

# Zoho Campaigns Set-up for Administrators

Zoho Campaigns is a stand-alone application that integrates seamlessly with the CRM Campaigns module in Zoho CRM.

Use Zoho Campaigns to build relationships with prospects, keep in touch with contacts, manage email campaigns, send scheduled autoresponders, integrate surveys and events, and even perform A/B testing. Eliminate importing and updating contacts for email lists by using the segmented list view records in Zoho CRM to build mailing lists in the Campaigns App.



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## Your guide to setting up Campaigns for Zoho CRM

How the Zoho CRM Campaigns module and the Zoho Campaigns application work

Segment Data in Zoho CRM

Campaigns Types

- Email

- Social

- Autoresponder

Setting up your account

- Company Profile

- User Profile

- Verifying other Users

Setting up the Campaign App Elements

- Authentication

- Custom Fields

- Merge Tags

- Campaign Theme

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- Social and other account Integrations

API Integration and Call Backs (and the ZSC Key)

Setting up Zoho CRM and Zoho Campaigns Sync

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This guide assumes a working knowledge of Zoho CRM and a basic understanding of email marketing tactics. If you need a hand developing an email marketing strategy and email campaign implementation, we'll be happy to help! You'll find us at [www.yourcrmteam.com](http://www.yourcrmteam.com).



## What you should know before you start

Yes, it's confusing. No it's not just you: Zoho named their campaign module in Zoho CRM and their stand-alone campaign application the same: Campaigns. Go figure; it must have seemed like a good idea at the time. To try and avoid confusion we'll use standard – if somewhat clunky – nomenclature throughout this guide. References to the Zoho CRM Campaigns module <sup>(A)</sup> will be referred to as *CRM Campaigns module* and the stand-alone Campaigns application will be referred to as the *Campaigns app*.



This guide is designed for setting up the Zoho Campaigns App / Zoho CRM integration. Refer to the link listed in the resource section at the end of the document for complete details and alternate methods of working with Zoho Campaigns.

## What's the difference between Campaigns and Campaigns?

### The Campaigns Module in Zoho CRM

**What it is:** The Zoho CRM Campaigns Module is a top-level "holding" record to help you manage and analyze marketing campaigns. The CRM Campaigns module tracks details about email marketing, trade shows, direct mail, events, surveys – or any type of marketing campaign you want to analyze.

A CRM Campaign module record enables you to:

- Aggregate Leads and Contacts associated with a campaign -
  - In the Campaign record: view the Contacts or Leads associated with a campaign.
  - In a Contact or Lead record: view the Campaigns associated with the Contact or Lead
  - Provide visibility into marketing activities for all authorized CRM users
- Record Campaign details to analyze results and determine ROI. Those details may include -
  - Start Date and End Date
  - Campaign Type
  - Costs: Budget and Actual
  - Expected vs. actual number of impressions (attendees, signups, etc.)
  - Expected Revenue
  - Notes, Activities, and other related entities
  - Any other details that matter by creating custom fields and sections.

**What it is not:** CRM Campaigns module records are not used to perform any email marketing functions. Although you can send mass emails from Zoho CRM, the number that can be sent daily is limited and there is no ability to track or report on results. That's where the Campaign app comes in.

Emails associated with email campaigns are created, sent, and analyzed using the integrated Campaigns App (or mailings can be managed in an external app such as Constant Contact, Swiftpage, or MailChimp).

### The Campaigns App

**What it is:** The Campaigns app is the tool that allows you to create templates, add email content, build subscriber mailing lists, and run reports for emails campaigns. It's where you can create and send follow-up emails, where you can perform A/B testing to validate tactics before mailing an entire list. It's the tool you'll use to create a series of touches to build relationships and send relevant offers.

**A) See Addendum A for a more comprehensive overview of using the CRM Campaign module.**

The Campaigns app “fetches” Leads and Contacts from your CRM so that you don’t need to reenter or import contacts, and it can update the status of the Campaign Module members.

**What it is not:** Depending on how you approach email campaigns, you may find that the Campaigns App doesn’t fit a true drip campaign model. Each email campaign has a fixed start and finish date based upon an assigned time frame.

That means that you can’t add a new contact to some existing campaigns and engage them from the beginning email in the series. There are ways to work around this that we’ll address, but it’s an important distinction you need to know about.

## Getting Started

It all starts with data, so **it all starts in Zoho CRM**. It’s easy to build mailing lists in the Campaigns app based on records in Zoho CRM Lead and Contact list views. This integration also brings the results of your email campaigns back into the CRM Campaign modules.

As a result you’ll be able to see the status of campaign “members” in the CRM Campaign module as well as in the Campaigns related lists in Zoho CRM Leads and Contacts records.

