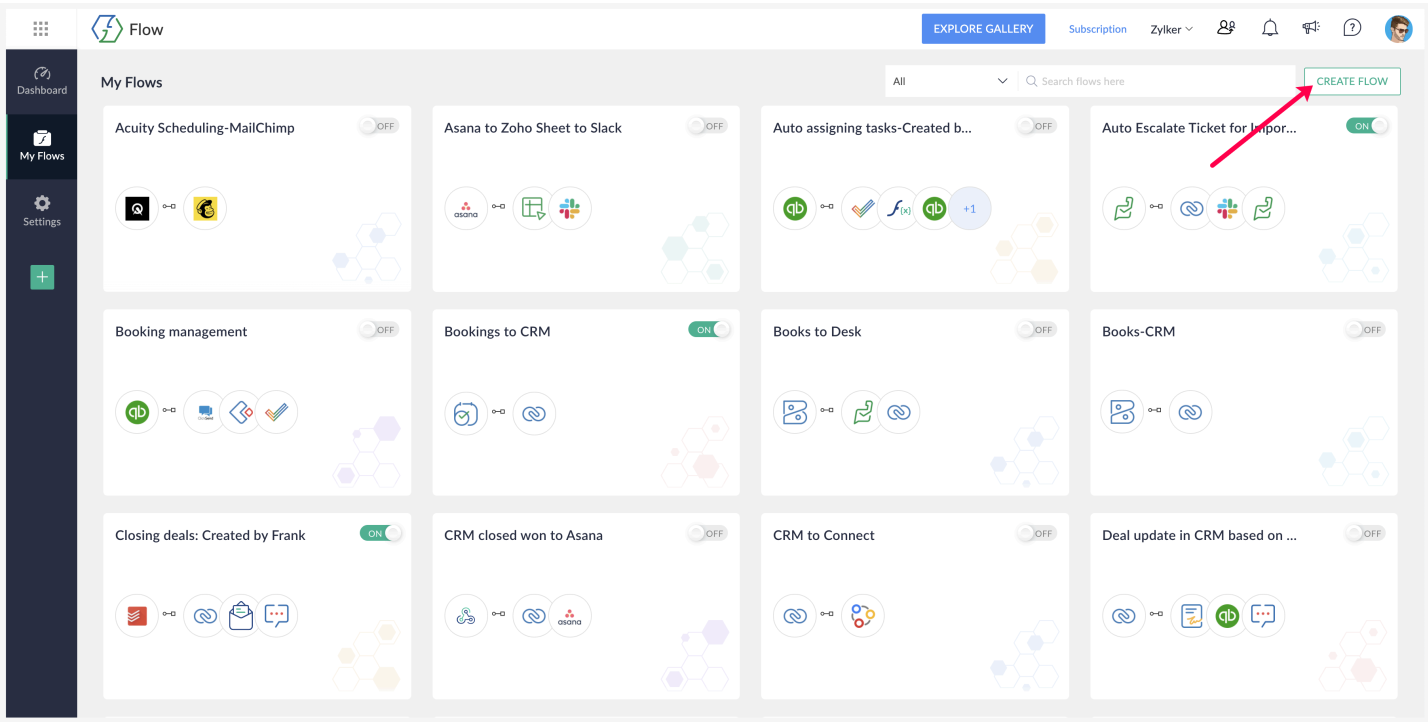
Create a flow from scratch

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

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



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. Configure its trigger

2. Add actions

3. Save the flow

4. Test and debug the flow

5. Switch on the flow

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:

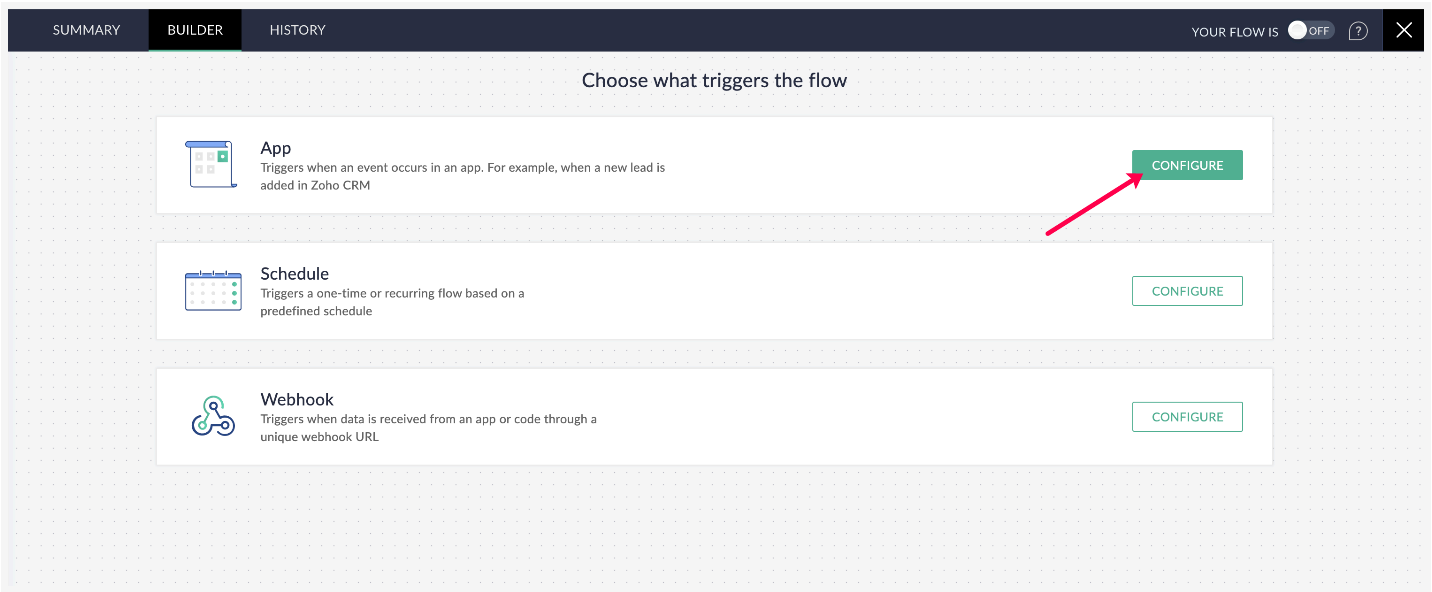
> **App Trigger**: Triggers when an event occurs in an **app**.
>
> **Schedule Trigger**: Triggers a one-time or recurring flow, on your customized schedule.
>
> **Webhook Trigger**: The Webhook trigger lets you push data from third-party applications (that support configurable webhooks) to Flow.

