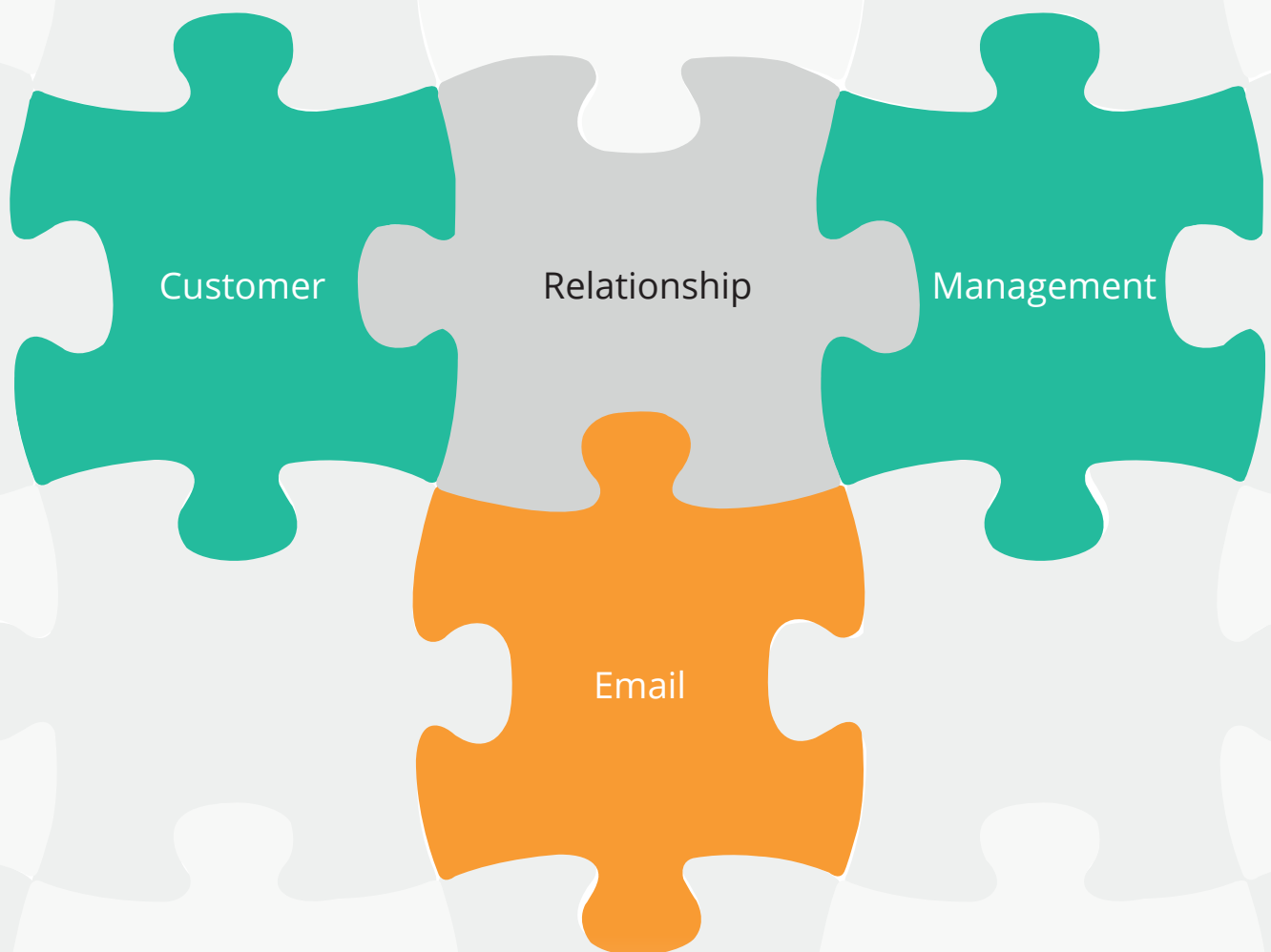


Emails + Zoho CRM for Your Business



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- The Basics
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The Basics

Can anyone deny the fact that email is still an important medium in business communication? There may be some who would like to argue otherwise - in the 'social media age', email is losing its stand. Yet, the truth doesn't change. People still send a lot of emails: companies to their customers, employees to their managers, sales reps to prospects, one team member to another and a lot more to go on!

