Zoho Corporation

Zoho Bigin

What is Zoho Bigin?

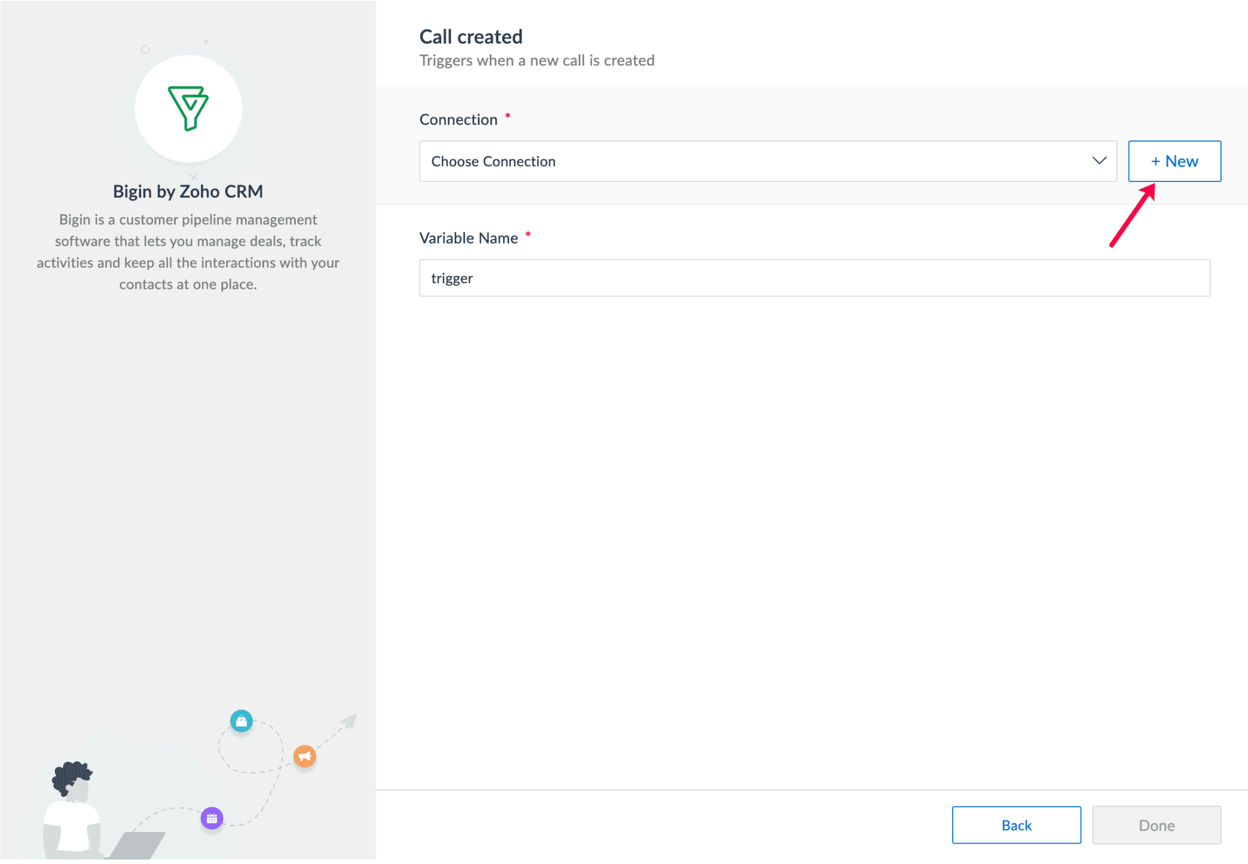
Zoho Bigin is a simple CRM (Customer Relationship Management) tool designed for small businesses. It helps manage contacts, track business data, and automate tasks in an easy-to-use interface.

Integrating Zoho Flow with Zoho Bigin allows users to automate tasks between applications, such as creating or updating CRM records, saving time and reducing manual effort.

Let's imagine you own a business that uses Zoho Bigin for managing calls and Google Sheets for tracking them. With Zoho Flow, you can automate the process where every time a new call is created in Zoho Bigin, it automatically updates the corresponding row in a Google Sheets document. This helps your data remain up-to-date, reduce errors, and grow your business.

