

Create a flow from scratch

Create and customize a flow from scratch to solve your automation needs.

1. In the <u>My Flows</u> section, click **Create Flow** in the top right corner, or the + button on the left.

	$\langle \mathcal{I} \rangle$ Flow				EXPLOR	E GALLERY Su	bscription Zylker 🗸 😫 🚊	a: 0 🚱
() Dashboard	My Flows				All	✓ Q Search f	lows here	CREATE FLOW
My Flows	Acuity Scheduling-MailChimp	OFF	Asana to Zoho Sheet to Slack	OFF	Auto assigning tasks-Created b	OFF	Auto Escalate Ticket for Unpor	ON
Settings	••						2 * @ # 2	
	Booking management	OFF	Bookings to CRM	ON	Books to Desk	OFF	Books-CRM	OFF
	••		(O) es (O)					
	Closing deals: Created by Frank		CRM closed won to Asana	OFF	CRM to Connect	OFF	Deal update in CRM based on	OFF
	 ✓ ✓		8 00 1		••		∞ ∞ 🛃	

2. Enter the flow name and a description (optional). Click **Create** to be directed to your builder screen.

Once you land on the builder screen, follow these steps to configure your flow:

- 1. <u>Configure its trigger</u>
- 2. Add actions
- 3. <u>Save the flow</u>
- 4. Test and debug the flow
- 5. <u>Switch on the flow</u>

Configure trigger

When you land on the builder, you will be asked to select the trigger type. A trigger is the event that starts a flow execution. Zoho Flow currently supports three types of triggers:

(i) <u>App Trigger</u>: Triggers when an event occurs in an **app**.

Schedule Trigger: Triggers a one-time or recurring flow, on your customized schedule.

<u>Webhook Trigger</u>: The Webhook trigger lets you push data from third-party applications (that support configurable webhooks) to Flow.

You can choose any one of these trigger types for a flow.

App trigger

Let's look at how you can configure an app trigger. For example, when a new lead is added in Zoho CRM. 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	DNFIGURE			
		Schedule Triggers a one-time or recurring flow based on a predefined schedule	DNFIGURE			
	්	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 () Checks for new entries every five minutes	
123FormBuilder	× °	
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 > Co	nfigure	? ×
×	New contact Triggers when a new contact is created	
Zoho CRM	Connection * CRM Connection	∽ ⊕ NEW
Zoho CRM is an on-demand customer relationship management application. You can	Having trouble using this connection? Test Reconnect	
customize your workflows and information, predict sales with detailed reports, and even	Variable Name *	
leads.	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	
F	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	
nare, 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	
	Filter criteria Configure the conditions that trigger this flow	
	Choose V Choose V	+ Clear
	Q Search	
	Entry submitted - New version	(+) Add (
	Form	
	Referrer Name	
	Submitted	
	Submitted (Pretty)	

- 7. Click Done.
- Note: There are two types of triggers that various apps support. These are polling and realtime (webhook). The polling trigger checks for data updates at regular intervals and triggers the flow. The realtime trigger initiates the flow when the trigger app pushes update data to Zoho Flow. Learn more
- Trigger criteria: You can also configure your app 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. Learn more

Learn more about app trigger

Alternatively, you can choose schedule trigger or webhook trigger as your flow's trigger:

Schedule trigger

Triggers a one-time or recurring flow, on your customized schedule. For example, you can set up a flow that sends a channel message in Slack on all Mondays, at 12pm. <u>How to configure</u>

Webhook trigger

The Webhook trigger lets you push data from third-party applications (that support configurable webhooks) to Flow. Using the custom URL that Flow provides, set up an integration that starts when there is a data update in the third-party application. For example, you can configure this trigger to receive data from a programming language. <u>How to configure</u>

Note: Once configured, you can can reconfigure a trigger by click	change the triggers but can't delete them unless you delete the flow king the edit icon. Click the trigger type to change it.	v. You
Schedule Trigger > Configure		×
	Choose schedule type Frequency *	
Schedule	Weekly Start Date*	<u>~</u>
Triggers a one-time or recurring flow based on a predefined schedule	Select Date [
	Every 1 \checkmark week(s) on Sunday \checkmark	

Add Action

An action is a task that the workflow executes based on the trigger. Once you have configured the trigger, you need to add actions. You will find these actions (**app** and **logic-based**) to the left of your builder under the *App* and *Logic* sections.

App-based actions

These are tasks that the workflow executes in an app, such as sending an email or adding a record. To configure app-based actions:

1. Click each app on the left of the builder to view the actions available. Drag the required action to the builder, and an indication to drop will appear.



