

# **ADVANCED**

# CAMPAIGNS





Advanced Campaigns provides you with in-depth knowledge on various types of applied campaigns in email marketing. In Advanced Campaigns, we not only offer various types of integrations with other websites, but also the best steps to take for the success of your email campaign.

In this guide, we'll be going over different types of campaigns and how they relate to your business needs. We'll also go over how to create a campaign and view reports. Finally, each section will feature an FAQ to address additional concerns.

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# Eventbrite Campaign

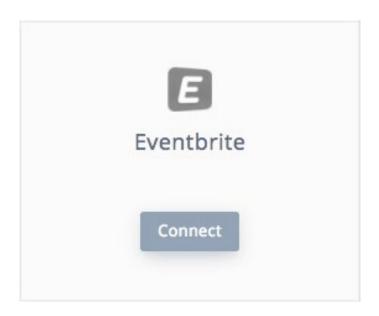
Zoho Campaigns integrates with Eventbrite and enables you to send an invitation for your event. With this integration, you can promote your event and increase your ticket sales. Eventbrite users can integrate their account with Zoho Campaigns and can add their events to your email campaigns.

#### Integrate with an Eventbrite account

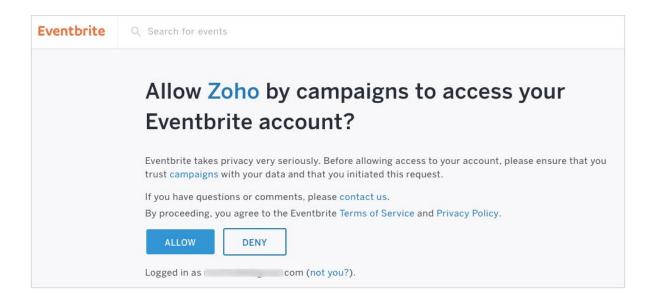
Before you create an event based campaign, it is important to connect your Zoho Campaigns account with Eventbrite.

To connect your Eventbrite account:

- 1. From the Navigation toolbar, choose **Settings** and select **Integrations**.
- 2. Hover on **Eventbrite** and click **Connect**.



- 3. Enter your Eventbrite credentials. A pop-up will appear to request access to information and to authorize your account.
- 4. Click Allow.

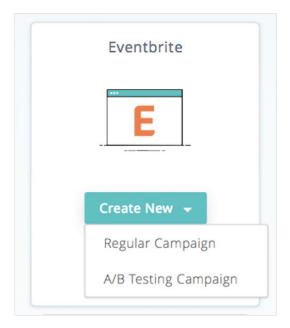


#### Create an Eventbrite campaign

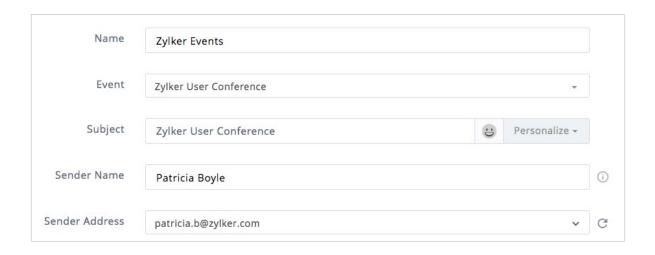
As soon as you connect Eventbrite and Zoho Campaigns, you can easily select any of your events to be added to your campaigns. Once the authorization of account is complete, you can proceed with creating an event-based campaign.

To create an Eventbrite campaign:

- 1. From the Navigation toolbar, choose **Campaigns** and select **Advanced Campaigns**.
- 2. Click Create Campaign in the top-right corner of the screen.
- 3. Hover over the **Eventbrite** category and click **Create New**.



- 4. Fill out the following information on the Basic Info page:
  - 1.Name
  - 2.Event
  - 3. Subject Line
  - 4.Sender Details



5. Select one of our specially designed Eventbrite templates for sending an invite to your mailing list.



6. Select a mailing list or segment to receive your campaign, then click Proceed.

The Eventbrite campaign will be sent for review. Once the review is complete, you'll be able to send the campaign.

#### **Eventbrite Reports**

Once your campaign is sent, you can view the Eventbrite results in the Report Summary. The Campaign report shows the number of Eventbrite invites delivered, bounces, and unsent.

