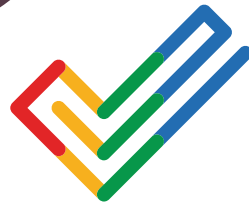


Email project management with
Zoho Mail and **Zoho Projects**

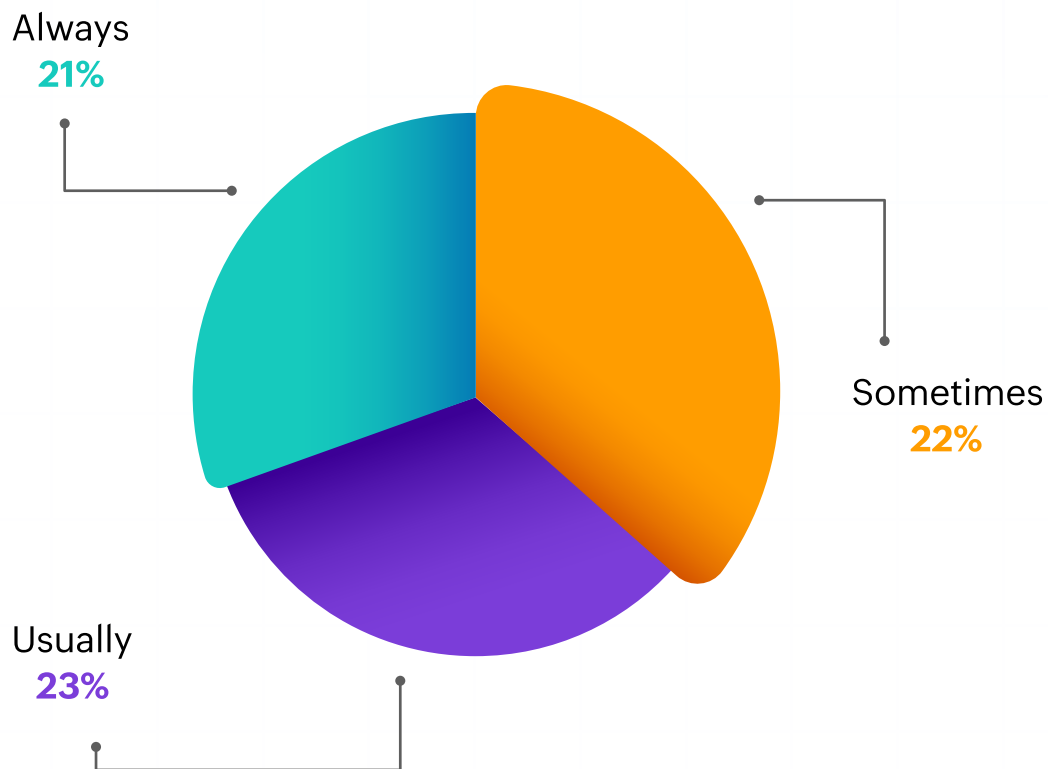


How many times have you yearned for a vacation in the middle of a tiring work week?

We all dream about visiting that one destination, but when we finally make it there, how many of us have been able to resist the urge to check our work emails?

A Business Insider poll found that [66% of Americans check their work emails while on vacation.](#)





While this poll dates back right before the pandemic, [remote work has only brought new insights to this trend:](#)

