

Understanding the new Topic Management and CRM setup migration webinar Q&A

1. Can the September 30 deadline be extended?

Yes. On September 30, a pop-up will appear on your screen, where you will have the option to extend the migration till Oct 31, 2022. However, we recommend you to migrate to new setup soon. Please write us to support@zohocampaigns for any assistance with respect to migration.

2. Do these changes impact journeys? If so, how?

No, it won't impact your existing journeys until you edit and reactivate it.

3. Once you complete the migration, will journeys need to be reactivated?

No, your existing active journeys will be active even after the migration. You do not need to reactivate the journey until you edit and change the journey. We will only ask you to assign a topic once after you edit it.

4. How are previous unsubscribes handled once the migration takes place?

The previous unsubscribed will not be affected once you have migrated to the new topics management.

5. We haven't used Topics so far, but I see that it's mandatory for all organizations. When we migrate, will we experience any issues?

You will not experience any issues. This will further enhance your marketing strategies and deliverability. We have made Topics mandatory to provide better experience for you and your users in users in sending right emails and to choose what they want to receive respectively. Hope this clarifies.

Please drop us an email to support@zohocampaigns.com, if you have any queries in migration. We can guide you through.

6. Can we create a sync for each module: Leads and Contacts? Does it only allow one module?

Yes. You can create a sync for each module once.

7. Does the new signup form automatically create contacts/leads in both CRM and Campaigns? And are visitors still required to double-opt-in?

You will have an option to push the contacts to Zoho CRM in the signup form. Using which, you can either push the contact as a lead or contact in Zoho CRM.

Double opt-in is recommended. However, you will have an option to turn this off. To turn off, please navigate to "Settings > Manage Opt-In" to disable double opt-in.

8. When someone fills out the signup form, are they required to double-opt-in - i.e. they receive a second confirmation email they must click confirm on?

We always suggest having the double opt-in enabled. However, if you would like to disable the double opt-in, please navigate to "Settings > Manage Opt-in > Disable double opt-in".

9. Is there a way to have all existing contacts marked as "marketing" topic recipients automatically when upgrading?

Yes, we will automatically assign as Marketing topic for all contacts while migrating to

new topics set up.

11. Can you only show specific topics in the email preference option? I do not want to display all the topics to our customers.

No, it is not possible to show certain topics as of now. Recipients will be able to see all the topics which had configured in your account.

12. What is the difference between Topics and Segments?

Segments or lists are supposed to be used internally to categorize contacts so that one can send targeted campaigns, while Topics is for contacts to subscribe to the emails they prefer to receive. Both have to serve different purposes.

Example of Segments or lists that are used for internal categorization of contacts:

- Contacts registered for a webinar
- Contacts who attended an event
- Contacts who signed up for a demo

Topics are used to specify the kind of emails one sends out so that contacts can register their preference on what kind of mails they wish to receive. Example:

- Nurturing emails
- Product announcements
- Newsletter

There may be different kind of emails (newsletters, promotional emails, announcements, etc) that one sends out to contacts in a list. Not every contact would be interested in all the emails being sent. They should be given a preference. That is where topics come into play.

13. Would the user see multiple mailing lists based on the Topic functionality, versus Segments is internal.

Once you have migrated to the New Topics Management, the contacts will only be able to see the Topics available.

14. Is it mandatory to migrate to Topic Management?

It is important to migrate to the new topic setup because some core features like workflows, segments, sync will function properly only post the new topic migration.

15. I have an active sync between CRM to Campaigns, will it automatically stop on Sept 30.

No, we won't stop your sync. On September 30, a pop-up will appear on your screen, where you will have the option to extend the migration till Oct 31, 2022. We recommend you to migrate before the extended deadline.

16. What if there are contacts already in Campaigns but the same contacts are synced from CRM as non-marketing. How is that reconciled?

In this case, we will check the status of Zoho Campaigns and retain them and we will not overwrite the status which you had configured in Zoho CRM sync.

17. Is it correct that Zoho One customers, who have both Campaigns and Marketing Automation enabled, will not be required or will not be able to switch to the new sync?

We are extending the deadline dates for Zoho One customers who have enabled the Shared Account model till the new version of Marketing Automation is live. The dates will be announced soon.

19. I have future emails already scheduled. They don't have topics assigned to them. What will happen to them after I update campaigns?

The scheduled campaigns will not be affected. It will be sent based on the existing setup.

20. Is that ok if I don't sync the campaign and CRM? What is the important feature that I will be missing?

If you are not syncing the records from Zoho CRM to Zoho Campaigns, the emails which

you are sending through Zoho Campaigns for your records will not be recorded in Zoho CRM. Also the Unsubscribes from Zoho Campaigns will not be updated in Zoho CRM and vice versa.

