Settings

The Settings section lets you view and manage organization details, app connections, and members on Zoho Flow. To access Settings, click the gear icon on the left bar.

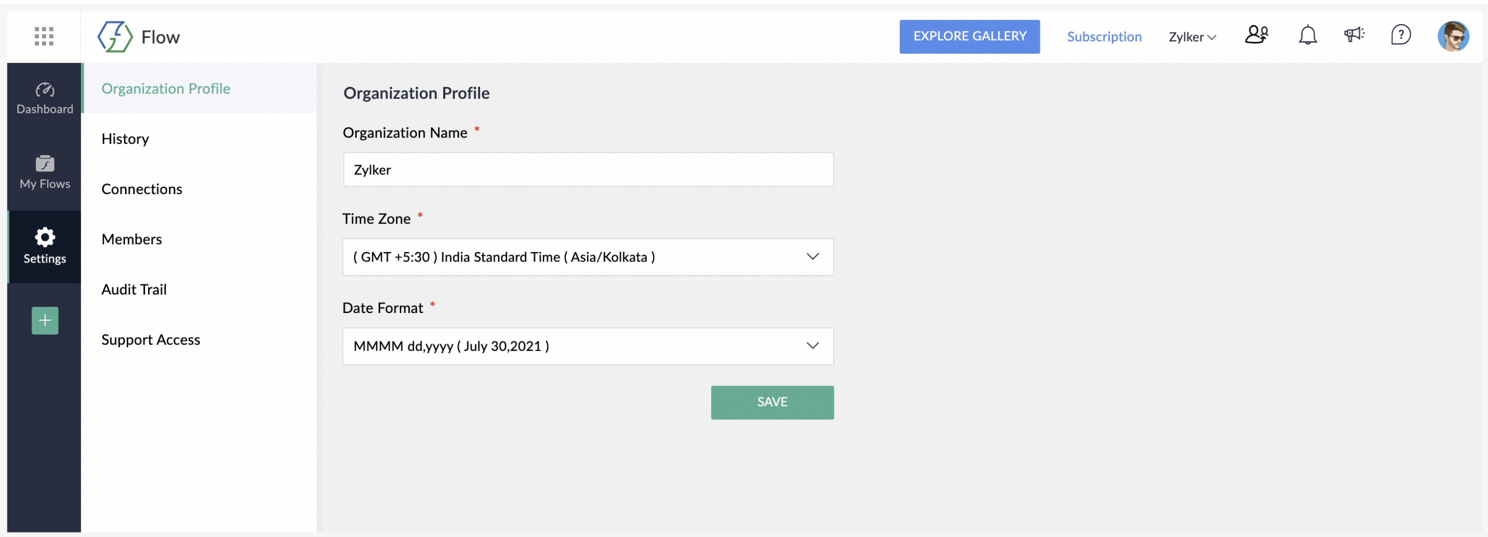
The Settings section contains 6 sub-sections:

Organization Profile

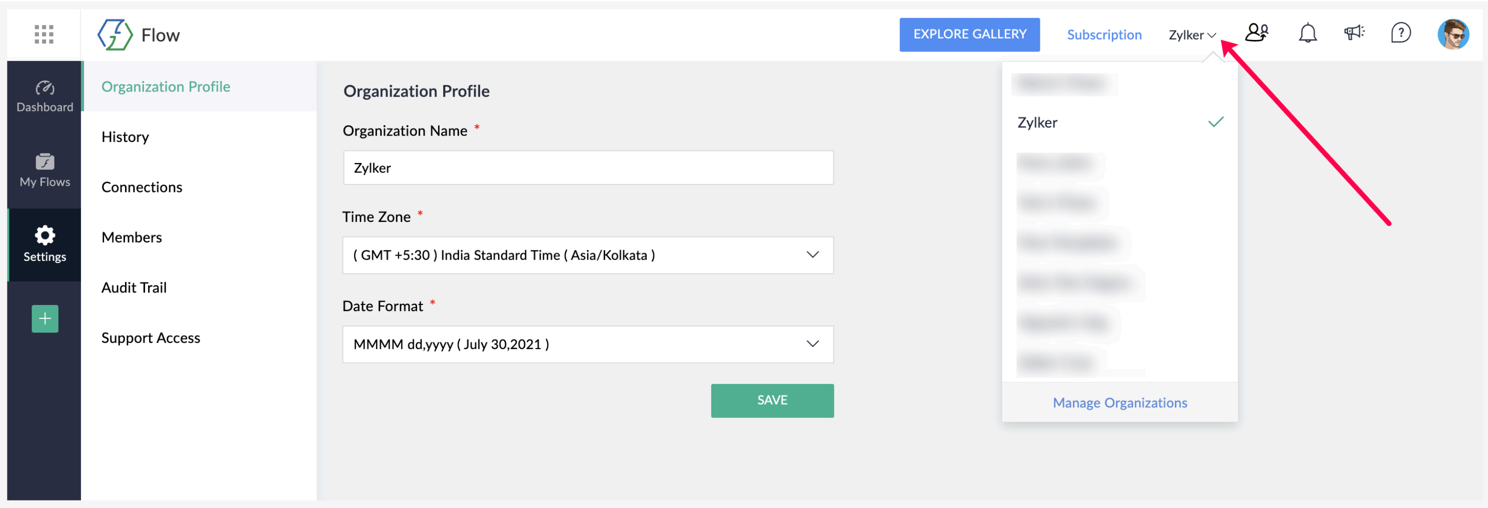
Under the organization profile you can view and edit various details such as the organization name, time zone, and date format.

Note that the organization name can be edited by the owner or admins only.

