automation build from the closest matching category template rather than a blank Custom Workflow, even when substantial customization is planned. The templates encode Zoho's own recommended trigger/action patterns, which shortens build time and reduces the chance of leaving a condition branch unterminated.

5.3 Building a Time-Based Workflow (Drip Sequence)

Time-based workflows are the standard mechanism for drip sequences — a scheduled series of touches sent to contacts who match a defined set of criteria, run on a recurring cadence rather than firing continuously off a live event trigger.

This mechanism suits use cases where the trigger is a state rather than a discrete event — for example, "every contact who has been on the Prospect list for 14 days without converting" — which is naturally expressed as a recurring criteria check rather than a one-time event fired at a specific moment. ClearPath reaches for a time-based workflow specifically when the qualifying condition is something that becomes true gradually over time, and reaches for an activity-based workflow (Section 5.4) when the qualifying condition is a specific action a contact takes.

Procedure: Create a Time-Based Workflow

1. Navigate to Automation > Workflows, click Create Workflow, select Conditional Workflow, and choose Create under Time-based.
2. Provide a descriptive workflow name and select the associated mailing list, creating a new list if one does not already exist for this sequence.
3. Define up to six criteria to determine which contacts qualify, and use Change Pattern to set the AND/OR logic connecting multiple criteria.
4. Choose the action to apply to qualifying contacts: remove from a list, add to another list (optionally as a smart/dynamic list), send a one-time email, push data to Zoho CRM, update a contact field, add a contact score, or associate a webhook.
5. Set the timing: either a single one-time run, or a recurring schedule that re-evaluates and re-runs the workflow periodically.
6. Click Activate Now to launch immediately, or Save as Draft to schedule activation for later. An active workflow can be paused and reactivated at any time.

COMMON PITFALL

Inside a time-based workflow, the send-email action is limited to a single, one-time delivery per contact per run — it is not a multi-touch drip on its own. A true multi-email drip sequence is built either as several chained time-based workflows spaced by criteria (e.g., days-since-tag-applied), or as an activity-based/conditional workflow (Section 5.4) using Wait actions between sends.

5.4 Activity-Based and Conditional Workflows

Activity-based workflows trigger off a live contact action — opening a specific email, clicking a specific link, submitting a form, or being added to a list — and are the correct choice for behavior-driven journeys such as a browse-abandonment sequence or a lead-magnet follow-up. Conditional workflows layer branching logic (Simple, Multiple, or Email Activity conditions) on top of any trigger type, letting a single workflow send different content, wait different durations, or take different CRM actions depending on how a contact behaves at each stage.

ClearPath's default nurture architecture pairs an activity-based entry trigger (typically a signup form submission or a CRM sync criteria match) with a short conditional branch that checks engagement after the

first send, so unengaged contacts are routed toward a re-engagement path rather than continuing to receive the standard cadence.

Conditional branching is also where ClearPath builds in exit and suppression logic: a branch checking whether a contact has since unsubscribed, been marked hard-bounced, or converted to a customer routes those contacts to an immediate exit rather than letting them continue receiving a nurture sequence that no longer applies to their status. Every workflow ClearPath builds includes at least one such exit-condition branch near the entry point, independent of the workflow's primary purpose.

5.5 Editing and Managing Active Workflows

An active workflow does not need to be paused before it can be edited. Clicking Edit on a live workflow creates a separate draft copy; the original continues running unaffected until the draft is reviewed and Reactivated, giving ClearPath a safe buffer to make and validate changes without disrupting contacts already mid-journey. Only the workflow's process and action components are editable this way — triggers themselves are more restricted once a workflow is live.

The effect of an edit on contacts already in progress depends on what changed. Deleting a component a contact has already passed through can leave that contact stuck with no forward path, so components should be disabled or rerouted rather than deleted outright wherever active contacts may already be downstream of them. Reorganizing the order of components only affects new contacts entering the workflow going forward; contacts already past that point do not retroactively move to the new path. Edits to an Email Activity condition apply only to new entrants, while edits to an Email Response condition apply to both new and already-in-progress contacts. An in-progress Wait action is not interrupted by an edit, though contacts will no longer be able to enter any path that a completed Wait component used to lead into if that path is removed.

