



Zoho Corporation

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# Zoho Bigin

## What is Zoho Bigin?

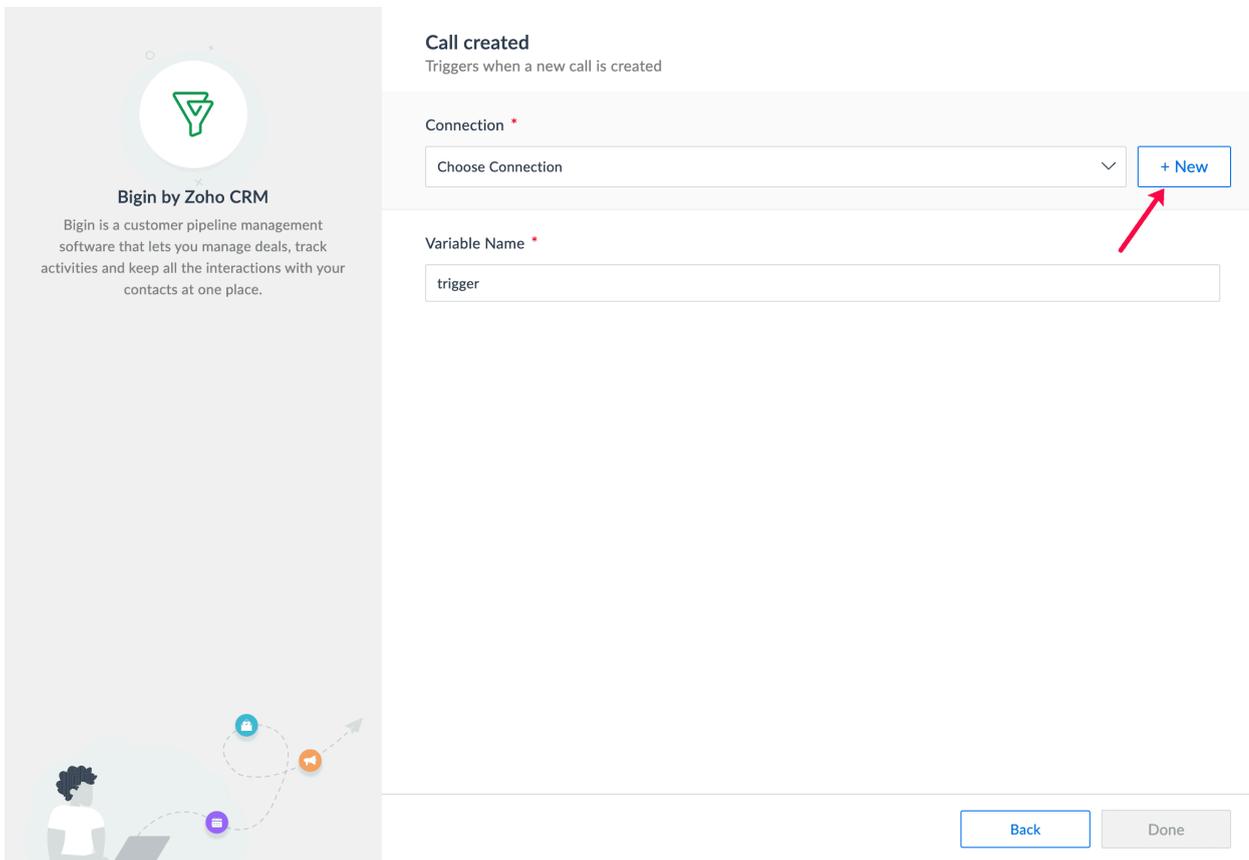
Zoho Bigin is a simple CRM (Customer Relationship Management) tool designed for small businesses. It helps manage contacts, track business data, and automate tasks in an easy-to-use interface.

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**.



## Zoho Flow Published by Zoho

Zoho Flow would like to access the following information.

### Zia Search

- READ To search your data across Zoho apps.

### Begin

Zylker

- Get the module information in the organization
- To get products data
- To update products data
- To read layout
- To read calls data
- To update calls data
- To read tasks data
- To update tasks data
- To read deals data

 **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**.



**Begin by Zoho CRM**

Begin is a customer pipeline management software that lets you manage deals, track activities and keep all the interactions with your contacts at one place.