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:

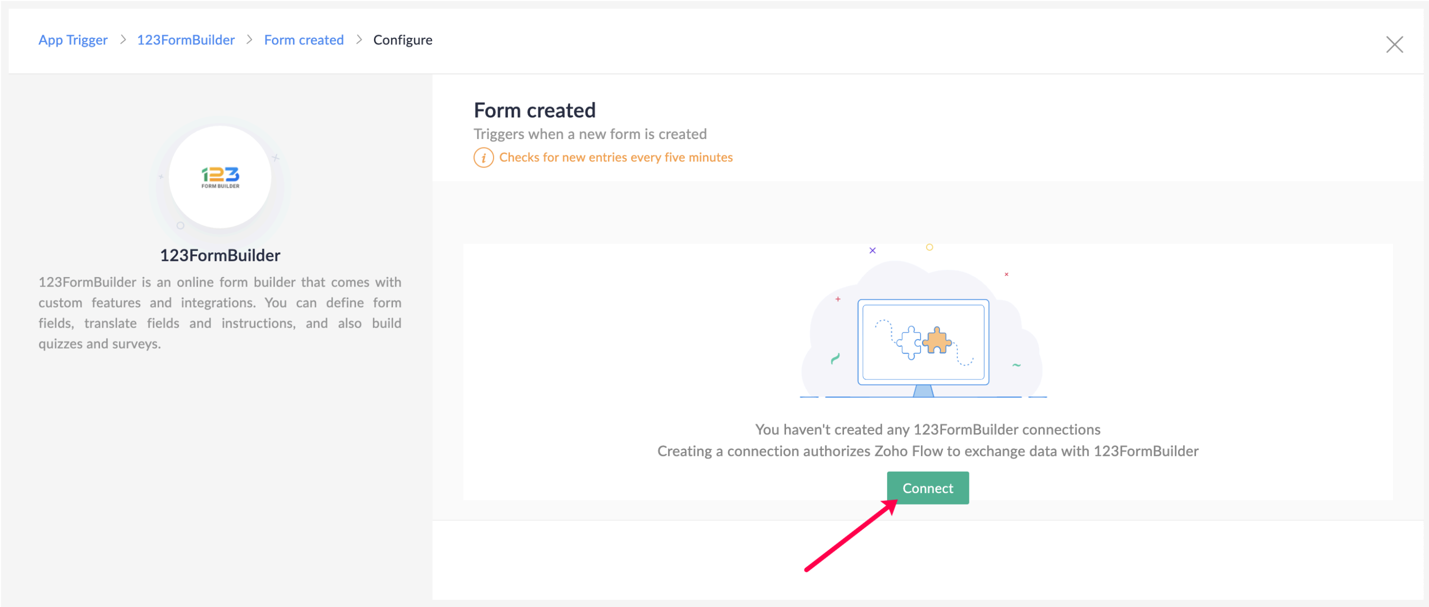
1. Click **Configure** in the *App trigger* box.



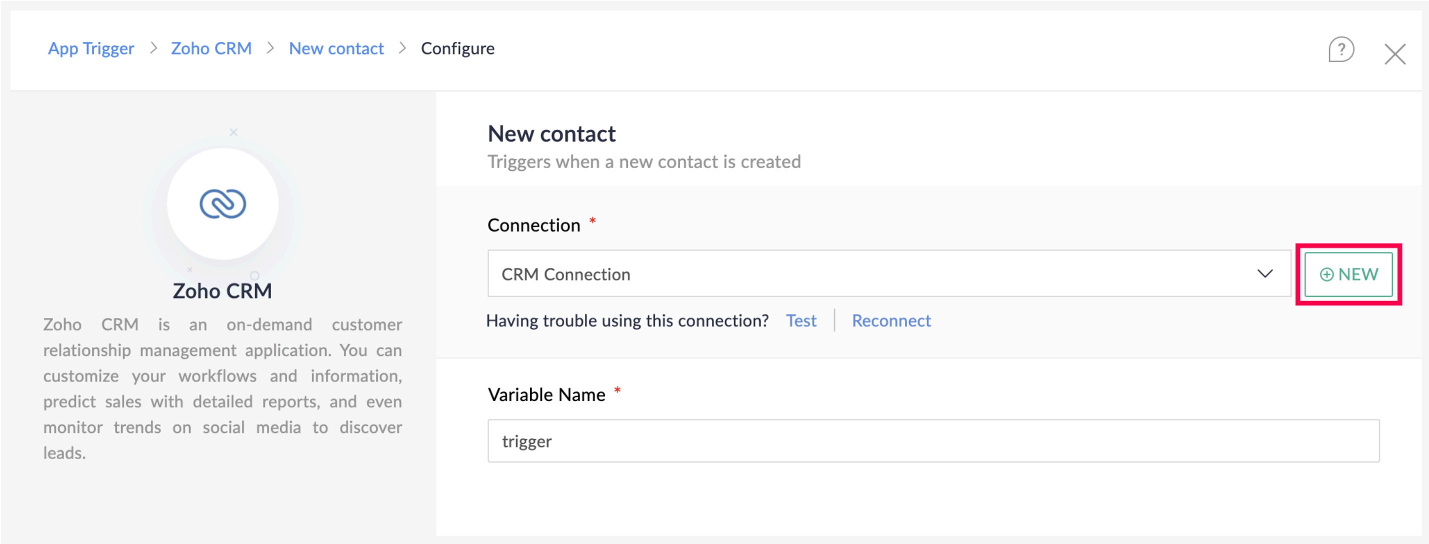
2. Pick an app to trigger your flow and click **Next**.

