Zoho Corporation

Glossary

Action

An action is a task executed by the workflow as a result of a trigger. For example, when a ticket is received, checking the email address in your CRM and adding it as a lead is an action.

Connection

A connection allows Zoho Flow to exchange data with your account in another application. You can connect multiple accounts for the same app.

Draft Flow

A flow that has not been switched on yet is a draft flow.

Flow

A workflow created to link actions. An event triggers the flow and causes actions in other apps. A flow can have one trigger and multiple actions.
For example, when a new ticket is received on Zoho Desk, the flow can check the customer details in Zoho CRM and add a new lead if it's not already there. Here, receiving the ticket acts as a trigger to this workflow, and creating or updating a lead in CRM is an action.

Live Flow

A flow that is switched on and executing.

Paused Flow

A flow that was initially live, but is now switched off.

Record

A record is the data that is obtained as output from the trigger or action. It can be used as input for further actions if required. In the case of receiving a ticket, the name, email address, ticket ID are data under the ticket record.

Task

A single execution of an action is a task. If you have a flow with one trigger and two actions every time it executes, it is considered as two executed tasks. The next time the Flow executes, the total task count will be four.

Trigger

The trigger is the event that activates the flow. When this event occurs, flow execution begins. For example, when a new ticket is received, a lead is created in your CRM. Receiving the ticket is the triggering event.