

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

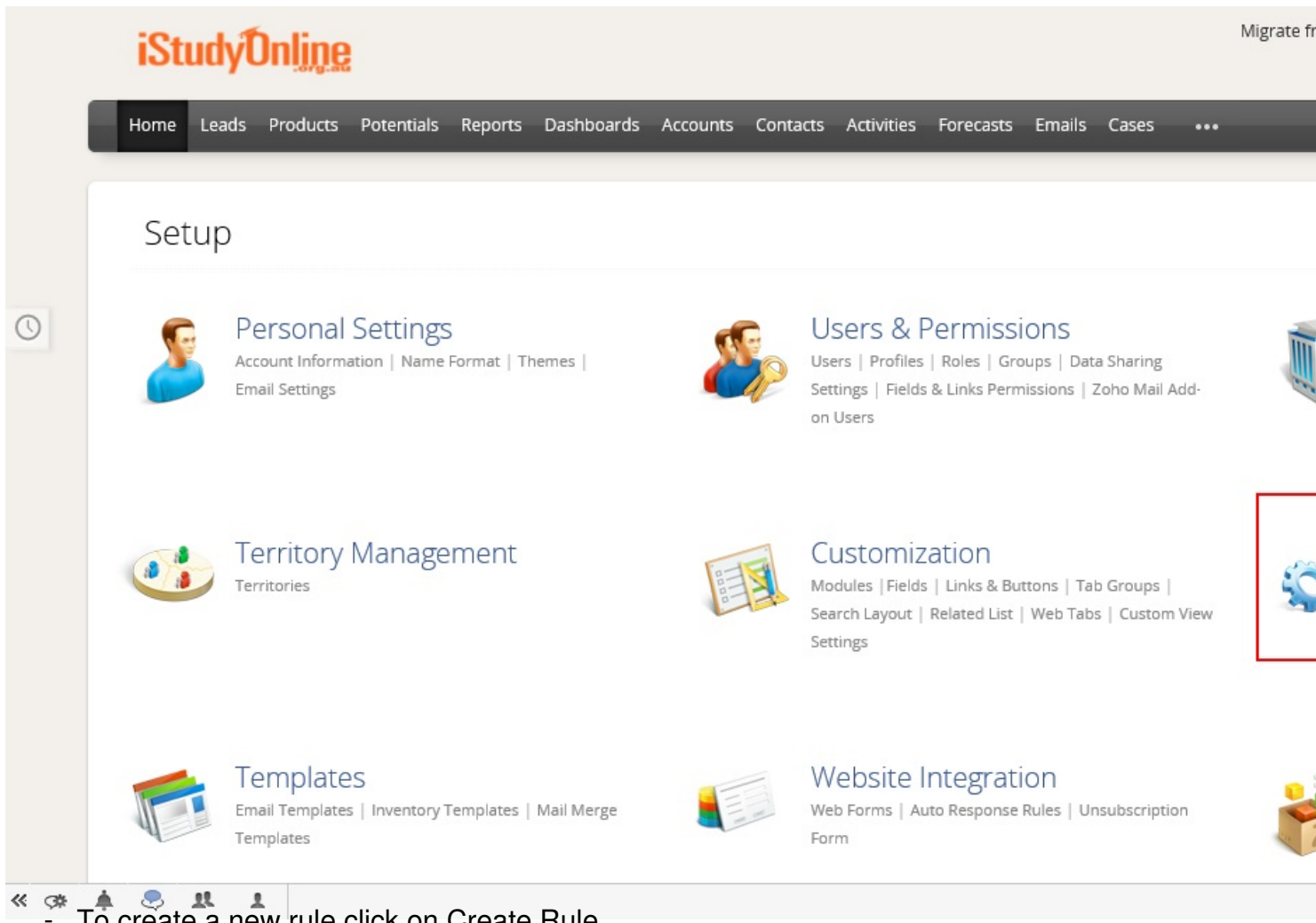
| Subject | Activity Type | From | Due Date | Status | Priority |
|---------|---------------|------|----------|-----------|----------|
| Call | Calls | | | | Normal |
| Call | Calls | | | | Normal |
| call | Calls | | | Scheduled | |
| Call | Calls | | | Scheduled | |
| Call | Calls | | | Scheduled |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

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, the text reads: "- To create a new rule click on Create Rule".