- Segment your Zoho CRM Contacts to create targeted lists for mailing.
  - Create custom fields required to track important details for data segmentation.
  - Segments can be based on regions, industry type, buying preferences, functional roles, renewal dates, product interest, buyer persona, and so on.
- Create (or use existing) List views in Zoho CRM to reflect the target markets.
  - Select the Contacts tab.
  - Click the Create View link (or Clone the current view to modify)



- Name the view, and share it or not, as appropriate
- Select the columns to include in the view and specify criteria to create segmented lists.

You don’t have to create segmented lists of Leads or Contacts lists in Zoho CRM before working with the Campaigns app, but your campaigns will be more successful if you thoughtfully engage your subscribers with the right message or offer.

That means if you haven’t segmented your data then you’ve got some work to do. You *must* identify records in meaningful ways to build targeted lists. Go ahead and segment your Zoho CRM database now; you’ll thank me later.

## Types of campaigns

First, let’s take a look at the types of campaigns you can run using the Zoho Campaigns App:

- Email Campaigns
- Social Campaigns
- Autoresponder

**Email Campaign** types include:

- Email
- Advanced Campaigns
- A/B campaign
- Eventbrite (must have live events in Eventbrite account)
- Eventbrite A/B
- Zoho Survey
- Zoho Survey A/B
- SurveyMonkey Survey
- SurveyMonkey Survey A/B

All A/B testing can be based on these variables (time-frame of test = x hours or x days [up to 12]).

- Sender
- Sender Details
- Content

The A/B testing “Winner” can be based on

- Open Rate
- Click Rate
- Manual

### **Social Campaigns:**

Social campaigns help extend email campaigns, enabling you to broadcast campaigns via social channels. You may connect with these accounts (you must already have or create these accounts):

- Facebook
- Twitter
- LinkedIn
- Eventbrite
- Survey Monkey
- Zoho Survey
- Selected Google accounts
- Google Analytics



### **Autoresponder Types:**

**Sign-up Based:** Sent to subscribers who joined a specific mailing list by signing up via a web form.

**Date Based:** Sent to subscribers based upon a specific date such as birthday, anniversary or a renewal and/or expiration dates.

**Closed Group:** Sent to a mailing list with a fixed number of recipients and used widely in product or event promotion.

Here are more details about how autoresponder-type emails could be used:

### Signup Based

- Subscriber signs up for x , receives an automated e-mail
- X days later, another email
- X days later, another email
- You can create follow-up messages *to a maximum of fifty* for an autoresponder series.
- This could be used for
  - Periodic updates (newsletter)
  - Promotions
  - Out of office
  - Intro to new services
- **Add new subscribers to this campaign: No, campaign must be cloned for new subscribers**

### Date Based

- This could be used for:
  - Birthday
  - Annual membership renewal
  - Anniversary, etc.
- Associate more than one date-based campaign with a contact; separate Campaign for each.
- Set the frequency for the Autoresponder – annual or once.
  - Yearly – Message will be based upon an annual recurring date such as birthday or anniversary wishes.
  - One Off–Message will be generated only once and will be on the basis of an exact date value such as expiration of a contract, warranty, service agreement, etc.
- **Add new subscribers to this campaign: Yes**

### Closed Group-Based

- This could be used for:
  - Launch an event
  - Product Promotion
- Emails follow a set series to a defined group of recipients
  - Send Immediately
  - Send in X days
  - Send in X + days
- **Add new subscribers to this campaign: No, campaign must be cloned for new subscribers**

## Authentication

When email is sent via Zoho Campaigns servers, the email gets authenticated automatically by using DomainKey signature so that the email passes through the anti-spam filters of the recipient's servers. This improves the deliverability of your emails.

To keep emails out of spam folders and reaching your subscribers, you need to take steps to ensure deliverability.

- For unverified senders: Opt-out from Domainkey Signature which you can find under verify all sender email address. By default, the DomainKey signature will not be chosen for the unverified domains
- For Verified sender domains: Add your domain name (don't include http or www).
- Set up your SPF record (See <https://www.zoho.com/campaigns/help/setup-spf-dkim.html>).

**Go to: Settings > Email Authentication**

## Custom Fields

Custom fields can be used as merge fields in emails and can be used as criteria to further segment records in the Zoho Campaigns app. Select and/or create custom fields for use in your campaigns (based on your Zoho CRM fields). For simplicity, these field names should mirror field names in Zoho CRM. You may select from Contact or Account Custom Fields.

- Click the "Add New Field" icon
- Select the field type
- Assign a display label (using the same field label as in Zoho CRM keeps things simple)
- Enter the Field Length
- Click Add.



Create custom fields in the Zoho Campaigns app before creating merge fields; you may also need to reference custom fields when using Merge Tags in Content or segmenting mailing lists. Don't forget that the custom fields must first exist in the CRM.