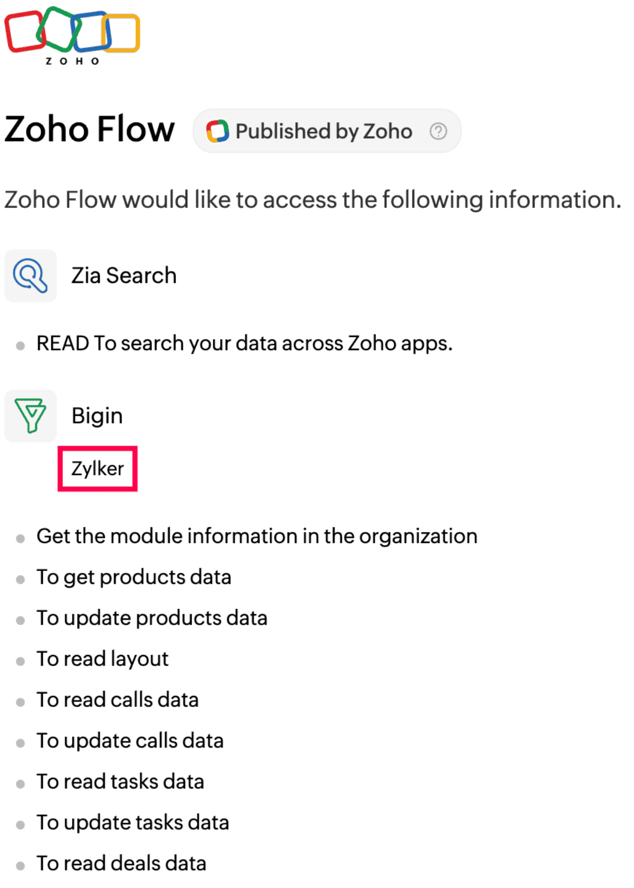
How to connect your Zoho Bigin account to Zoho Flow

1. Select the required trigger or action. When you select a trigger, click **Next**.
2. Select an existing connection from the dropdown, and click **Done.** Otherwise, click **+New.**
   Alternatively, you can create a new connection by navigating to **Settings**, then **Connections**. Click **Create Connection** and choose **Bigin by Zoho CRM**.



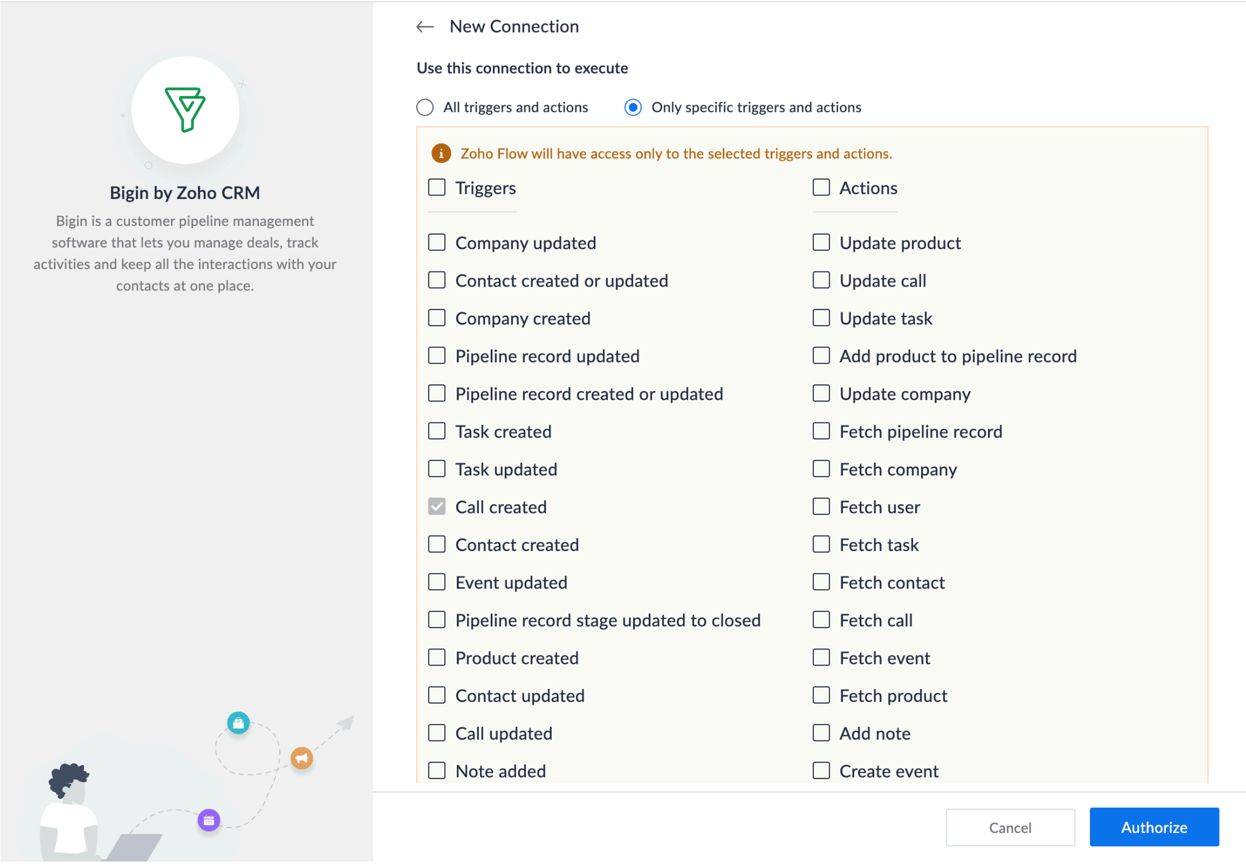
3. Enter a **Connection name**, choose an option to either include all triggers and actions or only specific triggers and actions, and click **Authorize**.

