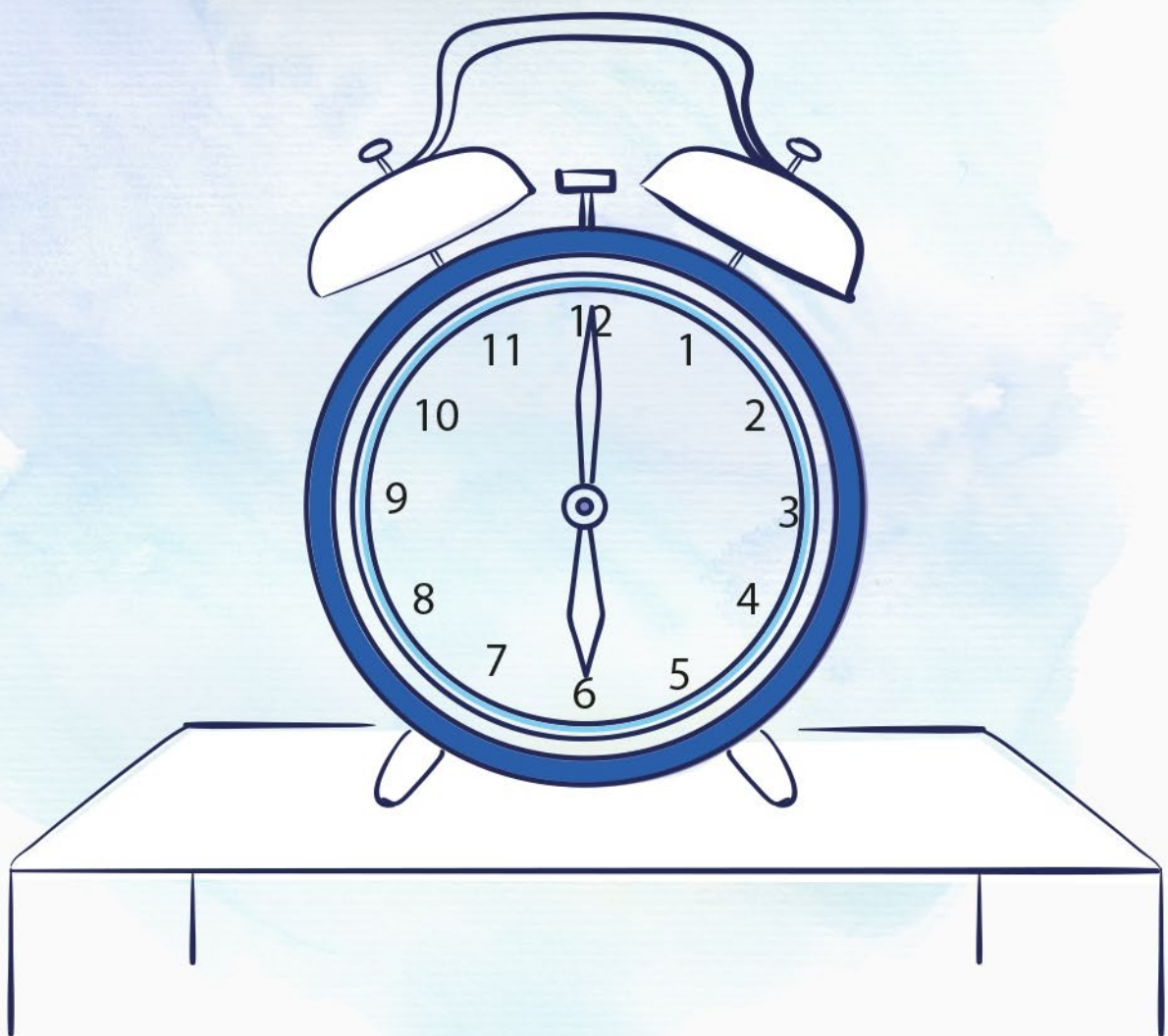


GETTING
STARTED
WITH ZOHO MARKETINGHUB





GETTING STARTED WITH ZOHO MARKETINGHUB

A User Guide

Welcome to Zoho MarketingHub! This guide will help you generate leads, nurture them and finally qualify for sales. In addition to marketing automation, you'll learn how to plan and budget your marketing activities using a marketing planner.