← New Connection

Use this connection to execute

All triggers and actions  Only specific triggers and actions

**Zoho Flow will have access only to the selected triggers and actions.**

Triggers	Actions
<input type="checkbox"/> Company updated	<input type="checkbox"/> Update product
<input type="checkbox"/> Contact created or updated	<input type="checkbox"/> Update call
<input type="checkbox"/> Company created	<input type="checkbox"/> Update task
<input type="checkbox"/> Pipeline record updated	<input type="checkbox"/> Add product to pipeline record
<input type="checkbox"/> Pipeline record created or updated	<input type="checkbox"/> Update company
<input type="checkbox"/> Task created	<input type="checkbox"/> Fetch pipeline record
<input type="checkbox"/> Task updated	<input type="checkbox"/> Fetch company
<input checked="" type="checkbox"/> Call created	<input type="checkbox"/> Fetch user
<input type="checkbox"/> Contact created	<input type="checkbox"/> Fetch task
<input type="checkbox"/> Event updated	<input type="checkbox"/> Fetch contact
<input type="checkbox"/> Pipeline record stage updated to closed	<input type="checkbox"/> Fetch call
<input type="checkbox"/> Product created	<input type="checkbox"/> Fetch event
<input type="checkbox"/> Contact updated	<input type="checkbox"/> Fetch product
<input type="checkbox"/> Call updated	<input type="checkbox"/> Add note
<input type="checkbox"/> Note added	<input type="checkbox"/> Create event