3. Choose the event in the app to trigger your flow and click **Next**.

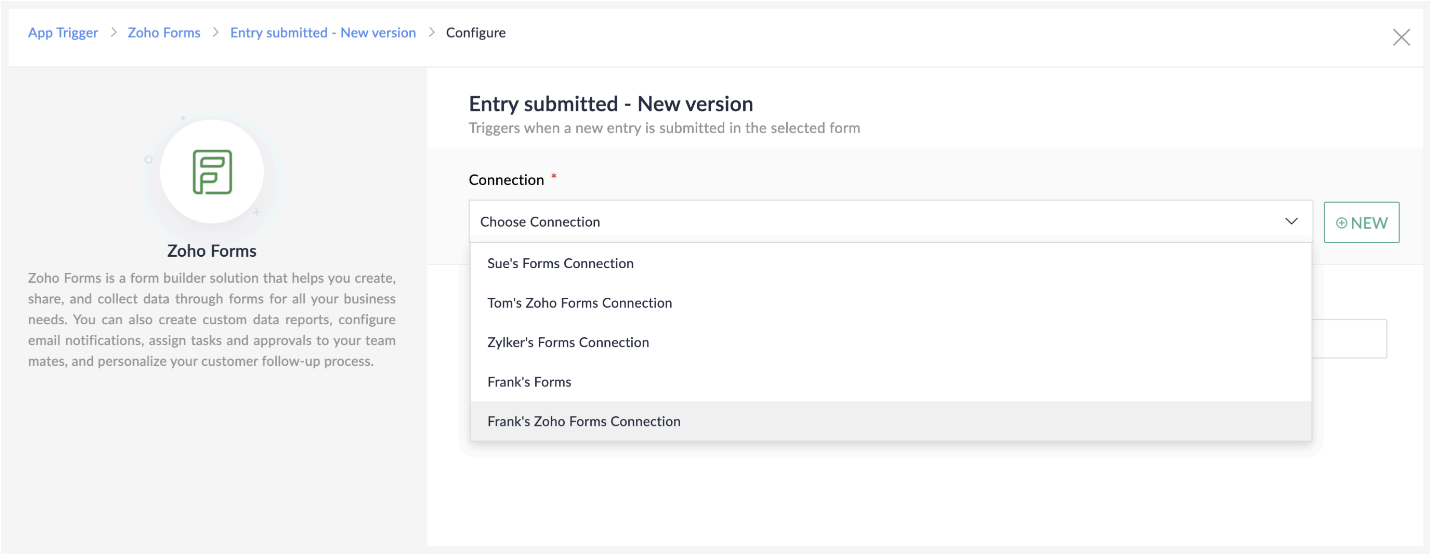
4. If you have not created any connections already, click **Connect**.



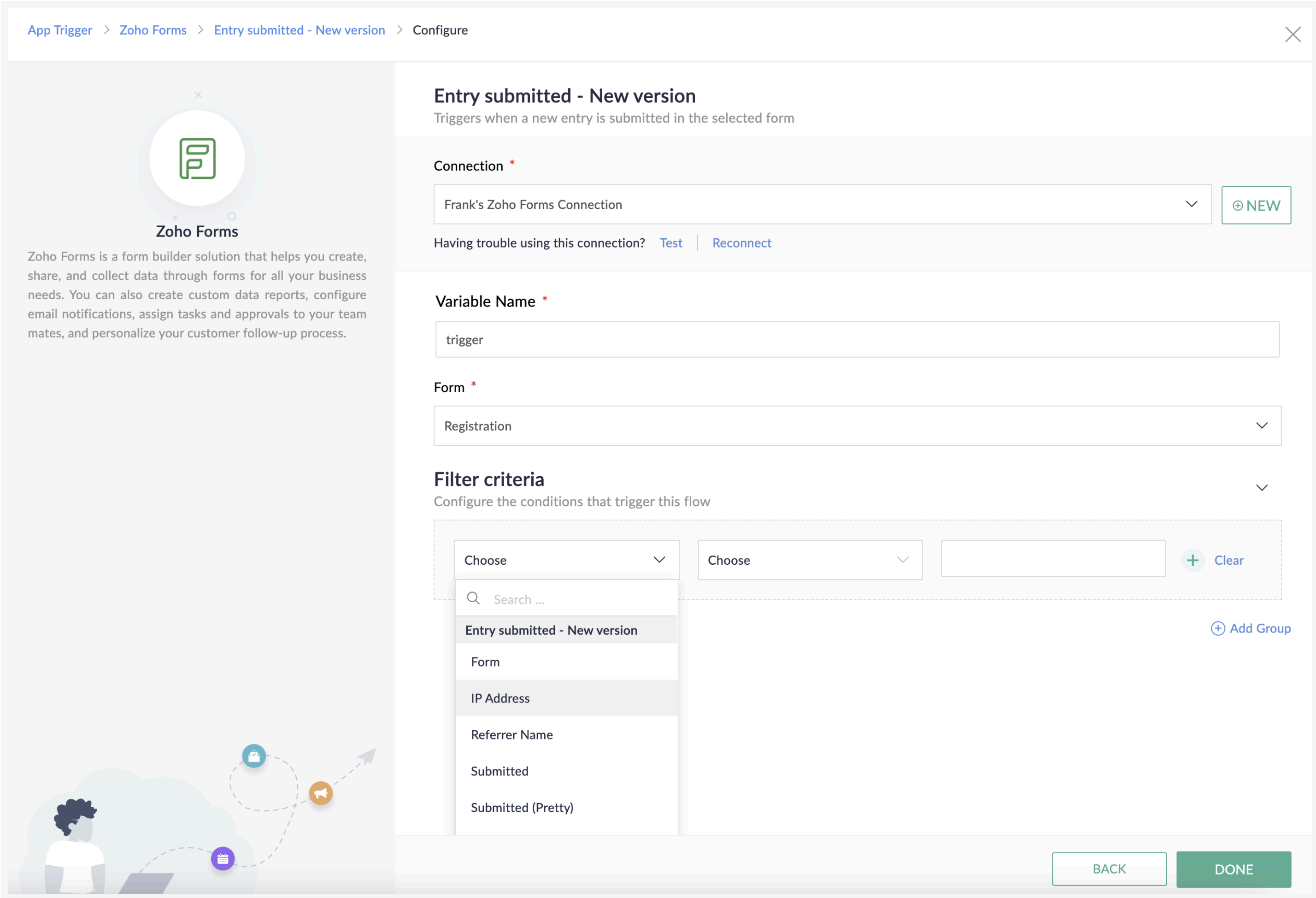
If there are existing connections, you can choose to create a new one by clicking **New connection**. Once you create a connection, it can be used for various flows in your organization. Note that different apps have different authentication methods.



