

App trigger

Triggers a flow when an event or a data update occurs in an app.

For example, when a new lead is added in Zoho CRM.

How to configure

To configure the app based trigger:

1. Click **Configure** in the *App trigger* box.

SUMMARY	BUILDER	HISTORY	YOUR FLOW IS	OFF	?	\times
		Choose what triggers the flow				
		App Triggers when an event occurs in an app. For example, when a new lead is added in Zoho CRM	ONFIGURE			
		Schedule Triggers a one-time or recurring flow based on a predefined schedule	ONFIGURE			
	Ś	Webhook Triggers when data is received from an app or code through a unique webhook URL	ONFIGURE			

- 2. Pick an app to trigger your flow and click **Next**.
- 3. Choose the event in the app to trigger your flow and click **Next**.
- 4. If you have not created any connections already, click Connect.

App Trigger > 123FormBuilder > Form created > Configure		\times
123	Form created Triggers when a new form is created (i) Checks for new entries every five minutes	
123EormBuilder	× °	
123FormBuilder is an online form builder that comes with custom features and integrations. You can define form fields, translate fields and instructions, and also build quizzes and surveys.		
	You haven't created any 123FormBuilder connections Creating a connection authorizes Zoho Flow to exchange data with 123FormBuilder Connect	

If there are existing connections, you can choose to create a new one by clicking **New connection**. Once you create a connection, it can be used for various flows in your organization. Note that different apps have different authentication methods.

App Trigger > Zoho CRM > New contact > Con	figure	? X
	New contact Triggers when a new contact is created	
Zoho CRM Zoho CRM	Connection * CRM Connection Having trouble using this connection? Test Reconnect	✓ ⊕ NEW
relationship management application. You can customize your workflows and information, predict sales with detailed reports, and even monitor trends on social media to discover leads.	Variable Name * trigger	

If you would like to choose an existing connection, pick from the dropdown.

App Trigger \rightarrow Zoho Forms \rightarrow Entry submitted - New version \rightarrow	Configure		\times
	Entry submitted - New version Triggers when a new entry is submitted in the selected form		
	Connection * Choose Connection	~	• NEW
Zoho Forms Zoho Forms is a form builder solution that helps you create, share, and collect data through forms for all your business needs. You can also create custom data reports, configure email notifications, assign tasks and approvals to your team	Sue's Forms Connection Tom's Zoho Forms Connection Zylker's Forms Connection		
mates, and personalize your customer follow-up process.	Frank's Forms Frank's Zoho Forms Connection		

- 5. After configuring or selecting a connection, the variable name will be autofilled. You can edit the name if needed. When renaming the variable, note that:
 - All names must start with a letter. Variable names can contain alphanumeric characters and underscores.
 - Other characters, such as spaces, are not accepted. Names must be unique to avoid naming clashes.
 - If you use the same variable name for multiple actions, the result of the action executed last will be stored in the variable. **E.g:** new_deal, createTask

6. Enter data in the fields that appear.

×	Entry submitted - New version Triggers when a new entry is submitted in the selected form	
同	Connection *	
	Frank's Zoho Forms Connection	✓ ⊕ NE
Zoho Forms oho Forms is a form builder solution that helps you create,	Having trouble using this connection? Test Reconnect	
hare, and collect data through forms for all your business eeds. You can also create custom data reports, configure mail notifications, assign tasks and approvals to your team	Variable Name *	
ates, and personalize your customer follow-up process.	trigger	
	Form *	
	Registration	
	Registration	
	Filter criteria Configure the conditions that trigger this flow	
	Filter criteria Configure the conditions that trigger this flow Choose Choose Choose	+ Clear
	Filter criteria Configure the conditions that trigger this flow Choose \checkmark Choose \checkmark Q Search Entry submitted - New version	+ Clear • Add C
	Filter criteria Configure the conditions that trigger this flow Choose Choose Choose Choose Choose Form	(+) Clear ⊕ Add C
	Filter criteria Configure the conditions that trigger this flow Choose Q. Search Entry submitted - New version Form IP Address	+ Clear • Add C
	Filter criteria Configure the conditions that trigger this flow Choose Q Search Entry submitted - New version Form IP Address Referrer Name	+ Clear • Add C
	Registration Filter criteria Configure the conditions that trigger this flow Choose Choose Q Search Entry submitted - New version Form IP Address Referrer Name Submitted	(+) Clear ⊕ Add C
	Filter criteria Configure the conditions that trigger this flow Choose Q Search Entry submitted - New version Form IP Address Referrer Name Submitted Submitted (Pretty)	+ Clear • Add C

7. Click Done.

App trigger mechanism

App triggers can be either be **Polling** or **Realtime**.

https://help.zoho.com/portal/en/kb/flow/user-guide/create-a-flow/articles/app-trigger

- **Polling trigger**: This is the most common mechanism used in app triggers. When you use this trigger, Zoho Flow checks for new events in the connected app every 5 to 15 minutes to start the flow. The frequency of this checking will vary depending on your <u>pricing plan</u>.
- **Realtime trigger**: With this trigger, it works like a webhook trigger, and the connected app will send new event data instantly, and Zoho Flow will start the flow right away.

	\times
Choose Asana Trigger	
O Project created Realtime Triggers when a new project is created	
Project updated Realtime Triggers when the details of an existing project are updated	
Tag added Polling Triggers when a new tag is added in the selected workspace	
C Task completed Realtime Triggers when an existing task is completed	
Task created Realtime Triggers when a new task is created	
Task section changed Realtime Triggers when a change is made in a task section	
	Choose Asana Trigger Project created Reattine Triggers when a new project is created Project updated Reattine Triggers when the details of an existing project are updated Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace Triggers when a new tag is added in the selected workspace

You can look for the label next to a trigger name to find out if it is polling or realtime.

Note: An app trigger's mechanism is fixed, and cannot be changed.

Trigger criteria

You can configure your trigger in such a way that your flow executes only when certain conditions are met. This avoids the extra step of adding a **Decision** logic following the trigger. While setting up your trigger, navigate to **Filter criteria** and configure the test conditions. The first dropdown is the list of variables from the trigger. The second dropdown is the operation to be performed. The field is what the variable should be compared with.

App Trigger > Zoho CRM > New module entry > Configure



Zoho CRM is an on-demand customer relationship management application. You can customize your workflows and information, predict sales with detailed reports, and even mon lead

New module entry

Triggers when a new entry is created in the selected module

trigger	
Module *	

Filter criteria

tor trends on social media to discover s.	Configure the condition	ons that trig	ger this flow			
	Created by	~	contains	~	Frank	+
			OR		~	
	Created by	~	contains	~	Tom	÷
			AND		×]	
	Phone	~	is not null	~		÷
						(+) Add Group
					BACK	DONE

To add more test conditions, click the + button. Test conditions are separated by AND/OR logic.

(i) **AND** - Output is true only if both the test conditions are true **OR** - Output is true if one or both the test conditions are true

Adding groups

You can also stack together multiple test conditions as groups by clicking the Add Group button. It can then be separated using AND/OR logic.

App Trigger > Zoho CRM > New module entry > Configure



In the above illustration, the first group contains two test conditions separated using 'OR', which checks whether the Lead was created by either Frank or Tom. If it is true, it then goes to the second group, which checks whether the Phone number field in that Lead entry is not empty. The flow will trigger only if the lead was created either by Frank or by Tom, and if the Phone number field is not empty.

	Module				
er	Leads				
n.					
n	Filter criteria				
er	Configure the conditi	ons that trig	ger this flow		
	Created by	\sim	contains	 ✓ Frank 	9
			OR	\sim	

+

+ Add Group