# **Shopify Campaigns**

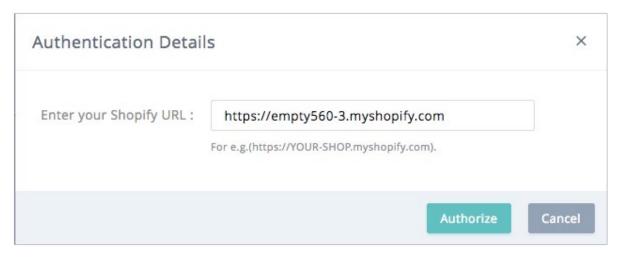
Zoho Campaigns integrates also with Shopify. With this integration, you can select your products for your email newsletters, import contacts from your Shopify account, and track the recipients who've purchased your products.

To connect your Shopify account:

- 1. From the Navigation toolbar, choose **Setting**s and select **Integrations**.
- 2. Hover on **Shopify** and click **Connect**.



3. Enter your Shopify URL and click the **Authorize** button to proceed to the Shopify website.



4. Enter your Shopify login credentials

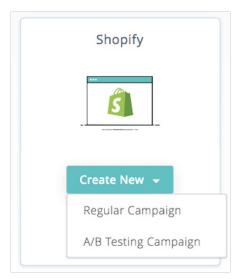
# Create Shopify campaign

Once you connect Shopify and Zoho Campaigns, you can easily add products to your campaigns.

To create a Shopify campaign:

1. From the Navigation toolbar, choose **Campaigns** and select **Advanced Campaigns**.

- 2. Click Create Campaign in the top-right corner of the screen.
- 3. Hover over the **Shopify** category and click **Create New**



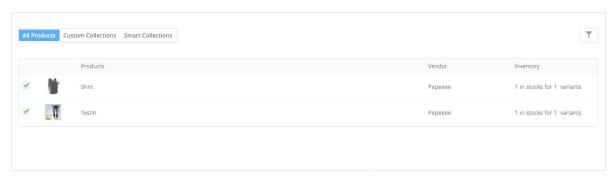
- 4. Fill out the following information in the Basic Info page:
  - 1. Name
  - 2. Subject Linet
  - 3. Sender Details
- 5. Click Next.
- 6. Choose any of the following options:

All Products - http://docs.shopify.com/api/product

Custom Collections - http://docs.shopify.com/api/customcollection

Smart Collections – http://docs.shopify.com/api/smartcollection

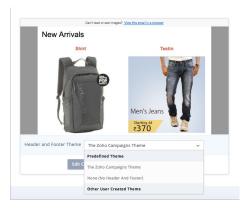
7. Select the products, you want to show in your email campaign.



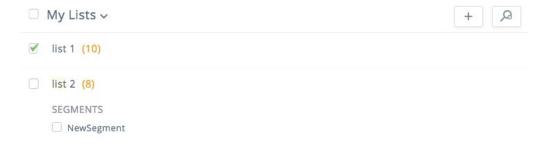
8. Select one of our specially designed Shopify templates for sending an invite to your mailing list. These templates are tailor-made to cater to e-commerce based email campaigns.



9. Select a **Campaign theme** which matches your template design and click Next.



10. Select a mailing list or segment to receive your campaign, and click Proceed.

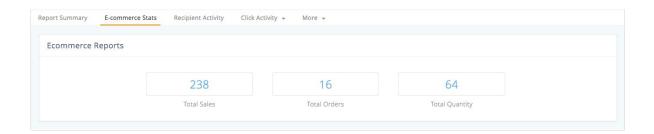


11. The **Shopify** campaign will be sent for review. Once the review is complete, you'll be able to send the campaign.

## How to view Shopify reports

Once your campaign is sent, you can view the campaign results in the Report Summary. The Campaign report shows the number of surveys delivered, opened, and clicked. In addition, we also show Ecommerce Stats, which highlights the following:

- 1. Total sales resulting from this email campaign
- 2. Number of orders placed by the email campaign's recipients.
- 3. Total quantity sold of each item
- 4. List of order details for each customer, including order date, order number, quantity, and price.



## Where can I view the Shopify tracking code?

You can view these E-commerce stats by embedding the Shopify Track Code in your Shopify account.

