Integration Setup: Zoho CRM

Getting Started · https://coreel.ai/help/integration-setup-zoho-crm/

Connecting Zoho CRM to coReel lets you send video emails to your Zoho contacts, look up contacts by name or email when composing, and trigger Zoho automation when your videos are sent or watched.

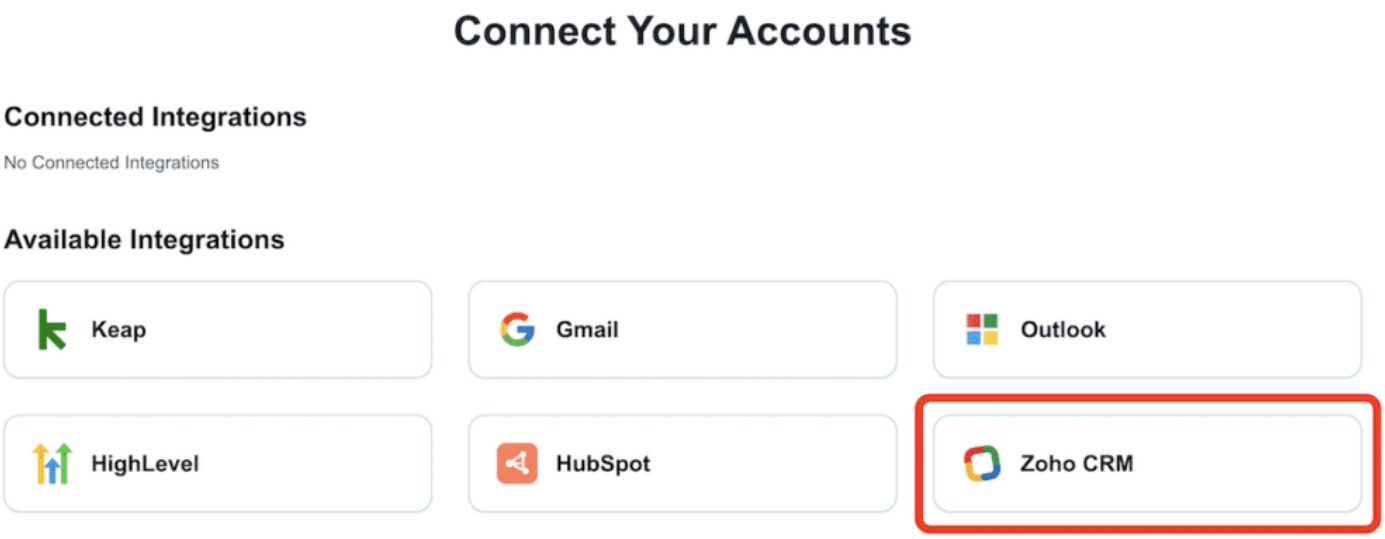
This article walks you through connecting Zoho and verifying it's working.

Before you start

- You'll need a Zoho CRM account with **Admin-level access**.
- Zoho is available on every paid coReel plan.
- You'll need 5 minutes.

Step 1 — Open the Zoho integration page

1. Sign in to coReel at app.coreel.ai.
2. Go to **Settings → Integrations**.
3. Find the **Zoho** card.
4. Click **Connect Zoho**.



You'll be redirected to Zoho's authorization page.

Step 2 — Authorize coReel

On Zoho's authorization screen:

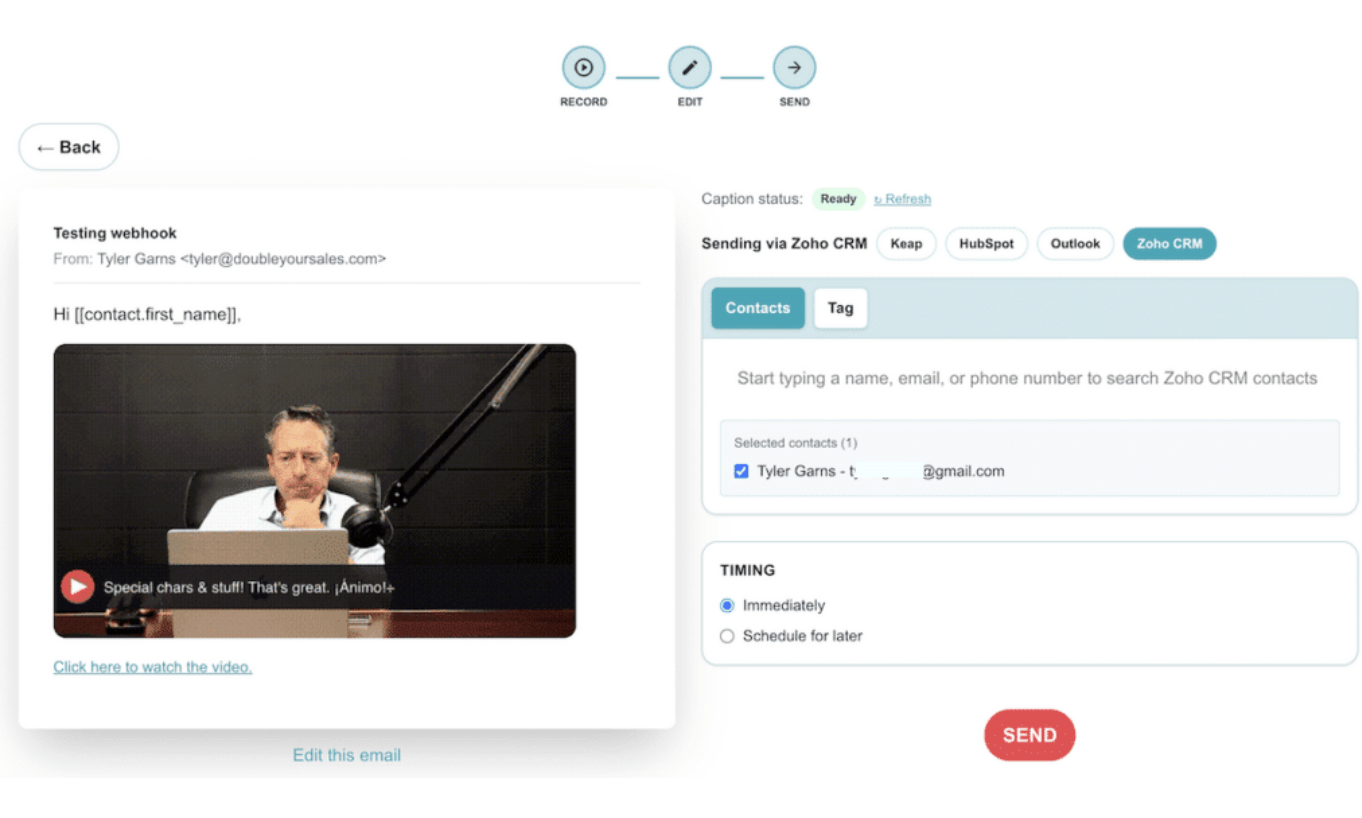
1. Sign in to Zoho if you aren't already. Make sure you're signed in to the **Zoho account region** that holds your CRM data (US, EU, AU, India, China, Canada, or JP). coReel auto-detects the right region from the account you authorize with.
2. Review the permissions coReel is requesting. We ask for:
   - Read and update CRM contacts (to look up recipients and apply tags)
   - Send mail (to deliver video emails through Zoho)
   - Read and write CRM tags (so you can trigger automation based on tags)
   - Read your account profile (so we can show the right "From" address)
3. Click **Accept**.

You'll be redirected back to coReel.

Success Check: The Zoho card in Settings → Integrations now shows **Connected** along with your Zoho account email.

Step 3 — Send a test video

1. Click **+ New Video** and record a short test video.
2. On the send screen, choose **Zoho** as the send provider.
3. In the recipient field, start typing the name or email of a Zoho contact.
4. Pick the contact from the autocomplete dropdown.
5. Click **Send**.



Check the recipient's inbox — they should receive your video email sent from Zoho.