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



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.



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:

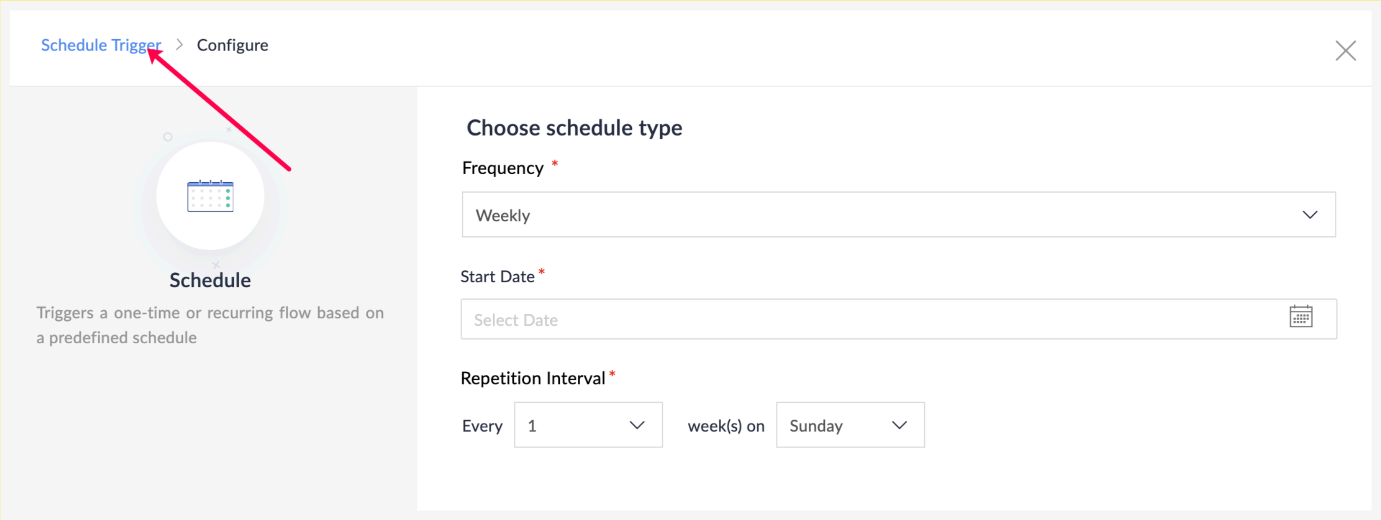
Schedule trigger

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. How to configure

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. [How to configure]

Note: Once configured, you can change the triggers but can't delete them unless you delete the flow. You can reconfigure a trigger by clicking the **edit** icon. Click the trigger type to change it.