COMMON PITFALL

Use the trace path view to check where currently active contacts sit in the workflow before making a structural edit to a live automation with meaningful volume already in flight. Editing blind, without checking who is mid-journey, is the most common way a workflow edit produces contacts stranded with no next action.

ClearPath schedules a lightweight quarterly review of every active workflow on a managed-services account — confirming it is still active, checking whether its trigger and content assumptions still match current business reality, and reviewing whether contacts are flowing through and exiting as designed rather than accumulating at a stalled point. A workflow built accurately at launch can quietly become stale as the client's product line, pricing, or sales process evolves, and nothing in Zoho Campaigns proactively flags that drift.

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Chapter 6: Deliverability & Compliance

6.1 Bounce Management

Zoho Campaigns classifies every bounce using the underlying SMTP error code returned by the receiving server. A hard bounce (SMTP codes in the 5.x.x range) signals a permanent delivery failure — a nonexistent address, a nonexistent domain, a permanently blocked or deactivated account — and Zoho immediately adds the address to the account's bounced list, since continued attempts to hard-bounced addresses actively damages sender reputation. A soft bounce (SMTP codes in the 4.x.x range) signals a temporary condition — a full mailbox, a temporarily offline mail server, greylisting or rate-limiting by the receiving server, an oversized message, or a temporary SPF/DKIM/DMARC authentication failure — and Zoho continues to retry delivery rather than immediately excluding the address.

For hard bounces, the only corrective action is removal of the address from the mailing list; a hard-bounced address should never be manually re-added without independently verifying the address is valid. Soft bounces that persist across repeated send attempts are automatically converted to hard-bounce status after Zoho's internal retry threshold is reached.

ClearPath reviews the bounce report (Section 7.3) after every send above a defined bounce-rate threshold, not only at the end-of-month reporting cadence, because a sudden spike in hard bounces on a single send is frequently the earliest visible signal of a bad import, a stale purchased-style list slipping through, or a sync misconfiguration (Section 3.5) routing the wrong records into a live list.

Bounce rate is also one of the few metrics ClearPath benchmarks against a fixed industry-general expectation rather than only against the client's own historical trend: a healthy, well-maintained list typically bounces well under 2% per send. A rate meaningfully above that on a mature, previously well-behaved list is worth investigating even in the absence of any other visible symptom, since it usually means either list decay (addresses going stale over time as people change jobs or providers) or a recent import that was not adequately cleaned before landing on a live list.

6.2 Unsubscribes and the Do-Not-Mail List

Zoho Campaigns will not permit a campaign to send without a functioning unsubscribe mechanism in the template; the default header/footer theme includes an unsubscribe button automatically, and a marketer who strips that theme out must manually re-add the `$(LI:UNSUBSCRIBE)$` or `$(LI:ORG_OPTOUT)$` merge tag in its place. When a recipient clicks unsubscribe, their address is added to the account-wide Do-Not-Mail list immediately, and no further campaign from any list in that Zoho Campaigns account can reach that address until the contact actively resubscribes.

Because it is account-wide rather than list-specific, the Do-Not-Mail list is the single strongest suppression mechanism in the platform, and ClearPath treats it as the authoritative source of truth for contact-ability — it should never be worked around by re-importing an unsubscribed address into a new list.

BEST PRACTICE

CAN-SPAM requires unsubscribe requests to be honored within 10 business days; Zoho's immediate, automatic suppression exceeds that requirement by default. Do not build custom workflow logic that

delays or filters unsubscribe processing — let the native mechanism handle it.

A rising unsubscribe rate on an otherwise stable list is one of the more reliable early indicators that content, frequency, or targeting has drifted out of step with what the audience actually signed up for. ClearPath tracks unsubscribe rate as a trend line across a client's sending history, not just per-campaign, since a single elevated number can be noise but a sustained upward trend across several consecutive sends is a signal worth investigating regardless of whether any single send crossed a defined threshold.