The screenshot shows the Zoho CRM Automation interface. On the left is a 'Setup' sidebar with various settings. The main area is titled 'Automation' and contains tabs for 'Workflow', 'Assignment Rules', 'Case Escalation Rules', and 'Approval Processes'. Under 'Workflow', there are sub-tabs for 'Rules', 'Alerts', 'Tasks', 'Field Updates', 'Webhooks', and 'Custom Functions'. The 'Workflow Rules' section includes a 'Create Rule' button (highlighted with a red box) and a 'List of Rules' section with filters for 'All Modules' and 'All' status. A table below lists the 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 Automation, click on the Workflow Rules icon on the left. Then, 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

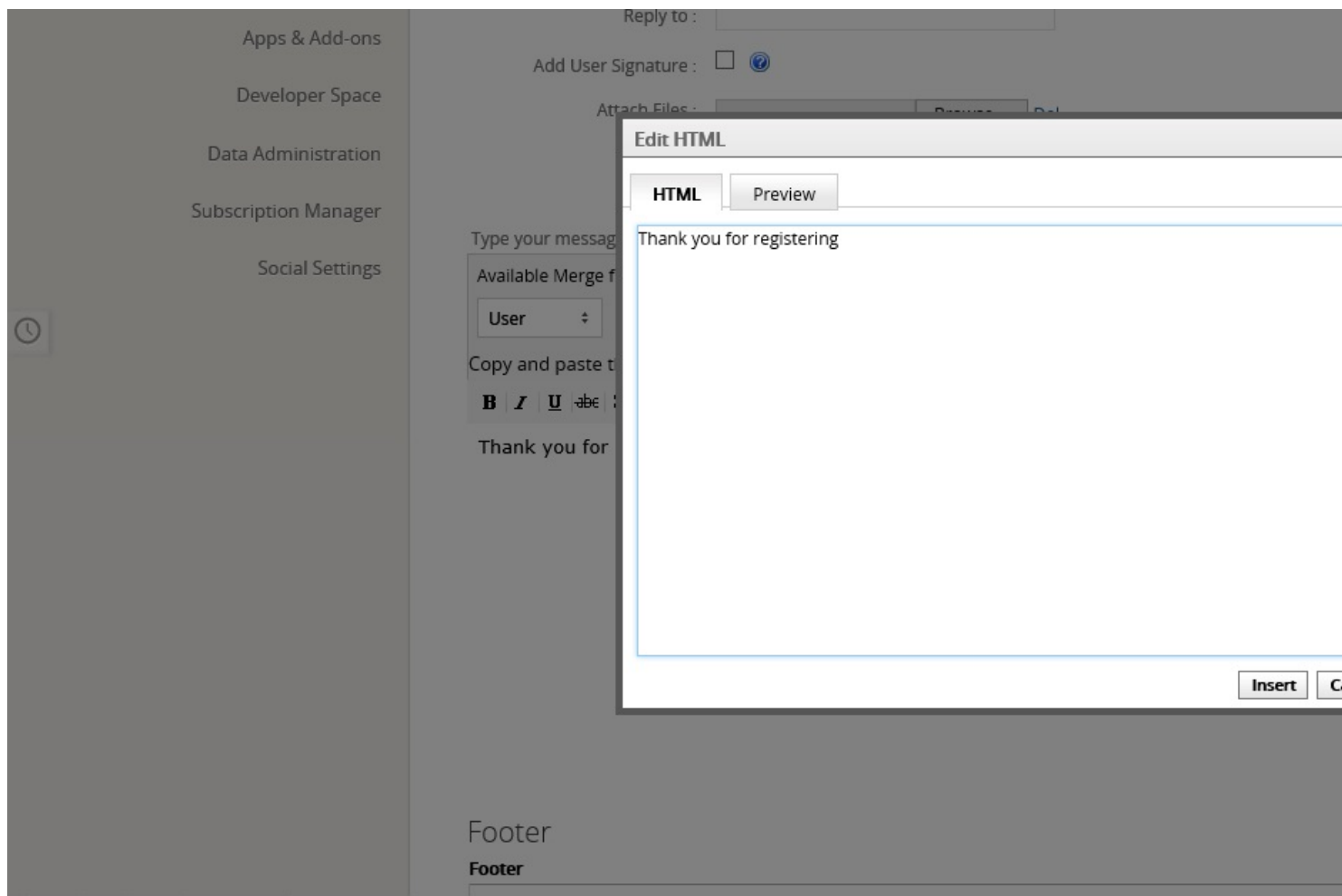
On the bottom click Edit

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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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[Call to API Calls to create email rule with trigger rule](#) [https://www.zoho.com/crm/help/automation/examples.html#2. Fetch Records from t](#)