4. If you choose to include all triggers and actions, you'll see all the data points that will be authorized for access. Click **Accept.**



Note: When creating a connection, you'll need to select one organization if you have multiple organizations. All triggers and actions will apply only to the selected organization. If you need to work with multiple organizations, we recommend creating separate connections for each one.

5. Else if you choose to include only specific triggers and actions, you can select the ones you want to scope while excluding others. This defines the extent of Zoho Flow's access to the connected application. Click **Authorize.** You'll then be redirected to the configuration page. Click **Accept.**



6. Click **Done.**

API documentation

If you experience any Zoho CRM-related errors in your flows or if you wish to learn more about the Zoho CRM API, the API documentation can be found here.

Learn how to fix app-specific errors using API documentation

Triggers and actions available in Zoho Flow

Triggers

Specific to Contacts

Contact created - Use this trigger to send a reminder to follow up with the customer and add the contact to your CRM.

Contact created or updated - Use this trigger to send a welcome email when a new contact is created.

Contact updated - Use this trigger to update your contact list in a messaging app like Slack.

Specific to Company

Company created - Use this trigger to send a welcome email with company details like name and address.

Company updated - Use this trigger to update the company's information in Zoho CRM.

Specific to Pipeline

Pipeline record created - Use this trigger to send a follow-up reminder to the team when a new pipeline record is created.

Pipeline record created or updated - Use this trigger to update the record in the project management system.

Pipeline record probability updated - Use this trigger to adjust follow-up tasks based on the updated probability.

Pipeline record stage updated to closed - Use this trigger to update the team members when an existing pipeline record stage is updated to closed.

Pipeline record updated - Use this trigger to notify the sales team when the details of an existing pipeline record are updated.

Specific to Product

Product created - Use this trigger to notify the inventory management team via a messaging channel when a new product is created.

Product updated - Use this trigger to notify the sales team when any detail of an existing product is updated.

Specific to Activities

Calls:

Call created - Use this trigger to notify a team member when a new call is created.

Call updated - Use this trigger to send an email when any detail of an existing call is updated.

Events:

Event created - Use this trigger to send notifications to the team via Zoho Cliq/any messaging app when a new event is created.

Event updated - Use this trigger to alert the team members when any detail of an existing event is updated.

Task:

Task created - Use this trigger to send an email to the team member when a new task is created.

Task updated - Use this trigger to notify the task owner when any detail of an existing task is updated.

Specific to User

User added - Use this trigger to send an alert when a new user is added.

Other triggers

Note added - Use this trigger to notify the team member when a new note is added to a record, ensuring important updates are communicated immediately.

Actions

Specific to Contacts

Create or update contact - Use this action to create a new contact or update the details of an existing contact.

Fetch contact - Use this action to fetch the details of an existing contact by email address, name, or ID.

Update contact - Use this action to update the details of an existing contact.

Specific to Company

Create or update company - Use this action to create a new company or update the details of the company if it already exists.

Fetch company - Use this action to fetch the details of an existing company by name or ID.

Update company - Use this action to update the details of an existing company.

Specific to Pipeline

Add product to pipeline record - Use this action to add a product to the selected pipeline record.

Create or update pipeline record - Use this action to create a new pipeline record or update the details of the pipeline record if it already exists.

Fetch pipeline record - Use this action to fetch the details of an existing pipeline record by its name or ID.

Update pipeline record - Use this action to update the details of an existing pipeline record.

Specific to Product

Create or update product - Use this action to create a new product or update the details of an existing product.

Fetch product - Use this action to fetch the details of an existing product by ID, name, or code.

Update product - Use this action to update the details of an existing product.

Specific to Activities

Calls:

Create call - Use this action to create a new call.

Fetch call - Use this action to fetch the details of an existing call by its ID or the contact ID.

Update call - Use this action to update the details of an existing call.