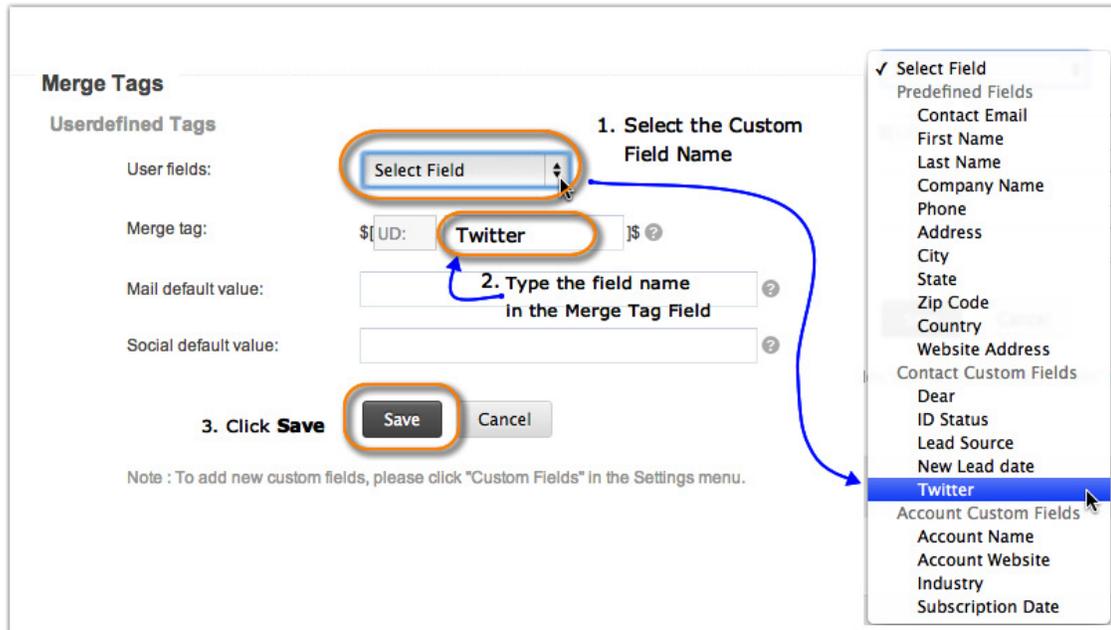
**Go to: Settings > Custom Fields**

## Merge Tags

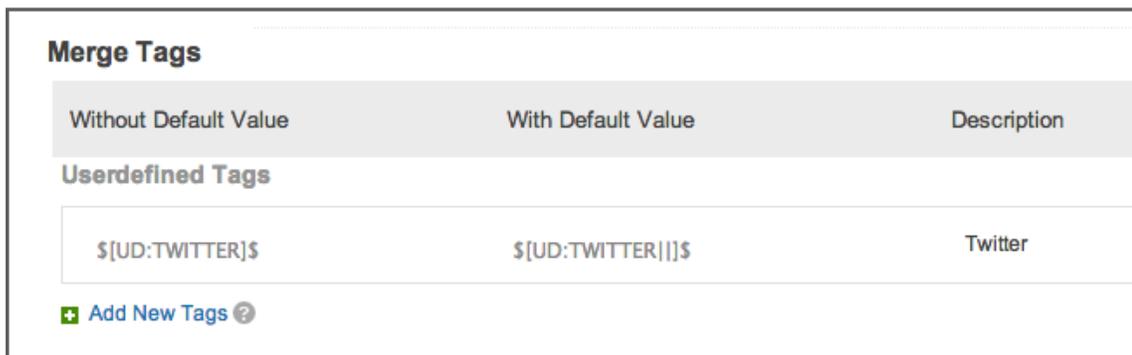
Use Merge Tags to personalize emails to your subscribers by merging values from CRM fields. Header & footer tags are useful for subscription-related operations and updating your subscriber's profile. The screen for creating merge tags is not particularly intuitive, so it may be confusing the first time you create a merge tag.

These are the steps to follow (make sure custom fields have been created first in both CRM the Contacts and Accounts module in Zoho CRM and in the Custom fields in the Campaign app):

- Select Settings > Merge Tabs.
- Click in the User fields drop down list and select a field for which to create a merge tag,
- Click into the Merge tag field and type the merge tag name into the field (do not include special characters, they will be added upon saving).
- Click Save.

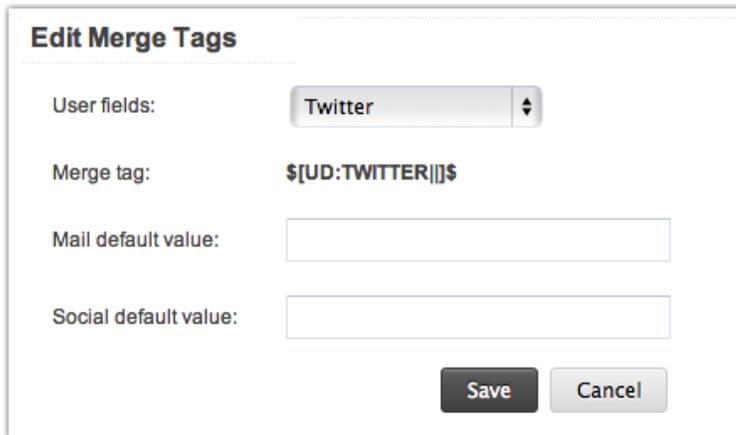


- The screen will change after adding the first merge tag, making it a bit more intuitive.
- To add more tags, click the Add New Tags link.