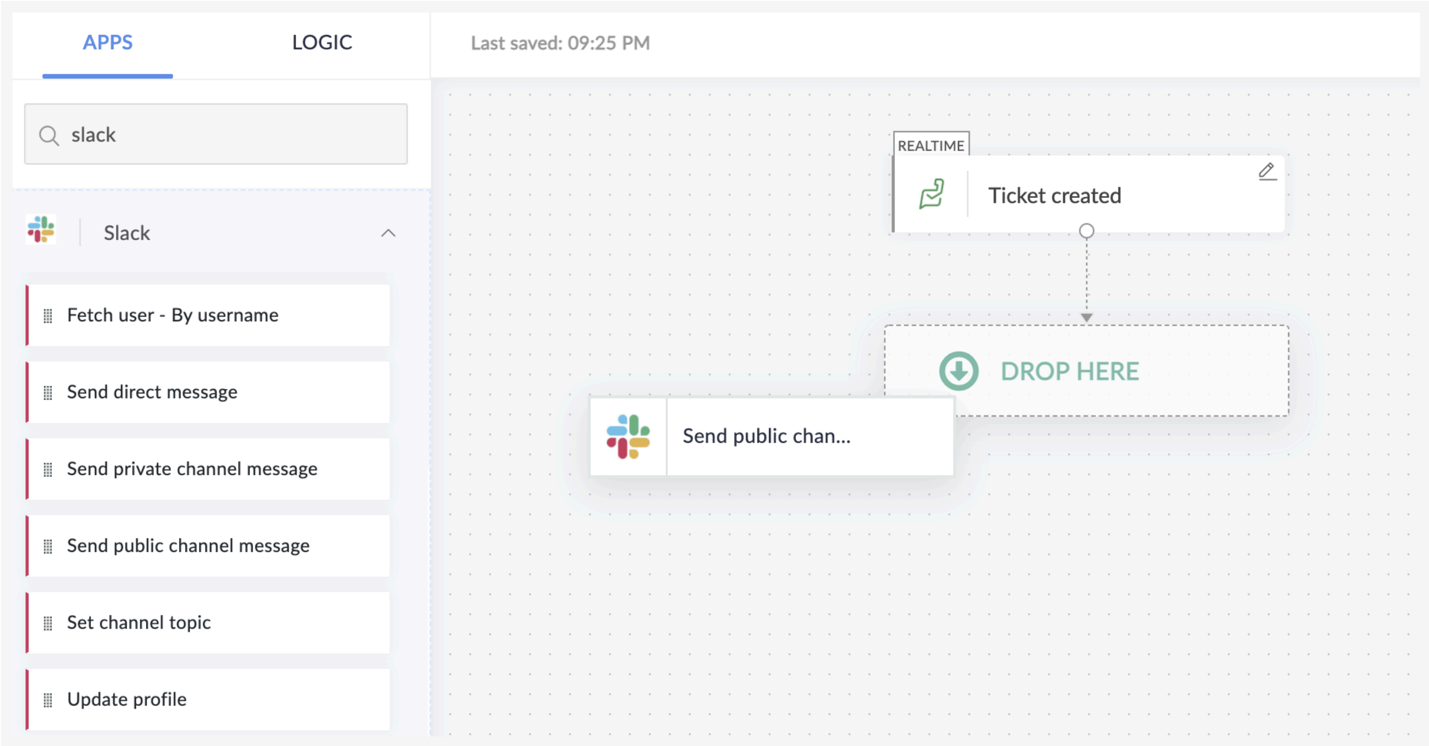
Add Action

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.

