

Written by Tom

The below instructions will detail how to edit or create a Zoho CRM workflow rule to send emails automatically when a new lead is created or a when leads are imported via the API call.

- Login into Zoho CRM and click on Setup

The screenshot shows the Zoho CRM interface. At the top, there is a navigation menu with the following items: Home, Leads, Products, Potentials, Reports, Dashboards, Accounts, Contacts, Activities, Forecasts, Emails, Cases, and a menu icon. The user is logged in as Petra Tanidis. A notification states: "Your Enterprise Trial expires in 14 days".

The main content area is divided into two sections:

Activities

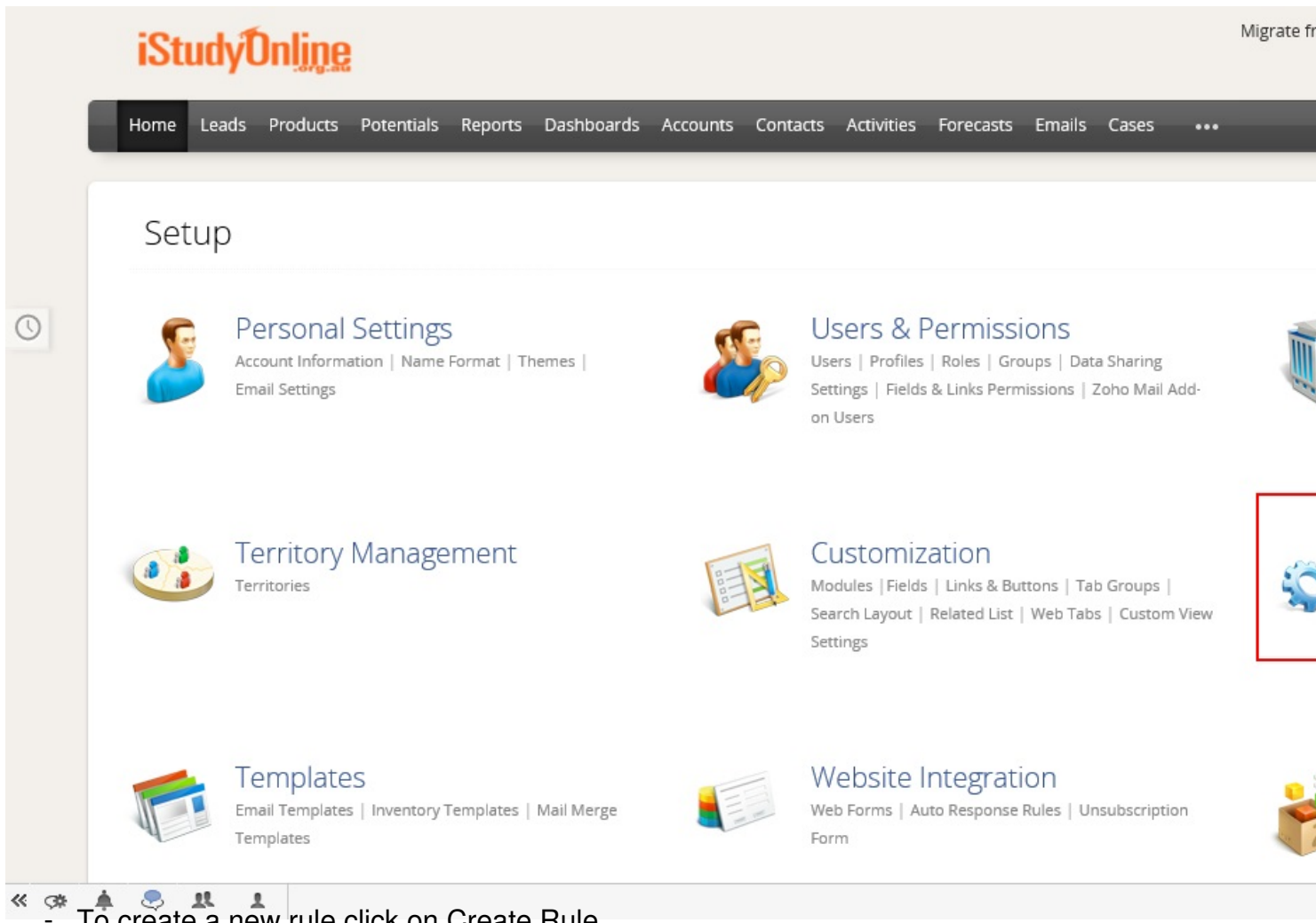
Subject	Activity Type	From	Due Date	Status	Priority
Call	Calls				Normal
Call	Calls				Normal
call	Calls			Scheduled	
Call	Calls			Scheduled	
Call	Calls			Scheduled	

Open Tasks

Subject	Due Date	Status	Priority
Send email again	22/09/2015	Not Started	High

The URL in the browser address bar is: <https://crm.zoho.com/crm/ShowTab.do?module=Setup>

- Under Automation click on Workflow



The screenshot shows the Zoho CRM Setup page. At the top, there is a navigation bar with the following items: Home, Leads, Products, Potentials, Reports, Dashboards, Accounts, Contacts, Activities, Forecasts, Emails, Cases, and a menu icon. The main content area is titled "Setup" and contains six categories of settings, each with an icon and a list of sub-items:

- Personal Settings**: Account Information | Name Format | Themes | Email Settings
- Users & Permissions**: Users | Profiles | Roles | Groups | Data Sharing Settings | Fields & Links Permissions | Zoho Mail Add-on Users
- Territory Management**: Territories
- Customization**: Modules | Fields | Links & Buttons | Tab Groups | Search Layout | Related List | Web Tabs | Custom View Settings
- Templates**: Email Templates | Inventory Templates | Mail Merge Templates
- Website Integration**: Web Forms | Auto Response Rules | Unsubscription Form

At the bottom of the page, there is a footer with a series of icons: a double left arrow, a gear, a bell, a globe, a group of people, and a single person. Below these icons is the text: - To create a new rule click on Create Rule

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Automation

Workflow | Assignment Rules | Case Escalation Rules | Approval Processes

Rules | Alerts | Tasks | Field Updates | Webhooks | Custom Functions

Workflow Rules

Workflow rules automate your business processes. They are a set of rules that are executed when c... include email alerts, tasks, field updates, webhooks and followups that can be set as an instant action

[Create Rule](#)

List of Rules: **All Modules** Status: **All** [Reorder Rules](#)

Rule Name	Module	Execute On	Timed Actions	Alerts	Tasks	Updates
Big Deal Rule	Potentials	Create or Edit	0	1	0	0
Thank you for re...	Leads	Create	0	1	0	0

rule - Under Actions, click on the Email Template, select the Rule Name and click on the

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4. Actions

The following instant and time based actions including alerts, tasks and field updates are associated to

Instant Actions

Send Alerts

Name	Email Template
Thank you for registering	Thank you for regis

Assign Tasks

Update Fields

Call Webhooks

Call Custom Functions

Time Based Actions

No time based actions for this rule.

Edit

Delete



- On the bottom click Edit

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The screenshot shows the Zoho CRM interface for editing an email template. On the left is a sidebar with navigation options: Apps & Add-ons, Developer Space, Data Administration, Subscription Manager, and Social Settings. The main area is titled "Email Template Body" and contains a text box with the content "Thank you for registering". Below this is a "Footer" section with an empty text box. At the bottom right of the main area, there are four buttons: "Edit" (highlighted with a red box), "Clone", "Delete", and "Go Back".

<< Edit the email template with WYSIWYG editor or in HTML

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