Zia For Emails
READ ME

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Overview

Most business communication and transactions happen over emails, be it with customers, prospects, partners or vendors. Besides being an essential mode for communication, emails are an official repository for important information details on meeting schedules, events, business agendas, addresses, invoices, social handles, etc. are available on emails and sales representatives may spend quite a lot of time in entering such details manually into the CRM database.

In Zoho CRM, Zia can help them capture important information such as customer's personal information or details of an event right from the emails. Furthermore, without even having to read the entire conversation, one can know the intent of the email, as in, a request, a query, or complaint as suggested by Zia.

Data Enrichment from email signatures

In professional emails, signatures are considered as one's corporate identity as they contain information about the sender. It carries details about their role in the company, their social handle, and contact details. People even use email signatures to create brand recognition, drive traffic to their website, or promote events.

When such valuable information is available in signatures, why not let Zia help you capture the details in your CRM account. Zia's Data enrichment from email, facilitates data population for leads, contacts, and accounts from the email signatures. Details like email address, website, contact number, company name, social handles, designation, company location, and address mentioned in the email signature can be captured into CRM record. It will help reduce the time and effort that is needed to update a record manually and additionally ensure the accuracy of the data.

In CRM we have identified some fields that are commonly used such as fax, designation, phone number, last name, email etc. and termed them as "enrichment fields". But, as there may be a possibility of referring these fields with different names in the CRM account, to avoid confusion or incorrect data entry we let you map these enriched fields with the right CRM field.

Note
This feature is available only in the Leads, Contacts or Accounts modules. Only the users who have permission to access these modules can use the feature.

To enrich data from email signatures

1. Select a record from Leads, Contacts or Accounts module.
2. Open an email from the record's related list.
3. Click Enrich Data.

   **Note:** If there is no new information you will receive a notification from Zia stating the same.

4. In the *Data Enrichment by Zia* page, click **Configure field mapping**.

5. In the *Enrichment Settings* page, under Zoho CRM fields tab choose the fields from the drop-down list.
6. Click **Save**.

**Note**

- If you have already installed the "Data Enrichment" plugin in your CRM account, few global or company based information will be auto-populated from the internet. If required, you can overwrite those fields with the information retrieved from the email signature. You can instruct CRM to do so by selecting the checkbox of the respective fields under the **Update** tab.

- You can use both the plugin and the email signature to enrich your CRM data. The former can enrich any global information on the record from the internet, while the latter can enrich personal information of a record.
Activity extraction from email

Emails often hold a lot more information than just a response or business conversation. For example, organizations send invitations for events, share meeting agendas and venues, schedule calls or direct tasks to team members over emails. These information can be captured as activities in CRM for record keeping and proper follow-up. But adding these details manually can be time-consuming and may also introduce inadvertent errors while copying details from the emails. Zia's activity extraction from emails can help you to capture events, tasks, and calls automatically from an email.

Zia can tap the keywords in the emails that hint at "event", "call", or "task" and display an excerpt of it in the email. You can click on an email from the records related list or SalesSignal and capture the event, task or call.

Points to consider

- In case multiple events are mentioned in the email, then the most distinct one will be captured by Zia. For example, if the email states a call at 9:00 am and a task at 4:00 pm, Zia will pick the 9:00 am call because its the first occurrence.
• The activities will be automatically tuned to the organization's business hour. For example, if the time and date mentioned by the customer in the email is 10:00 am PST, then the time will be converted to the organization's timezone.
• If a business hour or shift hour is not configured in an account, then the default time, that is, 9:00 am will be taken into account for all the activities.
• In cases where the time or date are mentioned in ranges like 3:00 to 3:30 pm or 20th to 22nd March, Zia will pick the first instance that is, 3:00 pm and 20th March. To ensure accuracy we recommend you to check the populated time and date before saving and edit it if needed.
• Zia will capture events/tasks/calls that are scheduled for future dates only. For example, if a meeting is scheduled for the same day then Zia will not pick the activity.
• Zia is currently trained with a handful of keywords and we are continuously expanding the vocabulary. Some examples of the keywords that we have used are:

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Calls</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send</td>
<td>Contact me</td>
<td>Demo</td>
</tr>
<tr>
<td>Prepare</td>
<td>Can we schedule a call</td>
<td>Meeting</td>
</tr>
<tr>
<td>Task</td>
<td>Call me after</td>
<td>Circumstance</td>
</tr>
<tr>
<td>Complete</td>
<td>Contact</td>
<td>Episode</td>
</tr>
<tr>
<td>Collect</td>
<td></td>
<td>Happening</td>
</tr>
<tr>
<td>Do</td>
<td></td>
<td>Incident</td>
</tr>
<tr>
<td>Summary</td>
<td></td>
<td>Occasion</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Symposium</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Seminar</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Workshop etc..</td>
</tr>
</tbody>
</table>

To capture activities from an email

1. Go to the Leads/Contacts or equivalent custom module and select a record.
2. In the email related list, open an email and click **Capture event/Schedule call/Schedule task**.
   This popup will be visible only if Zia identifies event related details in the email.
3. In the **Activity Information** popup, view the populated details of the event/task/call. If required, edit the details.
4. Click Save.

**What to expect in near future**

We are constantly working to maximize Zia's vision and deliver the highest possible benefit to our customers. Here are a few things on our road map:

- Capturing multiple activities from the email and marking them inside the body of the email.
- Activities extracted from emails will be suggested in a common place outside of emails, so that even if you miss the email you will not miss the activity.
• Create a feedback loop based on edits made by the user on the suggestions and parse the model for increase accuracy.
• Train Zia with more industry specific keywords and improve its accuracy.

**Intent of an email**

Zia will monitor the email conversations and highlight the intent of the received emails. She will understand the email content and capture the following intents: request, query, complaint, and others.

**Sentiment Analysis of Emails**

In business we all receive innumerable emails every day but the ones that have a negative tone usually require an immediate attention over the others. Zia analyzes the tone of your incoming emails and shows if it has a positive or a negative sentiment and helps you to take a prompt action. Email Sentiment is available for all the users who have configured IMAP integration.

Inside Zoho CRM, you can view the email sentiment for a record under a record's related list.

Read more about email sentiment [here](#).