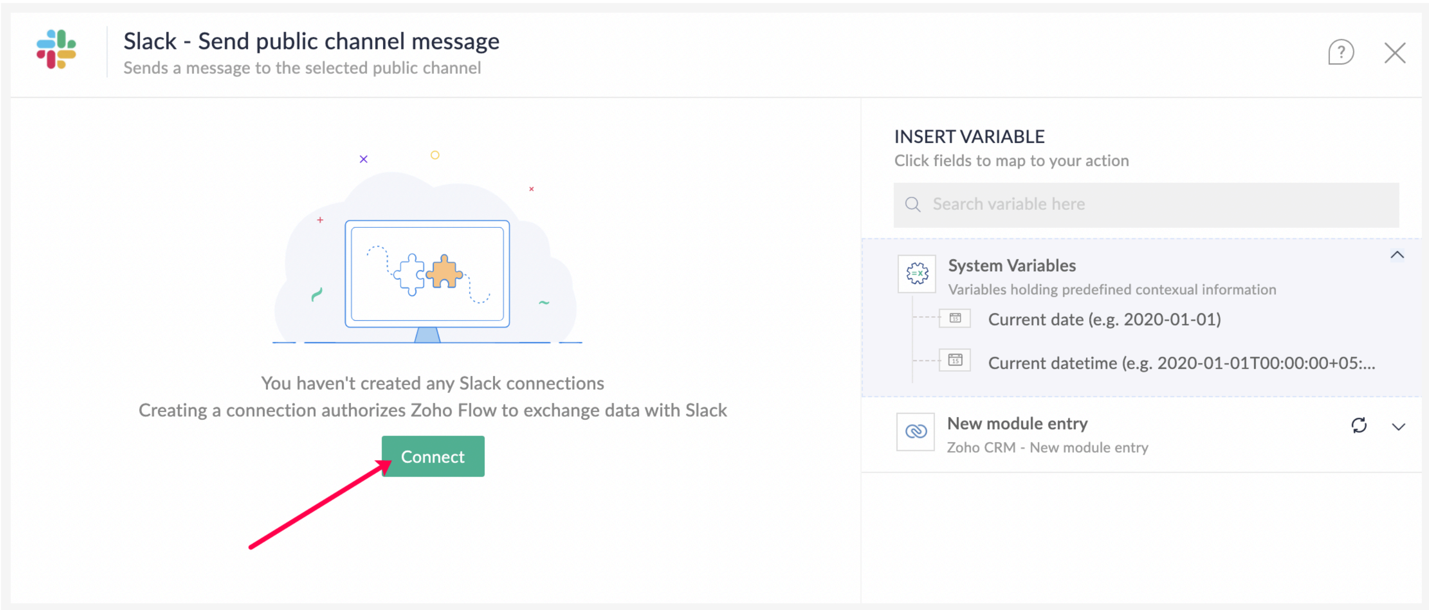
App-based actions

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

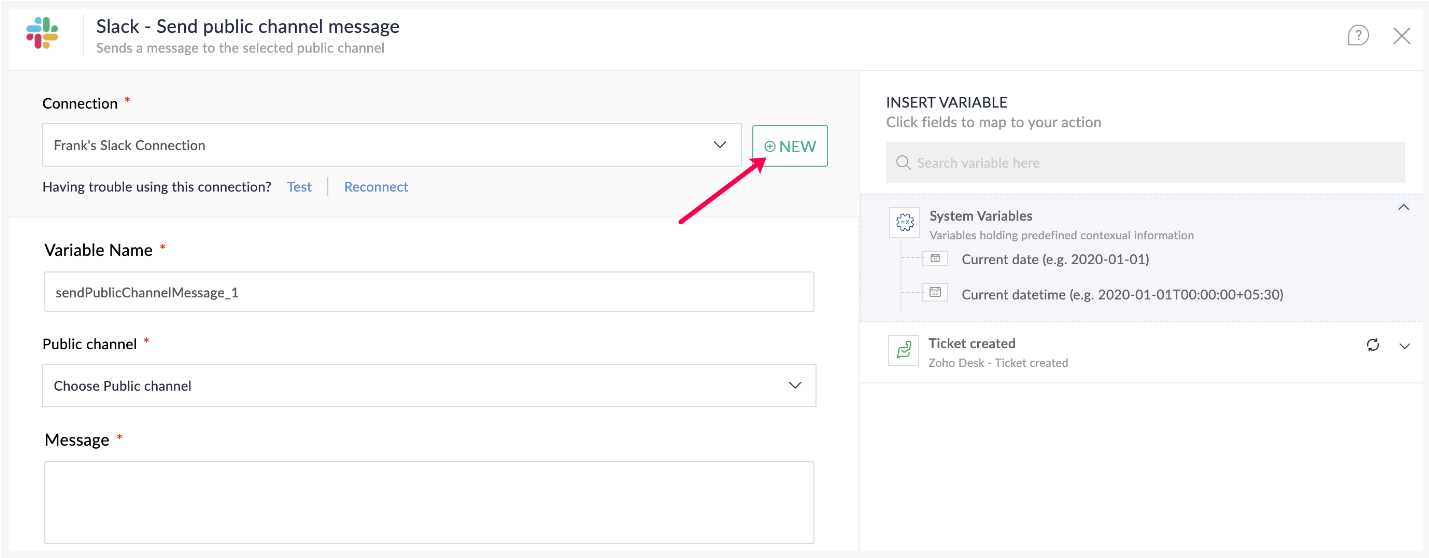
1. Click each app on the left of the builder to view the actions available. Drag the required action to the builder, and an indication to drop will appear.



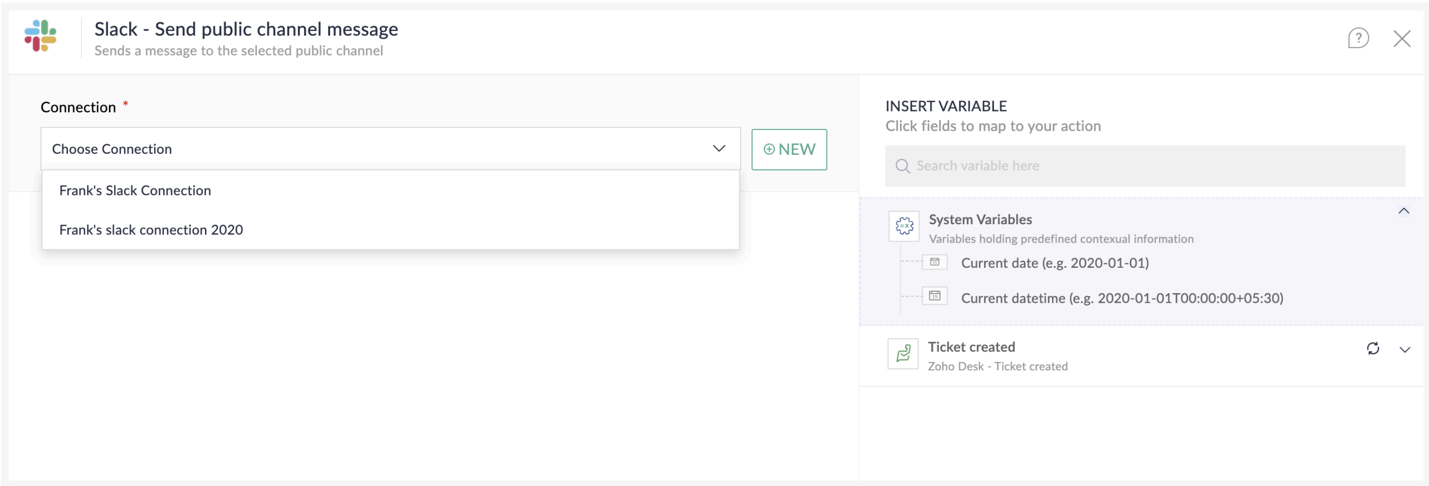
2. In the configuration window that opens, click **Connect** if you have no existing connections.



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.



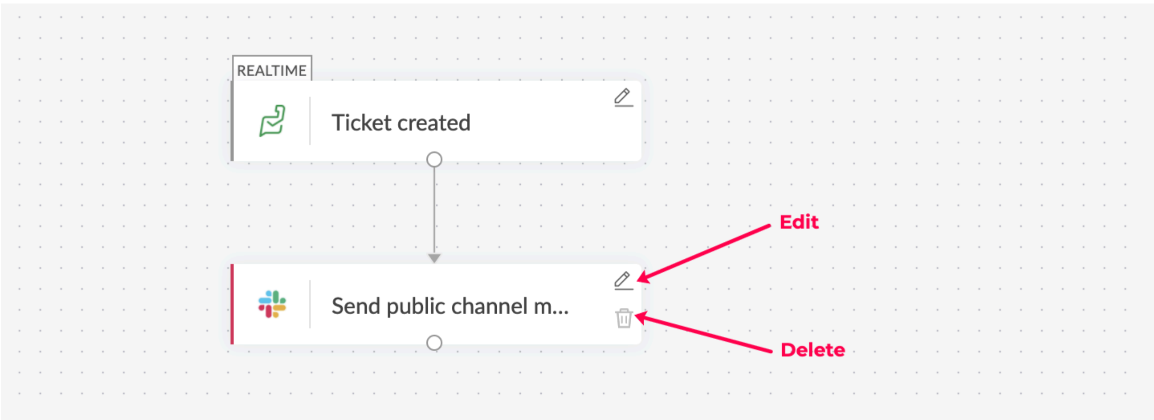
If you would like to choose an existing connection, pick from the dropdown.