Picture some common practices in organizations.

- »» A sales rep makes calls to discuss the prospects of a deal to a lead. Additionally, he also sends an official email to involve others and keep them informed of the progress. The lead, on his part, does not fail to get a written confirmation of the details that were discussed on phone.
- »» Company sends emails to targeted customers, informing them about some new products or inviting them to an event.
- »» Emails newsletters are a common sight in your Inbox. Companies send email newsletters, offering various discounts for up-selling and cross-selling opportunities.

You can imagine many such situations in your daily work life where email is the best-suited option for communication.

The Email + CRM Solution

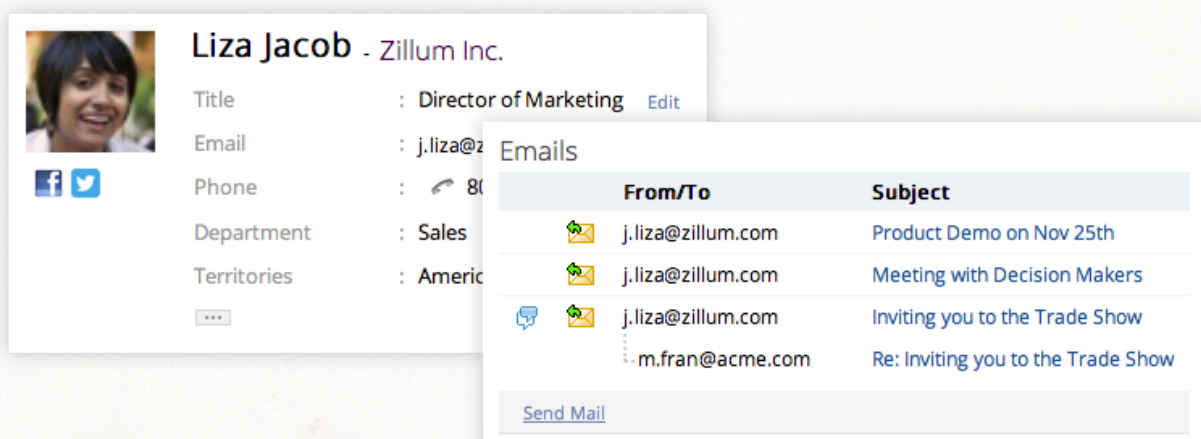
Now that we have settled on the point that email is important for business, let us go to some complications that we face when it comes to managing, organizing and keeping track of all the emails that clutter your inbox.

It is a difficult task at work, if your emails are in one place and your customer records in another.

The communication that you have with your customers needs to be kept for the record. You need to have them organized in a way to quickly access them whenever required. In that case, having customer details in one place and the related emails in another place may not be very convenient. There definitely needs to be a connection to eliminate any loopholes in email management.

*Having a **copy of the email** attached to your customer records is the solution that **Zoho CRM** provides.*

Sent an email to your customer Liza, to schedule a product demo? It will be right there, with the others details on Liza in your CRM account.



Liza Jacob - Zillum Inc.

Title : Director of Marketing [Edit](#)

Email : j.liza@zillum.com

Phone : 800-800-8000

Department : Sales

Territories : Americas

[f](#) [t](#)

Emails

From/To	Subject
j.liza@zillum.com	Product Demo on Nov 25th
j.liza@zillum.com	Meeting with Decision Makers
j.liza@zillum.com	Inviting you to the Trade Show
m.fran@acme.com	Re: Inviting you to the Trade Show

[Send Mail](#)

Read further and you will...

- Discover the various email options that Zoho CRM has when it comes to sending your emails.
- Find out the best email option for you.
- Learn the benefits of keeping emails organized along with the customers' data.