The time zone of your organization is taken into consideration when you configure a schedule trigger or include a delay in your flows. The flow will execute based on your organization's time zone.



If you are part of multiple organizations, you can switch to another organization by clicking the organization name on the top bar.



Alternatively, click your profile picture in the top right corner. In *My Organizations*, click **Manage**. Here, you can view more details such as all the organizations that you are part of, your role, organization ID, and created date. You can:

Access Organization

Click to access an organization that you are a part of.

Set as Default

When you set an organization as default, you will be directed to it every time you access Zoho Flow.

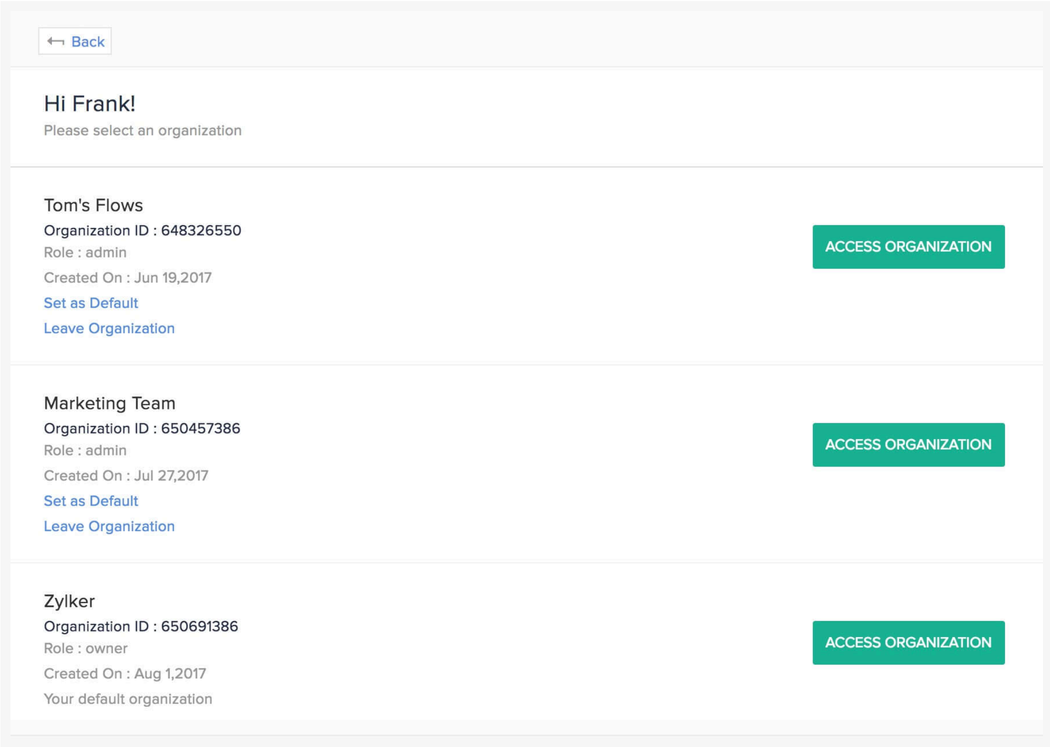
Leave Organization

If you request to leave an organization, an email will be sent to the owner. Once they approve your exit request, you will no longer be able to access the organization. The connections and flows that you created will continue to be active.

Delete Organization

Hover on the organization name and click the trash icon that appears to delete the organization you own. If you choose to delete the organization, a request will be sent to the Zoho Flow Team. You can cancel the request before approval, or reactivate the organization within **30 days** of deletion. **After 30 days, all data, including flows, app**

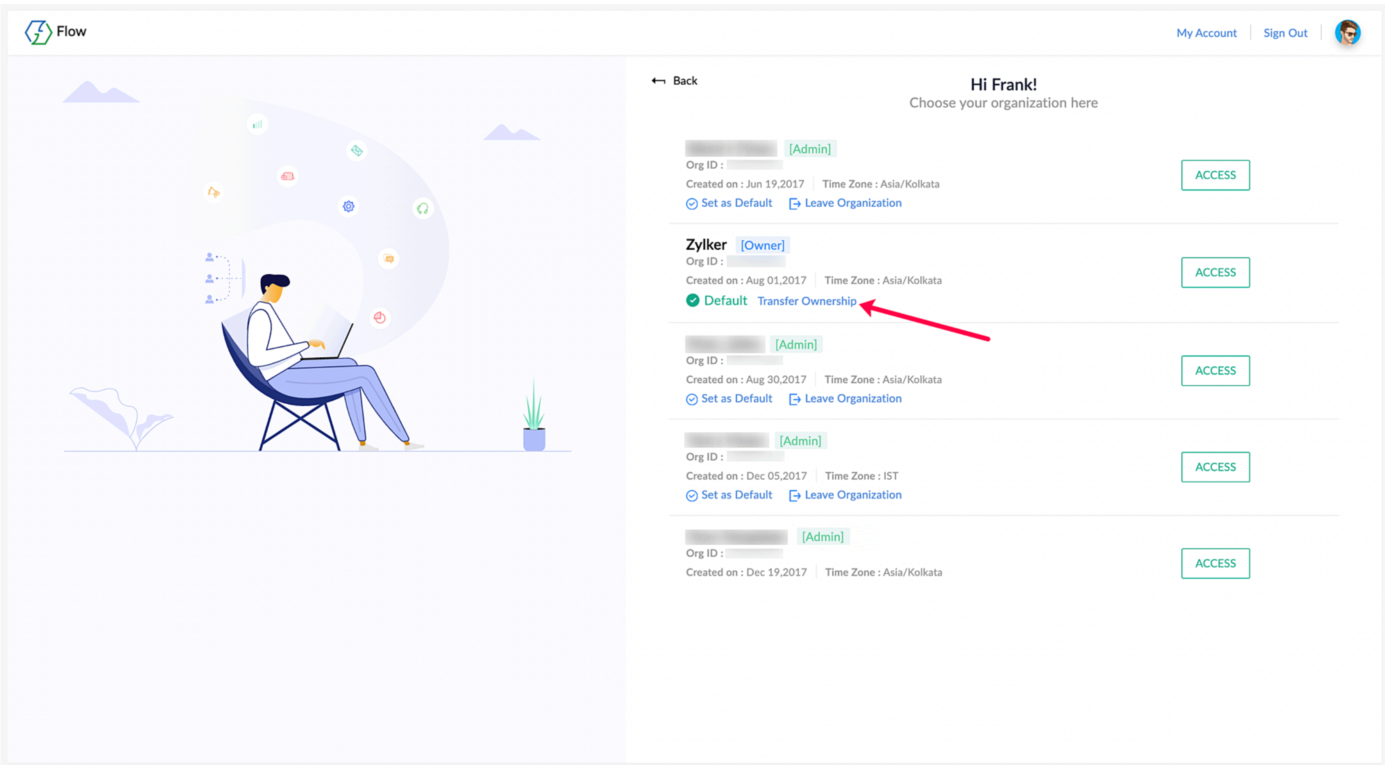
connections, history, and audit trial, will be deleted.