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]

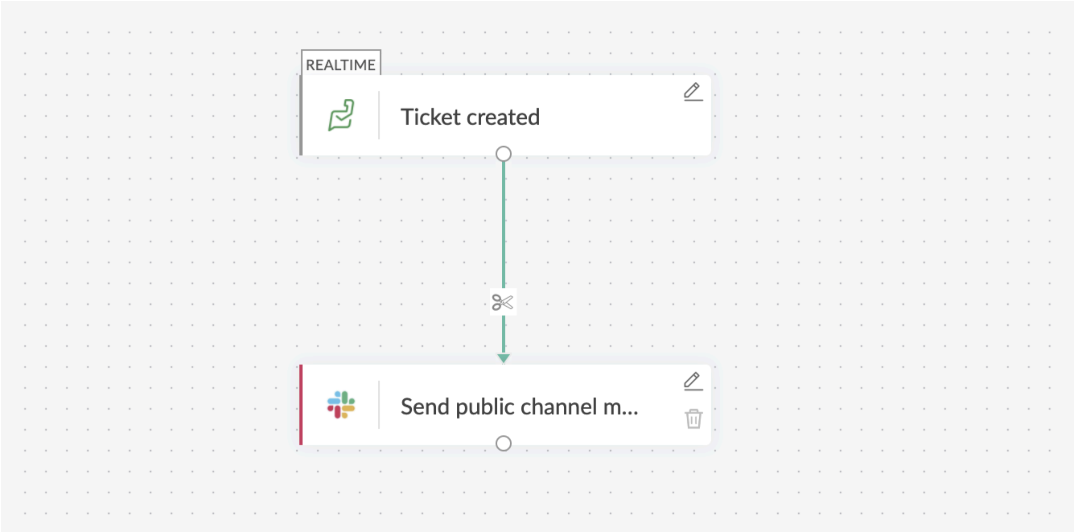
4. Click **Done**.

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



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.



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. [Learn more](#)

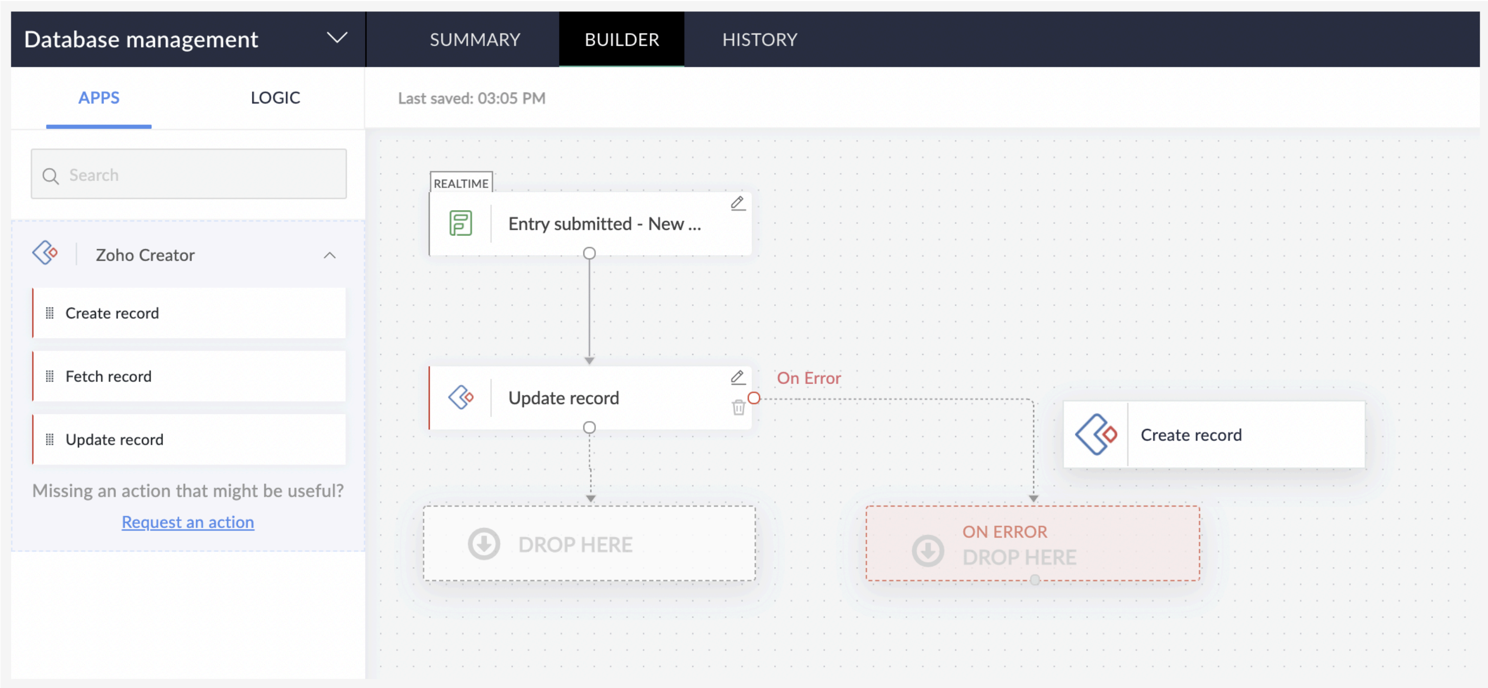
Note:

- If you edit a trigger or action, modify the [mapped data](#) 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**.