Send frequency itself is one of the most common root causes behind a rising unsubscribe trend, and one of the easiest to overlook, since the content of any single send can look perfectly reasonable in isolation. ClearPath periodically checks total send volume per contact per month against what that contact actually opted into — a subscriber who joined a monthly newsletter list but is now also receiving three product-update sends and two event invitations per month is being sent to at a materially higher frequency than they agreed to, even though no single one of those campaigns did anything wrong on its own.

6.3 Sender Reputation and List Hygiene

Inbox placement is governed primarily by sender and domain reputation, which mailbox providers build from a combination of authentication status (Chapter 1), bounce rate, spam-complaint rate, and recipient engagement. Zoho's deliverability guidance recommends a gradual IP/domain warm-up for new sending domains — ramping send volume up over time rather than launching at full list volume immediately — because a brand-new domain has no established trust signal with major mailbox providers.

Zoho's own guidance further recommends periodic list cleaning, removing or re-permissioning contacts who show no engagement (opens or clicks) over roughly a six-month window, since a stale, unengaged segment of a list depresses aggregate engagement metrics and increases the odds mailbox providers route future sends to spam regardless of content quality.

COMMON PITFALL

Zoho's content guidance recommends maintaining roughly a 60% text to 40% image ratio and avoiding spam-trigger phrasing in subject lines and body copy. An email built as a single large image with little surrounding text is both a spam-filter risk and inaccessible to screen readers — avoid it even when a client's design team prefers an image-forward look.

For a brand-new sending domain, ClearPath's standard warm-up plan ramps volume over roughly two to four weeks: an initial send to the most engaged known contacts (existing customers or recently active leads), followed by progressively larger sends to broader segments of the list as bounce and complaint rates confirm the domain is establishing a clean reputation. Skipping the warm-up and sending to a full, untested list on day one is the single most common cause of a new domain landing in spam folders industry-wide.

6.4 Engagement-Based Sending and Re-Engagement

Because mailbox providers weigh recipient engagement heavily in inbox-placement decisions, Zoho recommends segmenting sends by demonstrated interest and engagement level rather than blasting an entire list uniformly on every send — the segmentation tools in Section 2.4 are the primary mechanism for this. A standard ClearPath pattern pairs a defined engagement segment (contacts with no opens/clicks in the last 90–

180 days) with an activity-based or time-based workflow (Chapter 5) that runs a short, low-frequency re-engagement sequence before those contacts are either reactivated or suppressed from ongoing sends.

ClearPath schedules a recurring quarterly review of engagement metrics for every managed-services client, specifically to catch a slow reputation decline before it becomes visible as a sudden drop in open rate. Because sender reputation degrades gradually and mailbox-provider filtering decisions are not fully transparent to the sender, waiting for a visible symptom before reviewing engagement data means the underlying damage is usually already several sends old.

6.5 Spam Complaints and Feedback Loops

An abuse complaint occurs when a recipient clicks Report Spam or Mark as Junk in their own email client rather than using the campaign's unsubscribe link. Zoho tracks this as a Marked Spam metric on the campaign report without disclosing which specific recipient filed the complaint. Zoho enforces a strict organization-wide abuse-complaint threshold of 0.1%; campaigns that exceed it are automatically canceled or stopped mid-send, and an account with a sustained pattern of complaints above that threshold can be warned, blocked, or ultimately suspended pending a review of the organization's contact management practices.

Every email sent through Zoho Campaigns includes Zoho's own abuse-reporting address in the message header, which lets some receiving mailbox providers route a spam report back to Zoho directly as a feedback-loop (FBL) signal, independent of whether the recipient used the in-app unsubscribe link at all. Because this channel operates outside standard unsubscribe tracking, minimizing complaints has to start upstream — with permission-based list building, topic-based targeting (Section 2.2), and a visible, easy-to-find unsubscribe link — rather than being something the platform can fully absorb after the fact.

BEST PRACTICE

Treat the 0.1% complaint threshold as a hard operating ceiling, not a target. ClearPath's internal standard is to review send strategy, list segmentation, and content relevance any time a campaign's complaint rate exceeds roughly a third of Zoho's threshold (0.03%), well before it puts the account at risk of an automatic stop.