Cancel
Authorize

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);
}
```



### Bigin by Zoho CRM - Create event

Creates a new event

Connection \*

Begin Test Connection



+ New

Having trouble using this connection? [Test](#)

From \* date time

Format: yyyy-MM-ddTHH:mm:ssZ.

2025-01-03 12:00:00

To \* date time

Format: yyyy-MM-ddTHH:mm:ssZ.

2025-01-31 11:00:00



Update pipeline record

Update pipeline record

● 01-15-25 11:21:41 AM

input

output

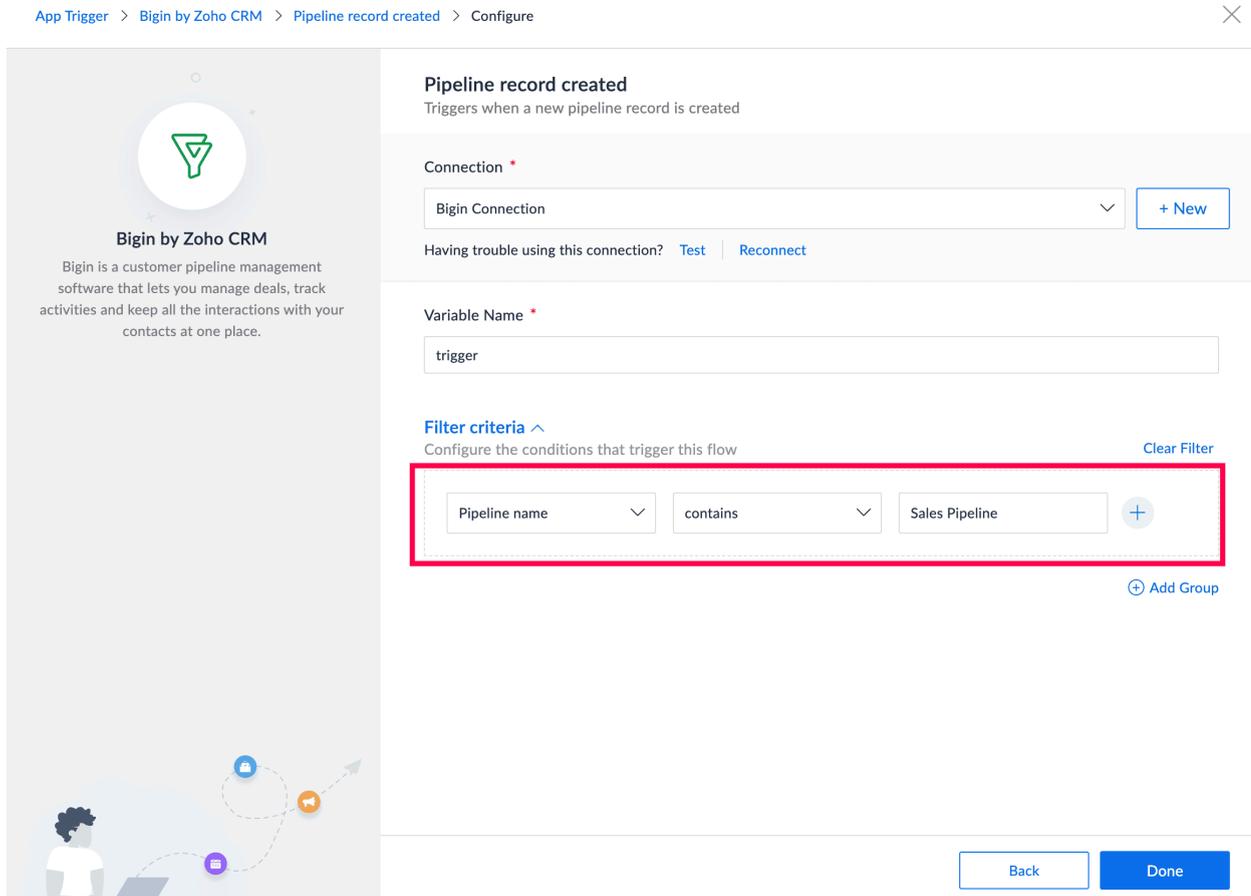
"Begin by Zoho CRM says "Invalid input for Cf\_Date\_time. The expected input type is datetime.""

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*.



**Connection \***

Begin Connection + New

Having trouble using this connection? [Test](#)

---

**Variable Name \***

trigger

**Pipeline \*** string

Select a deal pipeline to configure the fields specific to that pipeline. All generic fields will be updated regardless of the selection. However, you cannot change a deal's pipeline with this action.

Sales Pipeline

**Deal Owner** number

Map the Owner ID here.

**Deal Name** string

Mandatory if the deal exist.

\$(trigger.Contact\_Name\_name)

**Email id** email

\$(trigger.Created\_By\_email)

**Secondary Contacts** string

Seperate multiple contact IDs by commas.

**Insert variable**

Click fields to map to your action

Search variable here

---

**System Variables**

Variables holding predefined contextual information

- date Current date (e.g. 2020-12-22)
- date time Current datetime (e.g. 2021-05-30T23:30:30+05:30)

---

**Pipeline record created**

Begin by Zoho CRM - Pipeline record created

- string Account ID
- string Account name
- decimal Amount
- date time Appointment date and time
- date Closing Date
- date time Closing Date Time
- number Company
- number Contact
- string Contact ID
- string Contact name
- string Created by
- email Created by - User email address
- string Created by - User ID

Cancel Done

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

**Begin by Zoho CRM**

Begin is a customer pipeline management software that lets you manage deals, track activities and keep all the interactions with your contacts at one place.

#### Choose Begin by Zoho CRM Trigger

- Pipeline record created or updated Realtime  
Triggers when a new pipeline record is created or updated

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- Pipeline record probability updated Realtime  
Triggers when the probability of an existing pipeline record is updated

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- Pipeline record stage updated to closed Realtime  
Triggers when an existing pipeline record stage is updated to closed, won, or lost.

---

- Pipeline record updated Realtime  
Triggers when the details of an existing pipeline record are updated

---

- Product created Realtime  
Triggers when a new product is created

---

- Product updated Realtime

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

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.

The screenshot shows the configuration window for the 'Begin by Zoho CRM - Send email' action. The window is titled 'Begin by Zoho CRM - Send email' and has a subtitle 'Sends an email to the specified contact'. It is divided into two main sections: configuration fields on the left and a variable selection panel on the right.

**Configuration Fields:**

- Connection:** A dropdown menu showing 'Begin Connection' with a '+ New' button and a link to 'Test'.
- Variable Name:** A text input field containing 'sendEmail\_3'.
- Module name:** A dropdown menu with 'Choose Module name' and a 'string' type indicator.
- Module record ID:** A text input field containing the trigger variable '\$[trigger.Record\_Creation\_Source\_ID\_\_s]' with a 'string' type indicator.
- From - Email address:** A dropdown menu with 'Choose From - Email address' and a 'string' type indicator. Below it, a note states: 'If the From - Email address is null, the default email will be used.' A list of email addresses is shown, with 'Frank Ocean-frank@zylker.com' selected. A 'Use a Custom Value' link is also present.
- Choose Is organization email?:** A dropdown menu with 'Choose Is organization email?' and a 'string' type indicator.
- Template ID:** A dropdown menu with 'Choose Template ID' and a 'string' type indicator.

**Insert variable panel:**

- Header: 'Insert variable' with the instruction 'Click fields to map to your action'.
- Search bar: 'Search variable here'.
- List of variables with their types: Modified by - User ID (string), Modified by - User name (string), Owner ID (string), Owner name (string), Owner's email address (email), Pipeline ID (number), Pipeline name (string), Pipeline record ID (string), Pipelines Name (string), Pipelines Owner (number), Probability filter - Comparison operator (string), Probability filter - Percentage value (string), Record Creation Source ID (string), Secondary Contacts (string), Stage (string), Sub-Pipeline (string), Tag (string).

At the bottom right, there are 'Cancel' and 'Done' buttons.

Settings

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

**Channels**

- Email
- Messages
- Phone
- Social
- Signals