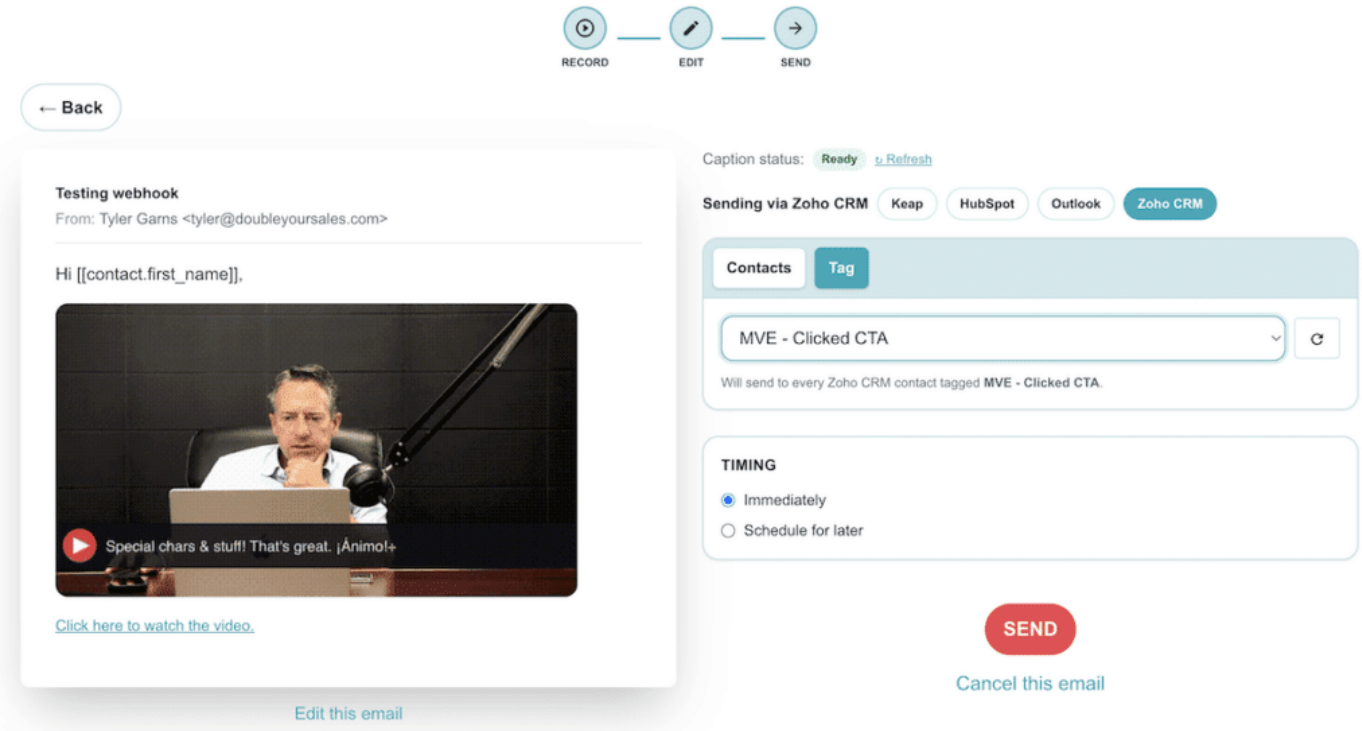
Success Check: The send completes, and you can see the email logged on the contact's record in Zoho.

Sending to a Zoho tag

Instead of picking one contact at a time, you can send to everyone with a specific Zoho tag — useful for outreach lists, customer segments, or onboarding cohorts.

1. On the send screen, choose **Zoho** as the provider.
2. Switch the recipient mode from **Contact** to **Tag**.
3. Pick the tag (e.g. `2026-Q2-launch`, `prospects-warm`).
4. Compose and send as normal.

coReel queues one send per contact in the tag.



Zoho recipient panel with the Tag mode selected and a tag picked.

Using Zoho automation with coReel

You can configure coReel to trigger Zoho automation when:

- A video is sent
- A recipient watches your video
- A recipient clicks your CTA
- A recipient replies to your video

To set this up:

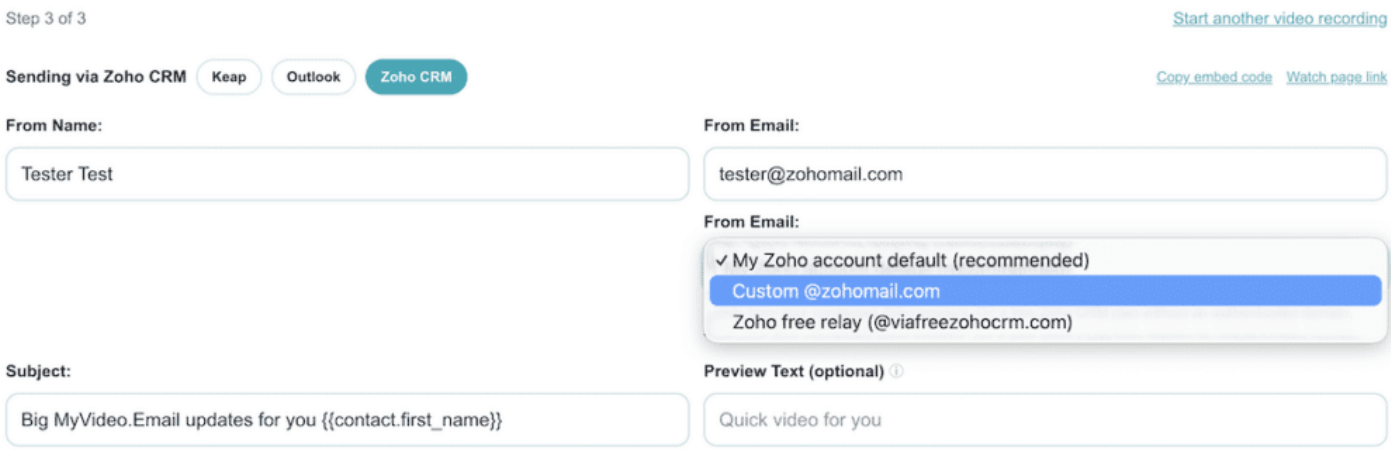
1. Go to **Settings → Automations** in coReel.
2. Pick **Zoho** as the automation provider.
3. Choose which Zoho automation templates fire for which events.
4. Save.

See Automation Templates for the full automation guide.

Sending from a specific Zoho address

Zoho lets you configure multiple "From" addresses on your CRM (e.g. `sales@brand.com`, `support@brand.com`). coReel picks up your verified Zoho sender addresses automatically.

1. Start composing a video email.
2. Choose **Zoho** as the provider.
3. Use the **From** dropdown to choose which verified Zoho address to send from.
4. Compose and send.



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If you don't see your preferred address, configure it in **Zoho CRM → Setup → Email → Email Configuration** and reconnect coReel.

Disconnecting Zoho

1. Go to **Settings → Integrations**.
2. Find the Zoho card.
3. Click **Disconnect**.

Disconnecting stops all Zoho automation triggers and prevents new sends through Zoho. Past sends and automations that already fired remain in Zoho's records.

Tips and best practices

- **Reconnect after Zoho permission changes.** If your Zoho admin changes the scopes available to integrations or rotates your API access, reconnect coReel so we pick up the latest grants.
- **Use tags for repeatable outreach.** Maintaining a tag in Zoho and sending to it is the fastest way to repeat a video campaign without re-picking recipients each time.
- **Test with yourself first.** Tag your own Zoho contact record and send a test video to it before sending to a real audience.

Troubleshooting

"No active integrations" alert when I try to send. Your Zoho OAuth token has expired or been revoked. Go to **Settings → Integrations** and click **Reconnect Zoho**.

Zoho contacts aren't showing up in the recipient search. Make sure you're searching by name or email exactly as it appears in Zoho. If results never appear, disconnect and reconnect — the OAuth token may not have the contacts scope.

Send completed but the email didn't arrive. Check the contact's record in Zoho. If coReel logged the send and Zoho accepted it but the email never arrived, it's almost always a deliverability issue (SPF/DKIM/DMARC) with the sending domain in Zoho. See Sender Domains for setup.

Automation didn't fire when the video was watched. Check **Settings → Automations** in coReel — make sure the Zoho automation template is selected for the "video watched" trigger. Then check the template itself is **active** in Zoho — inactive templates don't fire.

My region (EU / AU / India / etc.) wasn't recognized. coReel auto-detects your Zoho region from the account you authorize with. If you get an error during connection, sign out of Zoho completely, sign back in to the correct regional Zoho domain (`zoho.eu`, `zoho.com.au`, etc.), then retry **Connect Zoho** from coReel.