- Edit the Merge Tags (to add default mail or social values)  by clicking the Edit icon.

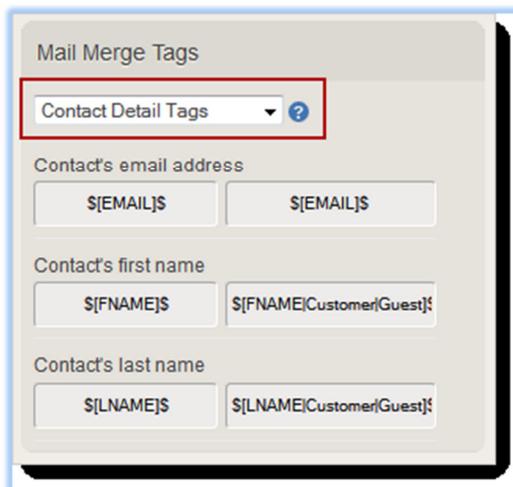
- The default values will be used when the designated field is empty.



**Go to: Settings > Merge Tags**



Please note that merge tags can also be used for Call Back URL's, campaign subject and for list details known as List Link tags. 45 custom fields are allowed per organization.



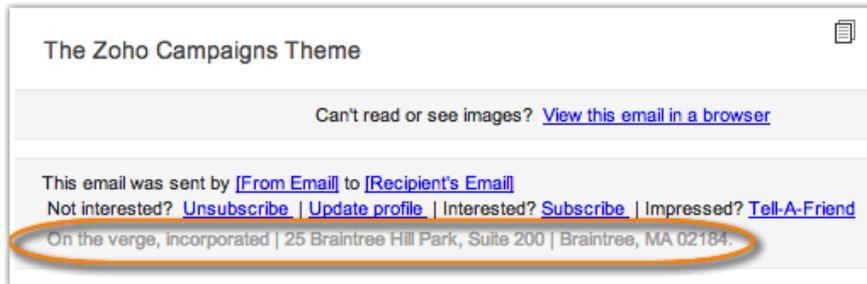
Default values (used for empty merge fields in subscribers' records) will be displayed between the field name end bracket and the end "\$" merge code.

### Create or select a default Campaign theme

The Zoho Campaigns Theme is a pre-designed theme that can be used instead of a customized theme. The company name & address for "The Zoho Campaigns Theme" uses the information provided in Company Profile. Remember, to be compliant with CAN-SPAM laws, your campaigns must contain your company address.

- Click Create My First Theme
- Name the theme

- Set your Campaign Theme as a default – this will now be associated with all campaigns.
  - OR -
- Clone Theme: This option duplicates the background color, font style & size, alignment and other customizations from a previously created Campaign theme.
- Header Text and Preview (use default or edit to customize)
- Select Colors, Fonts, etc.
- Footer Text and Preview (use default or edit to customize) Select Colors, Fonts, etc.
- Company name and address (required by Campaigns app for CAN-SPAM law)



#### Example of email footer with address

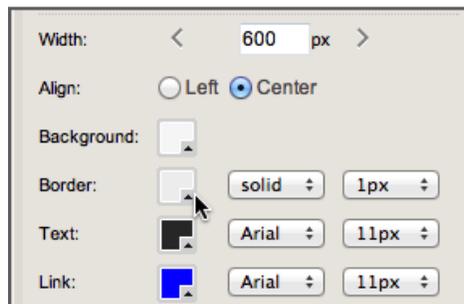
See complete details on designing your theme at [https://www.zoho.com/campaigns/help/settings-user-guide.html#Campaign\\_Themes](https://www.zoho.com/campaigns/help/settings-user-guide.html#Campaign_Themes).

**Go to: Settings > Campaign Theme**

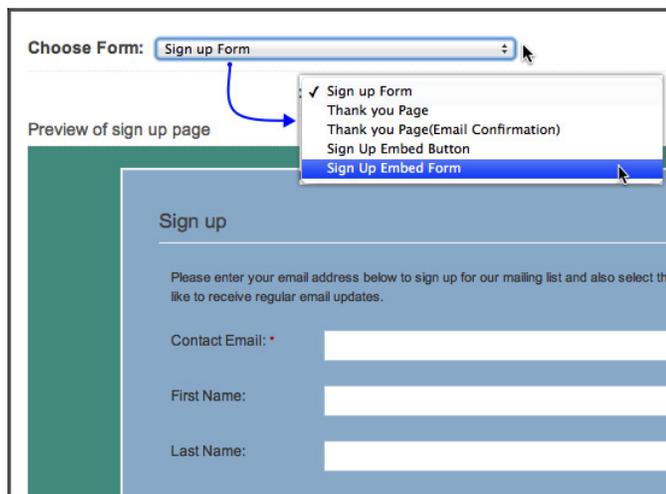
### Design the Sign-up Forms

Sign-up form themes allow you to customize the appearance of your forms to reflect your company's brand in the design. All style elements like color, font, font-size, background-color, etc can be edited.