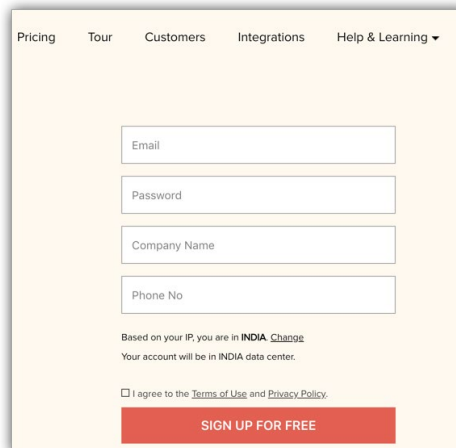
Besides, this Getting Started guide, you'll find the Zoho MarketingHub User Guide and many other additional resources at <https://www.zoho.com/marketinghub/help/>

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How do I sign up for Zoho MarketingHub?

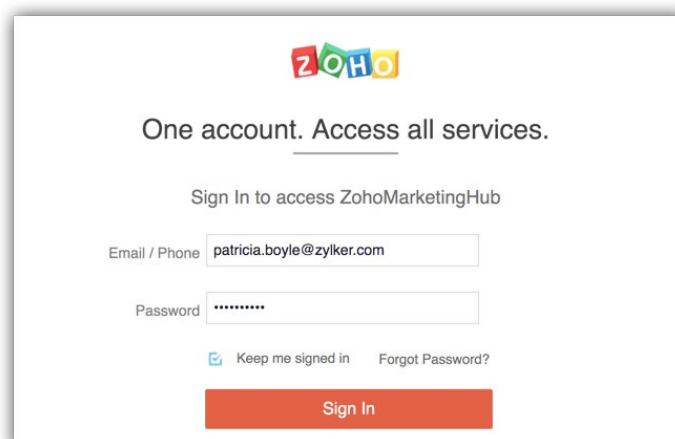
To open a free trial account with Zoho MarketingHub, go to <https://www.zoho.com/marketinghub/> and use the signup form to create an account.



The image shows the Zoho MarketingHub sign-up form. At the top, there is a navigation bar with links: Pricing, Tour, Customers, Integrations, and Help & Learning. Below the navigation bar, the form contains four input fields: Email, Password, Company Name, and Phone No. Below these fields, there is a message: "Based on your IP, you are in INDIA. [Change](#). Your account will be in INDIA data center." Below this message, there is a checkbox labeled "I agree to the [Terms of Use](#) and [Privacy Policy](#)." At the bottom of the form, there is a red button labeled "SIGN UP FOR FREE".

If you would like to upgrade to one of our subscription plans, please visit <https://www.zoho.com/marketinghub/pricing.html>

If you already have an account with zoho.com. You can make use of your existing email address and password to log in to Zoho MarketingHub.





The image shows the Zoho MarketingHub sign-in form. At the top, there is the Zoho logo. Below the logo, the text "One account. Access all services." is displayed. Below this text, the text "Sign In to access ZohoMarketingHub" is displayed. Below this text, there are two input fields: "Email / Phone" and "Password". The "Email / Phone" field contains the text "patricia.boyle@zyker.com". The "Password" field contains a series of asterisks. Below the input fields, there is a checkbox labeled "Keep me signed in" and a link labeled "Forgot Password?". At the bottom of the form, there is a red button labeled "Sign In".

For more information, call us at

 USA: +1 (888) 900 9646,

 UK: +44 (20) 35647890,


 Australia: +61-2-80662898,

 India: +91-44-67447000

You can also write to us at support@zohomarketinghub.com.

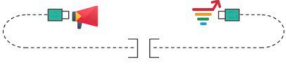
How to set up an account with Zoho MarketingHub?

Once you sign up to Zoho MarketingHub account and you're already a user in Zoho Campaigns, you can share your Campaigns account's data with your MarketingHub account. If you are new user, you need to add fresh data to get started.



Dear Patricia, welcome to Zoho MarketingHub


As a Zoho Campaigns admin, you can choose to associate your existing account with MarketingHub or create a new account.



Associate with Zoho Campaigns

By associating your existing Campaigns account, your data from there gets shared to your MarketingHub account. At anytime, you can choose to move to a new MarketingHub account, but your current shared account will be closed and your data won't be available.