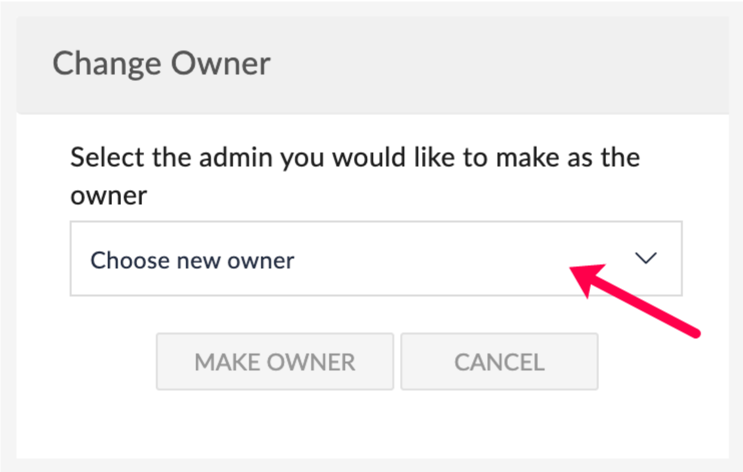
Transfer Ownership of Organization

If you are the owner of a Zoho Flow organization, you can transfer its ownership to one of the existing admins. To do so:

1. Click **Transfer Ownership**.



2. Choose an admin from the dropdown you wish to transfer ownership to.



3. Click **Make Owner**.

Note:

- You can only transfer the ownership of your organization to an existing admin who does not already own any other Zoho Flow organizations.
- Only admins who do not already own any other organizations will be displayed in the dropdown.