Built-in Email Option

Zoho Mail Add-on

BCC Dropbox

Plug-in for MS Outlook

Built-in Option to Send Emails

Zoho CRM comes with a built-in option to send emails to your leads and contacts. Without any email account configured, you can send email to your contacts from within your CRM account and also have them associated to the contacts or leads. That way, you need not search your inbox for the email communications that you had with a customer.

How the built-in email works

The built-in email option is available in some of the modules that include Leads, Contacts, Potentials, Quotes, Invoices, Sales Order, etc. Each record in these modules has an option to send emails. Not just an option to send but also to store a copy of that email with the record.

Let's take John, the sales rep in Zillum Corp. He is not the Administrator but one of the sales executives. He signed up for Zoho CRM using his official email address, which is **john.w@zillum.com**.



Now, when John sends an email to his contact, the From address would be his primary email - john.w@zillum.com. You may wonder, how all this works without actually configuring the email account inside Zoho CRM. Simple! Zoho CRM creates a virtual email account with John's email address. Emails are sent from that virtual account and are associated to the records in CRM. Of course, this virtual email account cannot be accessed but only the email associated to the CRM records.

These emails, sent using the built-in email functionality, are public. If you can access the record, then you can check the associated emails as well.

Sending Emails To...

Leads, Contacts and Potentials

For contacts and leads, it is pretty simple when you send emails. Their email address is available along with the other details but for potentials, it is not the same.

Potentials, in Zoho CRM, are the business deals with organizations (B2B) or with people (B2C), which generate revenue for your organization.

Potentials do not have an email address. So what happens when you send the email to a potential in Zoho CRM?

*For every **opportunity**, you will have a contact person who is involved in the **buying process**.*

If you take a look at a potential in your CRM account, you will note that a contact is related to the opportunity. When you send an email to a potential, Zoho CRM takes note of the contact's email address and sends it there.

Quotes, Invoices and Sales Orders

In a sales process, quotes, invoices and sales orders also have a role to play. Between a company/vendor and a customer, quotes and invoices are important documents that are exchanged and kept as a record of the sale.

After creating quotes, invoices and sales orders in Zoho CRM, you have the need to send it to the customer. That is the very reason why there is an email option in these modules.

Just like potentials, quotes, invoices and sales orders also have a contact associated to them.

*When you **click on the Send Email option**, you are basically sending an **email to the contact** with the quotes/invoices attached as a PDF.*

Purchase Orders

The case with purchase orders is different.

Purchase Orders are legally bound order-placement documents for procuring products or services from vendors.

*Each **purchase order** has the details of a contact and vendor. So the purchase order can be sent **either to the contact or the vendor**.*

When you click on the Send Email option, you have the choice to send an email to the contact or the vendor with the purchase order attached as a PDF.

There is one thing that this built-in option does not provide - you cannot keep a full history of the email communication, as the received emails do not get associated to the CRM records. For that, the Zoho Mail Add-on is a better option.

Zoho Mail Add-on

This is an integration with Zoho Mail. Using this, you can get your email account inside Zoho CRM. The email account that you add will be accessible under a new tab, **Email**.

So, who needs to set up a mailbox in Zoho CRM and why?

The Zoho Mail Integration is a great tool for sales reps. A typical day of a sales rep includes finding qualified prospects, making calls, completing tasks, attending meetings with prospects, collecting more details on the leads, etc. During all these activities, one may find themselves sending an email at one point or the other and getting replies too.

With this add-on, a copy of all the outgoing as well as the incoming emails are associated to the corresponding CRM records. That gives the sales reps a full history of the email communication to work with.



With this add-on, you can not only keep customer-specific emails associated to CRM data but also get the entire inbox accessible inside Zoho CRM. It comes along with additional settings to share the emails with other users.

email **Sharing** OPTIONS

Private - Do not share Emails with colleagues.

Custom - Share Emails from the selected leads and contacts.

Public - Share Emails from all leads and contacts.