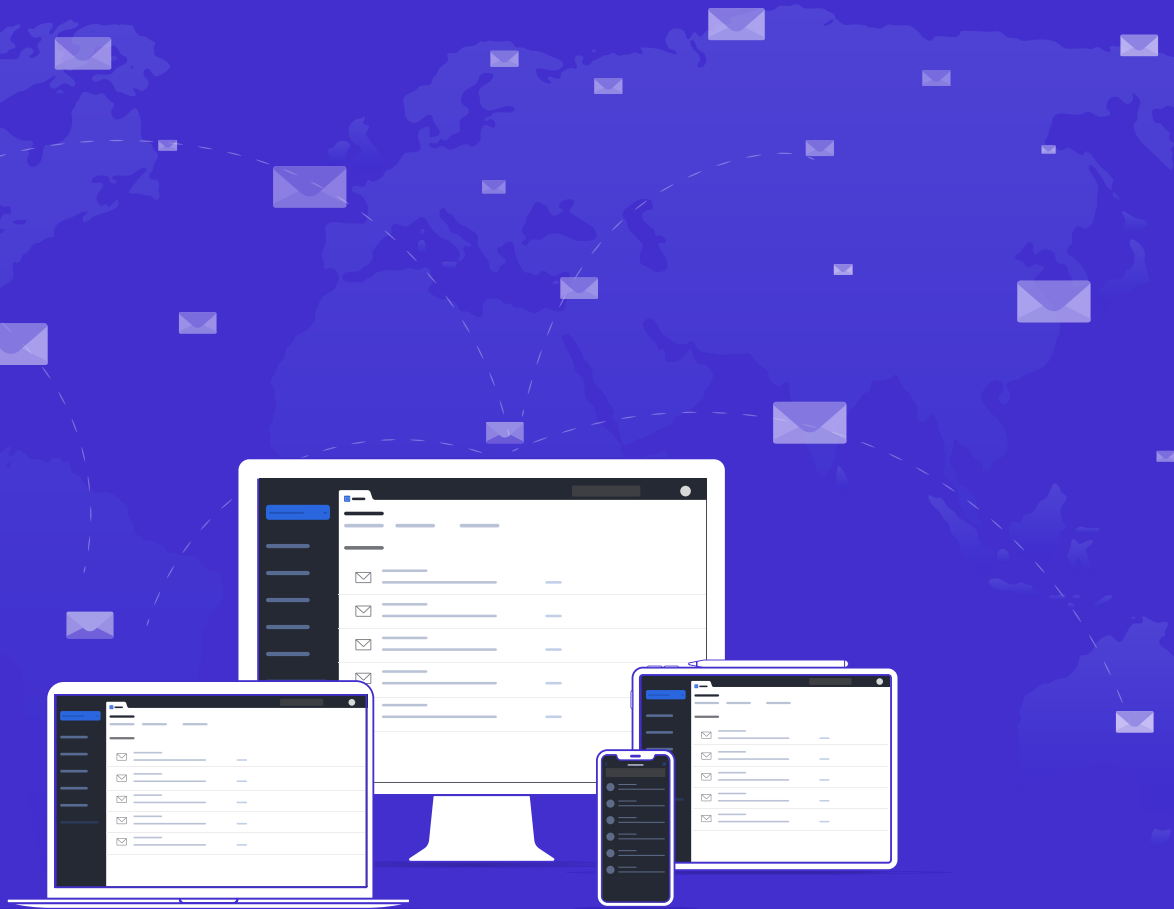
"Eighty-one percent of remote workers claim to check work emails outside of work hours, including 63 percent who do so on weekends and 34 percent while on vacation."

The fear of missing out on important emails, wanting to keep up with work updates, and the anticipation of a cluttered inbox are the major factors for these staggering numbers.

But why are emails still so ubiquitous?

Emails are universal. A customer you're trying to reach might not have the messaging software you use, but they'll definitely have access to emails.

Emails also dominate professional communication mediums because of their ability to provide a wide reach at remarkable speed, while also being reliable and secure. Today, emails are accessible from any device—whether a home PC or your smartwatch—and can even be used offline.

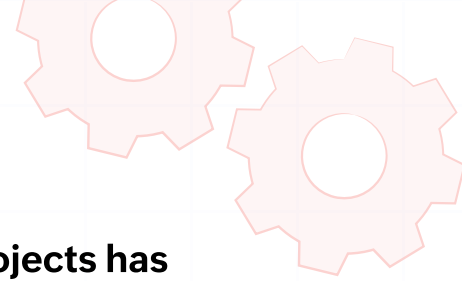




Email sent; so what's next?