2. In the configuration window that opens, click **Connect** if you have no existing connections.

Slack - Send public channel message Sends a message to the selected public channel	$\widehat{}$	\times
x ° x ° x ° x ° x ° x ° x ° x °	INSERT VARIABLE Click fields to map to your action Search variable here System Variables Variables holding predefined contexual information Current date (e.g. 2020-01-01) Current datetime (e.g. 2020-01-01T00:00:00+05	~
Creating a connection authorizes Zoho Flow to exchange data with Slack	New module entry C Zoho CRM - New module entry C	; ~

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.

Sends a message to the selected public channel		?	\times
Connection * Frank's Slack Connection	INSERT VARIABLE Click fields to map to your action Q Search variable here		
Variable Name sendPublicChannelMessage_1	System Variables Variables holding predefined contexual information Current date (e.g. 2020-01-01) Current datetime (e.g. 2020-01-01T00:00:00+05:30)		~
Public channel * Choose Public channel	Zoho Desk - Ticket created	Ç	· ~
Message *			

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

nnection *		INSERT VARIABLE		
Choose Connection	✓ ⊕ NEW	Click fields to map to your action		
Frank's Slack Connection		Q Search variable here		
Frank's slack connection 2020		System Variables Variables holding predefined contexual information Current date (e.g. 2020-01-01) Current datetime (e.g. 2020-01-01T00:00:00+05:30)		
		Zoho Desk - Ticket created	Q	

3. Enter data in the fields that appear. You can map data from the previous steps to move information from one app to another in the flow. Learn how to map data

4. Click Done.

5. The action can be edited or deleted using the icons in the right of the action.

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

- 6. You can add links between the trigger and actions to modify the sequence of events. Click the small dot on the trigger or action and drag to the other action.
- 7. To remove a link, hover over it until a scissors icon appears and click on it.

REALTIME					
J J Tick	lat granted	<u> </u>			
	Ket created				
	· · · · · · · · · · · · · · · ·				
1		0			
Ser	nd public channel m	·			

You can add as many actions as you need.

Logic-based actions

If you wish to automate detailed tasks, you can add logic elements to perform different actions for different filter rules, delay part of the workflow, or introduce your own function. <u>Learn more</u> **Note:**

- If you edit a trigger or action, modify the <u>mapped data</u> in the next steps accordingly. Otherwise, the flow will fail.
- If you add fields in an app while configuring your flow, they may not be reflected as variables in the next step. To solve this, click edit on the Zoho Flow builder for the app you modified, and click **Done**.

Add Actions to an Error Branch

You can configure your flow in such a way that if an action encounters an error and fails, a different branch of actions are executed. This way, you have more control over your flow if an important action has failed.

You can attach actions to an error branch the same way you normally attach actions to a trigger or other actions. In the Builder, drag and drop the required action into a slot on an 'On Error' branch to assign a new error branch for an action. You can then keep adding more actions to that branch, if needed.

Database management $\qquad imes$	SUMMARY BUILDER	HISTORY
APPS LOGIC	Last saved: 03:05 PM	
Q Search	REALTIME	1
🔇 Zoho Creator ^	Entry submitted - No	ew
II Create record		
II Fetch record	Update record	∠ On Error
II Update record		Create record
Missing an action that might be useful? Request an action	DROP HERE	

You can utilize this feature to notify your team instantly if an important action has failed, to create a new record if an action to update a record has failed, to configure the same action with a different set of data mapped to its fields, and so on.

REALTIME	Entry submitted - New	2		
	Update record	Con Error		
M	Send email	 <i>ℓ</i> <i>□</i> 	Create record	∠ ¹ 0 ⁰
			Send email	⊘ ⊡

For example, in the above scenario, if the Update record action fails (that record might not exist), then a new record with that data will be created.

Note:

- If an error branch is configured on an action, any type of error that fails that action will activate the error branch.
- Auto Rerun will not handle a failed action if an error branch is configured on that action.
- You can add an Error Branch to an existing Error Branch.

Save

Your flow will be autosaved by default. You can also use the **Save** button at the top of the screen if required. Until you switch on at least once, your flow will be saved as a draft.

You won't be able to save your flow if your flow has no actions, or if an action or trigger is not configured completely.



Test and debug

Testing and debugging your flow ensures that it is error-free. This is an optional step to check if the flow is working correctly.

Click the Test & Debug icon. Learn how to test and debug



Switch on

To switch on your flow and let it work with actual data, click the slider at the top.

SUMMARY BUILDER	HISTORY	YOUR FLOW IS	OFF	?	\times
Last saved: 10:02 PM		7	n	Q	►
	REALTIME				
	Send Public Channel M.				
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