

## Email trigger

The email trigger lets you parse data from formatted emails to automate workflows. This is ideal for automating workflows that involve emails that follow templates, such as invoices, cab receipts, payslips, and more.

## What is email parsing?

Email parsing allows you to extract data from incoming emails. The parsing can be configured to extract specific data fields from incoming emails. Doing so allows you to convert the contents of an email into easy-to-handle pieces of data.

## How email trigger works

The Email Trigger lets you start your flow when an email with a predefined template reaches a pre mailbox. Once you configure the trigger with a sample email template, you can choose to send similarly templated emails any time you wish to trigger the flow. Our email parser will extract the data based on the sample template you have provided. This will be helpful to utilize the data in your emails as <u>variables</u> in your flow.

## How to configure email trigger

- 1. In the *My Flows* section of Zoho Flow, click **+Create**, then **Create flow**.
- 2. Enter the flow name, and optionally a description.
- 3. Click **Create**.
- 4. Select **Email** as the trigger.



- 5. Click **+Template** to create a new template.
- 6. Send a sample email with the desired format to the provided mailbox address for parsing.
- 7. Once the email is received, you are ready to configure the template.
- 8. In the template, highlight the positions of words or group of words where new data is likely to appear in subsequent emails.

	Configure email trigger
	Template name * Provide a unique name for your email template
	Uber receipt
Email	Assign variables from email content Refresh conter
ses incoming emails to trigger a workflo	
	Highlight specific parts of the email and assign labels to them. These labeled areas will be converted into variables that you can
	use in the subsequent actions.
	Subject : Your Uber Receipt for 9/27/2023
	Subject : Your Uber Receipt for 9/27/2023 Hello <mark>\${Name}</mark> ,
	Subject : Your Uber Receipt for 9/27/2023 Hello \${Name}, Thank Name this selection
	Subject : Your Uber Receipt for 9/27/2023 Hello \${Name}, Thank Name this selection This label will become the name of the new variable.
	Subject : Your Uber Receipt for 9/27/2023   Hello \${Name},   Thank Name this selection   Trip D String V   String V
	Subject : Your Uber Receipt for 9/27/2023 Hello <u>\${Name}</u> , Thank Name this selection This label will become the name of the new variable. Trip D String V Name
	Subject : Your Uber Receipt for 9/27/2023 Hello <u>\${Name}</u> , Thank Name this selection This label will become the name of the new variable. Trip D String V Name - Picki - Drop CANCEL SAVE
	Subject : Your Uber Receipt for 9/27/2023 Hello <u>\${Name}</u> , Thank Name this selection This label will become the name of the new variable. Trip D String V Name - Pick - Drog CANCEL SAVE
	Subject : Your Uber Receipt for 9/27/2023 Hello \${Name}, Thank Name this selection This label will become the name of the new variable. Trip D String V Name - Pick - Drop CANCEL SAVE
	Subject : Your Uber Receipt for 9/27/2023 Hello \${Name}, Thank Name this selection This label will become the name of the new variable. Trip D String V Name - Pick - Drop CANCEL SAVE Charges - Base Fare: \$2.50

**Note:** These positions will be recorded as variables and the next time an email lands in your template's mailbox address. The values present in those positions will be available for execution.

- 9. Provide labels for the variables.
- 10. Take note of the mailbox address for the template you've configured. Send or forward similarly-formatted emails to this address to trigger your flow.

	Configure email trigger	
	Choose email template Choose from predefined email templates, allowing Zoho Flow to identify and extract values from the configured variables in the incoming emails.	
	Uber receipt V + Te	mplate
Email	View and edit template	
es incoming emails to trigger a workflow	Variables defined in the template: { Name : "John Doe", Total_fare : "\$18.00" }	
	Filter criteria V Mailbox address for the template: the same template to this mailbox to trigger this flow. Comparison of the template to the same template tem	emails o

- 11. After configuring, click **Proceed** and add actions to your workflow.
- **Tip:** You can automate the sending of your preferred emails to Zoho Flow's mailbox by setting up Automatic forwarding of emails from your email service provider settings.