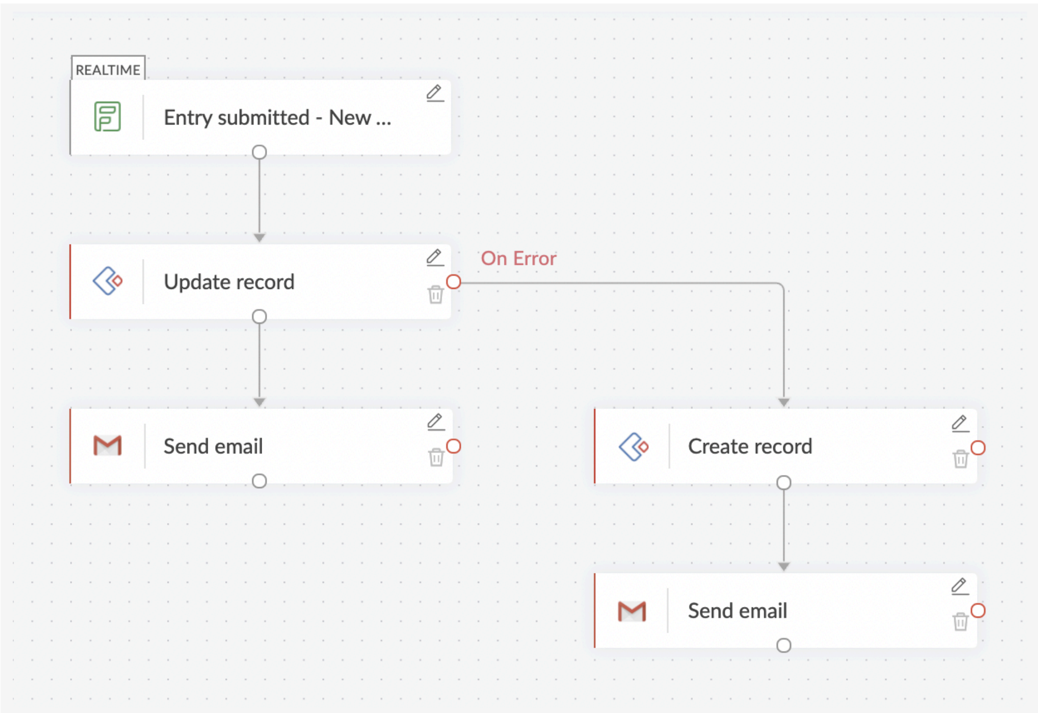
Add Actions to an Error Branch

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.



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.



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.

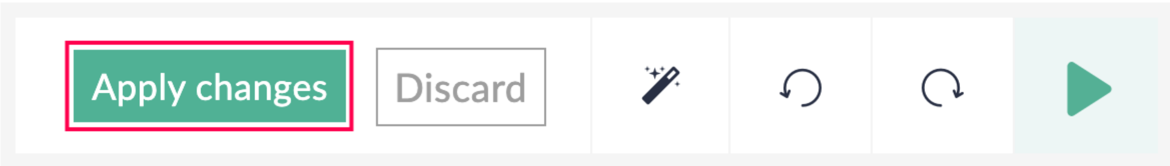
Note:

- 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.

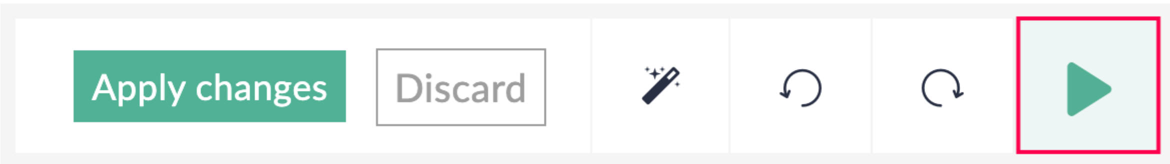
You won't be able to save your flow if your flow has no actions, or if an action or trigger is not configured completely.



Test and debug

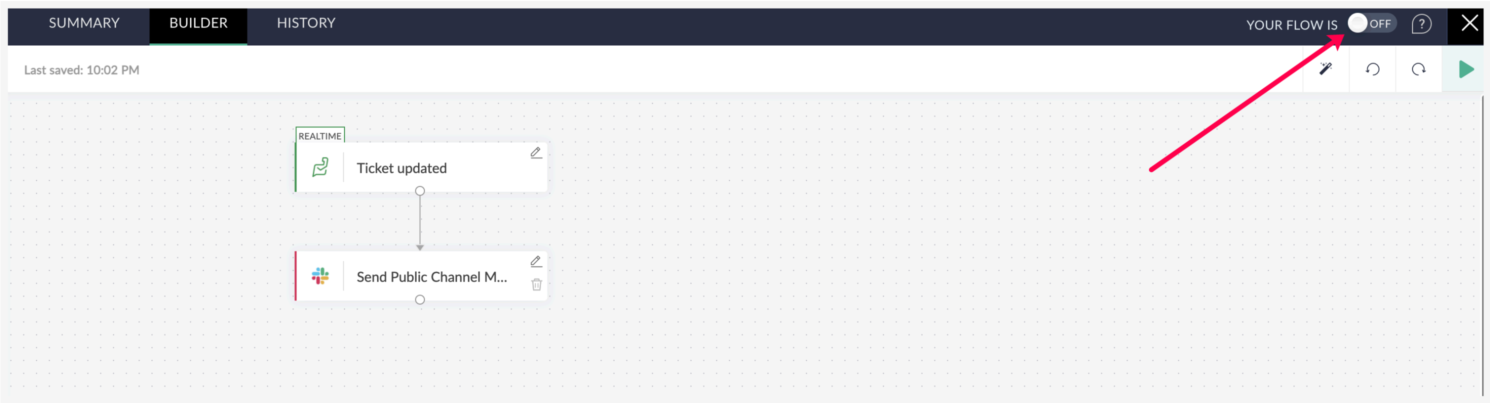
Testing and debugging your flow ensures that it is error-free. This is an optional step to check if the flow is working correctly.

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
Last saved: 10:02 PM
REALTIME
Ticket updated
Send Public Channel M...