Create shared account



Create new account

By creating a new MarketingHub account, you need to add fresh data to get started. At anytime, you can choose to bring in data from Zoho Campaigns by associating your Campaigns account, but in this case, your existing new account will be closed and your data won't be available.

Create new account

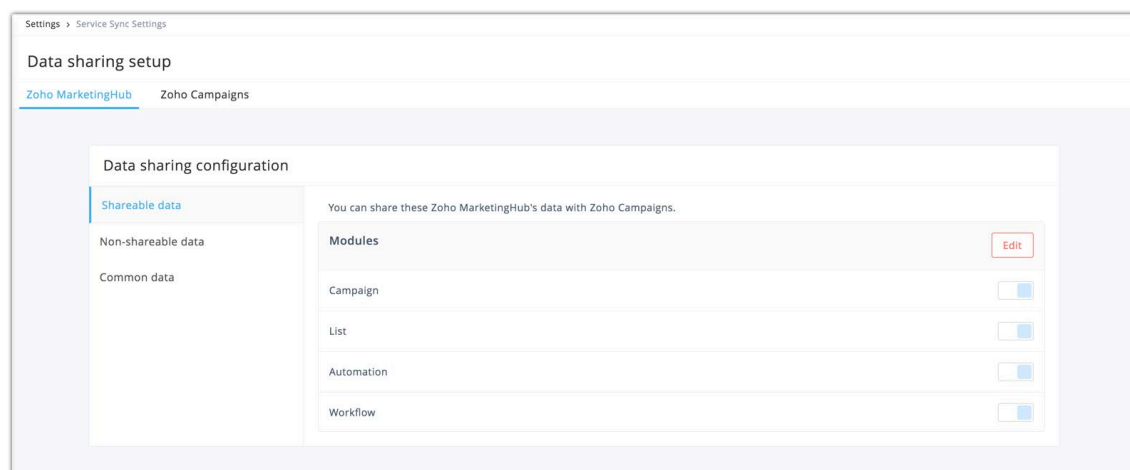
When you want to share data with MarketingHub?

By associating your existing Campaigns account, your data from Campaigns will be shared with your MarketingHub account. You can synchronize and share your Zoho Campaigns data with Zoho MarketingHub by following the steps below:

From the Navigation toolbar, select Settings and choose Service Sync Settings.

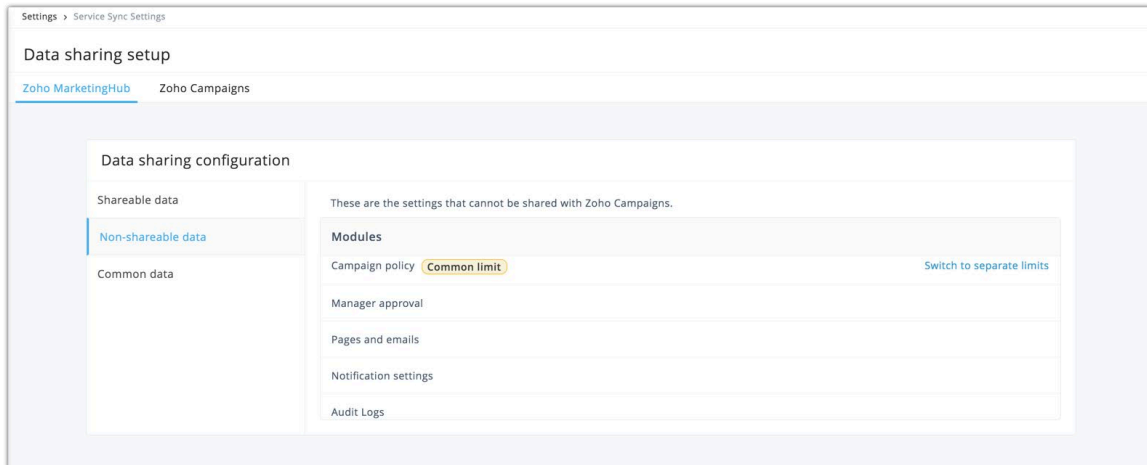
In the Data Sharing Setup page, you can see the data that are shareable, non-shareable, and the data that are common for both the applications.