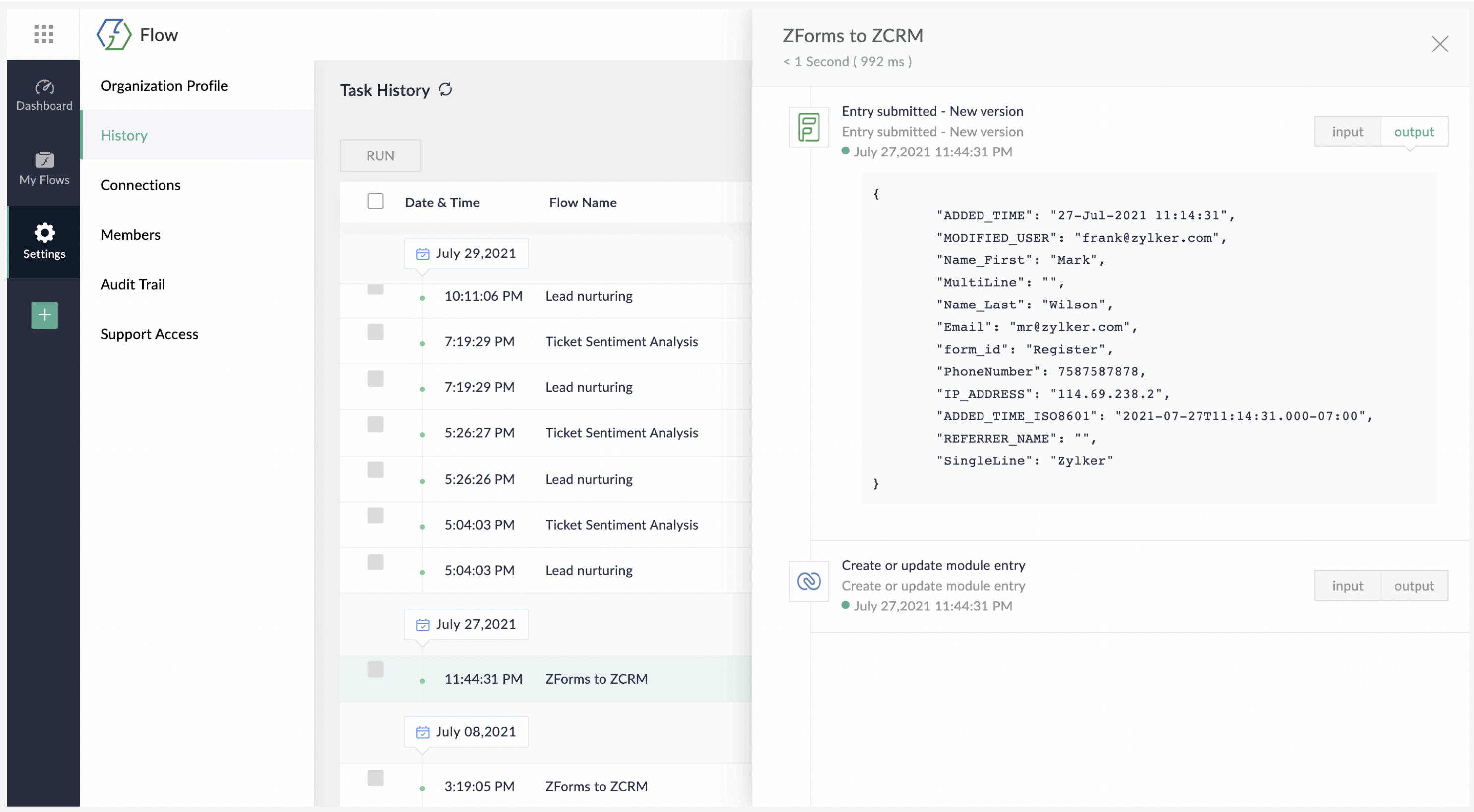
Get your Organization ID

In some cases, such as when you are contacting support to resolve an issue or when you are trying to update your subscription plan, you may need to obtain your Organization ID. To do so:

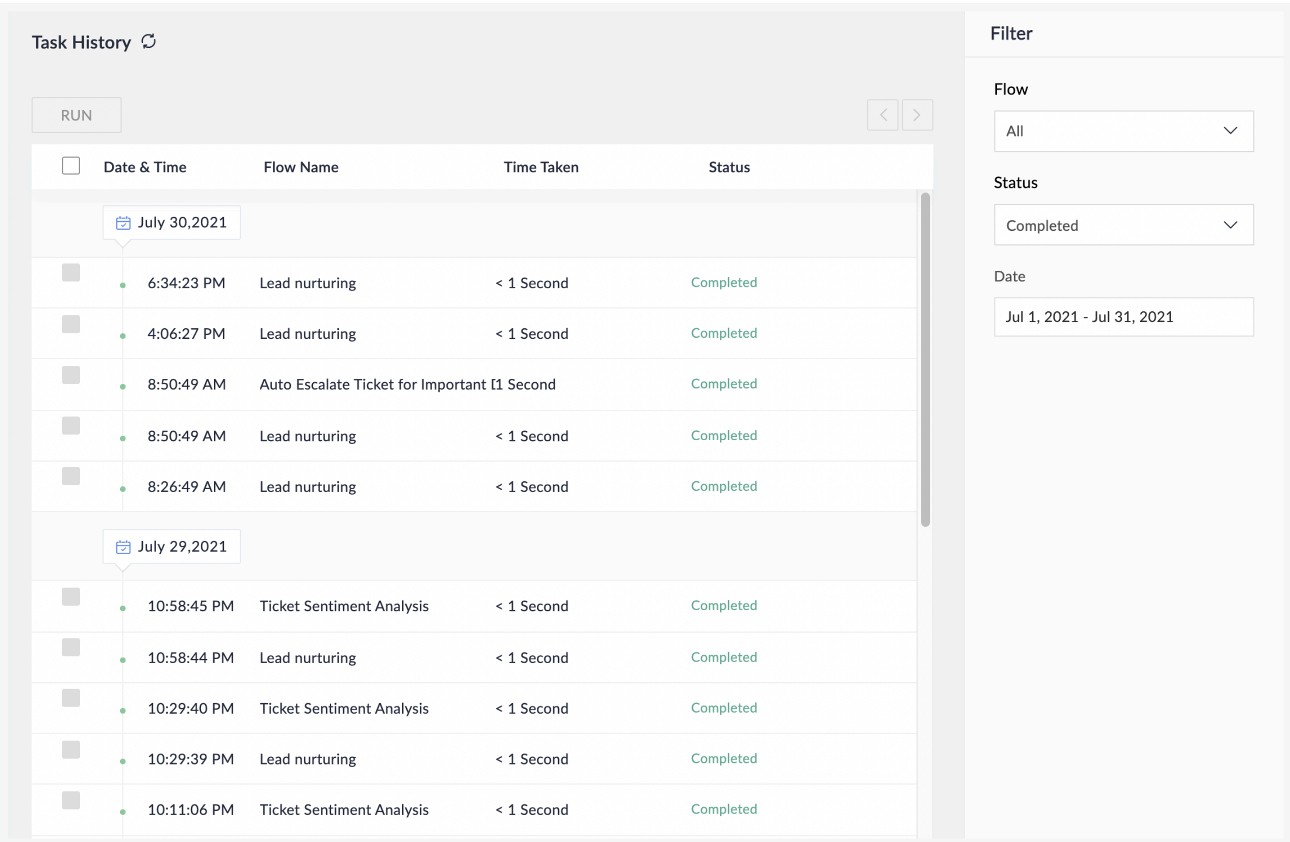
1. Log in to your Zoho Flow account.
2. Click your profile picture in the top right corner. In *My Organizations*, click **Manage**.
3. Here, you can view all the organizations you are part of and get details such as your role, organization ID, timezone, and more.

History

View the history of all flow executions in your organization here. Click a particular execution to see all the steps of the flow and their input and output details.