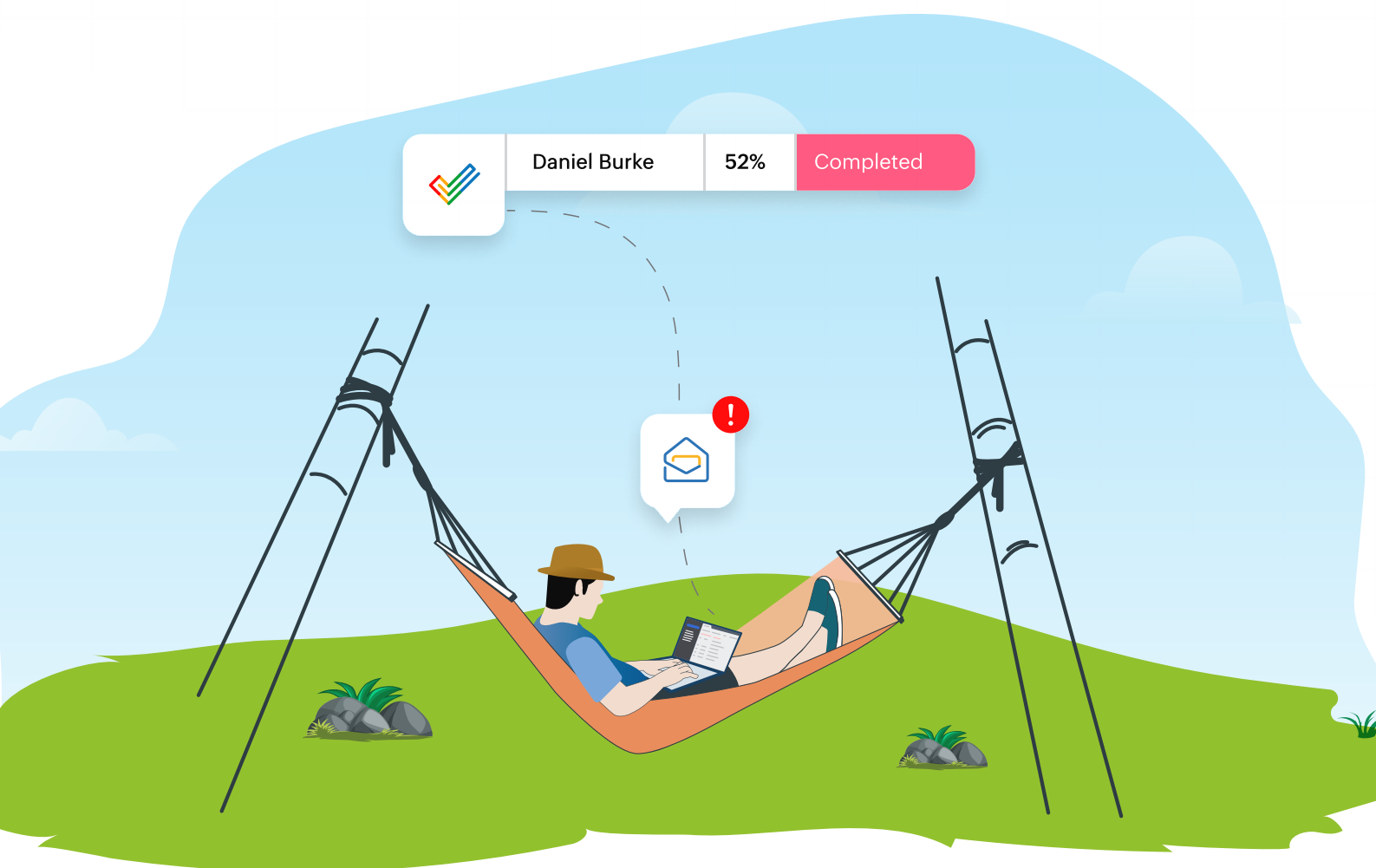
Given the widespread accessibility of emails, accessing them is quite simple. However, triggering actions based on emails, such as acknowledging them as a work item, adding them to your project management software, or assigning them to another employee, can be challenging while on the move.

For instance, let's say John receives an email from a company stakeholder when he's on a vacation. Given the significance of the sender, he drafts a reply to send off; but to act on the suggestions in the email, he'd either have to forward the email and its action plan to someone else, or log in to his project management software to jot down the tasks himself.



To tackle these kinds of scenarios with ease, **Zoho Projects has collaborated with Zoho Mail to create an integration where an email itself can be added as a task or bug to Zoho Projects**, allowing you to include information on the assignee and start and due dates, all within Zoho Mail. This also ensures that no information mentioned in the email is privy to the owner of the task, improving transparency.

You can even add new tasks and bugs to Zoho Projects right from Zoho Mail's interface, without the need to switch tabs.