You can choose the data to be shared, by clicking the Edit button in the Shareable data subtab.



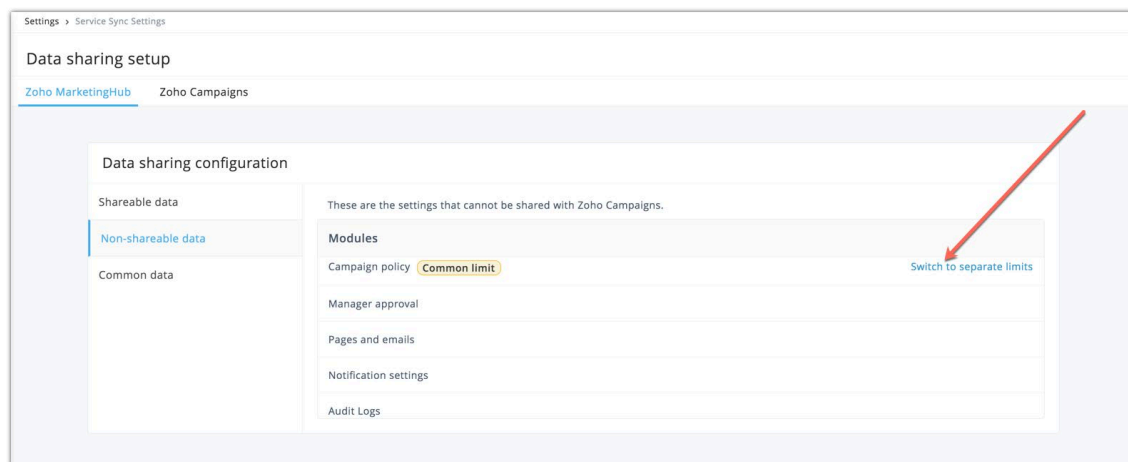
Following are the data that cannot be shared (Non-shareable data):

- 1) Campaign Policy
- 2) Manager Approval
- 3) Pages and Emails
- 4) Notification Settings
- 5) Audit Logs



However, the Campaign Policy that you have in Zoho Campaigns can be replicated in Zoho MarketingHub.

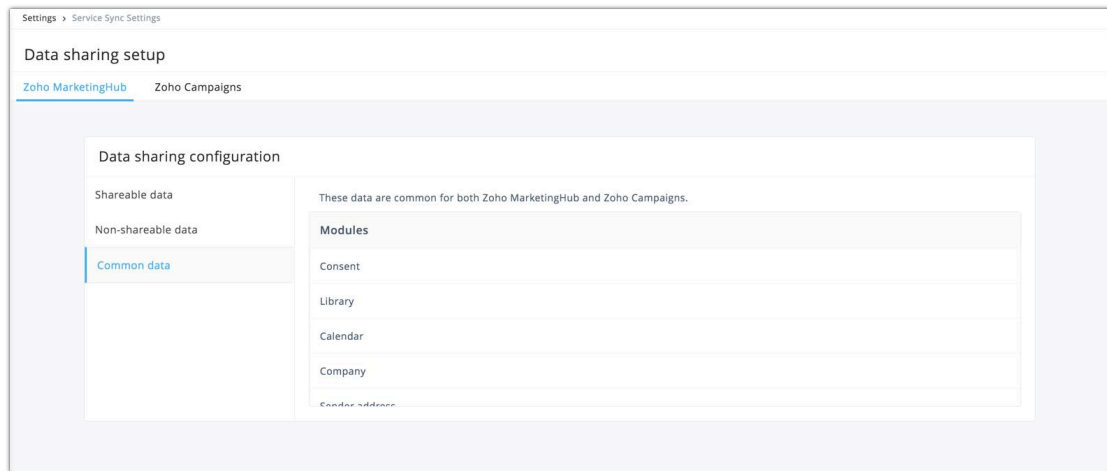
Click on Switch to common limit to have the same campaign policy for both apps. (OR) Click on Switch to separate limit to have a different campaign policy for both apps.



If you choose to have a common email policy for both the applications, the changes that are made in one of the apps will be reflected in the other app as well.

If you choose to have a separate email policy for both the apps, changes made in the policy will be applicable only in the respective application.

Common data will be available in Campaigns as well as in MarketingHub.