The filters on the right allow you to view a customized list of executions sorted by flows, status, and date.



Understanding Execution Statuses

You will be able to see the status of each execution in History. Here's a list of all possible statuses:

Processing: The flow execution is in progress. Data is being moved between apps in your flow.

Queued: Whenever Zoho Flow receives data from a connected app in your flow, the status displayed will be 'Queued' until the data is ready to be moved. This status will remain until the records are picked for processing. All queued records will be executed automatically.

Delayed: You have a ' Delay' action in your flow. This status will be displayed until the duration specified in the Delay action is reached.

Filtered: A filter condition (Trigger criteria) added to your flow's trigger has filtered a record from executing.

Completed: The execution of the flow has completed successfully.

Failed: The flow ran into an error during execution. Learn how to fix errors

> **Note:** The status of an execution that has taken an error branch in a flow will have "via error branch" next to it.

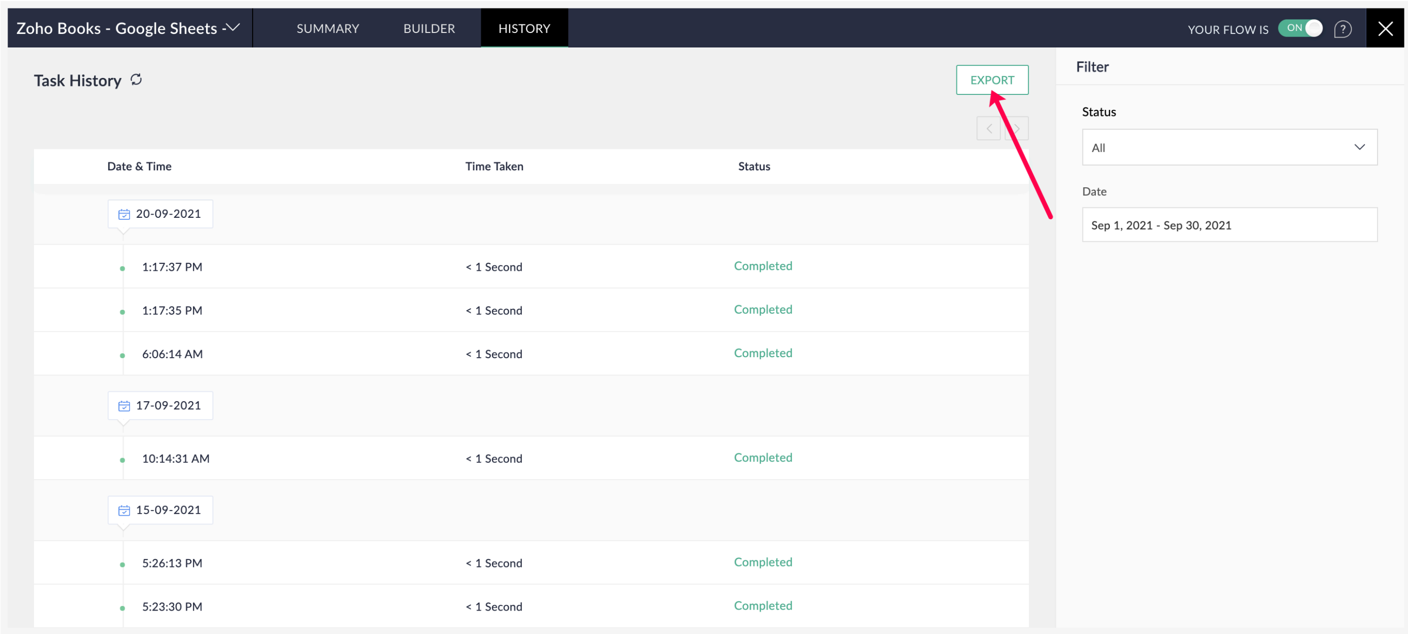
How to Export a Flow's Task History

Export Task History allows the owner or the admins of an organization to receive the task history of a flow for a selected period to their email inbox.

The file will be in CSV format, with a **maximum size of 10MB**. If the size of execution data for this time frame exceeds 10MB, we will attach a file that contains the latest logs that fit the file size. For the remaining logs, you can export the logs of the previous dates again.

To export your logs:

1. From **My Flows**, open your required flow.
2. Navigate to **History**.
3. Under **Filter**, select a date range.
4. Click **Export**.



5. Once you receive the email, download the attached file.

Note: The logs will be sent to the email address associated with the admin or owner exporting them.