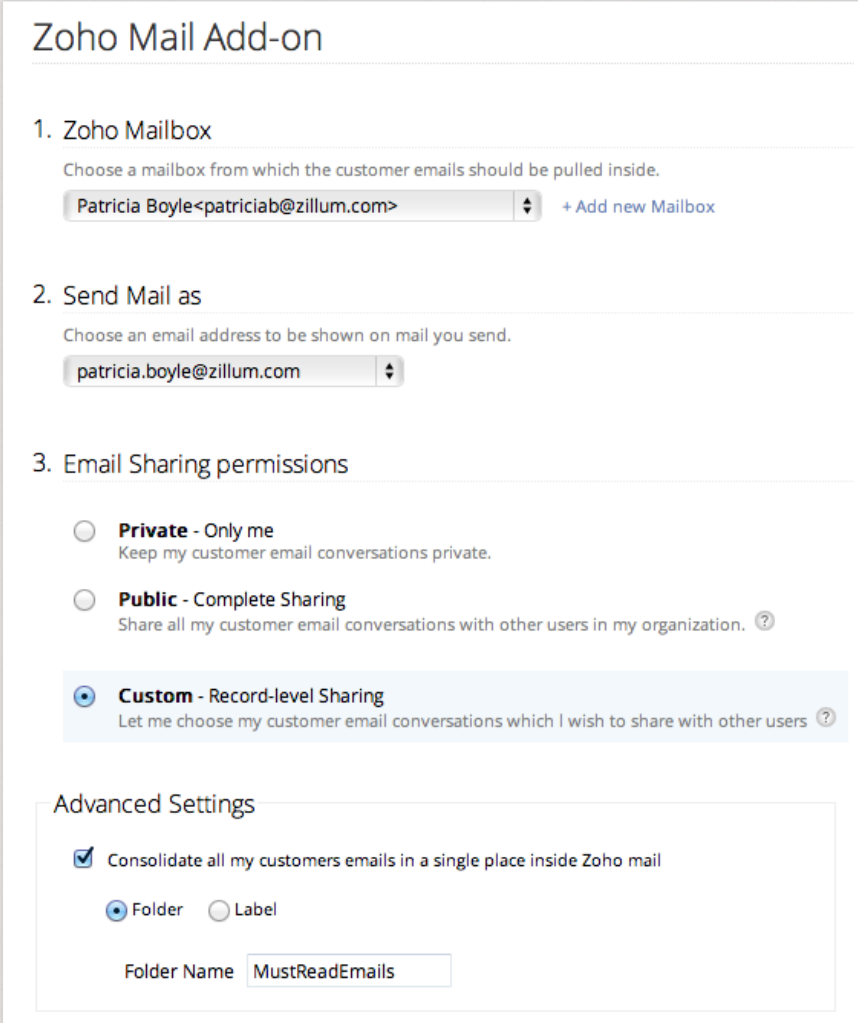
This integration is not just limited to users who have an account with Zoho Mail. If you use Gmail, Yahoo Mail, Hotmail or other mail clients, that will not stop you from using this feature. You can still use this integration and configure your mailbox within Zoho CRM.



Though POP account can be configured, if you have an email account configured via IMAP, you will not be able to bring that within Zoho CRM.

Zoho Mail Account

If you have an email account with Zoho Mail, or have a hosted email domain in Zoho Business, you need not configure the POP account in Zoho Mail. You can directly select the mailbox while configuring the Zoho Mail Add-on and get your inbox inside Zoho CRM in a jiffy!



The screenshot shows the 'Zoho Mail Add-on' configuration window. It is divided into three main sections: '1. Zoho Mailbox', '2. Send Mail as', and '3. Email Sharing permissions'. Below these is an 'Advanced Settings' section. In the '1. Zoho Mailbox' section, a dropdown menu shows 'Patricia Boyle<patriciab@zillum.com>' and a '+ Add new Mailbox' link. The '2. Send Mail as' section has a dropdown showing 'patricia.boyle@zillum.com'. The '3. Email Sharing permissions' section has three radio button options: 'Private - Only me' (unselected), 'Public - Complete Sharing' (unselected), and 'Custom - Record-level Sharing' (selected). The 'Advanced Settings' section has a checked checkbox for 'Consolidate all my customers emails in a single place inside Zoho mail', with 'Folder' selected over 'Label' for the 'Folder Name' field, which contains the text 'MustReadEmails'.