- Create or Clone Theme
  - Upload Logo (recommended size, 170 X 30 pixels)
  - Use design tools for colors, fonts, etc.



- Preview the Sign-up page



Add lists or remove reference to lists (Note –if you’ll offer mailing lists that your new subscribers can join, if lists have not yet been created, you’ll need to revisit this later to incorporate them).

See full details at: <https://campaigns.zoho.com/home.do#settings/formcustom>

**Go to: Settings > Sign up Form Themes**

## Account Integrations

You can integrate these social accounts to broadcast your campaigns (assumes you have the account):

- Facebook
- Twitter
- LinkedIn

If you're already logged in to your social accounts using the same browser, the social accounts will automatically authenticate. Otherwise, be sure to have your social account credentials at hand. Other integrations - enable and authorize:

- Google Contacts, Google Docs [Google Drive], and Google Analytics
- Eventbrite
- SurveyMonkey
- Zoho Survey

**Go to: Settings > Integrations**

## API and Callbacks

Zoho Campaign Modules will generate an API token, which you should copy and paste wherever it’s requested to prevent typos. The Token will look like this: [29a8be2fe826fd920744160e63beb67b](#). Using the API is an advanced function that’s outside the scope of this document. Please reference this link for further details: <https://www.zoho.com/campaigns/help/api-keys.html>

## ZSC Key

But, while we're on the subject of APIs and linking applications, in order to add a service (such as the Campaigns App) to Zoho CRM, you'll need to generate a ZSC Key in Zoho CRM. This part is easy, so don't worry about it! When requested, this key is provided for the Zoho service, along with the administrator's email address.

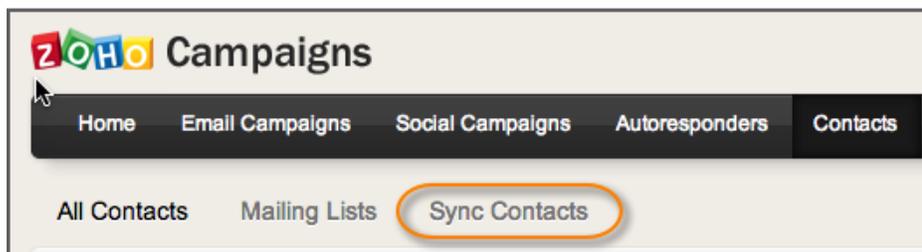
- Login to your Zoho CRM as an administrator
- Setup
- Developer Space
- Zoho Service Communication (ZSC) Key

ZSC Key looks like this - dbbd007118973d5702ad0870dc15a664

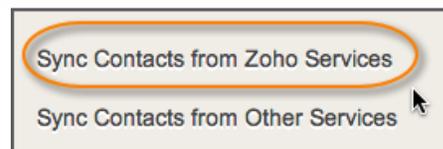
## Mailing lists: Enable the Sync feature between Zoho CRM and Zoho Campaigns

### Integrate your Zoho CRM Account

1. To enable the Zoho Campaigns app to use Zoho CRM to maintain mailing lists, configure the Zoho Campaigns account to fetch records from Zoho CRM.
2. In the Campaigns app, select **Contacts > Sync Contacts**.



3. Choose Sync Contacts from Zoho Services, then select the **Zoho CRM** service to be integrate with Zoho Campaigns.



4. Enter your CRM account's **email address** and **Zoho Service Communication (ZSC) key** to integrate your CRM account (See ZSC Key section, above).
5. Click **Save** button to proceed.

## Where the heck do I set up mailing lists in the Campaigns App?

As mentioned on page 3, using segmented Lead or Contact Custom Views in CRM is, in our opinion, the ideal way to create email lists and keep campaign activity synced between the Campaigns App and the Zoho CRM Campaigns module.

## Options in how you build mailing list

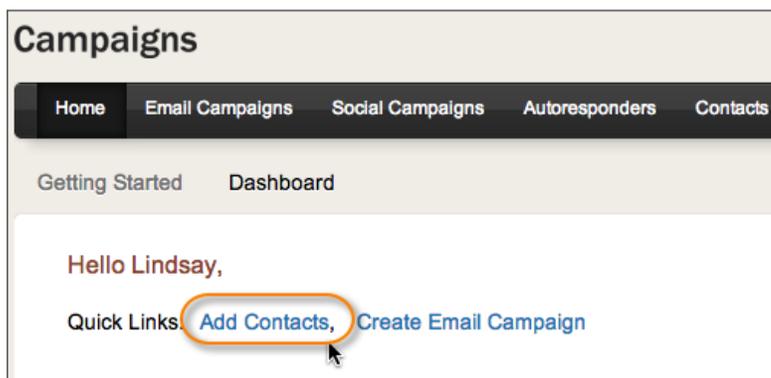
There are a variety of ways to add email addresses directly to the Campaigns App - without syncing to Zoho CRM. However, if tight integration between the applications is the goal, we recommend fetching contacts from CRM and syncing campaign results to keep details aligned. Just in case you want to create mailing lists without the CRM integration, here's are three ways to go about it. In the Campaigns App:

1. Add manually (see details, below)
  - Home > Dashboard / Add Contacts
    - Enter email addresses for contacts
  - Home > Dashboard | Add Contact
    - Create a basic contact record in the Campaigns App
  - Home > Dashboard > Add Contacts | Add multiple Contacts
    - Enter multiple contact record details in the Campaigns App
2. Import Records
  - Home > Dashboard > Add Contacts | Import from File.
  - Home > Dashboard > Add Contacts | Import from Google Spreadsheets.
3. Home > Dashboard > Add Contacts

Add manually: details on how to add multiple addresses manually

The Quick Links on the Dashboard (Home tab).

1. Click Add Contacts



2. Type or copy/paste up to 20 email addresses (press enter after each so that each address is on its own line)
3. To add records to an existing Mailing list
  - a. Check the name(s) of existing Lists.

**-OR-**

4. To create a new list

- a. Click the Add Mailing List Link.
  - b. Name the list.
5. Select your option for Subscription Sign up (may the recipient subscribe to lists, on not).

The screenshot shows a modal dialog box titled 'Add Mailing List'. Inside, there is a section for 'New List:' with an empty text input field. Below this is a section for 'Sign-up Form Subscription:' with two radio button options: 'Allowed ?' and 'Not Allowed ?'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

6. Click Save.

➔ When you manually add or import email addresses to the Campaigns App, they do not sync to CRM.

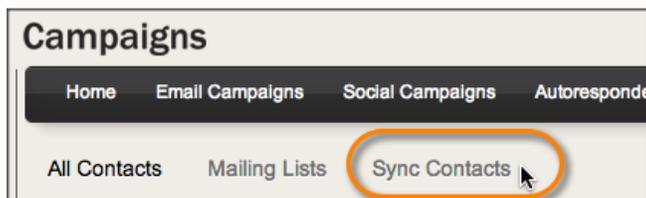
Although there *may* be scenarios when you want to quickly add an email address into the Campaigns App, CRM If you're carefully tracking interactions with your leads and contacts, it's unlikely you'll want to add or import contact records anywhere but into Zoho CRM.

➔ The number of paid subscribers in your account may limit the number of records you can fetch from CRM to the Zoho Campaigns App and Zoho CRM. You'll need to upgrade your account (select the Upgrade link in the top, right corner)  to add additional subscribers if you exceed the limit.

### To “fetch” contacts from CRM from within the Campaigns App:

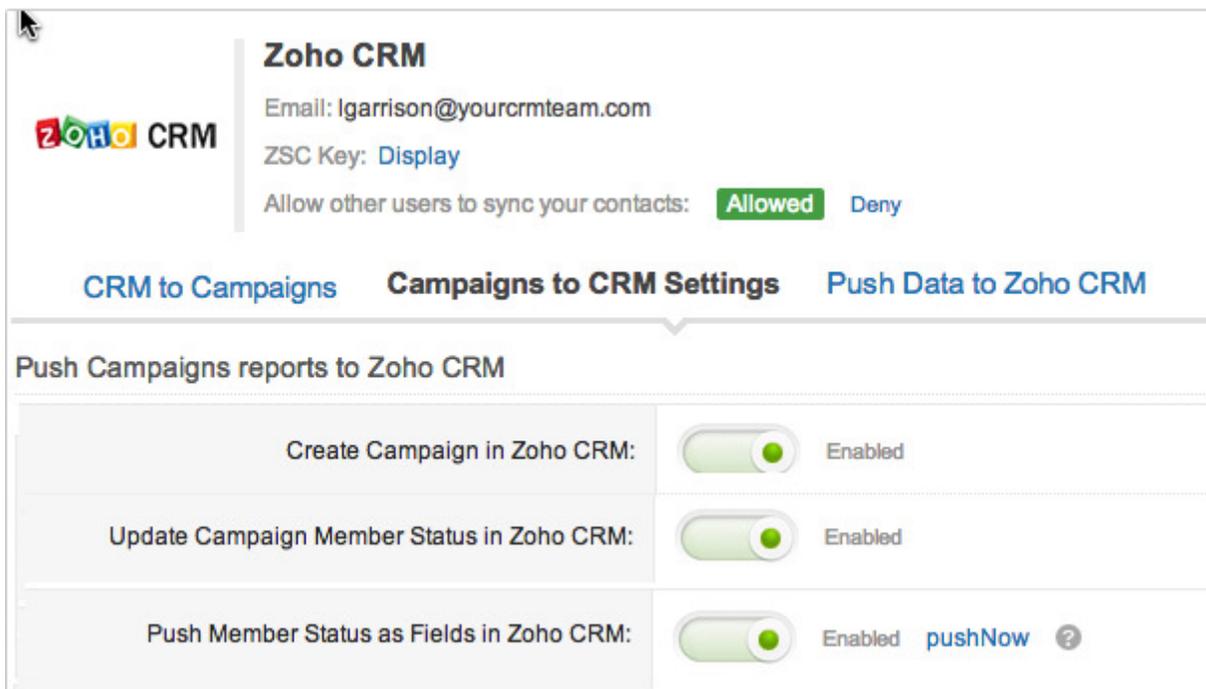
The integration between applications enables management of segmented, custom lists in CRM, the delivery and tracking of email campaigns via the Campaigns App. In the Campaigns App:

1. Contacts > Sync Contacts



Establish your preferred settings to update your records in Zoho CRM.

There's a lot going on in these images, below – we'll break it down.



The screenshot shows the Zoho CRM settings interface. At the top, there's a header for "Zoho CRM" with the email "lgarrison@yourcrmteam.com" and "ZSC Key: Display". Below this, there's a toggle for "Allow other users to sync your contacts:" which is currently set to "Allowed".

There are three main sections: "CRM to Campaigns", "Campaigns to CRM Settings" (which is selected), and "Push Data to Zoho CRM".

Under "Push Campaigns reports to Zoho CRM", there are three rows of settings:

Setting	Toggle	Status
Create Campaign in Zoho CRM:	<input checked="" type="checkbox"/>	Enabled
Update Campaign Member Status in Zoho CRM:	<input checked="" type="checkbox"/>	Enabled
Push Member Status as Fields in Zoho CRM:	<input checked="" type="checkbox"/>	Enabled <a href="#">pushNow</a> <a href="#">?</a>

1. Create a campaign in the Zoho Campaigns app and “push” the information to Zoho CRM.
2. Update Campaign Members’ Record Status in Zoho CRM.
3. Push the member Status as a Field in Zoho CRM.

**You're ready to start campaigning!**

At this point your account is fully ready to being creating email campaigns!

Watch for our step-by-step guide on working with mailing lists, creating campaign emails, syncing records between the Zoho Campaigns App and Zoho CRM, performing A/B testing, and working with your email campaigns, due early Fall 2013.

## A. Addendum: Understanding the Zoho CRM Campaigns Module

The Zoho CRM Campaigns Module is designed to gather information from leads and contacts who may have an interest in an offer. The default Campaigns Module fields are as follows, although you can add custom fields and sections to meet your requirement.

Field Name	Description	Data type	Maximum Limit
Campaign Owner	Select the name of the user to whom the campaign is assigned	Pick list	-
Campaign Name	The name of the campaign	Text box	Alphanumeric (40)
Type	Select the type of the campaign	Pick List	-
Status	The status of the campaign	Pick List	-
Start Date	The date the campaign starts	Date format	-
End Date	The date the campaign ends	Date format	-
Expected Revenue	Specify the revenue expected after launching the campaign	Currency	-
Actual Cost	Specify the actual amount spent on the campaign	Currency	-
Budgeted Cost	Specify the planned amount to be spent on the campaign	Currency	-
Expected Response	Specify the campaign turnout %	Number	
Num sent	Specify the number of leads/contacts to whom the campaign details has been sent	Text box	Integers
Created By	Displays name of the user created the campaign first time	Date/Time	-
Modified By	Displays name of the user modified the campaign	Date/Time	
Description	Additional campaign details	Text area	32000 characters

### Customize Campaigns

In addition to tracking email campaigns, your organization may also want to evaluate the effectiveness of tradeshow, seminars, sponsorships, association networking, web offers, etc. Each of these requires an investment of resources, so you'll want to track which are providing the best return on your investment. This will help you allocate your marketing budget based on hard data rather than guesswork. To that end, create custom fields and sections to manage details associated with broader campaign types.

For example, you could create a section called “Events” and use it to track the investment in and results of any event-related campaign, such as tradeshow, seminars, lunch-and-learns, etc. By creating fields specific to marketing channels you can, for example, track overall show attendance, number of new leads obtained, the cost of the show, and then ultimately the revenue from new sales connected from that show.

As a result, based on the budget you have set aside for trade show participation, you’ll be able to identify the most profitable shows to attend each year because you’ll have the data to back up the decision. Very smart marketing!

### Create Campaigns

Multiple Leads and Contacts can be associated to a campaign. Create campaigns individually by using the following:

- In the **Campaigns** module, click **New Campaign**.
- In the *Create Campaign* page, enter the campaign details.
- Click **Save**.
- Filling in the details in the campaign creation form.
- Or by Cloning the campaign with a few changes in the existing record.