To view the Shopify Track Code:

- 1. From the Navigation toolbar, choose **Settings** and select **Integrations**.
- 2. Click the Show Details link corresponding to the Shopify icon.
- 3. Select and copy the Shopify tracking code.



#### To paste the Shopify Track Code,

- 1. Login to your Shopify account.
- 2. Click Settings in the left panel, then select Checkout.
- 3. Navigate to the Order Processing section
- 4 Paste the Shopify track code in the box below Additional Content & Scripts.
- 5. Click the Save Changes button to confirm.

```
Additional scripts

src=src+"?orderId="+"{{ id }}"+"&reportId="+encodeURIComponent("{{
    attributes.zc_rid}}");
    document.getElementById("zc_image").setAttribute("src",src);
    </script>
```

# Coupon Campaigns

Offering coupons is one of the best ways to increase your site traffic and boost your sales. So, how can you create a coupon- based email campaign (or A/B test campaign) where every recipient receives a unique coupon code?

At Zoho Campaigns, users can create coupon campaign using coupon merge tags. These tags will be replaced by a unique coupon code for contacts. In this section, we'll learn about the Coupon Campaign and how you can use it in your business.

## Why Coupon Campaigns?

**Confidential Access** – From contacts' perspective, you are sending a unique coupon code which cannot be misused by others.

Authenticate Coupons – Check the authenticity of coupon by entering the coupon code in the given path and find the coupon details such as the recipient's name, expiration date, and redeem status.

Reward Loyal Customers – Sending a coupon campaign is a great way to recognize a loyal customer. Suggest that they redeem the coupon points in their account on your web site.

### Coupon Merge Tags

Coupon Merge Tags are used to generate unique coupon codes rather than sending the same coupon to all contacts.

\$[CT:COUPONCODE]\$ - Generates Coupon Code

\$[CT:EXPIRYDATE]\$ - Generates Coupon Expiry Date

#### Create coupon campaign

To create a Coupon Campaign:

- 1. From the Navigation toolbar, choose **Campaigns** and select **Advanced Campaigns**.
- 2. Click Create Campaign in the top-right corner of the screen.
- 3. Hover over the **Coupon** category and click **Create New**.



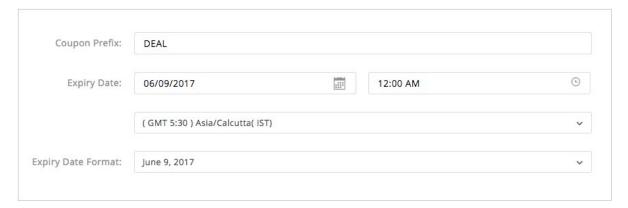


#### 4. Enter the following details:

**Coupon Prefix** – Enter the beginning letters of your coupon. It must be alpha-numeric and contain 4-12 characters.

**Coupon Expiry Date** – This is the expiration date for the coupon set for the campaign.

**Coupon Expiry Date Format** – Select the date format for the coupon expiration date.



#### 5. Click Next.

#### **Basic Details**

In the Basic Details page, enter the campaign details as given below:

Field	Description
Campaign Name	To identify the email in the future.
Campaign Subject	A suitable subject line that relates to your Campaign.

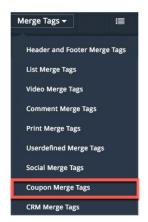
Sender Name	You can either mention your name or your organization's name.
Sender email address	You've to specify your business email address. (By default, it'll reflect the email address related to your Zoho Campaigns account).
Reply to Address	The purpose of this email is to receive any reply from contacts. This can be same as the sender's email address.



#### Content

In this step, configure the content of your email by choosing your email type and content options.

- 1. Select one of our content options such as designed templates, HTML editor or any other option.
- 2. Add the campaign content, and select the **Coupon Merge** tags associated to coupon campaigns to add them in the template.
- 3. Click **Save & Close** to proceed.

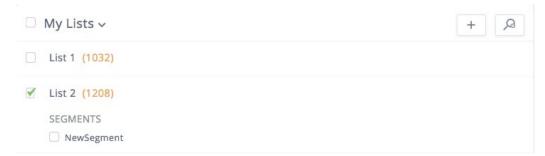




**Note:** You can find the coupon merge tags on the right side of the Content Editor.

#### **Audience**

In Choose Recipients page, select the mailings list(s) you wish to use. If you haven't created a list yet, you'll be asked to create one now.



