ZOHO COMMUNICATION METHODS MANUAL

Zoho CRM + Zoho Desk Communication Standards

Internal Training Manual | Nkwali Compliance Consultants

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1. Purpose of this manual

This manual explains the approved communication methods used at Nkwali Compliance Consultants across Zoho CRM and Zoho Desk.

It is designed for new employees and sets the standard for:

• Sending professional emails from within Zoho CRM (preferred)

• Using templates correctly and keeping records complete

• Understanding the BCC tracking email and when to use it

• Using Email Insights for tracking open/click/bounce statuses

• Sending SMS from Zoho CRM

• Understanding how Zoho Desk converts incoming emails into tickets and how tickets are managed

This manual must be followed to ensure complete recordkeeping, compliance evidence, and consistent client service.

> **Key principle**
>
> All client communication must be visible in the client record.
>
> If it is not logged in Zoho, it is treated as if it did not happen.

2. Communication tools we use

2.1 Zoho CRM (outgoing communication)

- Email sent directly from CRM records (preferred method)
- Email templates for standard client communication
- Email Insights tracking (opened/clicked/bounced)

- SMS sending from Accounts or Contacts

2.2 Zoho Desk (incoming communication)

- All emails received at compliance@nkwalicompliance.co.za automatically create tickets
- Tickets are allocated to the responsible person to resolve
- Resolved tickets trigger a client satisfaction survey

3. The golden rule: Email from Zoho is preferred

Whenever possible, you must send client emails directly from Zoho CRM instead of a personal work inbox.

Why?

• Zoho automatically logs the email inside the record

• Anyone assisting later can see full communication history

• It protects the business if a staff member is absent or exits

• It improves audit readiness (communication evidence)

Approved sender identity

When emailing from Zoho, ensure the message is sent using:

Compliance Support <compliance@nkwalicompliance.co.za>

If you see a different “From” address, correct it before sending.

> **Non-negotiable standard**
>
> Client communication must be sent from Zoho CRM whenever possible.
>
> Personal email may only be used when Zoho cannot send (system down, urgent client

constraint).

If personal email is used, you MUST BCC the Zoho tracking address (see Section 5).

4. How to send an email from Zoho CRM

4.1 Where you can send emails from

You can send emails from the following CRM modules (and any custom module where Email is enabled):

- Accounts
- Contacts
- FSP Registration module
- Representative Additions / Rep Lifecycle modules
- Other custom modules where client communication is required

4.2 Step-by-step: sending an email from a record

1) Open the correct record (Account, Contact, FSP Registration, Rep Addition request, etc.).

2) Navigate to the Email section within the record (Email related list / Send Email option).

3) Click “Send Email”.

4) Confirm the “From” field shows: Compliance Support <compliance@nkwalicompliance.co.za>.

5) Select an email template (recommended) OR draft the email manually.

6) Attach documents if required (letters, proof, forms).

7) Review subject line, recipient email, and any CC recipients.

8) Send the email.

9) Confirm the email appears in the Emails related list (this proves it is logged).

Quality check after sending

> Always confirm the email is visible in the record’s Emails related list.
>
> If it does not appear, it was not logged correctly and you must investigate immediately.

5. Using BCC for email tracking (when sending from personal email)

5.1 What BCC means

BCC stands for Blind Carbon Copy.

It allows you to send a copy of an email to another recipient WITHOUT the main recipient seeing that address.

Example:

• To: client@email.com

• BCC: tracking@email.com

The client does not see the BCC address, but the system receives a copy for recordkeeping.

5.2 Our Zoho CRM BCC tracking email

If you send an email from your personal work email, you MUST BCC this address:

> **Zoho CRM BCC tracking address**
>
> bdjbd0m_u0qw9cy@mails3.zohocrm.com

5.3 What BCC does for us

When you BCC the Zoho CRM tracking email:

• Zoho receives a copy of your email

• It logs the email to the correct CRM record (where configured)

• It protects the organisation by keeping communication evidence centrally

This is essential when:

• You are forced to send from personal email

• Zoho email sending is unavailable

• You are replying directly from Outlook/Gmail due to urgency

> **Mandatory rule**
>
> If you email a client from a personal work email, BCC must be used.
>
> No BCC = No Zoho record = Non-compliance with internal communication standards.

6. Email templates (why we use them and how)

Zoho CRM contains approved email templates. Templates standardise our communication and reduce errors.

Benefits of templates:

• Consistent professional tone across the business

• Faster sending, fewer typing mistakes

• Approved legal/compliance wording included

• Better reporting via Template Analytics

6.1 How to use templates correctly

- Select the most appropriate template for the scenario
- Check that merge fields pull correct client information
- Edit only what is necessary (avoid removing key compliance wording)

- Add attachments when required
- Before sending, read the email fully as the client will receive it

7. Email Insights (tracking client engagement)

Email Insights is enabled in our CRM.