In the Zoho MarketingHub subtab, you can view the MarketingHub's data that are being shared with Campaigns. Sharing of these data can only be configured in MarketingHub and not in Campaigns.

What happens when I create a new account in Zoho MarketingHub?

By creating a new MarketingHub account, you need to add fresh data to get started.

To start with, from the Navigation toolbar, click Settings.

Company Profile – Add company name, mail address, website address, phone number, industry, privacy policy link, Terms of use link, and brand logo.

My Profile – Add name, email address, country, region, city, and lead name format.

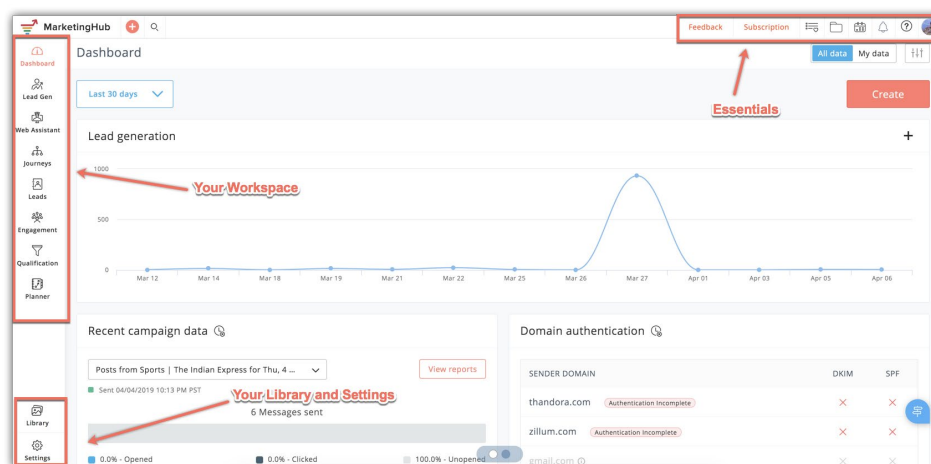
Manage Users – Send invite to add new users in your organization.

Exploring the Zoho MarketingHub page

Your workspace -Drive more leads, build a comprehensive marketing plan, and optimize your marketing efforts with automation.

Essentials-Organize your data, get help, access the marketing calendar, and manage your profile in one place.

Your library & settings- Add your email templates, form templates, and images in the library. You can also set your Zoho MarketingHub preferences in the settings.



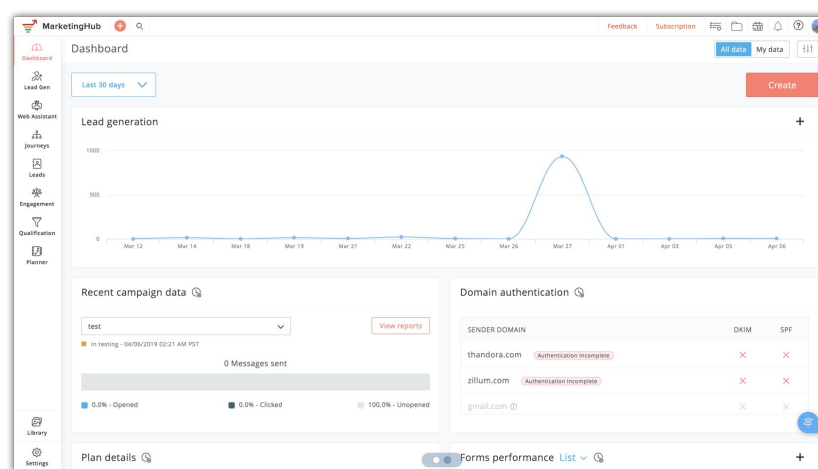
Understanding the Dashboard

You can customize your dashboard with your favorite widgets and choose what you want to see in the main display. In this section, we'll go over each widget and its purpose.

In this section, we'll take you through different aspects of your dashboard and how it can help you understand various data points in your account.

My Data - This view is unique to each Zoho MarketingHub user, and only that user can view it. In this view, You can take a look at the number of leads generated, lead conversions, top referral domains, and more.

All Data - This view gives you the accumulated data from all accounts in your organization.



Customize your Dashboard

You can customize your dashboard with your favorite widgets and choose what you want to see in the main display. In this section, we'll go over each widget and its purpose.

