

Actions

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Zoho Tables offers three types of actions now. They are: <u>a) Send Email</u> <u>b) Create record</u> <u>c) Update record</u>

Let's try to understand how these individual actions work.

a) Send Email

This action allows you to send an email to the selected email addresses when the trigger event occurs to execute the automation.

In the example below, an email is sent to the digital marketing manager every time a post is published.

Choose a trigger

Select the table named "Posts" and choose the trigger, "When record is updated".

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	e 🐵 Post	Publish Date	B Channels	Status	S Type of Post	$^{\infty}$ Post Headline	B SPOC	+			
1 Wifi 6 Technology		October 1, 2022	Facebook LinkedIn	Published	Owned	Scale up business productivity with Wifi 6	Hazen				
2 Next Generation F	irewall	October 20, 2022	Instagram LinkedIn	Published	Paid	Next Generation Firewall to protect your business	Lawrence				
3 The official blog	10	October 24, 2022	Facebook Instagram	Request	Owned	Major components of cyber security #cyber	Olivia				
4 Data Loss Protect	ton	October 27, 2022	Linkedin	Request	· Paid	Try DLP for free #data loss protection	Hazen				
5 Components of En security	nd point	November 2, 2022	Instagram Linkedin	Request	Owned	Components of end point security #security	Lawrence				
6 Browser Protection Webinar	n-	November 8, 2022	Facebook	Request	Promotion	Is your browser protected for online threats. Atten	Olivia				
7 Type here to creat	te a record										
+ 5 8											
6 Records											

Choose a trigger gif

Customize the condition

Click on "+Add Condition" to set the filter condition as **Status is any of** *Published*.

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Pos	ts - Channels	SPOC Η				0	Log 🕞 Automation	< Email Manager ; ×
∃ Viev	rs 🕂 📋 All Posts	:	11 Sort 🖓 Filter	Record Height	Color 5	C 🛞 Manage fiel	Ids + Add Record	Trigger
	30 Content Topic	Publish Date	E Channels	Status	Type of Post	🗵 Post Headline	B SPOC	When record is updated (0)
1	Wifi 6 Technology	October 1, 2022	Facebook Linkedin	Published	Owned	Scale up business productivity with Wifi 6	Hazen	Table
2	Next Generation Firewall	October 20, 2022	Instagram Linkedin	Published	Paid	Next Generation Firewall to protect your business	Lawrence	Posts v
3	The official blog	October 24, 2022	Facebook Instagram	Request	Owned	Major components of cyber security #cyber	Olivia	Condition + Add Coggittion
4	Data Loss Protection	October 27, 2022	Linkedin	Request	Paid	Try DLP for free #data loss protection	Hazen	
5	Components of End point security	November 2, 2022	Instagram Linkedin	Request	Owned	Components of end point security #security	Lawrence	Add Actions
6	Browser Protection - Webinar	November 8, 2022	Facebook	Request	Promotion	Is your browser protected for online threats. Atten	Olivia	
7	Type here to create a record							
+ 5								
6 Records								

Customize the condition gif

Add the action

Now, click +Add Action & Select Send Email.

Enter your digital marketing manager's email ID, subject line & custom message.

Note: Ensure that you enable automation to complete the process.

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Post	s - Channels	SPOC 🕒					ଓ Log ⊙ Autom	ation	< Email Manager : ×
∃ View	s 🛨 🔛 All Posts	1	11 Sort 🖓	Filter 🛞 Record Heigh	nt 🔔 Color	5 0 6	Manage fields + Add Re	cord	∲ Trigger
	30 Content Topic	@ Post	Publish Date	E Channels	Status	Type of Post	IC Post Headline	B SPI	When record is updated (0)
1	Wifi 6 Technology		October 1, 2022	Facebook LinkedIn	Request	Owned	Scale up business productivity with Wifi 6	Hazen	Table
2	Next Generation Firewall	Mr.	October 20, 2022	Instagram Linkedin	Request	· Paid	Next Generation Firewall to protect your business	Lawre	Posts v
3	The official blog	8/10 10	October 24, 2022	Facebook Instagram	· Request	Owned	Major components of	Olivia	Condition
		12 N 2					cyber security #cyber		◎ Status v is any of v
4	Data Loss Protection	2 8 -	October 27, 2022	Linkedin	Request	Paid	Try DLP for free #data loss protection	Hazen	Published ·
5	Components of End point security	a second	November 2, 2022	Instagram Linkedin	Request	Owned	Components of end point security #security	Lawre	+ Add Condition
6	Browser Protection - Webinar		November 8, 2022	Facebook	· Request	Promotion	Is your browser protected for online threats. Atten	Olivia	\downarrow
7	Type here to create a reco	4							Add Actions
+ 5									
6 Records									