Events:

Create event - Use this action to create a new event.

Fetch event - Use this action to fetch the details of an existing event by title or ID.

Update event - Use this action to update the details of an existing event.

Task:

Create task - Use this action to create a new task.

Fetch task - Use this action to fetch the details of an existing task by name or ID.

Update task - Use this action to update the details of an existing task.

Specific to User

Create user - Use this action to create a new user.

Fetch user - Use this action to fetch the details of an existing user by email address or user ID.

Update user - Use this action to update the existing user.

Other actions

Add note - Use this action to add a note to the selected module.

Send email - Use this action to send an email to the specified contact.

Add tag to record - Use this action to add a tag to the specified record.

Create tag - Use this action to create a new tag in the selected module.

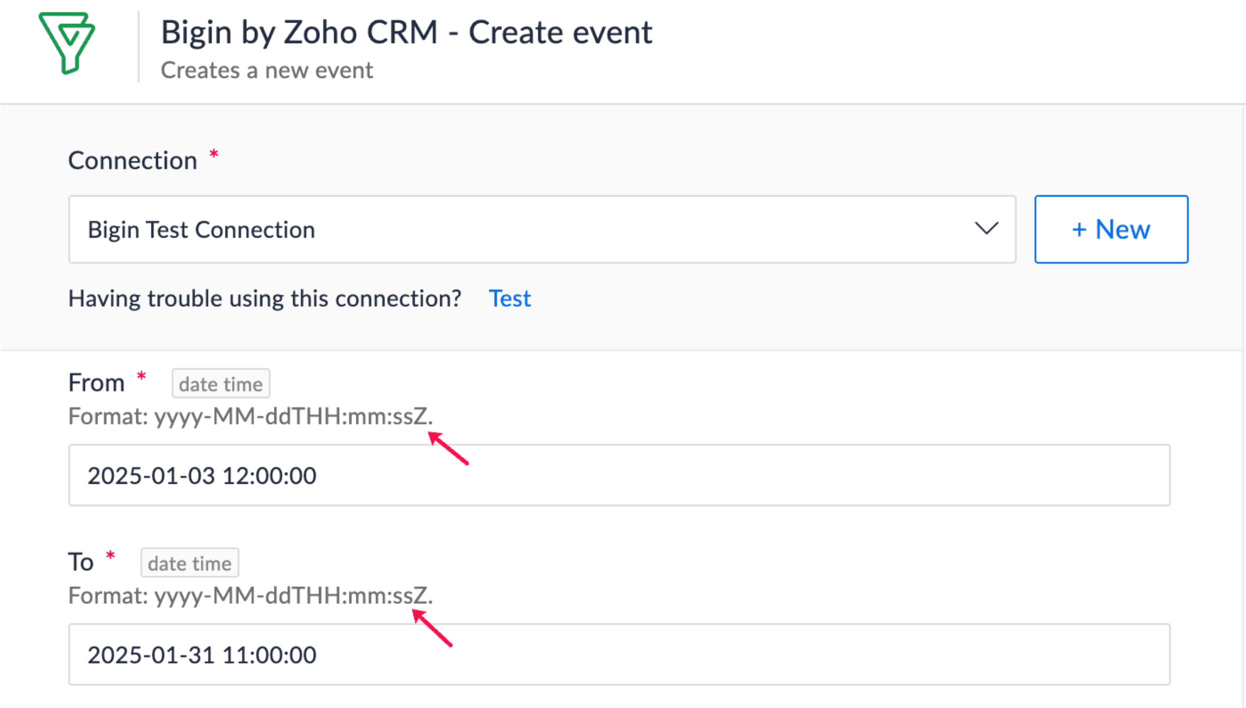
Remove tag from record - Use this action to remove an existing tag from the specified record.

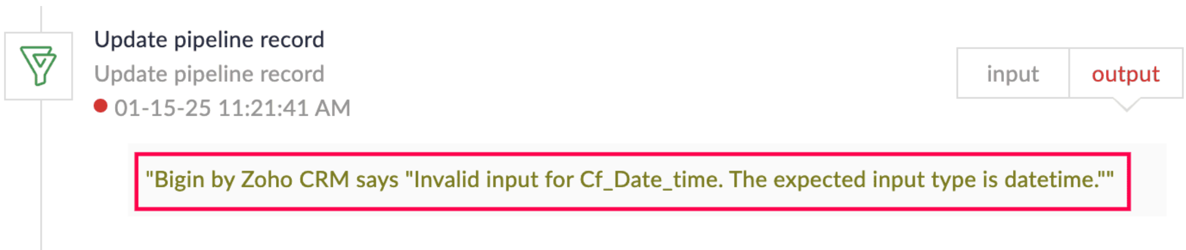
Troubleshooting tips and tricks

1. **How to configure date time fields in Zoho Bigin?**

   Ensure that any field with the ***date time*** input type follows the format ***yyyy-MM-dd'T'HH:mm:ss'Z'***. You can use the following [custom function] to convert the date fields into the required format for Zoho Bigin.

```
string dateformat(string dateStr, string inputFormat, string outputFormat)
{
myDate = dateStr.toTime(inputFormat);
return myDate.tostring(outputFormat);
}
```