To customize your dashboard:

1. From the Navigation toolbar, choose Dashboard.
2. Click the Settings icon in the top-right corner.

3. Select at least one of these options:

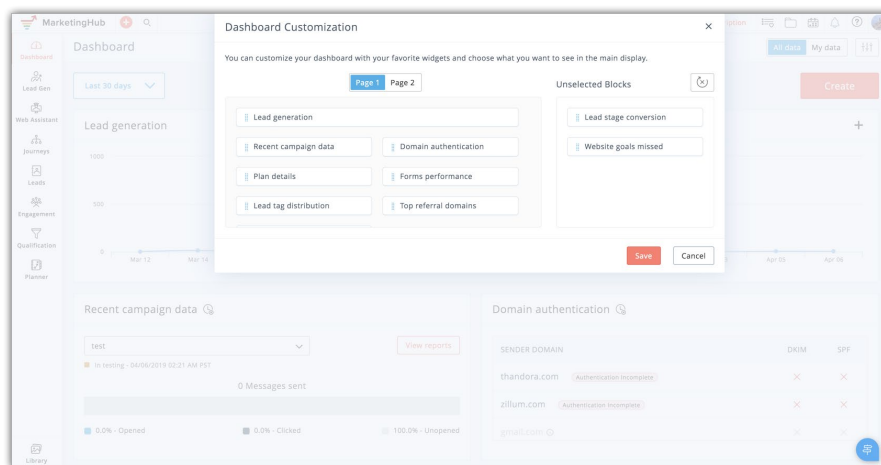
Choose dashboard page – Select the dashboard page you'd like to customize.

Adding widget – Drag and drop your favorite widgets from the Unselected Blocks panel on the right.

Moving widget – Click and drag a widget to the desired position.

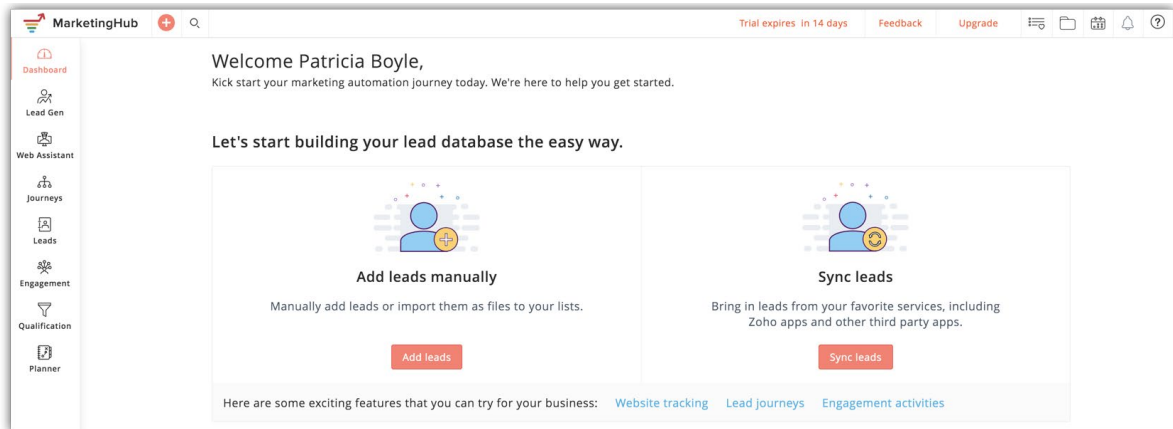
Removing widget - Click and drag the widget to the Unselected Blocks panel.

4. Click Save.



How to generate leads?

You can generate leads through numerous ways. Apart from signup forms and smart pop-ups, you can add leads manually, sync leads from Zoho CRM, generate leads from events, webinars, conferences, and tradeshow via Eventbrite, GoToWebinar, and OnSpot.



[Learn how to add leads manually](#)

[Learn how to sync leads from Zoho CRM](#)

[Learn how to generate leads via Eventbrite](#)

[Learn how to generate leads via GoToWebinar](#)

[Learn how to generate leads via OnSpot](#)

How to create my first signup form?

Once you create your Zoho MarketingHub account, we'll take you to our welcome page, where you can start with creating your first signup form.