GIF - Showing Action & Automation output

In the above GIF, you can see the digital marketing manager receiving an email once the **status of the record changes to "Published**" on the table named "Posts".

FAQs

1. What is the default sender's email address?

Ans. The sender's email address is no-reply@localnotifications.zohotables.com

2. Can we add attachments to the automation email?

Ans. As of now, Zoho Tables does not support adding attachments to an automation email. We are working on incorporating this feature and it will be released soon.

3. How can I format the emails I send out?

Ans. You'll be able to format the emails in the future version using the Rich text editor.

4. Can you only send automation emails to the base collaborators?

Ans. No, we can also send emails to recipients who are not collaborators of the base.

5. Can you send an automation email to more than one email address?

Ans. Yes, we can send emails to multiple email addresses.

b) Create record

This action allows you to create a new record in your base when the trigger event occurs to perform the automation.

In the below example, as part of our content creation process we have a table consisting of all the content that needs to be reviewed by the manager. What if we want to create a separate table that shows only the list of content that is approved upon the review process? This can be achieved using Create record.

Choose a trigger

a) Select the table "*Content Review*" which shows the complete list of content to be approved.

b) Choose the trigger, "When record matches a condition".



Choose a trigger gif

Customize the condition

Click on "+Add Condition" to set a condition where the trigger sets off every time the field, Approved is ✓(checked).

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Post	Details Content Review -	Completed 💽			③ Log ⊙ Automation	< Populate Table ; ×
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	Campaign Name	Post URL	III ETA	Approved	+	When record is updated (0)
1	Wifi 6 Technology	wiftech/writer.com	January 26, 2023			Table
2	Next Generation Firewall	nextfirewall/writer.com	January 29, 2023			Content Review ~
3	The Official Blog	blos/writer.com	January 30, 2023			Condition + Add Condition
4	Data Loss Protection	dataloss/writer.com	January 25, 2023			
5	Components of End point security	endpointsecurity/writer.com	January 27, 2023			Add Actions
6	Browser Protection - Webinar	browserwebinar/writer.com	January 28, 2023			
7	Type here to create a record					
+ 5 3						
6 Records					1	

Customize condition gif

Add the action

a) Click + Add action and choose the action "Create Record". Select the table "Completed" (where the new record will be created).

b) Click + Choose field

c) From the combo box, click the + icon to select the desired field value(s) that you want to populate into the "Completed" table we created. You can choose as many fields as you prefer.

Note: Ensure that you enable automation to complete the process.

See it in action

In the below GIF, you can see the list of approved contents created as new records in a separate table "Completed".

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	🕫 Campaign Name	@ Post URL	III ETA	Approved	+	When record is updated (0)
'	Wifi 6 Technology	wiftech/writer.com	January 26, 2023			Table
2	Next Generation Firewall	pextfrewall/writer.com	January 29, 2023			Content Review v
3	The Official Blog	blog/writer.com	January 30, 2023			Condition
						S Approved is v
*	Data Loss Protection	dataloss/writer.com	January 25, 2023			
5	Components of End point security	endpointsecurity/writer.com	January 27, 2023			+ Add Condition
6	Browser Protection - Webinar	browserwebinar/writer.com	January 28, 2023			Ļ
7	Type here to create a record					Add Actions
+ 5 3						
6 Records						

GIF - Showing Action & Automation output

FAQ

1. When a record is created on a new table, how do we ensure that all the fields from the previous table are also inserted?

Ans. While adding the action, under the section fields ensure you insert each field from the original table. You can select as many desired fields by clicking the +icon from the combo box.