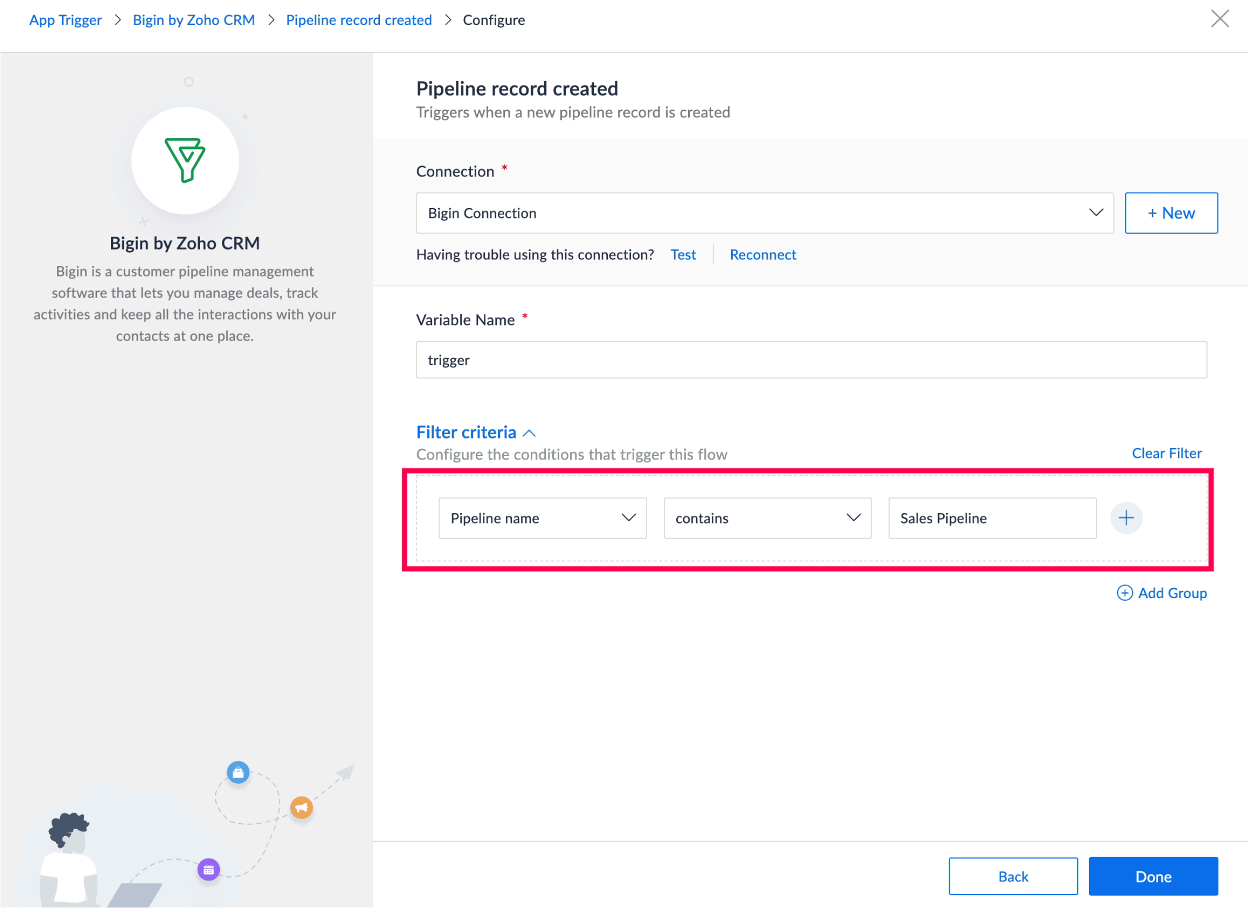


   Here *Cf_Date_time* is the field name.

2. **How does the pipeline-related trigger work?**

When using pipeline-related trigger, the trigger will be activated for all pipelines within your Zoho Bigin account, not just a specific pipeline.