21. So if I understand correctly, you can globally assign a topic to a dedicated list?

In the New Topics Management, the Topics will be assigned at the contacts level. So when you are assigning a Topic to a mailing list, it will be assigned to all the contacts in that mailing list.

Please click on Contacts >>List >>Select the specific list >> Click on More where you will see an option to assign a topics.

22. We "Sync" contacts from our CRM - how do Topics get assigned that way?

We have an option to assign a topics when creating a sync from Zoho CRM. You can assign a respective topics while syncing itself or you can sync all contacts from Zoho CRM and assign topics once it is sync with Zoho Campaigns.

24. How does this affect segments?

Kindly note that new topics management will not affect the segments. You would need to assign topics if you would like to send an email campaign to the segment.

25. Can I assign multiple topics to a contact ?

Yes, you can assign multiple topics to a contact.

26. So there is no need to import contact from CRM anymore?

Yes, you may create sync to add contacts from Zoho CRM to Zoho Campaigns.

I am so confused! Do I need to pay extra for campaigns now?

27. What about marketing preferences? I send campaigns based on these.

Once you have migrated to the new Topics management, it will be contacts preference. You may create topics based on your requirement, assign topics to the contacts and send emails to them.

28. Do I need to pay extra for campaigns now?

Not really! it is just a functionality change. You need to pay anything extra.

29. How do I see the topics assigned to a contact in CRM?

We do not have an option to check the topic assigned for a contact in Zoho CRM. Instead, in Zoho Campaigns you may create a segment to check the contacts assigned with a specific topic.

30. How do I update Brand description?

The Preview in the Manage Topics section shows "Brand description" and "Select which newsletters you'd like to receive!" How do I update this wording?

31. Is there a way for a topic to be private or unlisted on the Manage Preference page?

There are some topics we need in order to send out messages, but we wouldn't want people outside of our intended audience to be able to subscribe to these topics. For instance, if we had the topic "news for school principals" can the topic/manage preference page be configured in a way to prevent non school principals from subscribing to the topic?

I understand that you do not wish to show certain types of topics to certain type of recipients as they may not be the targeted audience. Unfortunately as for now, it's not possible to hide the topics from certain recipients but we're discussing this provision with our team in order to make a similar option available in the product.

32. Will you be going over segmenting and workflows of contacts?

Migrating to the new topics management will not affect the workflows or segments. You may need to assign the topic only when you are modifying the existing workflow.

33. Is there any way to have more the 6 criteria for segments?

No, currently it is not possible to have more than 6 criteria. However, we are working on

increasing the criteria. We will update you once we increase the limit.

34. Will my current segments still be available after I migrate?

No, your segments will not be affected after this migration.

35. I have active syncs and workflows ongoing until mid October. What happens if I do not migrate over to to new CRM setup before Sept 30th? I will lose functionality with these mailing lists. The active workflows rely on tags added or deleted via ongoing syncs to either continue to send them workflows or exit them from workflow.. so I fear I will loose all this functionality now.

No, all your data will be intact. We will not stop your syncs abruptly. You can extend the deadline till Oct 31 if you still need some time. We are here to help you to migrate your setup smoothly. Please drop us an email to support@zohocampaigns.com, we will schedule a one -on-one meeting and assist you with migration.

36. You spoke about syncing Contacts from Campaigns. Can you also sync Leads from Campaigns? Would it have to be Lead to Lead and Contact to Contact? I ask as I haven't noticed a Lead in the Campaigns module and I work off of Leads in CRM. Does campaigns have Leads and Contacts or is Contacts in Campaigns more of a generic term?

Yes, you may create sync to fetch leads as well from Zoho CRM.

In Zoho Campaigns there is no classification of Leads or Contacts. All the records will be classified as contacts.

37. Is there any default topic contacts will be connected to?

No, currently it is not possible to have more than 6 criteria. However, we are working on increasing the criteria. We will update you once we increase the limit.

38. Will my current segments still be available after I migrate?

Your segments will remain the same

39. How do we know if we need to upgrade?

There will be banner shown in the dashboard if you have to migrate to new setup. You can also check under Contacts >> Topics for topic migration. For Zoho CRM, please click on Contacts tab >>Sync services.

40. How are topics synced back to leads or Contacts?

Sorry, we do not have an option to update the topic information in Zoho CRM.

41. Can you create a segment by Topic?

Yes, you may create segments based on the Topic assigned.