Zoho Mail Add-on

1. Zoho Mailbox

Choose a mailbox from which the customer emails should be pulled inside.

Patricia Boyle<patriciab@zillum.com> + Add new Mailbox

2. Send Mail as

Choose an email address to be shown on mail you send.

patricia.boyle@zillum.com

3. Email Sharing permissions

☐ **Private** - Only me
Keep my customer email conversations private.

☐ **Public** - Complete Sharing
Share all my customer email conversations with other users in my organization. ?

☒ **Custom** - Record-level Sharing
Let me choose my customer email conversations which I wish to share with other users ?

Advanced Settings

☒ Consolidate all my customers emails in a single place inside Zoho mail

☒ Folder ☐ Label

Folder Name MustReadEmails

Other Mail Accounts

What if you have an email account hosted in another email client that you use for all your business communication? You can still add that inside Zoho CRM and have the emails associated to the records.

Using this Zoho Mail Integration, you can add external accounts via POP protocol. Something important to note down here is, IMAP client functionality for accessing external accounts is not supported as yet.

Adding other email accounts hosted in third-party mail clients is not a complicated process. You just need add vbasic details to set up the POP account and choose it as your mailbox. Voila! Your email account will be added under the Email tab.

Zoho Mail POP3 Settings

Add POP3 Account

Email ID

1 patricia

2 patricia

POP3 Server Settings

Check for new Messages

Maximum number of emails per cycle

Add POP3 Account

Account name

Email ID

Incoming server

User Name

Password

☐ Make as Default account

Delete message settings

☐ Leave messages in the server

☐ Delete messages from Server whenever I receive here

☐ Delete messages from Server after every day(s).

☐ Delete messages from Server whenever I delete here

Test Account

Cancel

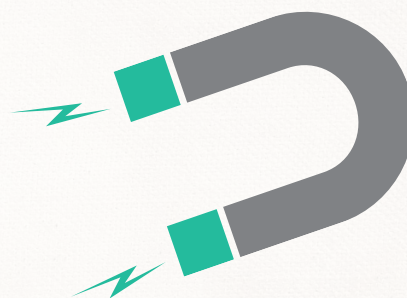
Save

200 (should be between 20 to 200.)

MailMagnet for Email Notifications

For every sales representative, email communication and follow-ups are among the top items in their To-Do lists. It goes without saying that sales reps know how important a timely response is to an email from a prospect. But is it feasible to keep a check on all the emails that come from your customers? For that you need to have a well-organized inbox.

You use emails to communicate to your leads and contacts to win deals and the same email is a channel for them to get back to you. You don't want to miss out on such emails in your inbox that is loaded with a lot of emails that may not need your immediate attention.

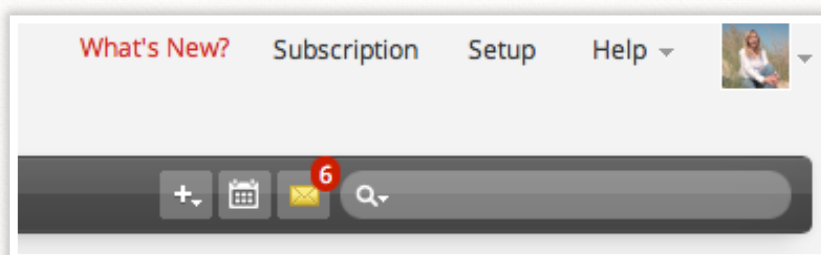


That is where MailMagnet comes in - it provides instant notifications when you receive those important customer emails in your inbox that need immediate attention.

*It intelligently **scans your inbox** and notifies you of the emails from your prospects and **customers in CRM**.*

That's not all; you can also reply to emails, add follow-up tasks and add notes, all from within MailMagnet. Along with this, you also have the option to filter the emails into separate folders or labels in your Zoho Mail inbox.