For example, if you use a ***Pipeline record created*** trigger in your workflow, the trigger will fire whenever a record is created in any pipeline, not just a particular one. However, if you wish to use the trigger for a specific pipeline, you'll need to add the filter conditions in the trigger filter criteria.

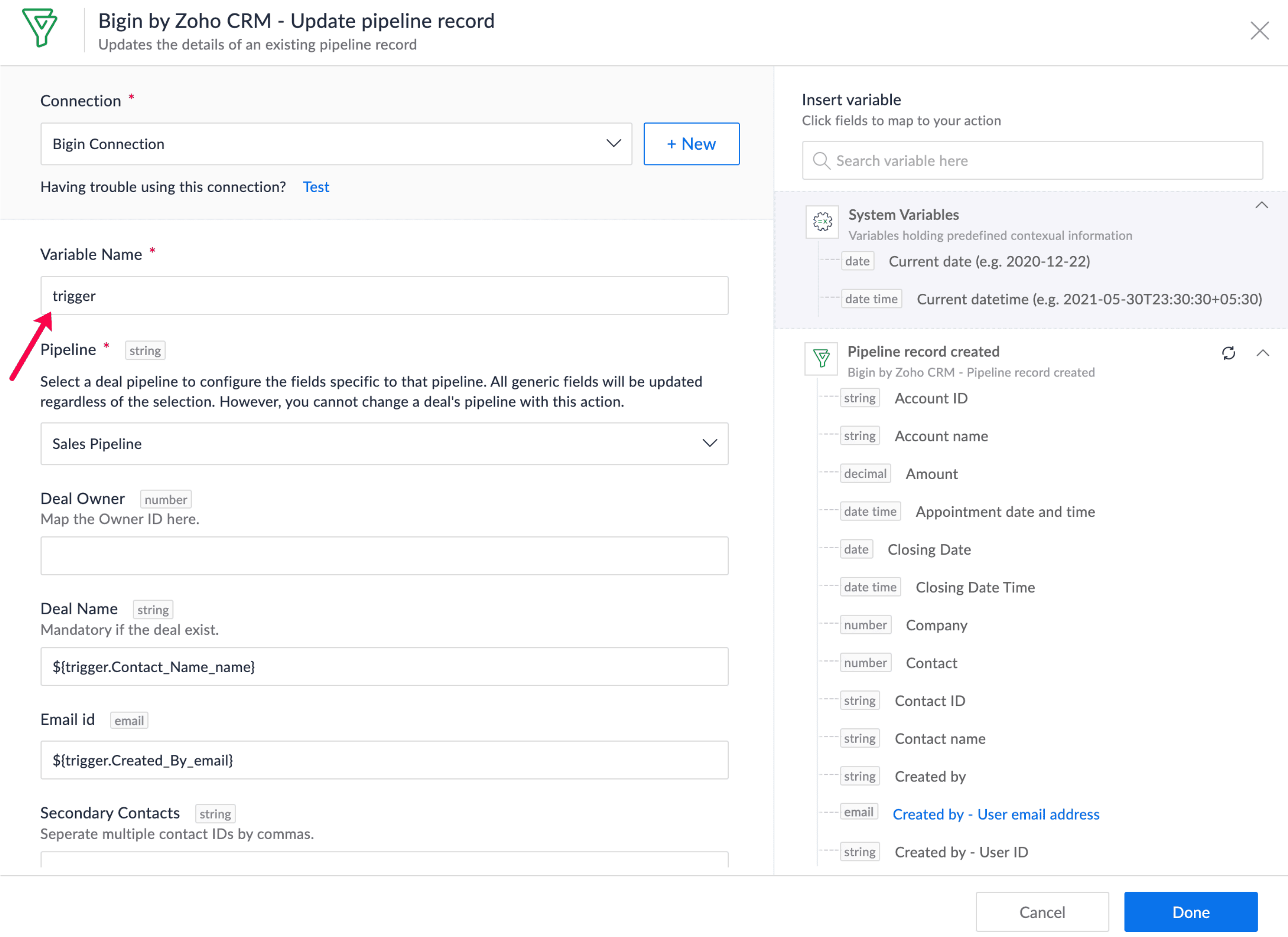


Here, the workflow will be triggered only when a new pipeline record is created under the ***Sales Pipeline***.