42. Is there a MERGE Tag available to insert in Web, SMS, or Email for subscription to topics and sub topics?

You may use Contact Preference ({LI:SUB_PREF}) merge tag in the email content to have your recipients to subscribe to the topics.

43. How do we update LEADS or CONTACTS in CRM with Topics updated in Campaigns?

Sorry, we do not have an option to update the topic information in Zoho CRM.

44.Can you re-order products and topics in manage topics?

I am afraid it's not possible to re-order the products and topics but this feature is already on our road-map and shall be implemented soon.

45. Are the Topics that recipients may choose to subscribe to recorded at all? Where can you access/report on this information (who has subscribed to what topics)?

We currently do not have any reports. However, we have this on our road map. In the meantime, you may create segments to check the contacts assigned with a specific Topic. You can create a segment based on topics and see who had subscribed to respective topics.To create a segment, pls click on Contacts >>Segments.

46. It's now mandatory to assign a Topic to an email campaign. Is it also mandatory to assign a Topic to every Contact?

It is not mandatory for all contacts to be assigned to a topic. However, if the topic assigned to the campaign does not match with the topic assigned to the contact, email campaign will not be sent to the contact.

47. Do all marketing contacts HAVE to be associated with a specific LIST? Or do they need a TOPIC only

It is not mandatory to have all the marketing contacts in mailing list. Only the appropriate topic has to be associated and when you are sending an email campaign to the topic the mailing lists which contains the contacts associated with the topic.

48. When a client selects topic preference this action AUTOMATICALLY adds them to the topic list for selected campaigns?

Does it REMOVE them from other campaigns also .. AUTOMATICALLY?

When a recipient selects a topic, it will be assigned to the contact. When you are creating a campaign, assigning a topic, and choosing a mailing list or segments, the contacts who are assigned with the same topic will be sent with the email. Also choosing the topic from preferences will not be removing the existing topics.

49. I am just about to launch my first campaign and will likely have relevant questions after doing so as of now I am just a young pup looking up to the big dogs.

Can you please write to onboarding@zohocampaigns.com for a detailed conversation. You can also write to support@zohocampaigns.com

50. And the instant syncs will always update and resync?

Yes, the instant sync will update when there is a field which is mapped is updated in Zoho CRM and when there is a new record create.

51. If we migrate and do the instant sync will it auto sync from now on with the CRM? How often do we have to sync Campaigns to the CRM?

Once you have migrated, you may need to create syncs for all the records from Zoho CRM. Once the sync is created, it will auto sync.

52. How often do we have to sync Campaigns to the CRM?

Once after the migration, the syncs created will be immediate. When there is an update or a new record is created in Zoho CRM, it will be synced.

52. Can you associate more than one topic to a campaign or segment or sign up form?

Yes, you can associate as many as topics to the segment or signup form.

53. If not all questions are answered during the webinar time, will you be getting in touch with us afterwards to answer our outstanding questions?

You can reach out to support@zohocampaigns.com anytime.

54. Is the list management in campaigns all manual? It would be great if you can explain how to create a report in the CRM and use that report to create a list for a Campaign based on the email addresses that are linked within those CRM accounts as a separate contact record.

We do not have an option to sync the reports created in Zoho CRM. However, once you have migrated you may create a sync, map all the required fields from all the modules and create segments based on your requirement.

55. Can we turn an existing list from the old version (for example, a list of people interested in what's new in music) directly into a topic in the new one?

Yes, once you have created a new topic you may select the contacts from the list and assign the topic. You can check this help document to know more about how effectively you can assign topics to your customers.

<https://help.zoho.com/portal/en/kb/campaigns/user-guide/contact-management/topics/articles/associating-a-contact-with-a-topic>

56. Do lists and emails get preserved when we migrate?

Yes, it will be intact.

57. Is the Marketing topic always an option by default or can you rename it to something else? We do not want to use it or have contacts see or be able to select a topic named Marketing.

Yes, you can rename it. Also you can create multiple topics with different names.

58. Do you have to show all topic options or can you choose what is shown in the preferences?

All the topics which you had configured in your account will be shown in preference management. Currently we do not have an option to choose which topics to show in preference management.

59. When a user is selecting their topic preferences, do you have to show all topics created in the system, or can you pick and choose what topics are available for the user to choose from?

As for now, we show all the topics that are available in your account but there are plans to enable / disable topics to be chosen by the users. Currently you can only delete a topic which needs to be hidden.

60. You use the term/label "Product" but my company does not have multiple products. Rather we might decide to break down by industry and then topics would be the type of email. For example > Publishing Industry (rather than a product) and Topics = Newsletter, Press Releases, Webinars. Does this make sense with this new framework?