## Send Campaign

The coupon campaign will be sent for review. Once the review is complete, you will be able to send the campaign.



#### Related FAQs

How do I validate the coupon code?

Validate the coupon code in the Coupon Services page. From here, you can also check details such as the recipient details, campaign name, campaign sent on, expiration date, and coupon status.

To validate coupons:

- 1. From the Navigation toolbar, choose **Campaigns** and select **Advanced Campaigns**.
- 2. Click the [image] icon in the top-right corner of the screen.
- 3. Enter the coupon code in the field provided.
- 4. Click the Check button to view the coupon information.



**Note:** You can click on history to view the number of sent coupon campaigns.

#### Where can I view the coupon campaigns?

View the coupon campaigns by following the steps below:

To view coupon campaigns:

- 1. From the Navigation toolbar, choose **Campaigns** and select Advanced **Campaigns**.
- 2. Click the [image] icon in the top-right corner of the screen.
- 3. Click **History** to view the coupon campaigns created in your organization.

# RSS Campaigns

RSS (Really Simple Syndication) is a simple method of receiving updates published on a website. You can find RSS on blogs, newsletters or any site where the content is updated regularly. At Zoho Campaigns, users can create an RSS-to-email campaign using RSS Merge Tags. These tags fetch the data from RSS feed and create content as a summary text that is sent periodically.

Let's take a look at RSS Campaign and how it can help your business

## What is RSS Campaign?

The RSS-to-Email Campaign is an easy way to share and view the website updates without visiting the website. This is done by sending automated campaigns to your contacts when there is an update in the site. Typically, an item in an RSS Campaign will contain a title, concise description, and link to the original content in the website.

### Why RSS Campaigns?

Without RSS, contacts need to check your website for new updates. This may be overly time-consuming for many contacts. The main purpose of RSS Campaigns is to provide contacts with the concenience of updates without the need to continually hunt for them

For example, your website releases one or two features on weekly basis and these features are followed by announcements and blogs. When you send an RSS Campaign, your contacts will receive the summary of your updates automatically.

#### Benefits of RSS Campaign

RSS Campaigns provide a regularly updated summary of web content in a capsule format, along with links to the full content.

**Easier access** – From the contacts' perspective, they can easily stay informed about the new features and updates via email.

**Saves time –** For the time-crunched marketer, it saves time and prevents them from having to create newsletters about the weekly updates.

**Nurture your contacts** – It becomes a new channel for your readers to subscribe to your blogs and updates. Easily share your blogs on social media and forward to friends.

Increases your site traffic – Interestingly, by not forcing your customers to visit your website, over time you will see an increase in traffic. This is due to an increase in visibility, as well as a regular reminder to your customers about what's going on with your company.

# **RSS Merge Tags**

RSS Merge Tags are used to bring the content from a website that has an RSS Feed. Now, you can send email without having to create the content. Simply create an RSS Campaign and add these merge tags. They will fetch the content from your RSS Feed and send out the email. Make use of the following tags to customize your RSS campaign content.



**Note:** Usage of RSS merge tags is limited to RSS Campaigns only. Make use of other merge tags to personalize the content for RSS campaigns.

## Merge Tags for RSS Feeds

Personalize your campaign content using the following tags. Using these tags, you can include the required elements (title, date, and author) of your blog in the content.

\$[RF:TITLE]\$ - Shows the title of the blog via RSS feed.

\$[RF:DATE]\$ - Shows the recently updated date of the RSS Feed.

\$[RF:URL]\$ - Shows the URL Link of the RSS Feed

\$[RF:DESCRIPTION]\$ - Shows the description of the RSS feed.

\$[RF:AUTHOR]\$ - Shows the blog author's name.

# Merge Tags for RSS Items

Use the following merge tags to show an individual item or post.

\$[RSSITEMS:START:n]\$ and \$[RSSITEMS:END]\$ - These are the opening and closing tags. Include the merge tags under this loop. Here **n= number** of items to display in RSS-to-email campaign.