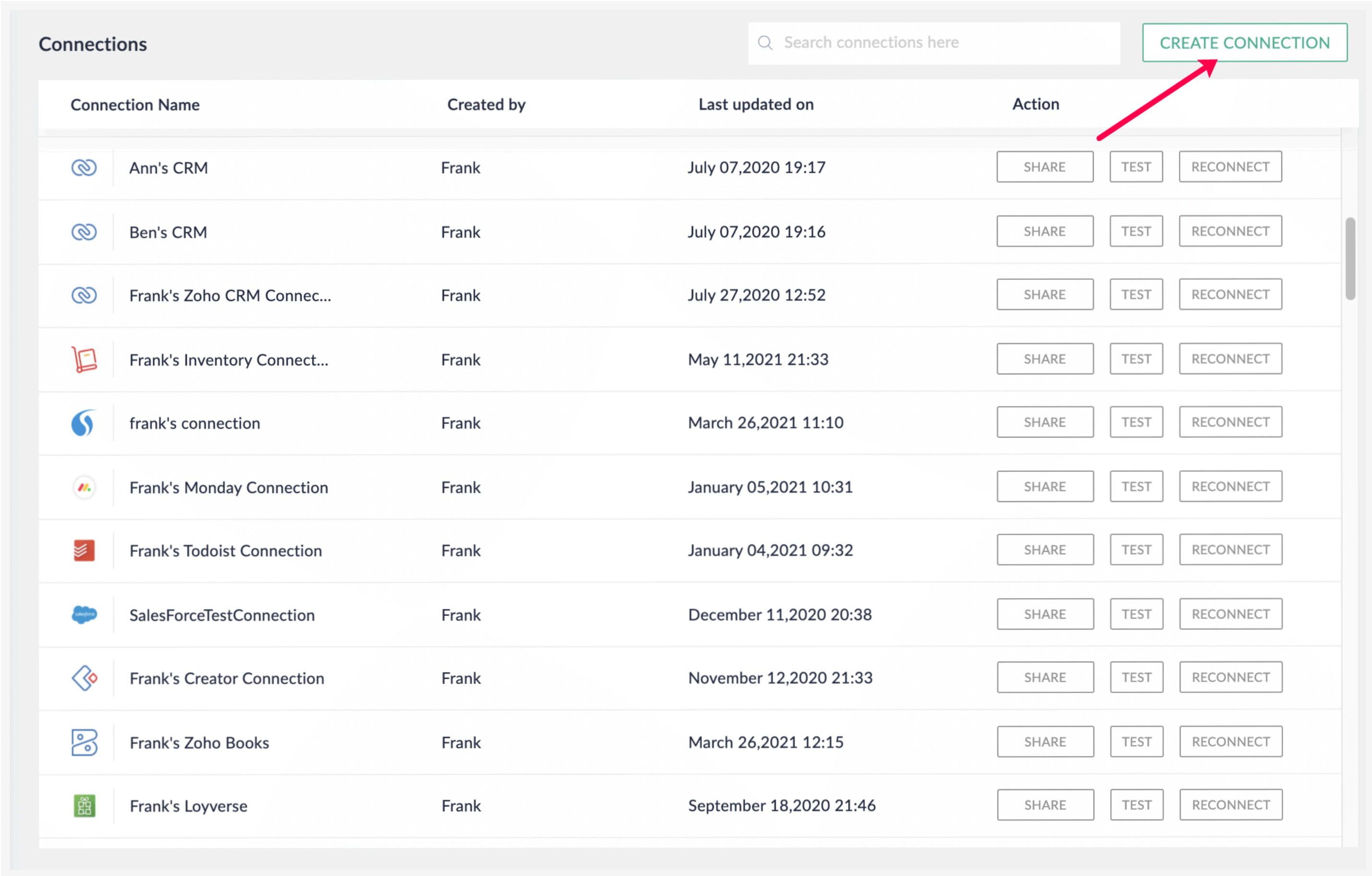
Connections

A connection is an app account that Zoho Flow has permission to exchange data with. For example, you can connect your Trello account or your team's Gmail account to Zoho Flow.

Create a Connection

To create an app connection:

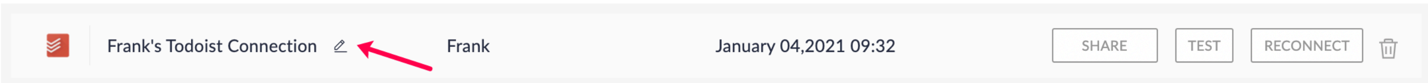
1. Go to **Settings** > **Connections**.
2. Click **Create Connection**.



3. In the configuration window that appears, choose an app and click **Next**.

4. Enter the connection name. This is the name of your app account on Zoho Flow. E.g.: Frank's Zoho Books, Ann's CRM.

5. You can edit your connection name any time by clicking the edit icon.



6. Enter any other details required to create a connection. This varies by app as different apps have different authentication requirements.

7. For some apps, you may be able to choose whether the connection can be used for all triggers and actions or only for a selected few.

8. Click **Authorize**.

Note: You can create multiple connections for the same app. For example, you can connect your personal and professional Gmail accounts to Zoho Flow.

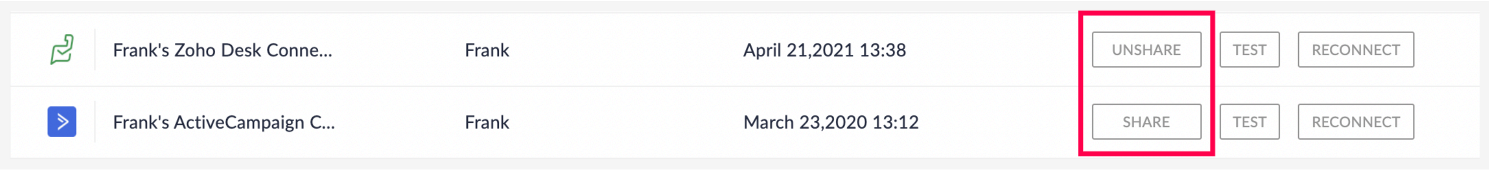
Share or Unshare Connections

Your app connection is private by default (excluding the organization owner and admins who have access to all connections). Sharing a connection makes it available to all members of your organization. They can access, create, and update data by using the connection in flows.

Click **Share** to share the connection with your organization members.

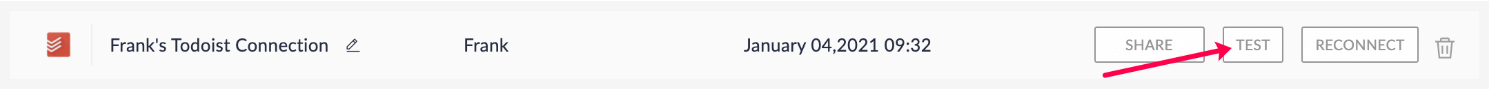
Unsharing a connection denies all other users access and makes it private again. Flows using the connection will continue to access, create, and update data using the connection.