Yes, you can. Please drop in an email to support@zohocampaigns.com. We will be happy to help you out with setting this up.

70. So we need to set up the Topics BEFORE we sync back to CRM?

You can sync contacts from Zoho CRM to Campaigns along with the topic. Choosing Topic is optional.

71. To confirm: on a contact profile details page, the subscription type field is the same as topic.

Kindly note on a contact profile page, the subscription type refers whether the contact is marketing or non marketing. However default topic:"marketing" is a sample one, **you can change it however you need it.**

72. Any suggestions on how to invite contacts to update their preferred topics?

You may use the contact preference merge tag ($\$[LI:SUB_PREF]\$$) to let the recipients to subscribe to the topics. Or you can use signup forms to let the users choose the topics on signing up as well.

73. Can forms be assigned to multiple topics? For our newsletters, we already ask people to select topics they are interested in so we would need the form that is integrated with CRM to now assign these folks to topics.

We are sorry that we do not have an option to assign multiple topics for the signup form. However, you will have an option to enable multiple topics subscription in the form's design, when you are creating a "Long form".

74. You mentioned that we can go in and assign topics for existing contacts, is there anything the people currently in our contacts list need to do?

The topic setup you do is only within Zoho Campaigns and will only be visible to your recipients once they click on the "update preference". Topic is focused on two major benefits, one from the application users' side, you can easily segregate the contacts based on their interest level. From the recipients' end, they can choose the kind of topic based emails they want to receive from you.

75. Yes, that would be super helpful to create customer lists that I don't want non-customers to access.

We are sorry that we currently do not have an option to hide any topics from preferences. All the topics will be listed when a contact choose the preference.

80. Does any of topic data synchronize to Zoho CRM

Current we do not sync topics data to Zoho CRM. However, we have plans to provide this soon. We will update you once it is available.

81. If I sync all our contacts into campaigns as nonmarketing. How soon can I move them to marketing?

You can move those contacts to marketing as soon as you sync with Zoho Campaigns.

82. Is there a way for a contact to unsubscribe from a specific topic? Their needs or interests may have changed but they still want to get emails about other topics.

In this case, you can use our contact preference merge tag "\$[LI:SUB_PREF]\$" in your email content. So recipients can choose from which topic they would like to receive from your end.

83. How do we ensure that contacts opt in?

To let your customers opt in to Topics, you can use our contact preference merge tag "\$[LI:SUB_PREF]\$" in your email content. So recipients can choose from which topic they would like to receive from your end.

84. What if they already opted in in a different email marketing system?

You still can use the contacts who have opted in through a different email marketing system in Zoho Campaigns.

85. I may have missed it, but what is the difference between Mailing List and Topics?

Mailing lists are containers of contacts, whereas Topics are used to send the emails to the recipients who are interested to receive emails from specific topics.

86. Can you use bulk segments with the workflows?

As for now, only segment can be selected for workflows.

87. When you select a topic when creating a campaign, does it only send the campaign to those contacts connected to a topic?

Yes, we will send the email only to contact who have a selected topics.

88. Can you choose more than one topic in one campaign?

Sorry, we do not have an option to choose more than one topic in one campaign.

89. Do we need to move contacts in the following folders: Unsubscribed, Bounced, Invalid, Inactive to Non-Marketing so they are not counted in the limit? Which of these folders will not be sent to? Do segments only include the Marketing subscribed contacts?

You may mark the contacts as non marketing if they do not want to be counted in your subscription. You can later use a criteria to select and convert non-marketing contacts to marketing.

90. Did you say that a campaign can only be associated with one topic?

Yes, a campaign can only be associated with one topic.

91. Did the contacts in the Do Not Mail folder move to the Non-Marketing folder? I do not see a Do Not Mail Folder.

I'd like to tell you that do not mail is nothing but unsubscribed contacts. You can find it on contacts > all contacts > left side drop down then choose unsubscribed contacts. Also, unsubscribed contacts and non-marketing contacts are different. Any contact who unsubscribed from your campaigns / account will be under unsubscribed contacts list whereas non marketing contacts are something you flag for time being but in future you may send campaigns to them until then you keep them in your account for managing purposes.

92. Praveen said "No, it is not possible to send the campaigns to two topics at a time. You will have to send two campaigns in this case or if the recipients is interested in both the topics, then we suggest you to create a separate topics which combines both the topics and send one campaign to them." and "Yes, you can associate as many as

topics to the segment or signup form" Does the latter not apply to campaigns which was the question?