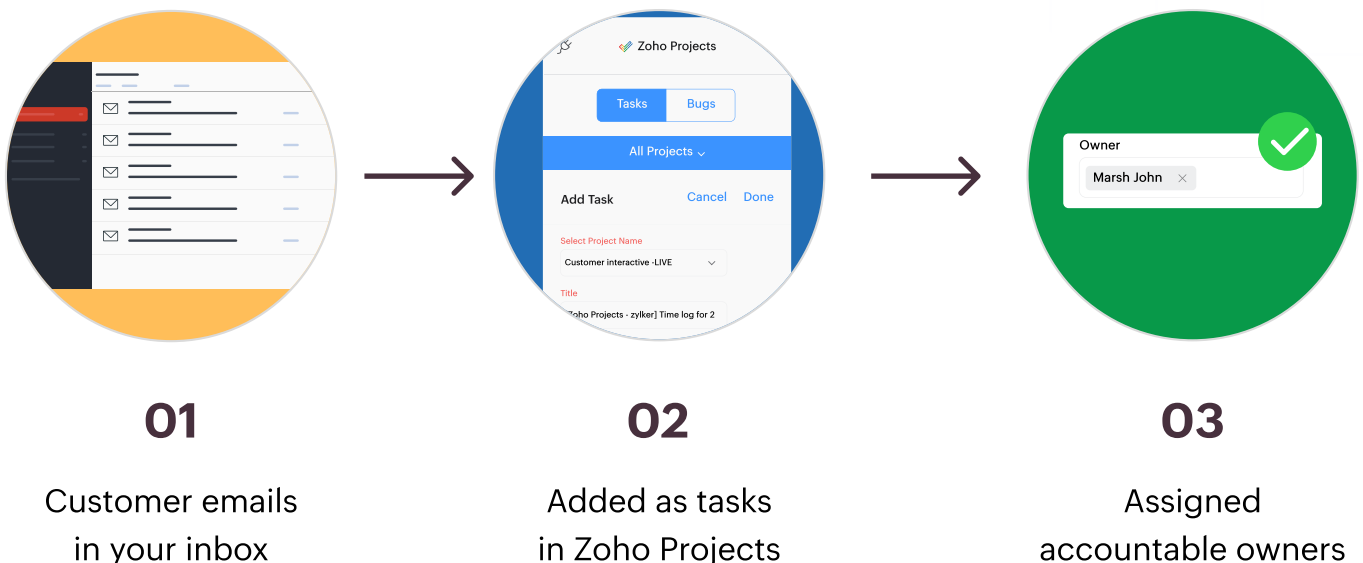


The customer is the king, and so are their emails

While the previous scenario tackles emails from stakeholders, how can we use this integration to address customer emails?

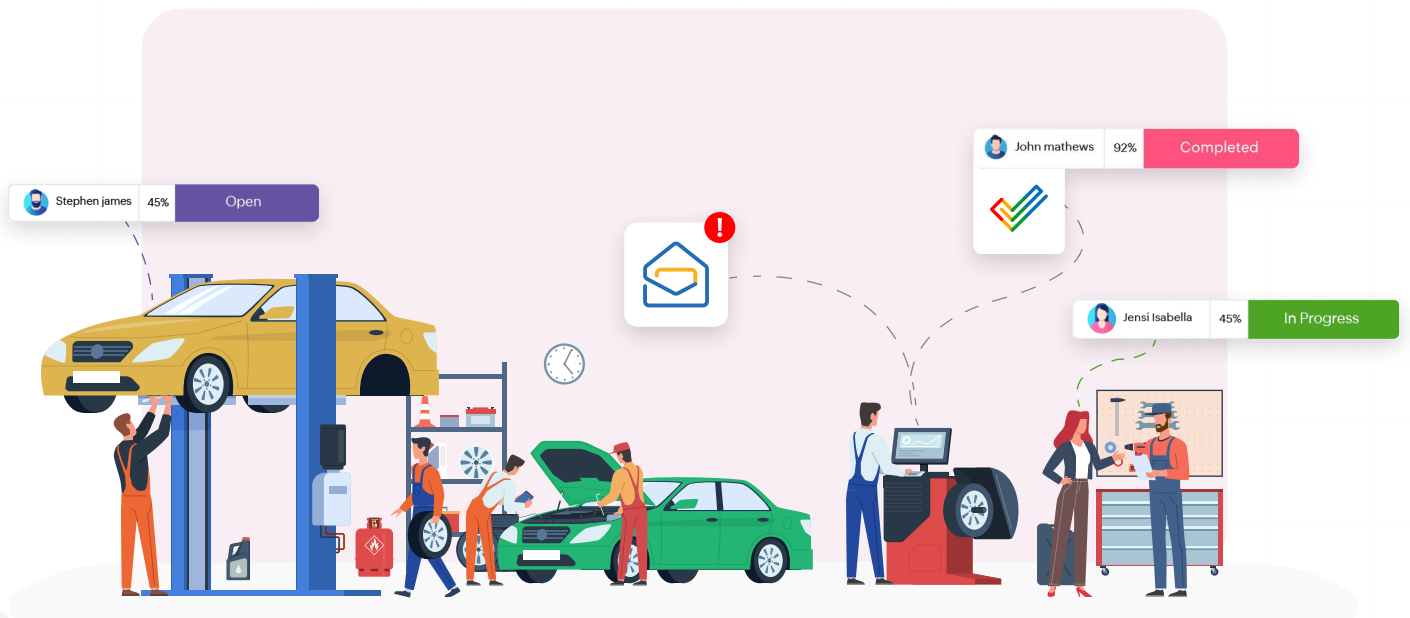
Even though customer support options are plentiful, connecting through email tends to be stable, can be sent at any time, is cost effective, and takes less time. Emailing also maintains a record that we can later come back to.

Customer emails that reach your inbox may range from questions and complaints to suggestions and new requests, and many of these emails need to be assigned as tasks to other people. Instead of forwarding these emails within the organization, where there's the possibility of them going unnoticed, you can directly add them as tasks in your project management system and assign them to the relevant owner, ensuring accountability.



Let's consider a business use case where integrating your email software with project management systems proved beneficial:

A custom car design company models and modifies cars to fit the exact requirements of their clientele. They use Zoho Projects to manage their orders. Each new customization request is added as a task in Zoho Projects and assigned to their employees. Further, Zoho Projects helps them manage and inspect each task throughout its lifecycle.