To create a signup form,

On the Welcome page, click the Create signup form. Signup form creation is divided into five phases:

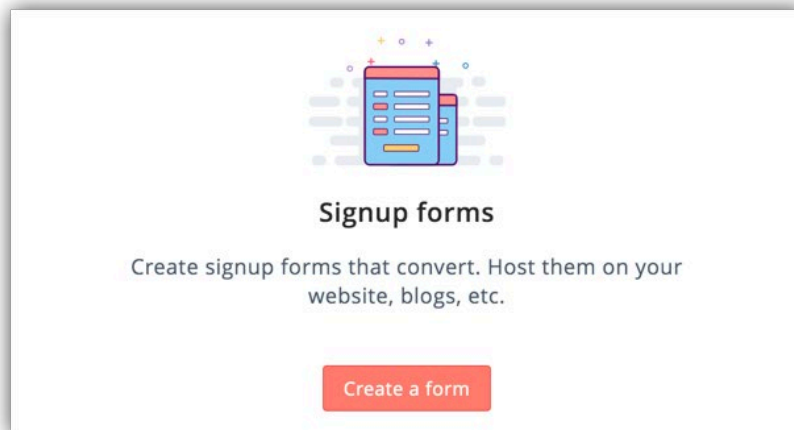
Choose the right template – Choose a signup form from the available designs based on your needs.

Customizing the signup form – Customize the font, color, style, and additional fields in your form.

Adding thank you pages and signup response emails – Draft confirmation email messages and customized thank you pages.

Associating signup form to a mailing list - Leads join the associated mailing list via this signup form.

Publishing the signup form – To generate signup form code, URL, and button so that you can share it on online platforms.



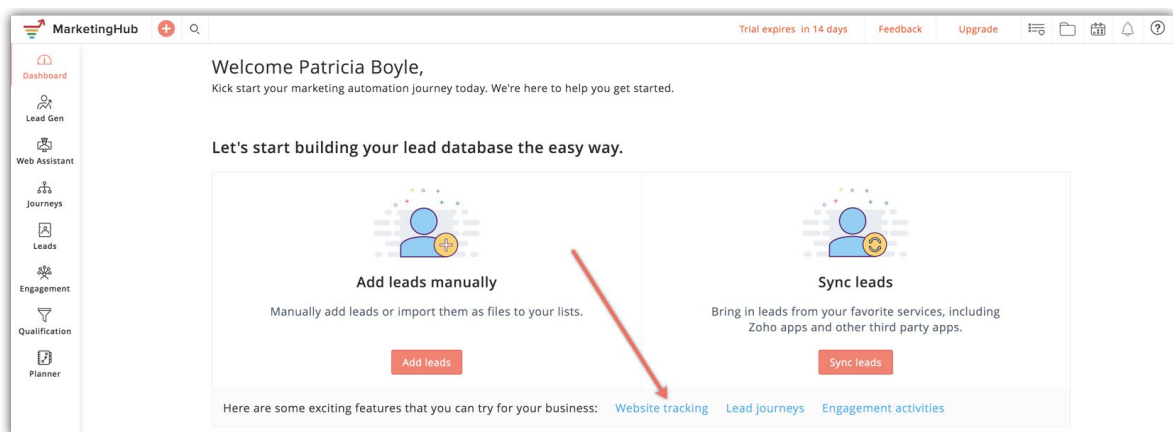
How to track my lead's behavior on my website?

Once you create your Zoho MarketingHub account, we'll take you to our welcome page, where you can start with tracking your lead's behavior on your website.

With web assistant, you can:

- 1) Monitor visitor behavior
- 2) Analyze visitor interests in your website, products, and services
- 3) Gain insights into your web traffic
- 4) Categorize target subscribers based on their activities and interests
- 5) To track your lead's behavior on website,

On the Welcome page of Zoho MarketingHub, click the Get website code button. The Connect website page will appear.



Connecting your website – You'll enter your website domain to generate a JavaScript code snippet.

Embed code in webpages – You'll copy the code and paste it into the <body> section of the pages you want to track. Once you've embedded the tracking code in your webpages, and as your pages start receiving visits, they will be listed under the Pages subtab.

Validate page - If any of your page does not get listed under Pages in spite of adding the tracking code, you can use the Validate pages option to check if you've added the code correctly.