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Post	Details Content Review -	Completed 🛨			🕲 Log 🛛 😂 Auto	mation	< Populate Table :	ACTIVE	×
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	T Campaign Name		I ETA	C Approved	+		When record is update	ed	>
1	Wifi 6 Technology	wifitech/writer.com	January 26, 2023	~					
2	Next Generation Firewall	nextfirewall/writer.com	January 29, 2023	~			C Action		
3	The Official Blog	blog/writer.com	January 30, 2023	~			Create record		(1)
							Table		
4	Data Loss Protection	dataloss/writer.com	January 25, 2023				Completed		*
5	Components of End point security	endpointsecurity/writer.com	January 27, 2023				Fields		
6	Browser Protection - Webinar	browserwebinar/writer.com	January 28, 2023				(r) Campaign Name		
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7	Type here to create a record						I ETA		
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							+ Choose field		
							(+)		
6 Records									

There could be instances where the field names between tables may not exactly be the same, so make sure to

double-check if you're mapping the right field names together.

c) Update record

This action allows you to update the existing records in your base when the trigger event occurs.

In the below example, as part of our job delegation process, we want to update the department manager's name based on the assignee's job type.

Choose a trigger

Select the table "All Departments" and choose the trigger, "When record is updated".

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∃ Viev	vs + 🔛 Viev	w1 :		1	Sort 💎 Filter 🌐	Record Height 🕒 Color		5 0	B Manage fields	+ Add Record	D
	35 Employee ID	IC Employee Name	Joining Date	# Years of Experience	③ Job Type	Manager	+				
1	11001	Justin James	February 16, 2010	13	• Intern	Hazen					
2	11002	Railey Victor	June 11, 2019	6	Intern	• Hazen					
3	11003	Eva Helms	October 26, 2020	1	Intern	Hazen					
4	11004	Philip Krum	August 23, 2017	1	Backend Development	Lawrence					
5	11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence					
6	11006	Karen Emmanuel	April 23, 2022	1	• Intern	Hazen					
7	Type here to create	a record					*				
+ 5											
6 Records											

Choose a trigger gif

Customize the condition

Click on "+Add Condition" and set the condition as *Job Type is any of Marketing Lead/Product Marketer/Content Writer/ Product Marketing Associate.*

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All	Departments -	Marketing Prod	uct Design Develo	pment 🚼			ⓒ Log ○ Automation	< Assign Manager :	×
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	3 Employee ID	C Employee Name	Joining Date	# Years of Experience	Iob Type	Manager	+	When record is updated (0)	
1	11001	Justin James	February 16, 2010	13	Intern	 Hazen 		Table	
2	11002	Ralley Victor	June 11, 2019	6	• Intern	• Hazen		All Departments v	
3	11003	Eva Helms	October 26, 2020	1	• Intern	• Hazen		Condition + Add Condition	
4	11004	Philip Krum	August 23, 2017	1	 Backend Development 	Lawrence			
5	11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence		Add Actions	
6	11006	Karen Emmanuel	April 23, 2022	1	• Intern	Hazen			
7	Type here to create	a record							
+ 5	8								
6 Records									

Customize the condition gif

Add the action

a) Click + **Add Actions** and choose the action "Update record". Select the table "All Departments" where you want to update the record.

In this case we use the same table for both trigger and action.

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\equiv	iews + 🛅 Vie	w1 :	15 Sort	🖓 Filter 🌐 Recor	d Height 🔄 Color	5 0 6	Manage fields + Add Record	Trigger	
	🗵 Employee ID	3 Employee Name	I Joining Date	# Years of Experience	⊗ Job Type	Manager	+	When record is updated (0)	
1	11001	Justin James	February 16, 2010	13	 Intern 	Hazen		Table	
2	11002	Ralley Victor	June 11, 2019	6	Intern	Hazen		All Departments v	
3	11003	Eva Helms	October 26, 2020	1	• Intern	Hazen		Condition	
								⊗ Job Type v is any of v	
4	11004	Philip Krum	August 23, 2017	1	 Backend Development 	Lawrence		Marketing Lead Product Marke. *	
5	11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence		+ Add Condition	
6	11006	Karen Emmanuel	April 23, 2022	1	• Intern	• Hazen			
7	Type here to create	a record						Add Actions	
+ 5	8								
6 Recor	ds								

Add the action gif

b) Now **update your record condition** to filter out the exact *Record* you would like to change from the list of records available.