Whenever an inquiry or order is received through the company's email, it might include many details regarding custom requirements. Manually adding these details to project management software is laborious, so, to address these requests efficiently and correctly, the company integrates Zoho Projects with Zoho Mail. This way, relevant emails can be instantly added as tasks to Zoho Projects, right from Zoho Mail, and everyone knows exactly what they need to do.

The pros

Integrating email with your project management software opens up many possibilities. Here are some of the benefits of this integration

- 01 Simplified task and bug creation**

Action items are created instantly without the need to juggle between multiple screens or products
- 02 Convenient and straightforward**

The single click to create a task or bug is straightforward and convenient
- 03 Easy monitoring**

Updates to tasks or bugs created from an email can be tracked right from the email
- 04 Uninterrupted flow**

The toggle between email and project management software is eliminated, improving productivity
- 05 Streamlined communication**

Creating the email itself as a task ensures no communication is lost and all details from the initial sender are conveyed
- 06 Room for collaboration**

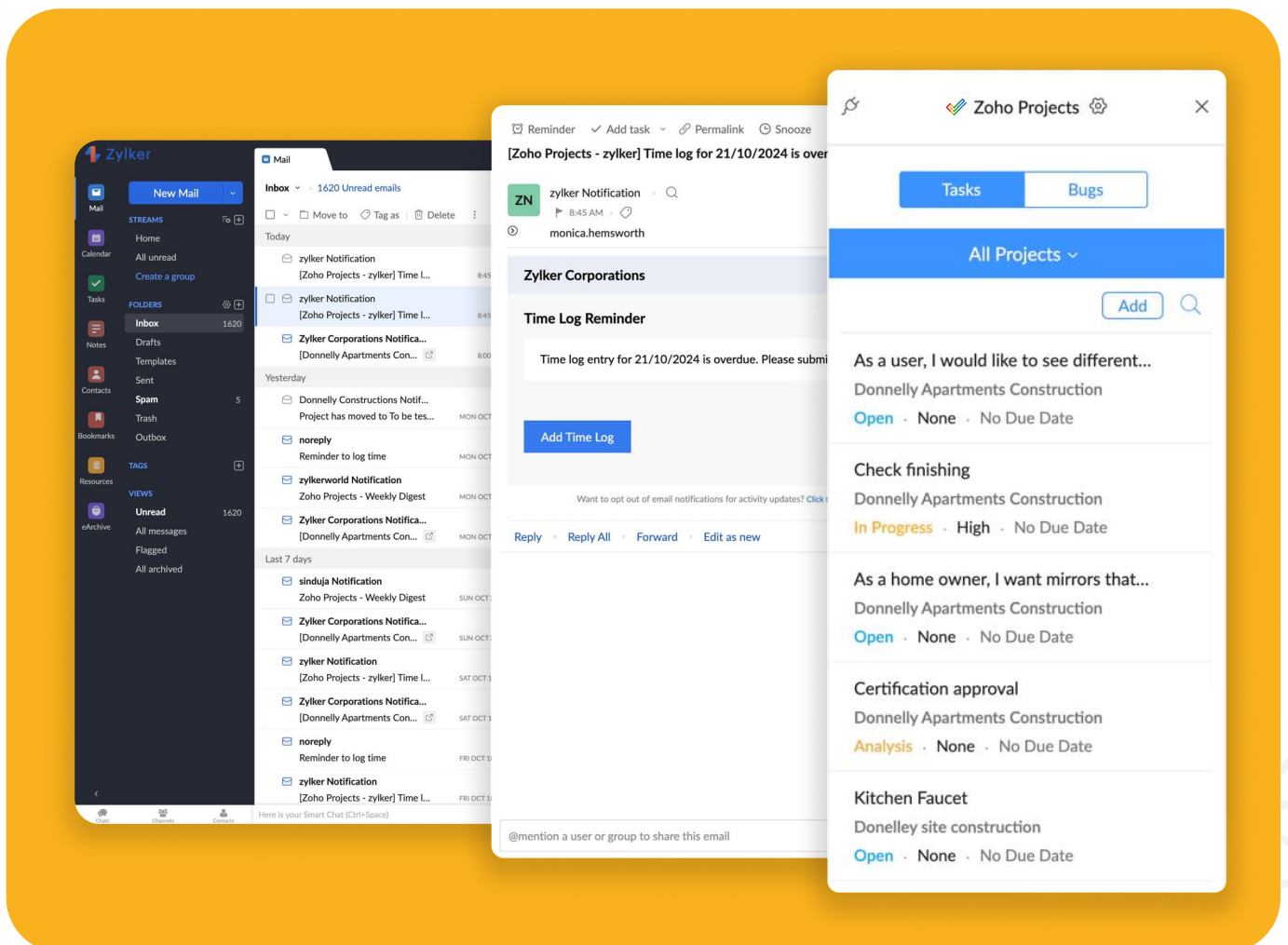
The option to choose the medium of collaboration is open via both the email or the project management software