#### For e.g.

\$[RSSITEMS:START:4]\$

\$[RI:TITLE]\$

\$[RI:URL]\$

\$[RSSITEMS:END]\$

This will display 3 RSS items.

\$[RI:TITLE]\$ - Shows the title of RSS item.

\$[RI:URL]\$ - Shows the URL Link of the RSS item.

\$[RI:DATE]\$ - Shows the recently updated date of the RSS item.

\$[RI:AUTHOR]\$ - Shows the author's name of the RSS item.

\$[RI:CONTENT]\$ - - Shows a concise form of the RSS item.

\$[RI:DESCRIPTION]\$ - Shows the description of the RSS item.

#### How to Create an RSS Campaign

RSS-to-email Campaigns allows you to send an automated email campaign when your website/ blog get updated. This is a step by step guide on how to create an RSS-to-email Campaign.

#### **RSS Feed Details**

To create RSS-to-email campaign:

- 1. From the Navigation toolbar, choose **Campaigns** and select **Advanced Campaigns**.
- 2. Click Create Campaign in the top-right corner of the screen.
- 3. Hover over the RSS category and click Create New.



4. Enter the following details:

RSS Feed or Blog URL – Enter the main site URL in the box and the RSS feed will be fetched automatically.

**Schedule Time –** Schedule a specific day and time for your emails to be sent.

Time Zone – Select the relevant time zone.

#### 5. Click **Next**.

RSS Feed or Blog URL	blogs.zylker.com/feed	
When to send the emails?	Days Weeks Months	
	Once a   Week(s) On	
	SUN MON TUE WED THU FRI SAT	
	at 00:00 🗸	
	US/Central	~
	Campaign will be sent based on this time after a new blog has been posted.	

# **Basic Details**

In the Basic Details page, enter the campaign details as given below:

Field	Description
Campaign Name	This will be automatically updated according to the website URL entered in previous page. However, you can manually set the name.
Campaign Subject	This will be automatically updated according to the website URL entered in previous page. However, you can manually set the name.
Sender Name	You can either mention your name or your organization's name.

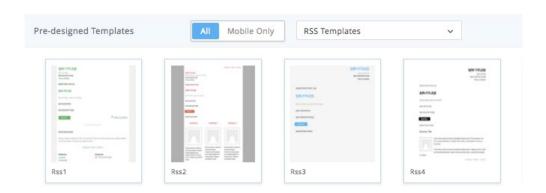
Sender email address	Specify your business email address. (By default,	
	this will reflect the email address related to your	
	Zoho Campaigns account).	
	The purpose of this email is to receive any reply	
Reply to Address	from contacts. This can be same to that of sender's	
	email address.	



#### Content

In this step, you will configure the content of your email by choosing your email type and content option.

- 1. Select one of our RSS-to-email templates for sending an RSS campaign to your customers. You can also make use of our regular templates designed for semails.
- 2. These RSS-to-Email templates will be embedded with the RSS merge tags in them.





- 3. If you are interested in using generic templates or trying other content configuration methods, select the RSS Merge tags associated for RSS-to-Email Campaign to add them to your template.
- 4. Click Save & Close to proceed.



**Note:** While using generic templates or other content configuration methods, it is mandatory to copy and paste the Merge tags so that they pull the RSS feed or item from your website. You can find the RSS merge tags to the right of the Template Editor.

#### Audience

In Choose Recipients page, select the mailings list (s). If you haven't created any mailing lists, you'll be asked to create one now.

#### Start RSS

In this page, there are two different options to start the RSS Campaign.

**Start RSS** – This will start the RSS campaign but it'll wait for the scheduled day and time to send the first email.

**Send Now & Start RSS** – This will start the RSS campaign and send its first email immediately.





#### Related FAQs

1. What is an RSS Feed?

RSS (Really Simple Syndication) is a simple method of receiving updates published on a website. You can find RSS on blogs, newsletters, or any website where the content is updated regularly. For more information, please visit.

2. What if there's no update or new content in the website or blog? Will it trigger the RSS Campaign?

In this case, no campaign would be sent. However, our merge tags will keep trying to check for any new content via RSS feed so that the next email would be sent.

- 3. Where can I get the RSS feed URL for my website or blog?