MailMagnet is like an add-on to the Zoho Mail Integration. So, if you have configured your email account within Zoho CRM using the Zoho Mail Integration, then MailMagnet will be there to inform you of those important emails from customers.



BCC Dropbox

Email clients now provide the option to create multiple mailboxes with different email addresses. There are quite a few reasons why multiple email addresses are used in business.

When you are involved in a big project that may get over in a matter of months or when you may have to hand it over to someone else at a later stage in the project, it makes sense to create an email account for this purpose. This makes sure that all email correspondence is channeled through this dedicated email address.

Some business set up multiple mailboxes for separate product lines where each division sells their products to a different set of target audience.

Often, organizations with multiple departments create mailboxes for each department to facilitate organized work platform. Departments like customer support, sales, PR, marketing, etc. could have separate email accounts to handle their email communication with people.

These scenarios could be in practice in your organization as well. When there is just one mailbox for all business communications, you have an option to use Zoho Mail Add-on, provided you have a Professional or Enterprise Edition. But when there are multiple mailboxes to manage email communication with customers and prospects, can you still associate the emails to the records in Zoho CRM?

To	<input type="text"/>
Cc	<input type="text"/>
Bcc	<input type="text"/>

Yes, of course you can, with BCC Dropbox Email Address.

BCC Dropbox provides a unique email address for each user in your Zoho CRM account.

*With this **unique email address**, you can automatically pull in all the emails sent to your **leads and contacts in Zoho CRM**.*

All you have to do is, BCC this dropbox email address when you send emails to your customers and get a copy of the email associated to the right lead or contact in your Zoho CRM account.

If the lead/contact does not exist in Zoho CRM, based on your BCC Dropbox settings a new lead/contact can also be created.



For users with Administrator or Standard profiles, the BCC Dropbox permission will be enabled. In case you want to restrict permission, you can always do so by editing the profile.

The BCC Dropbox email address can be used only for the Leads and Contacts modules, i.e. you can associate the sent emails only to the leads or contacts based on the settings. Go to **Setup > Personal Settings > BCC Dropbox** to find your BCC Dropbox email address.

other **BCCdropbox** OPTIONS



Instruct CRM on what records to search and associate emails to it.



Generate the email address whenever you need, for security reasons.



Download the email address as a vCard and store the BCC Dropbox email address elsewhere to access whenever required.



Add up to 5 different email addresses and associate emails send only from them to the leads/ contacts in Zoho CRM.

Plug-in for Microsoft Outlook

For those of you who use Microsoft Outlook for all your business communication, we have a plug-in for you too. If you send and receive emails to MS Outlook, you can still have them associated to your Zoho CRM account using the Zoho CRM Plug-in in MS Outlook. What you need to note here is, this plug-in is not available for Mac OS.

Things you can do with this plug-in:

- Associate MS Outlook inbound and outbound emails with Leads, Contacts or Potentials in Zoho CRM.
- Modify email message and file attachments to the Lead or Contact in Zoho CRM without modifying the original message in Microsoft Outlook.
- Add emails as Cases to Zoho CRM.

Additional options:

- Synchronize contacts, calendar events and tasks automatically from Microsoft Outlook to Zoho CRM.
- Export contacts, calendar (events) and tasks from Microsoft Outlook to Zoho CRM.
- Resolve conflicts while synchronizing contacts, calendar and tasks with Zoho CRM so that there is no duplication of customer data.

In a few simple steps, you can start using this plug-in.

» Step 1.

Download and install the Plug-in based on the MS Outlook version (32 bit or 64 bit).