When an account does receive a block notification from Zoho, ClearPath's response is to treat it as a genuine account-health event rather than a bureaucratic obstacle to clear as quickly as possible: reviewing the flagged campaign's list source, consent basis, and complaint pattern honestly before responding to Zoho's clarification questions. A response that addresses the underlying practice rather than only the immediate block tends to both resolve the block faster and prevent a recurrence.

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Chapter 7: Reporting & Analytics

7.1 Campaign Summary Reports

Every sent campaign generates a Report Summary showing emails sent, delivered, unique opened, unique clicked, unopened, bounced, and unsubscribed counts, alongside an Opens Over Time graph and a geographic breakdown of where recipients opened the message. Reports distinguish total engagement events from unique engagement events (each recipient counted once regardless of how many times they opened or clicked), which is the correct basis for calculating open rate and click-through rate rather than raw event counts.

Click-to-open rate (CTOR) — clicks as a percentage of opens rather than of total sends — is available alongside the standard open rate and click-through rate, and is generally the more useful metric for judging content and call-to-action quality specifically, since it isolates engagement among people who already opened the email from the separate question of subject-line and send-time performance that drives the open rate itself.

ClearPath delivers a short performance summary to the client after every meaningful send — typically the open rate, click rate, and CTOR alongside one or two sentences of interpretation — rather than assuming the client will independently interpret the raw Zoho report. A client who never sees the numbers translated into plain language tends to disengage from the reporting entirely, which erodes the perceived value of the managed-services relationship over time.

These headline numbers are most useful compared against the client's own prior sends rather than against a generic industry benchmark, since normal, healthy open and click rates vary meaningfully by industry, list size, and send frequency. ClearPath establishes a baseline from the client's first several campaigns specifically so that later reporting can say something concrete — better, worse, or flat relative to that baseline — rather than citing an industry average that may not reflect what is actually normal for this particular list and audience.

Open rate specifically should be read with some caution as an absolute measure of engagement, since privacy-protection features built into some mail clients (most notably Apple Mail Privacy Protection, which pre-fetches image content for a meaningful share of iOS and macOS recipients) can inflate apparent opens independent of whether a human actually read the message. ClearPath treats click rate and CTOR as the more reliable engagement signals for exactly this reason, and frames open-rate trends to clients as directional rather than as a precise count of human attention.

7.2 Engagement, Geography, and Device Reports

Beyond the summary, Zoho Campaigns provides a Recipient Activity report showing, at the individual contact level, whether the message was opened, which links were clicked, and whether the recipient unsubscribed, marked the message as spam, or forwarded it — giving ClearPath a contact-level view suitable for targeted follow-up rather than only an aggregate one. A Link Click Map overlays click-through percentages directly onto the rendered email, showing at a glance which content blocks and calls to action actually drove engagement.

Email Open by Location reports geographic distribution of opens by country (and, where available, more granular location) derived from recipient IP address, which is useful both for validating that a campaign reached its intended geography and for informing send-time optimization across time zones. Device and Email Client reports break down opens by device type (mobile, desktop, tablet), operating system, and desktop

email client or browser — critical input for the template simplicity guidance in Section 4.2, since rendering behavior varies meaningfully across clients.

ClearPath reviews the device and client breakdown at least once per client engagement, specifically to confirm the assumptions baked into the brand template are still accurate. A client whose device mix skews increasingly toward mobile over time may need a template revisit — larger tap targets on buttons, shorter subject lines that don't truncate on a small screen — even if the original template was well-designed for the device mix at the time it was built.

7.3 Bounce and Unsubscribe Reports

The bounce report for a given campaign lists each bounced recipient's address, the bounce classification (hard or soft, per Section 6.1), and the specific bounce reason returned by the receiving server, giving ClearPath a concrete diagnostic trail rather than a single aggregate bounce percentage. Auto-replies (typically out-of-office responses) are reported separately from true bounces, since they represent a successfully delivered message rather than a delivery failure.

Unsubscribe and spam-complaint activity is similarly available at the individual-recipient level per campaign, which ClearPath reviews after every send above a defined complaint-rate threshold to catch content, frequency, or targeting issues before they compound across subsequent sends.