  All you need to do is to enter the website or blog's main URL (e.g. www.campaigns.zoho.com), we'll automatically fetch the RSS feed URL from the main URL.
- 4. Why aren't my contacts receiving my RSS Campaigns?

  If your subscibers aren't receiving RSS Campaigns, this is likely due to a lack of new content on your website.
- 5. Who should I contact with questions or problems with RSS Campaigns?

Feel free to send all comments and questions to

Support@zohocampaigns.com.

# Survey Based Campaigns

Zoho Campaigns integrates with SurveyMonkey and Zoho Survey to send survey-based email campaigns. This not only provides the valuable feedback of your service, but is also a great way to get the pulse of the market for your future strategies. SurveyMonkey users can integrate their account with Zoho Campaigns and add their online surveys to their email campaigns.

#### Integrating with Survey accounts

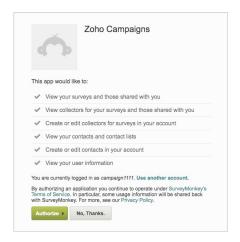
Before you create a survey-based campaign, it's important to connect your Zoho Campaigns account with SurveyMonkey and Zoho Survey.

To connect your SurveyMonkey account:

- 1. From the Navigation toolbar, choose Settings and select Integrations.
- 2. Hover on SurveyMonkey and click Connect.



3. Enter your SurveyMonkey credentials to integrate. This will prompt a popup message with a request to access information and authorize your account.



#### 4. Click Authorize.

To connect your Zoho Survey account:

- 1. From the Navigation toolbar, choose **Settings** and select **Integrations**.
- 2. Hover on Zoho Survey and click Connect.



Once you've connected to survey accounts, you'll be able to create a survey-based campaign.

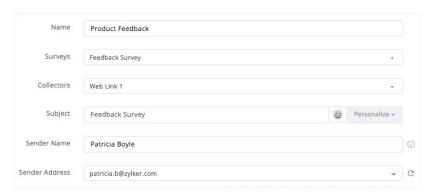
#### **Create Survey Campaigns**

Once you integrate with survey-based websites, you can easily select any of your surveys to be sent in your campaigns. After the authorization of account is done, you can proceed with creating a survey based campaign. To create a Survey Campaigns

- 1. From the Navigation toolbar, choose **Campaigns** and select **Advanced Campaigns**.
- 2. Click Create Campaign in the top-right corner of the screen.
- 3. Hover over the SurveyMonkey/Zoho Survey category and click Create New.



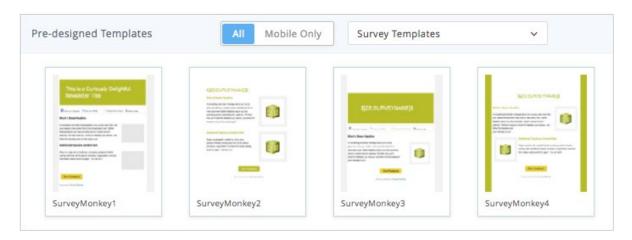
- 4. Fill out the following information on the Basic Info page:
  - 1.Name
  - 2.Survey
  - 3.Collectors
  - 4.Subject Line
  - 5.Sender Details



5. In the Content Configuration page, select one of our survey based **Designed Templates** or **Smart Templates** for sending a survey to your customers. You can also make use of our regular templates designed for emails.

**Designed Templates –** These are tailor-made templates especially to send survey campaigns.

**Smart Templates** – The unique benefit of these templates is that they are well optimized to use in your mobile phone and of course with the features mentioned in survey templates.



- 6. Copy the Merge tags associated for Survey name and Survey link and paste in the template, if you would like to add the survey name and link to your email.
- 7. Select a mailing list or segment to receive your campaign, and click **Proceed**. The survey campaign will now be sent for review. Once the review is complete, you will be able to send the campaign.



**Note:** The survey related Merge Tags are on the right side of the Template Editor. In the case of Merge Tags not being added to your designed template, 'Your Feedback' will be shown, which will redirect to the survey page.

#### **Survey Reports**

Once your campaign is sent, you can view the survey results in the Report Summary. The Campaign report shows the number of surveys delivered, opened, and clicked, In addition, Survey Reports highlights the following:

- 1) Number of contacts who have completed/started/yet to start the survey
- 2) Responses given by each customer



You can also view the list of contacts and their related activities on a completed survey in the Survey Reports page, as well as the reports section in your SurveyMonkey account.