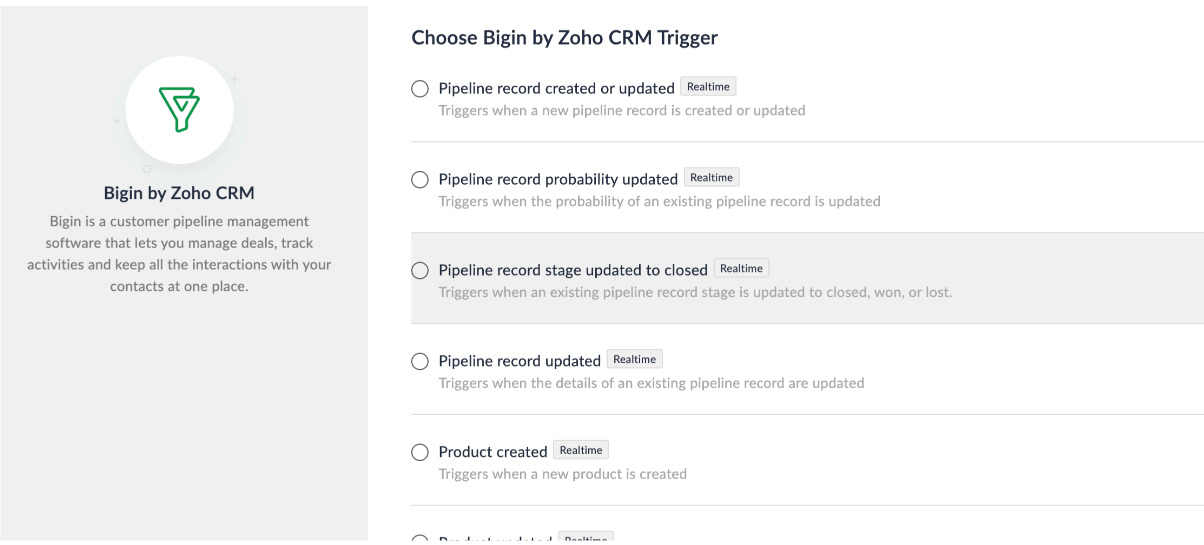
3. **How do I map fields from pipelines other than the first one in my workflow?**

Only the fields from the first pipeline are directly mappable. However, all fields are available in the trigger response. You can map additional fields by using the syntax **${trigger.<key>}**, where ***trigger*** is the variable name of the trigger.

For example, you select *Sales Pipeline* from the dropdown and want to map a variable *email* from the *Marketing Pipeline*.



4. The trigger ***Pipeline record stage updated to closed*** works only in English.



5. Can I move a specific deal to another pipeline in Zoho Bigin?

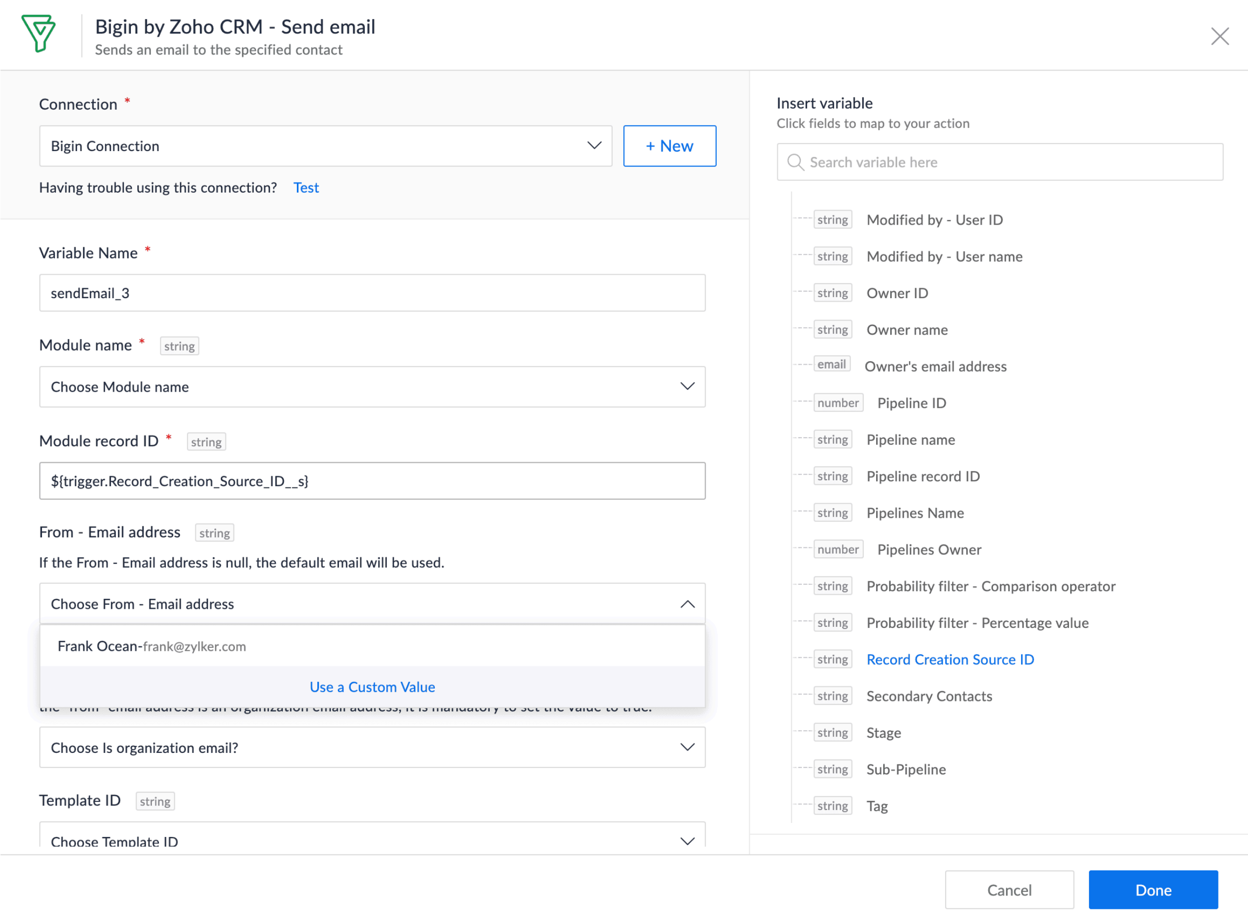
It is not possible to move a specific deal to another pipeline, but moving deals to sub-pipelines is still supported.