A single send with an elevated unsubscribe rate is not automatically a problem on its own — a purposeful re-engagement or win-back send, for example, is expected to prompt a wave of unsubscribes from genuinely disengaged contacts, and that is a healthy list-cleaning outcome rather than a failure. ClearPath interprets unsubscribe-rate spikes in the context of the campaign's purpose and audience rather than against a single universal threshold applied uniformly across every send type.

7.4 A/B Testing

Zoho Campaigns supports A/B testing on three campaign elements: the subject line, the sender's name and email address, or the message content itself. The marketer defines the size of the test audience and the duration the test runs before a winner is determined, and the platform evaluates the competing versions primarily on open and click performance across that test segment.

Once the test window closes, Zoho can either automatically send the winning version to the remaining, untested portion of the list, or hold for manual review of the test report before the marketer makes the final send decision. ClearPath's default configuration is a manual-review completion for any campaign to a list larger than roughly 2,000 contacts, so a human confirms the statistical result is meaningful before it drives the full send.

BEST PRACTICE

Test one variable at a time. A test that simultaneously varies both subject line and sender name makes it impossible to attribute the performance difference to either variable individually, which defeats the purpose of running a controlled test in the first place.

ClearPath reserves A/B testing for sends with enough list volume to produce a statistically meaningful result — as a rule of thumb, well under a few hundred recipients per test variant rarely produces a difference large

enough to distinguish from random noise. For smaller clients with modest list sizes, ClearPath instead accumulates learnings across several campaigns' worth of subject-line and content variation over time, rather than running a single-send A/B test that the list size cannot actually support statistically.

Subject-line tests tend to produce the clearest, most actionable results of the three testable elements, precisely because open rate is a large-sample, binary outcome that is easy to measure cleanly. Content tests are noisier in practice, since a content variation often changes multiple things about the email at once (layout, call-to-action wording, image choice) even when the marketer thinks of it as "one" variable, which makes the resulting click-rate difference harder to attribute to any single specific change.

7.5 Exporting and Sharing Reports

Recipient-level report data can be exported directly from Reports > Sent Campaigns: select a campaign, open Recipient Activity, choose the activity type of interest, and click Export to download the data in CSV, XLS, or XLSX format. The same export path is available from a specific link's click data — Reports > Sent Campaigns > Clicks > [select a link] > View Contacts > Export — for cases where the client only needs the list of contacts who clicked a particular call to action.

Exported files are password-protected by default, in keeping with the data-security posture described for list exports in Section 2.3. The default password is generated from a combination of the exporting user's own email address and Zoho user ID, so it is unique per user rather than a single shared account password. ClearPath documents this password formula for each client in their engagement handoff notes, since a client's internal team is often unaware the export is protected until they first try to open a downloaded file.

VERIFICATION NOTE

Zoho's documentation confirms that a consolidated report spanning all campaigns at once, and export of the bot-filtered "reliable opens" data specifically, are both currently unsupported. Reconfirm this limitation before promising a client a single, all-campaigns export — the practical workaround is exporting per-campaign and consolidating outside Zoho Campaigns, e.g., in Zoho Analytics or a spreadsheet.

For clients on a recurring managed-services retainer, ClearPath consolidates per-campaign exports into a single running spreadsheet or a connected Zoho Analytics dashboard on a monthly cadence, specifically to give trend visibility (open rate over time, list growth, engagement decay) that no single Zoho Campaigns report screen shows on its own. This consolidated view is typically what actually gets reviewed in a recurring client check-in, rather than any individual campaign's native report.

Sources

- What are the key metrics shown in a campaign report? — help.zoho.com/portal/en/kb/campaigns/faqs/reports-and-analytics/articles/what-are-the-key-metrics-shown-in-a-campaign-report
- Email Campaign Reports — zoho.com.cn/campaigns/help/reports/email-campaign.html
- Understand audience behavior with A/B testing — zoho.com/campaigns/ab-testing.html
- How does Zoho Campaigns track the click rate? — help.zoho.com/portal/en/kb/campaigns/faqs/email-deliverability/articles/how-does-zoho-campaigns-track-the-click-rate
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Chapter 8: Administration, Roles & Integrations

8.1 User Roles and Privileges

Zoho Campaigns separates permissions into organization-level and Workspace-level roles. At the organization level, an Admin has unrestricted access, including to Workspaces created by other admins, and is automatically included in every Workspace; this role cannot be scoped down. A Member's default access is limited to content they personally created (their own campaigns, contacts, and lists) unless granted broader Workspace-level privileges.