Examples of emails that are good candidates for converting to tasks or bugs:

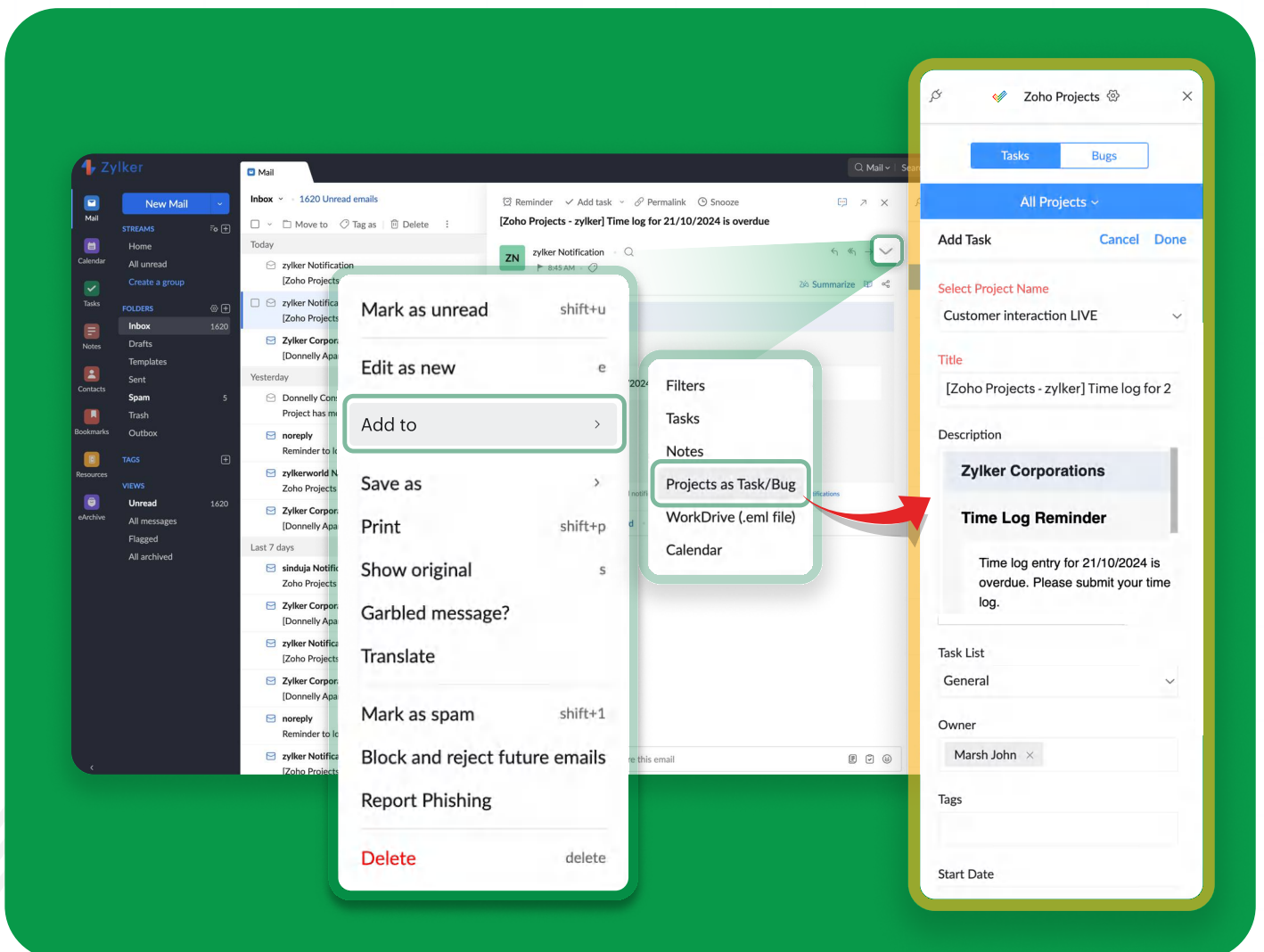


Setting it up

Log in to Zoho Mail account and select **Integrations** in Settings. Enable Zoho Projects and select a portal name to map the integration. Once the integration is configured, a new Zoho Projects slider will be visible to your right, giving you a comprehensive view of the tasks and issues in each project.