Yes, as we said a campaign can only be associated with one topic. If you would like to send a same email campaign to two different topics, then you may create two different campaigns.

93. Please distinguish products from topics. I name (I think as a "product") my emails by the address of the real estate I am trying to market. Can I also make a separate generic topic like "industrial real estate"?

For example, if you have multiple lines of business under one mothership, you may choose "Brand - Product - Topics". Since you are in to Real Estate, you may choose "Brand - Topic" and create Topics based on the type of the real estate which you are trying to market.

94. With our products and their topics, we send emails that cover 2+ topics in one email. How do we assign more 2 topics to a campaign?

No, it is not possible to send the campaigns to two topics at a time. You will have to send two campaigns in this case or if the recipients is interested in both the topics, then we suggest you to create a separate topics which combines both the topics and send one campaign to them.

95. What about syncing w/ Zoho CRM syncing?

Yes, you still can create sync in Zoho CRM to add the contacts from Zoho CRM to Zoho Campaigns. However, we would suggest you to do it from Zoho Campaigns to utilize the benefits of the feature completely.

96. Our new contacts in Campaigns come in from a Zap. How do we have them assigned to more than one topic?

Also, When we sync, we need the contacts assigned w/ multiple topics. How does/will the syncing work after 9/30?

You may follow the same steps to assign multiple topics to the contacts. You may choose the contacts in the mailing list - More - Assign Topics - Choose the topics which

you would like to assign.

When you are creating a sync, you may assign multiple topics to the contacts. It will remain the same even after migration.

97. If we don't assign a topic to our contacts, will the system automatically apply marketing as the default - I need to send an email today and cannot delay due to assigning topics.

We are sorry that the system will not be assigning the topics automatically. You will have to assign topics by selecting all the contacts together and assigning a topic. However, if you have migrated to the new topic, "Marketing" will be the default topic that can be selected to send campaigns.

98. How/where do we seek support if needed when sending our next/first campaign using specific topics?

You may send us an email at support@zohocampaigns.com or call our support line. We are here to help you.

99. How will this migration impact my autoresponders that are currently setup to be sent from mailing lists?

Migrating to the new integration module will not impact any existing workflows or autoresponders until it is edited.

100. Can you have multiple topics assigned to a webform?

Yes, you can assign multiple topics to a web form.

101. I'm trying to map a field that is in both CRM & Campaigns. I cannot find it in Campaigns. When I try to create it again it says the field already exists. I can't locate it by searching either.

Kindly contact support@zohocampaigns.com with your query we will assist.

102. Can the immediate syncs for All Contacts and All Leads be set up now? Will they

carryover to the new version?

If the existing syncs you created are for leads and contacts modules in CRM then they'll still remain active but if suppose you created a sync for custom views in CRM then that maybe interrupted. Migrating to the new sync setup will handle this case.

103. What about all of the Contacts currently located in Zoho Campaigns? Will they automatically be identified as Marketing Contacts?

Yes, they're already marketing contacts and the migration chances will be applicable to only new contacts that are entering to the Zoho Campaigns application.

104. If I sync all of my contacts as Non-Marketing tomorrow and want to change them to Marketing the next day, can that change take place one day after the sync?

Yes, it is possible. You can change the status once after you sync the contacts with Zoho Campaigns.

105. I have an account that isn't receiving the Migrate Now for the Sync services. It's a shared account. How will this be done?

I am sorry but as for now the migration option isn't available for shared account. A temporary workaround is to delete the Marketing Automation account and make the Zoho Campaigns as standalone so that you can migrate. But without removing Zoho Marketing Automation, I am afraid it's not possible to migrate. However, our team is working on it and shall come up with a solution soon.

106. Can I set up syncs NOW (before 09/30/2022) and have them migrate to the new version of the syncs?

Instead of creating a sync in the old version and migrate it after 30th of this month, please consider migrating to the new sync model now and create a sync with the new sync features. If you still wish to create a sync now then please create it for leads / contacts module.

107. If I have a custom field that has three check boxes and I use that field on a sign up form, can I make it so each check box is associated with a separate topic? That way

I can have one form that a user can use to say what topics they are interested in.

Yes, we have an option to choose multiple topics when you are creating a long form. However, we do not have an option to associate the topic to each option available in a field.

108. I want to be able to sync Lead Source / Contact Source from CRM. I selected this field for the Leads module but it is not listed when I try to create segments.

How do I find the field? How can you segment using a custom CRM field from the Leads module? I selected it to sync in the sync process but do not see it from the drop down menu when using segments.

It should ideally be synced. Please write to support@zohocampaigns.com and we can check on the issue.