Setting up event tracking - Events are any user interaction with your website, like clicking a CTA, downloading a book, or submitting a form.

For instance, if you want to track the number of clicks on your Subscribe button, you need to add a JS event like this:

```
<button onclick="zcAction('clicked', 'Landing_page_Subscription')"></button>
```

- 1) "Onclick" is the JS event
- 2) "zcAction" will be called to track the action
- 3) "Clicked" is the action
- 4) The value is the button name

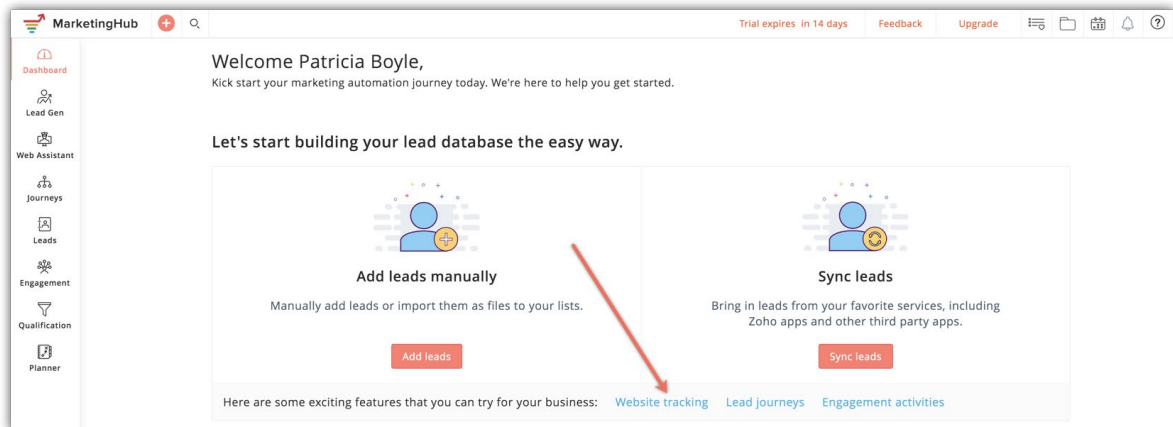
When the JavaScript event is added to your Subscribe button, all clicks made on that button will be calculated and displayed under the Events sub-tab. This example is specifically for a click action. You can track other elements by adding a JavaScript event call based on that specific element.

The elements you've defined will be listed under the Events subtab.

How to build a journey to nurture my leads?

Once you create your Zoho MarketingHub account, we'll take you to our welcome page, where you can start with building journeys to nurture your leads.

On the Welcome page, click the Build a journey button. The Create journey page will appear.



You can select any of the following options:

Pre-designed templates – These types of journeys have the trigger type already defined. There are eight pre-designed journey templates. You can select one of the templates based on your requirement --- On form submission, Date-field, To definite group, Re-engagement series, Smart series, On list entry, Survey, Event-based.

Blank – You can define a trigger type, configure the process elements, and the end-of-journey actions the way you want.

Once you select one of the options, you can initiate a series of messages and actions for them. Create an action flow and have them be completely automated. Every journey has three major sections.

Trigger

Under this section, you'll define the condition for your leads to enter the journey.

Consider the following examples:

Update field trigger - A journey with this trigger initiates whenever there is an update in the field you select.

Form submission trigger - A journey with this trigger initiates whenever there is a sign up via the form you select.

Process

Under this section, you'll define a series of actions to be performed on your leads. You can create an email series, define actions, split the path based on conditions, and much more.

End-of-journey actions

Under this section, you'll define a series of actions that will be performed when the lead completes/exits the process.

Once you are finished, activate the journey. Journeys will show you up-to-date reports, which you can use to analyze how well your strategy is performing with your leads.

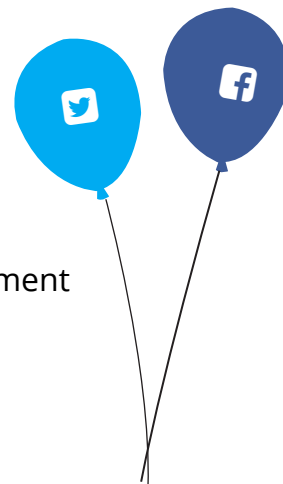
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