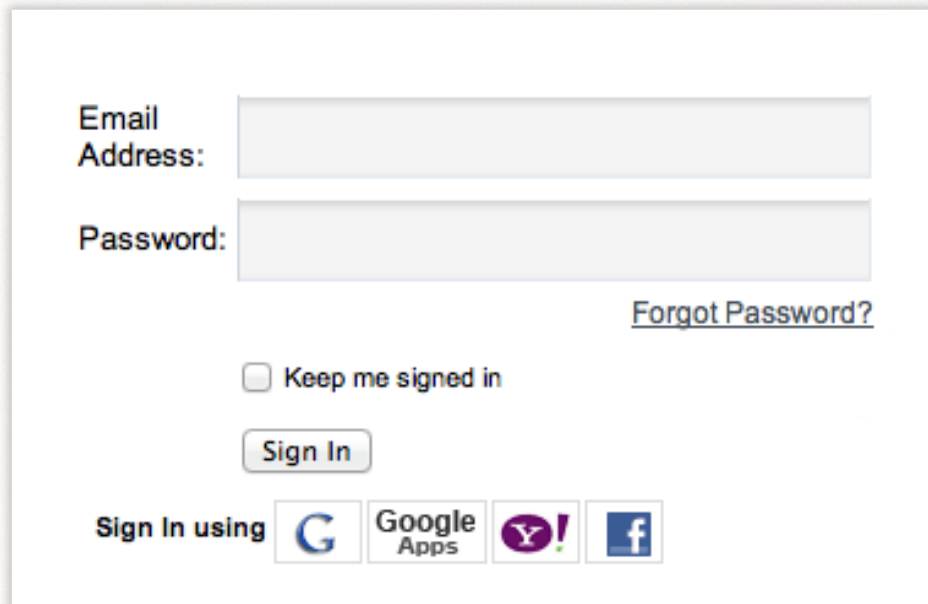
Go to **Setup > Apps & Add-ons > Other Apps > Plug-in for Microsoft Outlook** to download the plug-in.

Now, if you are already using the plug-in and updating it to a new version, then you need uninstall the plug-in and install it again. Please make sure that you close the application before uninstalling it.

» Step 2.

Configure Plug-in settings.

You have to log in to Zoho CRM Plug-in and configure a couple of settings for the smooth transfer of data to Zoho CRM. You can also sign in using your Google Apps, Google, Yahoo or Facebook login credentials but with a different password. Find out more in the Online Help.

A screenshot of the Zoho CRM Plug-in login interface. It features two input fields: 'Email Address:' and 'Password:'. Below the password field is a link that says 'Forgot Password?'. Underneath the link is a checkbox labeled 'Keep me signed in'. A 'Sign In' button is positioned below the checkbox. At the bottom, there is a section titled 'Sign In using' followed by four icons: Google (G), Google Apps, Yahoo (Y!), and Facebook (f).

Configure Mail Settings - With the Zoho CRM Plug-in for MS Outlook, you can associate the outgoing emails sent from MS Outlook to the leads and contacts in Zoho CRM. Based on the email address of the recipient, the right contact or lead is searched in Zoho CRM and the email is associated to the matching record. If the recipient's email address does not match a record in CRM, you have the option to automatically create a record and associate the email to it.

Now the question is, will the Zoho CRM system search the matching emails address in all the leads, as well as contacts? That is exactly what you will be setting up here in the plug-in settings. These options help you clearly define the criteria to search matching records.


- Automatically add emails to Zoho CRM.
- Search the recipient or sender's email address in Contacts and associate the email to the matching contact.
- Search the recipient or sender's email address in Leads and associate the email to the matching lead.

- If there are no matching leads, then select Contacts or Leads from the dropdown list to create a new record.
- You need to define if the outgoing emails should be associated to either contacts or leads in Zoho CRM.

Contacts
Tasks
Calendar
Mail
Conflict Resolution

Automatically add emails to Zoho CRM

[more details](#)

Sent items Folder


☒ **Automatically add emails to Zoho CRM**

☒ **Search the recipients'/Senders' email addresses in Contacts and associate the email to the matching contact**

If there are no matching contacts, then

☒ **Search the recipients'/Senders' email addresses in Leads and associate the email to the matching lead**

If there are no matching leads, then

Create a new
and associate the email to it

Apply

Mass Email

When you think of sending welcome emails to today's new leads or invitation emails for an event, to the contacts in your city, you can use Mass Email option. Available only for the Leads and Contacts modules, this feature lets you use email templates that you have already created, to send emails in bulk.