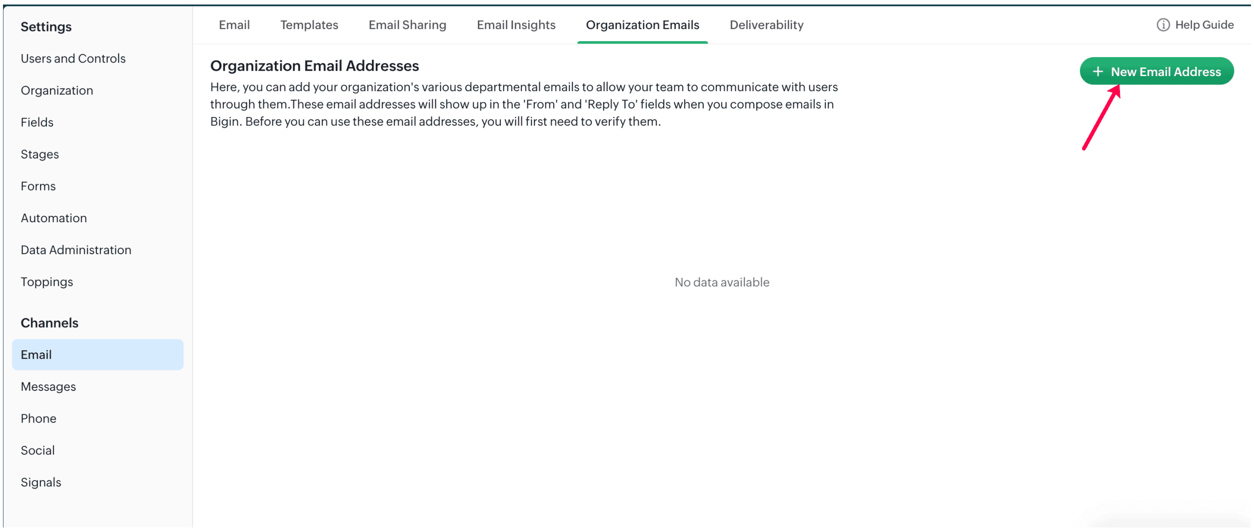
6. **How can I use an email address as the From address other than the one used to set up my Bigin connection?**

   To use a different email address, you'll need to add the new address in Zoho Bigin. Follow the steps below:

   1. Navigate to **Settings** > **Channels** > **Email**.
   2. Click ***New Email Address*** to add the new email address.

   Before using this email address for communication, you need to verify it. Only the verified email addresses will be listed in Zoho Flow's ***From - Email address*** field.




Settings
Users and Controls
Organization
Fields
Stages
Forms
Automation
Data Administration
Toppings
Channels
Email
Messages
Phone
Social
Signals
Email
Templates
Email Sharing
Email Insights
Organization Emails
Deliverability
Help Guide
Organization Email Addresses
Here, you can add your organization's various departmental emails to allow your team to communicate with users through them.These email addresses will show up in the 'From' and 'Reply To' fields when you compose emails in Bigin. Before you can use these email addresses, you will first need to verify them.
+ New Email Address
No data available