#### Related FAQs

Why can't I view any SurveyMonkey related surveys while creating a new survey campaign in Zoho Campaigns account?

There are two scenarios when such issues might occur.

1.When you've integrated with a SurveyMonkey account and created a survey in another, separate SurveyMonkey account. Recheck the integration and, if needed, we would suggest you integrate the proper SurveyMonkey account with the surveys.

2. When you've not created any survey in your SurveyMonkey account itself. It is a prerequisite to first create the survey in SurveyMonkey account and then proceed to Zoho campaigns to add it to your campaigns.

Can I view the survey related responses provided by the recipient while taking the survey?

Yes, you can view the responses given in a survey under the recipient's activity page under Reports tab of your Campaign website.

Is it mandatory to make use of merge tag in my survey campaign related templates?

No, it is not mandatory to include merge tags in survey templates. We've embedded the survey links in the survey templates. However, if you are using general designed templates, you need to use the merge tags so that the survey links are visible in the template.



# Form Based Campaigns

Integrate your Zoho Campaigns account with Zoho Forms. This is an in-house integration and does not require a separate sign in to Zoho Forms. With this integration, you can access the forms created in Zoho Forms and reach out to your users by creating form-based email campaigns.

Use our customized templates designed for sending form-based campaigns and personalizes them with form-based merge tags. Before you create an email campaign, let us take a look at how to integrate with Zoho Forms.

## Integrate Zoho Forms

To connect your Zoho Survey account:

- 1. From the Navigation toolbar, choosse **Settings** and select **Integrations**.
- 2. Hover on **Zoho Forms** and click **Connect**. You can now access your forms in Zoho Campaigns



# Create Form Campaign

To create a form-based campaign:

- 1. From the Navigation toolbar, choose **Campaigns** and select **Advanced Campaigns**.
- 2. Click Create Campaign in the top-right corner of the screen.
- 3. Hover over the **Zoho Forms** category and click **Create New**.

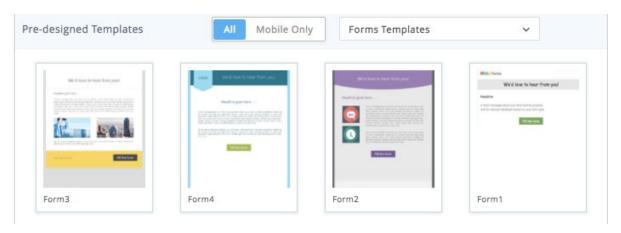


- 4. Fill out the following information on the Basic Info page:
  - 1.Name
  - 2.Forms
  - 3.Subject Line
  - 4.Sender Details

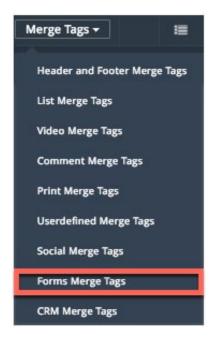


5. Click Next.

In the Content page, there are built-in templates to send forms to your customers. You can customize the templates to match your needs.



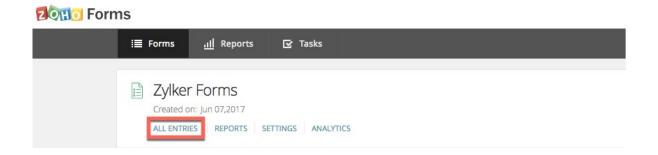
6. To view the form name and form link in your email, select the associated merge tags. (For example, **\$[ZF:FORMURL]\$** is the merge tag for Form Link).



- 7. Click the Save & Proceed button.
- 8. Select a Campaign theme that matches your template design, then select the list of contacts to send the Zoho Form Campaign.

Once, the email campaign is sent for review and gets approved, you can send your Zoho Form campaign.

You can view the form entrants' data in the **All Entries** section of sent form from your Zoho Forms account.





**Note:** The form-related Merge Tags are on the right side of Template Editor. If merge tags are not added in form templates, the content will have a call-to-action button that will redirect to the form. The content page will be pre-loaded with one of our form templates. However, you can select a regular template as an alternative.

#### **Contact us:**

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