If you'll not be available in town when the emails are to be sent, then simply schedule it to be sent whenever required.

Email Templates

Are you sending monthly emails to your customers reminding them to renew their subscription? Or are you sending monthly sales reports to your team?

Predefined email templates are used for automation and consistency when you often send emails or send them on a regular basis.



In Zoho CRM create email templates for each record type – such as leads and contacts. It saves you the time that you spend in typing out the same email again and again on different occasions.

Emails in a Record

The question now is, where are the emails associated to the records listed? In each record, there is a section that we call the Related Lists. This refers to the other records such as tasks, events, call, attachments, emails, contacts, products, etc. associated to a record. Email section is one such related list in your record.

Emails

Tricia Boyle's Emails

From/To	Subject	Date	Sent By
 patriciab@zillum.com	Re: Product Demo Required	11/10/2011 12:45:18 PM	Tricia Boyle
 amygracelin@gmail.com	Product Demo Required	11/10/2011 12:42:41 PM	Amy Gracelin

[Send Mail](#)

You can check the email communication here. When you have the Zoho Mail Add-on enabled, a drop-down in the Related List provides options to filter the emails.

Sent Emails from CRM – Only the emails that are sent from Zoho CRM using the built-in email option will be listed.

Zoho Mail Shared Users – This section lists the name of the users who have shared their emails. Select the name of a user and you will see the emails shared by the user.

When to use what?

Every email option may not be suitable for you. Identify the one that best suits your needs:

» Zoho Mail Add-on

When you want to associate both incoming and outgoing emails from your email account to the records in Zoho CRM. Be it Zoho Mail account or any other email client that facilitates POP account configuration.

» BCC Dropbox

When you manage multiple email accounts for business and want to associate outgoing emails from your email accounts to the records in Zoho CRM.

» Zoho CRM Plug-in for Microsoft Outlook

If you are using Microsoft Outlook for all your business communications.

All the above features are for Professional and Enterprise users.

How Many Emails Per Day?

Hope you got a pretty fair idea on what options to go with. While using these email options, Zoho CRM gives a limit to the number of emails that you send each day. By day, we mean 12 AM to 11.59 PM GMT.

for **individual** EMAILS

The email limit for the organization will be calculated based on the total number of confirmed and active users in the account.

- In the **Free Edition** - 50 x total confirmed and active users.
In the Free Edition, you can add a maximum of 3 users. For example, you have 2 active and confirmed users in your organization's account. Then the total number of individual emails that a user can send per day, per organization will be up to 100 (50 x 2) emails. 12 AM to 11.59 PM GMT is considered as one day.
- In the **Paid Editions** - 300 x total number of user licenses purchased.
For example, you have 5 active and confirmed users in your organization's account. Then the total number of individual emails that a user can send per day, per organization will be up to 1500 (300 x 5) emails.

for **mass** EMAILS

- Standard Edition - 250/day
- Professional Edition - 500/day
- Enterprise Edition - 1000/day



The mass emails per day, per company includes **Autoresponders**, active email **Schedulers**, **Macros** and **Mass emails**.

If this is not sufficient, you can increase the mass email limit up to 2250 per day, per organization for an additional cost. To get that, please write to us at sales@zohocorp.com.

Also, check out the **Zoho Campaigns Integration** with Zoho CRM. Campaign management allows you to manage your entire marketing process by which marketing campaigns are planned, produced, distributed and analyzed. The built-in synchronization with Zoho Campaigns helps you to export leads and contacts from CRM to Campaigns and easily plan & execute newsletters, welcome emails, customer surveys, etc. What more, tracking responses to these emails is also made easy within CRM.

Know more

We hope this document gave you a fair idea on the various email options in Zoho CRM and tips on email management from within Zoho CRM. You can find more details and step-by-step instructions on this in our Online Help.

Browse our online resources to find answers to your questions. You can also write to us at support@zohocrm.com

online**help**

<https://www.zoho.com/crm/help/>

demo**videos**

<https://www.zoho.com/crm/demo/>

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