This means all emails sent from our CRM account are tracked for status such as:

• Opened

• Clicked

• Bounced

This allows us to manage follow-ups professionally and improve service delivery.

7.1 What Email Insights allows you to view or create

- Email opened/clicked time in the record details page
- Email Status in the Advanced Filter of a custom view
- Template Analytics Report
- Template Performance and Version comparison
- Email Analytics Report and more
- Workflow rules for email status triggers (opened, unopened, opened & unreplied, unreplied)

Important note about tracking

All emails sent from your organization's CRM account are tracked (opened, clicked, bounced) because Email Insights is enabled.

Always use this information responsibly—do not challenge clients aggressively about opening emails; use it to improve follow-up timing.

7.2 Understanding email statuses

- Opened: The client has opened the email at least once

- Clicked: The client clicked a link in the email (e.g., form link, document link)
- Bounced: The email failed to deliver (incorrect email address, mailbox full, blocked domain)
- Unopened: No open recorded yet (client may still receive it—some security tools affect tracking)

7.3 Using Email Insights for follow-up workflows

Email Insights supports workflows and better follow-up. Examples:

• If email is unopened after 48 hours → follow-up reminder

• If email is opened but unreplied after 24–48 hours → call or WhatsApp follow-up

• If email is bounced → verify client email address and resend

Some workflows may be automated via Workflow Rules.

8. Sending SMS from Zoho CRM

Zoho CRM allows SMS sending directly from a client record.

When to use SMS:

• Quick confirmations (e.g., “We have submitted your request”)

• Urgent alerts (e.g., documents outstanding)

• Reminder prompts (e.g., follow-ups when emails are unread)

How SMS works in Zoho:

• Open Account or Contact record

• Click “Send SMS”

• Type the message

• Send

The SMS is then logged against the record.

> **SMS writing standard**
>
> SMS must be short, professional and clear.
>
> Never include sensitive personal information (ID numbers, passwords).
>
> If the message requires detail, send email and use SMS only to alert the client to check email.

9. Zoho Desk: Incoming emails and tickets

Zoho Desk is our central incoming communication system.

Any email sent to:

compliance@nkwalicompliance.co.za

automatically creates a ticket in Zoho Desk.

Why this matters:

• No email gets lost

• Issues are allocated to the correct person

• Response SLAs can be monitored

• Ticket history becomes an audit trail

9.1 Ticket lifecycle in Zoho Desk (high-level)

- Ticket created automatically from incoming email

- Ticket allocated to the appropriate staff member/team
- Staff member investigates and communicates with client via the ticket
- Ticket is resolved/closed when completed
- Ticket resolution triggers a client satisfaction survey

9.2 Allocation and responsibility

Once a ticket is assigned to you:

• You are responsible for acknowledging, investigating and resolving it

• You must keep the client updated where necessary

• You must update ticket status correctly to reflect progress

> **Ticket discipline**
>
> Never leave tickets open with no activity.
>
> If you cannot resolve immediately, update status and leave a note/update to show progress.

10. Other important Zoho communication practices

10.1 Notes and internal communication

Use Notes inside Zoho CRM records for:

• Internal context (what was discussed, what is outstanding)

• Call summaries

• Client preferences (preferred channel, best time to call)

• Evidence notes (where a document was stored, what was submitted)

Notes should be factual, professional, and written so another staff member can take over instantly.

10.2 Attachments and evidence

- Attach proof of submission, reports, signed documents where required
- Ensure attachments are linked to the correct record
- Avoid saving evidence only on personal computers

10.3 Consistency across modules

Whether you are in FSP Registration, Rep Addition, or any custom module:

• Always communicate from Zoho where possible

• Always ensure messages are logged

• Always update records so the client history is complete

11. Practical checklists

11.1 Email from Zoho CRM checklist

- Open correct record
- Click Send Email
- Confirm From = Compliance Support <compliance@nkwalicompliance.co.za>
- Use template where appropriate
- Proofread subject + body
- Attach documents if needed
- Send
- Confirm email appears in Emails related list

11.2 Personal email checklist (only if unavoidable)

- Send email from work inbox
- Add client email in To field
- Add Zoho tracking email in BCC: bdjbd0m_u0qw9cy@mails3.zohocrm.com
- Attach required documents
- Send
- Verify communication is logged/visible in Zoho (where configured)

11.3 Zoho Desk ticket checklist

- Acknowledge ticket

- Confirm understanding of issue/request
- Action the request or request more info
- Keep ticket updated with notes and status changes
- Resolve and close ticket
- Ensure ticket outcome is documented clearly

12. Conclusion

Professional communication is not only about the message—it is about recordkeeping and service continuity.

If communication is sent and not logged:

• The client record is incomplete

• The team cannot support each other properly

• Regulatory or client disputes become difficult to manage

Always use Zoho communication tools properly to protect the client, the team and the business.