In this case, to update a record with the trigger step, repeat the same condition. click + Add Condition and choose *Job Type is any of Marketing Lead/Product Marketer/Content Writer/ Product Marketing Associate.*

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All	Departments -	Marketing Prod	uct Design Develo	opment 🕕			O Log ⊙ Automation	< Assign Manager ; ×
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1	7: Employee ID	C Employee Name Justin James	Joining Date February 16, 2010	# Years of Experience 13	 Job Type Intern 	Manager Hazen	+	When record is updated Table - All Departments
3	11002	Eva Helms	October 26, 2020	1	 Intern 	Hazen		Update record (6)
4	11004	Philip Krum Elizabeth Jane	August 23, 2017 August 19, 2013	1	Backend Development UX Designer	Lawrence Lawrence		All Departments v Condition
6	11006	Karen Emmanuel	April 23, 2022	1	• Intern	• Hazen		+ Add Congition Fields
7	Type here to create	e record						+ Choose field
6 Records							-	

GIF showing record condition

c) Now choose the field that needs to be updated. Click + **Choose field**, and select the field "Manager". Then, choose the value with which the field must be updated. In the below example, we have selected the manager "Olivia" from the dropdown menu.

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All	Departments -	Marketing Produ	uct Design Develo	pment 🛨			O Log ○ Automation	< Assign Manager !	×
ΞVie	ws + 🔛 Vier	w1 :	14 Sort	V Filter 🛞 Recon	d Height 🔄 Color	5 0 8	Manage fields + Add Record	∲ Trigger	
0	C Employee ID	C Employee Name	Joining Date	# Years of Experience	Sob Type	Manager	+	When record is updated Table - All Departments	>
	11001	Justin James	February 16, 2010	13	· Incerts	 Pazen 			
2	11002	Railey Victor	June 11, 2019	6	 Intern 	 Hazen 		8 Action	
з	11003	Eva Helms	October 26, 2020	1	Intern	Hazen		O Update record	۲
4	11004	Philip Krum	August 23, 2017	1	Backend Development	Lawrence		Table	
						(C. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.		Ail Departments	*
5	11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence		lish Tursan ya kamu of	
6	11006	Karen Emmanuel	April 23, 2022	1	• Intern	Hazen		Marketing Lead Product Marke. *	0
7	Type here to create	a record						+ Add Condition	
+ 5								Fields	
								+ Choose field	
								۲	
6 Records								Ready to active your Automation?	wate

GIF showing choose field and value

Note: Ensure that you enable automation to complete the process.

See it in action

In the below GIF, you can see the department manager's name being updated based on the assignee's job type.

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	All Departments 🕞	Marketing Prod	uct Design Develo	pment 🚼			C Log O Automation	< Assign Manager :
\equiv	views + 🛅 Vie	nw1 i	11 Sort	🖓 Filter 🛞 Recor	d Height 🔄 Color	5 C B	Manage fields + Add Record	∲ Trigger
	😤 Employee ID	$\stackrel{\scriptstyle (2)}{\scriptstyle \sim}$ Employee Name	Joining Date	# Years of Experience	Iob Type	③ Manager	•	Solution Content in the second
1	11001	Justin James	February 16, 2010	13	Intern	Hazen		
2	11002	Railey Victor	June 11, 2019	6	Intern	Hazen		8 Action
3	11003	Eva Helms	October 26, 2020	1	Intern	Hazen		S Update record
								Table
4	11004	Philip Krum	August 23, 2017	1	 Backend Development 	 Lawrence 		All Departments v
5	11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence		Condition
6	11006	Karen Emmanuel	April 23, 2022	1	Intern	Hazen		Solution of Solut
7	Turne here to create	a meneri						Marketing Lead Product Market
	Type more to concern							+ Add Condition
+ 5	1							Fields
								Manager
								+ Choose field
6 Record	rds							Ready to active your Automation?

The above GIF showing the automation output gif

FAQs

1. Can multiple records and fields be updated using the update record action?

Ans. Yes, you can update multiple records and fields in one go using the update record action.