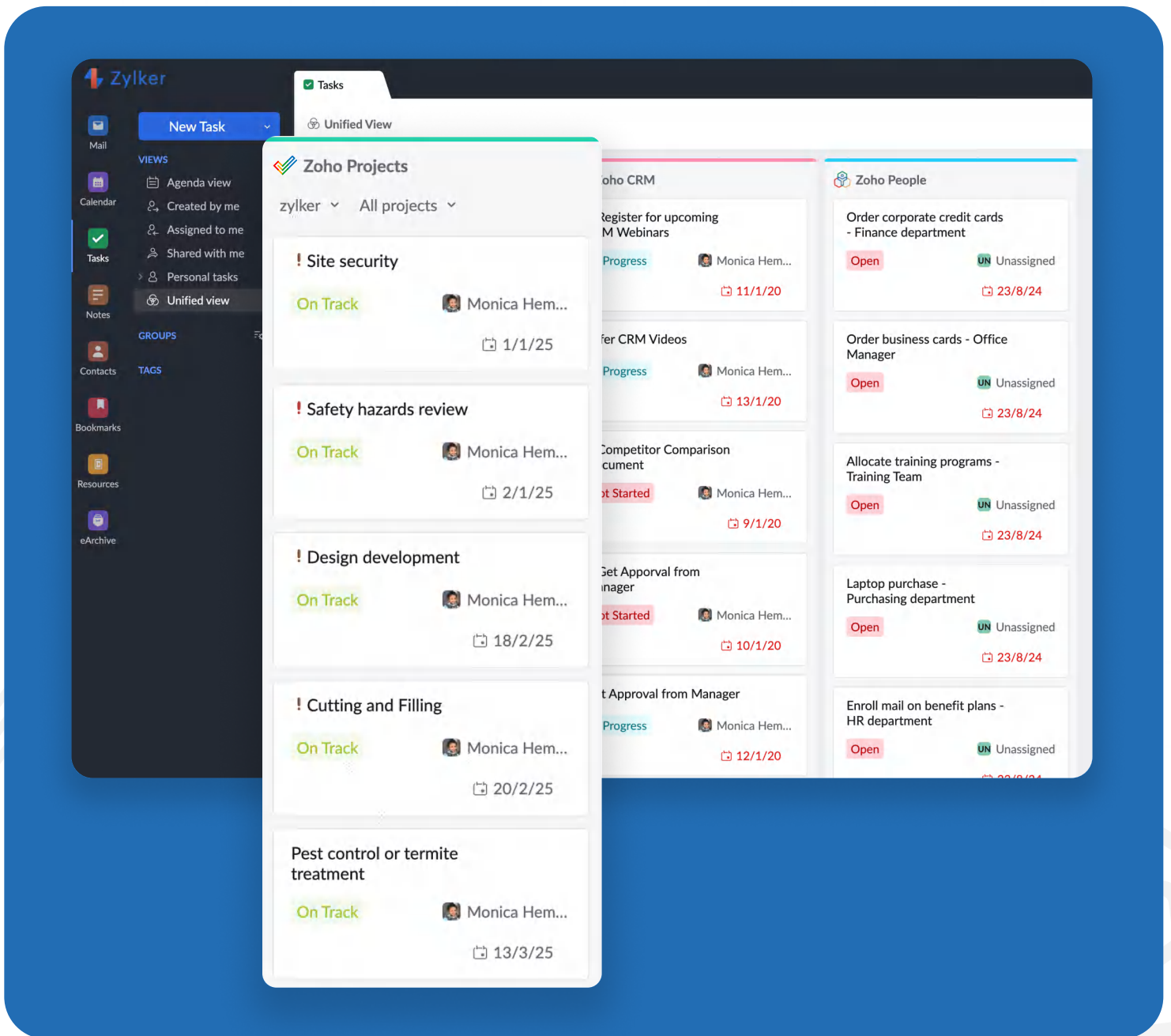


Open the email you'd like to add as a task, click the **More options** dropdown and select **Add To > Projects as Task/Bug**. The task details will get populated from the email and be displayed in the Zoho Projects slider. The subject of the email will get added as the task or bug title, the email content will get added as the description, and attachments from the email will be added as task attachments.



Apart from adding emails as tasks, you can also add new tasks to Zoho Projects from this window. Use the dropdown at the top to navigate to different projects, create a new project, or view your tasks and issues, all within Zoho Mail. The same email can also be used to add multiple tasks to Zoho Projects.

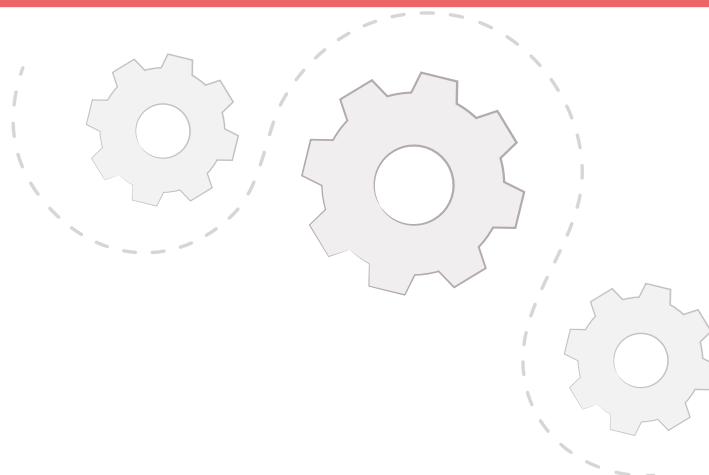
While working in parallel with other Zoho apps, like Zoho CRM, you can view all your **tasks** in one place using the Tasks tab in the left panel of Zoho Mail. For Zoho One users, this is listed as **ToDo** in the left panel. Navigate to **Unified view** to refer all your tasks across different products.