Within a given Workspace, four standard roles govern day-to-day access: Workspace Admin (full workspace control, including inviting users, managing settings, and defining custom role privileges), Manager (can create and send campaigns, import contacts, and view reports, but cannot manage workspace settings or add users), Editor (can create, edit, and delete campaigns and templates and view reports, but explicitly cannot send campaigns), and Viewer (read-only access to reports, appropriate for stakeholders who need visibility without any editing or sending capability).

Procedure: Add a User

1. Click the Settings icon in the top-right corner.
2. Navigate to Users and Control, then Manage Users.
3. Add the new user's email address and assign the appropriate organization- or Workspace-level role.

BEST PRACTICE

Assign client-side stakeholders the Editor or Viewer role rather than Manager during an active engagement. This lets them review and draft without the ability to send an unreviewed campaign to a live list — a guardrail that has prevented more than one accidental send industry-wide.

ClearPath's own consultant access follows the same discipline in reverse: once a client engagement transitions from active build to ongoing managed services, ClearPath's working role is generally set to Manager rather than Workspace Admin, so day-to-day campaign work does not carry standing access to add or remove other users or alter organization-level settings without a deliberate, separate elevation of privilege.

A periodic access review is part of ClearPath's standard managed-services checklist: confirming every user listed in Manage Users is still an active member of the client's team, and that each user's assigned role still matches their current responsibility. Departed employees and contractors whose access was never revoked are a common finding on a first audit of an account ClearPath did not originally build, and closing that gap is treated as a priority item rather than a routine housekeeping note.

8.2 Workspaces in Practice

Workspaces (introduced in Section 1.1) double as the practical access-control boundary for multi-brand or multi-department clients: a user can hold different roles in different Workspaces of the same organization, so a regional marketing lead might be a Manager in their own division's Workspace and have no access at all to a sibling division's Workspace. Only a paid subscription tier supports creating custom roles with hand-tuned privilege sets beyond the four standard roles in Section 8.1.

ClearPath recommends a dedicated Workspace per legally distinct entity or clearly separated brand, and a single shared Workspace with role-based access and topic-level segmentation (Section 2.2) for divisions of one brand that still need reporting or list separation. The distinction matters operationally: senders, domain authentication, and billing are organization-wide, while lists, campaigns, and most reporting are scoped per Workspace — so the right structure depends on which of those the client actually needs separated.

This structure decision is worth revisiting explicitly, not assumed permanent, whenever a client's business changes materially — an acquisition, a new product line spun out as its own go-to-market brand, or a reorganization that splits a previously unified marketing function. ClearPath treats the Workspace review as a standard agenda item during any scope-change conversation with an existing managed-services client, rather than something only considered at initial account setup.

8.3 Webhooks

Webhooks let Zoho Campaigns push event data to an external URL in near real time, which ClearPath uses to bridge Campaigns activity into systems outside the native CRM sync (Chapter 3) — internal dashboards, Zoho Flow (Section 8.4), or a client's own backend. Webhooks are configured from Settings > Webhooks (under Developer Space), or from within a specific list via Manage Lists > [List] > More Actions > Webhooks.

Contact-level webhooks fire on Subscribe, Unsubscribe, and Bounce events. Campaign-level webhooks fire on a broader set of lifecycle events: Under Review, Reviewed, A/B Test Completed, A/B Test Winner, A/B Test Inconclusive, Stopped, Canceled, Paused, Resumed, and Sent.

A common ClearPath use case pairs an Unsubscribe webhook with a lightweight internal endpoint that logs the event to a shared record outside Zoho — useful for a client whose customer success or sales team wants immediate visibility into which accounts just opted out, without requiring that team to have their own Zoho Campaigns login. Because webhooks push data outward in near real time, this pattern typically surfaces the event faster than waiting on the next scheduled CRM sync run (Chapter 3) would.