### Campaigns Types

There are many types of campaigns that can be tracked in addition to email campaigns:

- Trade Shows
- Direct Mailer
- Offers on Website or Blog Landing Pages
- Telemarketing
- Print or Online Ads
- Conferences or Workshops
- Lunch and Learn Seminars
- Networking Events



Although you can create a new Lead or Contact record from within the Campaigns Module, best practice is to associate the existing entity to the Campaign.

In the Campaign Details page, you can associate the following:

- **Open Activities:** To add tasks and events.
- **Closed Activities:** To display the closed tasks and events.
- **Potentials:** To display the potentials converted through a campaign.
- **Attachments:** To attach documents to the campaign.
- **Leads:** To display the leads generated through a campaign.
- **Contacts:** To display the contacts generated through a campaign.

## Add New Leads/Contacts to the Campaign Module

### To associate new leads

1. In the *Campaign Details* page, the existing lead details, if any, are displayed.
  - Click the column headings to sort the display order of the records.
  - Click the relevant Edit link to modify the campaign member status of the lead.
2. Click the New link.
3. In the *New Lead* page, specify the lead details.
4. Click Save.

### To associate new contacts

1. In the *Campaign Details* page, the existing contact details, if any, are displayed.
  - Click the column headings to sort the display order of the records.
  - Click the relevant Edit link to modify the campaign member status of the contact.
2. Click the New link.
3. In the *New Contact* page, specify the contact details. (Refer to the Standard Fields)
4. Click Save.

### Associate Existing Leads/Contacts

1. In the *Campaign Details* page, the associated lead or contact details, if any, are displayed.
2. Click Associate Existing Leads/Contact.
3. In the *Add Existing Leads/Contacts* page, specify the criteria to search the required records.
4. Click Search.
5. Under *Matching Leads/Contacts*, select the check box(es) of the records that you want to associate to the campaign.
6. Select the Campaign Member Status from the Status drop-down list.
7. Click Add to Campaign.  
The selected records will be associated to the campaign.

### Import Leads or Contacts

You can import a list of leads into Zoho CRM and directly associate them to the campaign. Note that while importing, the first campaign member status will be applied to all the leads or contacts. You can later change the campaign member status whenever needed.

If the import file is in XLS, XLSX or VCF format, you can import a maximum of 1500 records/batch. Records more than 1500 can be imported in CSV format. To import leads or contacts:

1. In the *Campaign Details* page, the associated lead or contact details, if any, are displayed under Leads/Contacts related lists.
2. Click Import.
3. In the *Import Leads* page, specify the import details. See Also Import Data  
The Imported leads/contacts will be associated to the campaign.

## Mass Update Campaign Member Status

The campaign member status defines the status of the leads or contacts who are part of the campaign. Note that the Status of a Lead is different from the Campaign Member Status.

### To update campaign member status

1. In the *Campaign Details* page, the associated lead or contact details, if any, are displayed.
2. Click Mass Update Member Status.
3. In the *Mass Update Campaign Member Status* page, select any of the following to get the list of records that you want to update:
  - All Records - Select this option and click Fetch to list all the records.
  - Manual Criteria - Select this option, provide search criteria and click Search to list records based on the criteria.
4. Under *Matching Leads/Contacts*, select the check box(es) of the records.
5. Select the Campaign Member Status from the Status drop-down list.
6. Click Update Member Status.

The selected records will be updated with the status that you specify.

### To add campaigns to leads or contacts

1. Click the **Leads/Contacts** tab.
2. In the *Leads/Contact Details* page, the existing campaign details, if any, are displayed.
  - Click the column headings to sort the display order of the records.
  - Click the relevant Edit or Remove link to change the member status field or remove the campaign association from the record respectively.
3. Click **Add Campaigns**.
4. In the *Add Campaigns to Lead/Contact* page, do the following:
  - Choose the campaign member Status from the drop-down list.
  - Select the check box(es) of the campaigns that you want to associate to the lead or contact.
5. Click **Add to Lead/Contact**.

## Customize Campaign Member Status

Each member associated to a campaign needs a campaign member status. For example, for a Trade Show campaign, the leads or contacts associated to it may have their status as Invited, Attended, etc.

### To customize campaign member status

1. Click Setup > Customization > Fields > Campaigns > Campaign Member Status
2. In the *Customize Campaign Member Status* page, all the status values will be listed. You can do the following:
3. Add Member Status - Click the Add Status link and enter the value along with its display Order. (Note that you have a maximum of 20 member status values).
4. Delete Member Status - Select the check box(es) of the values and click the Delete Status link to delete the value(s).
5. Click Save.



**Quick Links for easy reference:**

<https://www.zoho.com/campaigns/help/tips-and-tricks.html>

<https://www.zoho.com/campaigns/help/setup-spf-dkim.html>

<http://yourcrmteam.com/contact-us>

Watch for our step by step guide to creating and managing marketing campaigns. If you'd like us to send along, let us know: [Contact Us](#).

**Want help?**

**Ask us; we know stuff!**

**Call us at 800-963-1030 or email [zohohelp@yourcrmteam.com](mailto:zohohelp@yourcrmteam.com).**