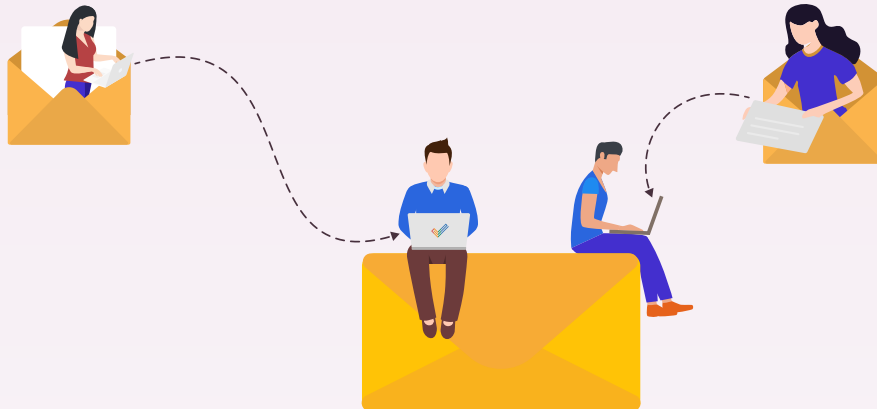


You can click on **Zoho Projects** to view the tasks listed in the product's interface. You can navigate between projects and custom views, create and update tasks, and perform most of the actions you'd perform from Zoho Projects.

The screenshot displays the Zoho Projects interface. The left sidebar contains navigation options like Mail, Views, Agenda view, Created by me, Assigned to me, Shared with me, Personal tasks, Unified view, Groups, Tags, Contacts, Bookmarks, Resources, and eArchive. The main area shows a task list for the project 'Donnelly Apartments Construction'. The tasks are grouped by task list, with 'All Open' selected. The table below represents the data shown in the screenshot.

#	Task Name	Owner	Status	Start Date	End Date	Priority	Work
Floor tiling							
PR-459	Floor tiles inspections	Eduardo Vargas	DSC form issued	05/26/2023	09/16/2023	High	41:00
PR-460	Caulk and Air seal	Monica Daniel	Content Review	06/28/2023	07/25/2023	Medium	58:23
PR-461	Install Carpet in Garden	Charles Stones	Open	06/14/2023	08/23/2023	None	60:21
PR-462	Draft invoice	Victor Young	In Progress	05/26/2023	09/24/2023	Low	40:45
PR-463	Tile frame	Monica Daniel	DIN allotment	05/02/2023	03/13/2023	High	58:12
PR-464	Quality check	Helen Collins	Order Received	05/02/2023	12/12/2023	Medium	28:15
Walk-through check list							
PR-468	Walk-through day plan	Eduardo Vargas	On Hold	04/15/2023	06/28/2023	High	00:00
PR-469	Painting	Monica Daniel	On Hold	04/15/2023	05/23/2023	Medium	36:12
PR-470	Electrical walk through	Charles Stones	License application	04/20/2023	05/02/2023	None	52:35
PR-471	Prepare client list for walk through	Victor Young	Published	04/20/2023	06/25/2023	Low	40:45
PR-472	Inspection work items	Monica Daniel	Image iterations	04/15/2023	04/15/2023	High	49:14
PR-473	Paint quality check in projects	Helen Collins	Completed	04/15/2023	04/20/2023	Medium	54:21
Electricity and wiring - All tasks							
PR-474	Ledger Reports	Eduardo Vargas	On Hold	04/15/2023	04/17/2023	High	60:18
PR-475	Safety Unity Check	Monica Daniel	On Hold	04/15/2023	04/20/2023	Medium	08:00





Summing up

When you think of official communication, you think emails. And in spite of the rise of different communication channels, emails are here to stay. Mapping them with your everyday project management system is the best way to step up your productivity game and make it easier for employees to do their jobs.

Integrating Zoho Mail with Zoho Projects combines the best of both products into a single space, providing you with limitless potential.

Try out the **integration** today!



• • T H A N K Y O U • •

Help Documents:

<https://help.zoho.com/portal/en/kb/projects>

Help Videos:

<https://www.zoho.com/projects/projects-videos.html>

Webinar:

<https://www.zoho.com/projects/webinar.html>

Projects Community:

<https://help.zoho.com/portal/en/community/zoho-projects>