Procedure: Create a Webhook

1. Navigate to Settings > Webhooks, or to a specific list's More Actions > Webhooks.
2. Click Create and name the webhook.
3. Enter the destination Webhook URL that will receive the posted data.
4. Select the HTTP method (POST or GET).
5. Set the calls-per-hour rate limit (default 60 on free-tier accounts).
6. For contact-level webhooks, configure any additional URL parameters needed by the receiving system.
7. Save the webhook. An existing webhook can also be associated with additional contact lists rather than rebuilt from scratch.

8.4 API and Zoho Flow Integration

Beyond webhooks, Zoho Campaigns exposes a REST API (documented under the Developer Space in Settings) for direct programmatic access to contacts, lists, and campaigns, which ClearPath uses where a client's stack requires tighter, request/response-style integration than a one-way webhook push supports. For most engagements, ClearPath instead reaches for Zoho Flow, Zoho's no-code integration platform, which ships pre-built Campaigns triggers and actions (for example, "When a contact unsubscribes" or "Add contact to a list") that connect Campaigns to hundreds of other Zoho and third-party applications without custom API code.

The practical decision rule ClearPath applies: use native CRM Sync Services (Chapter 3) for CRM-to-Campaigns contact and list data; use Zoho Flow for cross-application automation involving other Zoho One apps (Desk, Books, Forms, and similar) or common third-party SaaS tools; and reserve the raw webhook/API layer for custom or bespoke integrations that neither Sync Services nor Flow's pre-built connectors cover.

This layered approach also keeps the client's integration footprint maintainable after ClearPath's initial build work concludes. Zoho Flow's visual, pre-built connectors are something a reasonably technical client-side administrator can review and adjust without writing code, whereas a custom API integration typically requires a developer (ClearPath or otherwise) to modify — a distinction ClearPath weighs deliberately when a Flow-based option and a custom-API option would both technically satisfy a given requirement.

Every integration ClearPath builds — whether native Sync Services, a Zoho Flow, a webhook, or a custom API call — is documented in a short integration map delivered to the client at project handoff: what triggers it, what data moves, and which direction it flows. This is deliberately kept separate from the platform's own settings screens, since a client's future administrator (or a different consultant, should the relationship ever transition) should be able to understand the full integration landscape without having to reverse-engineer it screen by screen.

8.5 Data Security, Consent, and GDPR Settings

Zoho Campaigns supports GDPR-oriented data governance directly in the product rather than requiring it to be bolted on externally. Contacts can be processed under one of six lawful bases for communication — Contract, Consent Required, Consent Expressed, Legal Obligation, Legitimate Interest, and Public Task/Vital Interest — and this lawful-basis field is captured at the point of manual entry, import (Section 2.3), or CRM sync (Chapter 3), rather than left implicit.

The platform supports the two data-subject rights most relevant to email marketing operationally: the Right of Access, satisfied by exporting a contact's personal data in a machine-readable format on request, and the Right to Erasure, satisfied through the unsubscribe/preference flow, which gives a contact a path to have their personal data erased rather than only suppressed from future sends. For an additional layer of field-level protection, Zoho Campaigns offers optional Custom Field Encryption, which lets sensitive custom fields be stored encrypted rather than in plain text.

VERIFICATION NOTE

Zoho's GDPR features page documents the lawful-basis model, data export, erasure-via-unsubscribe, and custom field encryption, but the sources reviewed did not confirm whether Zoho executes a signed Data Processing Agreement (DPA) with customer organizations as a standard, self-service document versus a negotiated enterprise term. Confirm current DPA availability directly with Zoho or the client's legal counsel before representing it as a standard, out-of-the-box feature.

Sources

- Roles and Privileges — help.zoho.com/portal/en/kb/campaigns/user-guide/settings/manage-users/articles/roles-and-privileges-new-version
- Webhooks — help.zoho.com/portal/en/kb/campaigns/user-guide/settings/developer-space/articles/how-to-configure-webhooks

- Zoho Campaigns Integrations: Automate Your Business Workflows With Zoho Flow — zohoflow.com/apps/zoho-campaigns/integrations
- Zoho Campaigns features for the GDPR compliance — zoho.com/campaigns/gdpr/features.html