Click **Unshare** to make the connection private.



Test Connection

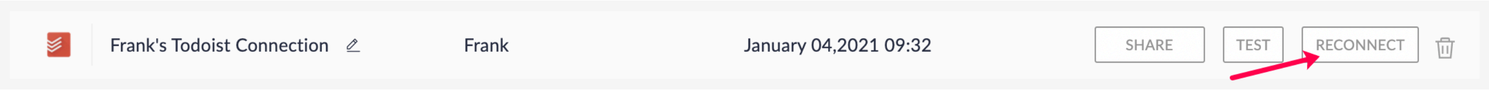
An invalid connection causes your flow to fail. Click **Test** to check whether your connection is working correctly. If you do not see a success message, try reconnecting or creating a new connection.



Reconnect Connection

Reconnect if your connection has an issue or if you want to change the triggers and actions that can use this flow (for selected apps only).

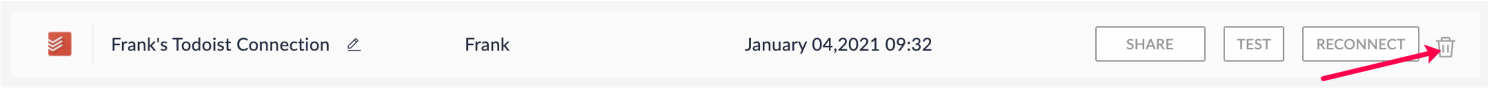
Click **Reconnect**, make the necessary changes, and click **Authorize**.



Delete Connection

Deleting a connection removes it permanently. If you delete a connection, flows using it will fail. Actions previously executed by the flow with the connection won't be affected.

Click the delete icon for the connection you want to remove from your organization.



Members

There are three types of organization members in Zoho Flow: owners, admins, and users. You can create an organization and belong to multiple organizations.

Roles and Permissions

Owners

By default, the person who creates an organization is the owner. As the owner, you can:

- Modify the organization name
- Add or remove members
- Change roles of members
- Create, edit, and delete flows
- Create, test, delete, and reconnect app connections
- View audit trail

Admins

As an admin, you can:

- Modify the organization name
- Add or remove members
- Change roles of members
- Create, edit, and delete flows
- Create, test, delete, and reconnect app connections
- View audit trail

Users

As a user you can:

- Create, edit, and delete flows
- Create, test, delete, and reconnect app connections

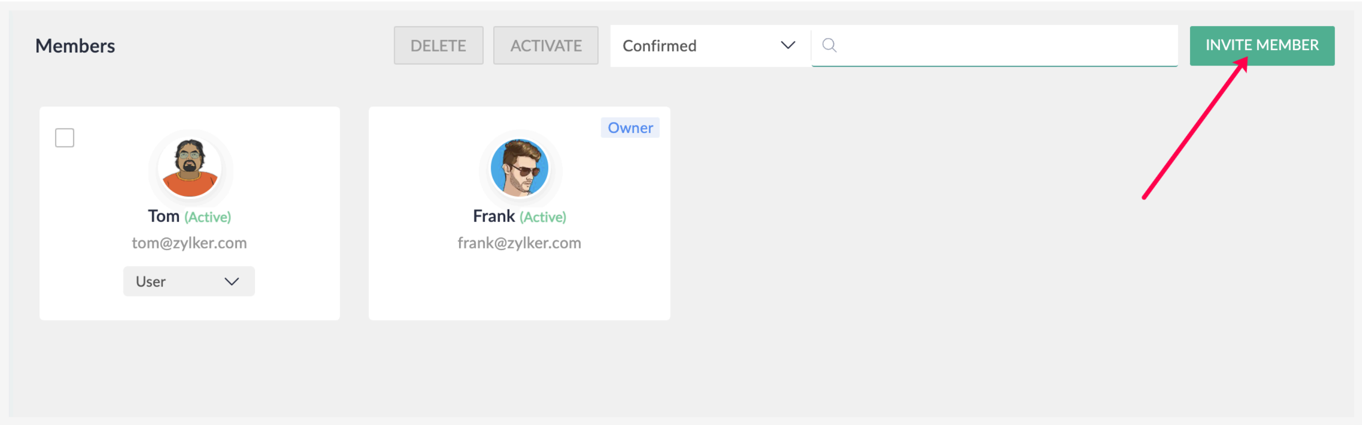
Managing Members

The owner or admin can manage the members of the organization.

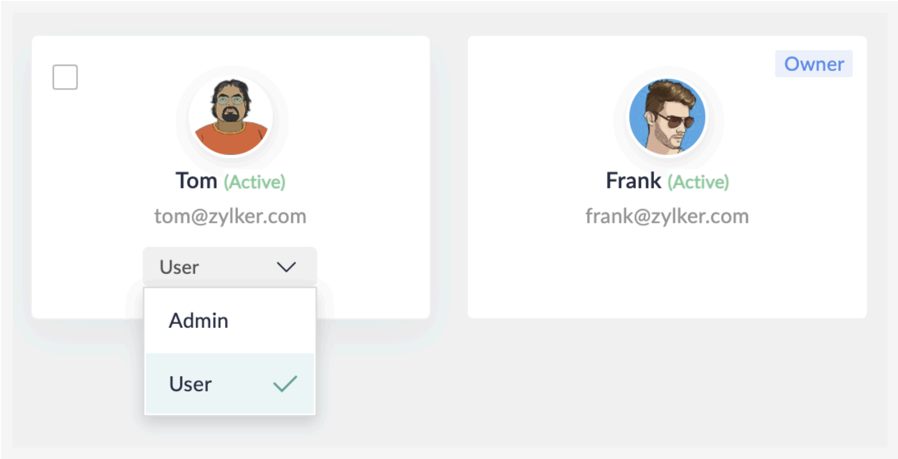
Add member

To add a member to your Zoho Flow organization:

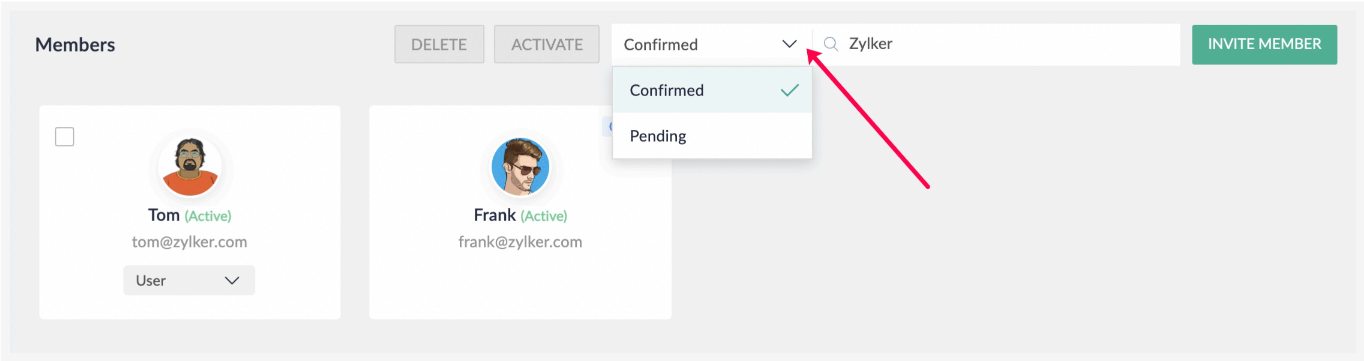
1. Go to **Settings** > **Members**
2. Click **Add Member** in the top right.



3. Enter the name, email address, and role of the new member and click **Send** to invite them.
4. You will be notified by email when the member accepts your invitation.
5. To change the role of a member, click on the current role. Choose the new role from the dropdown.



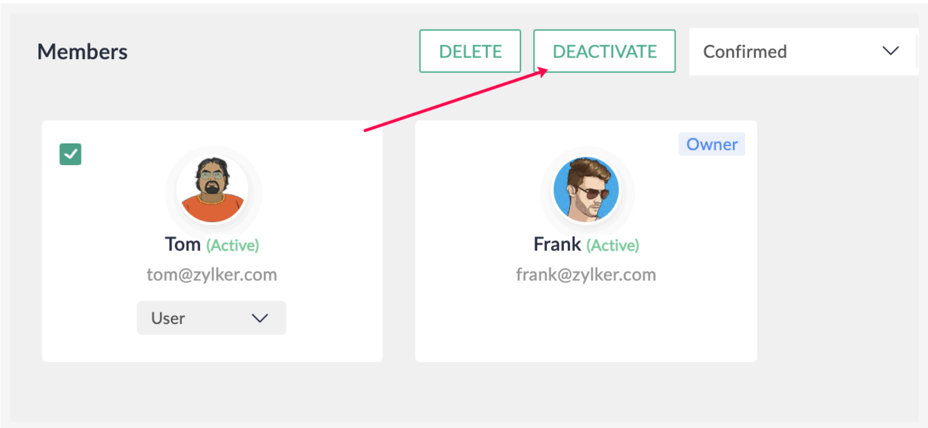
6. View the list of confirmed or pending members by choosing one of these options from the dropdown.



Deactivate or activate member

Deactivating a member restricts them from accessing your Zoho Flow organization.

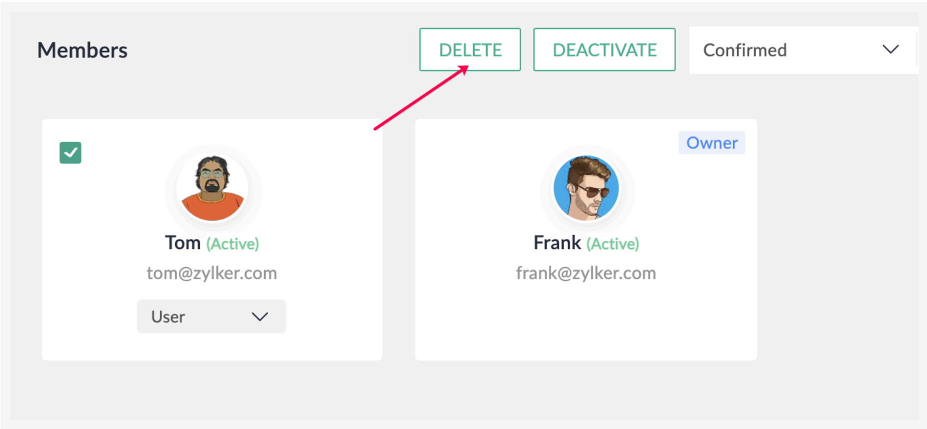
Select the checkbox for the required user and click **Deactivate**. To activate the member again, select the checkbox for the user and click **Activate**.



Remove member

Removing a member denies them access to your organization until they are invited again. This feature is particularly useful when you want to invite a client or an employee from another team to work in your Zoho Flow organization for a limited period of time.

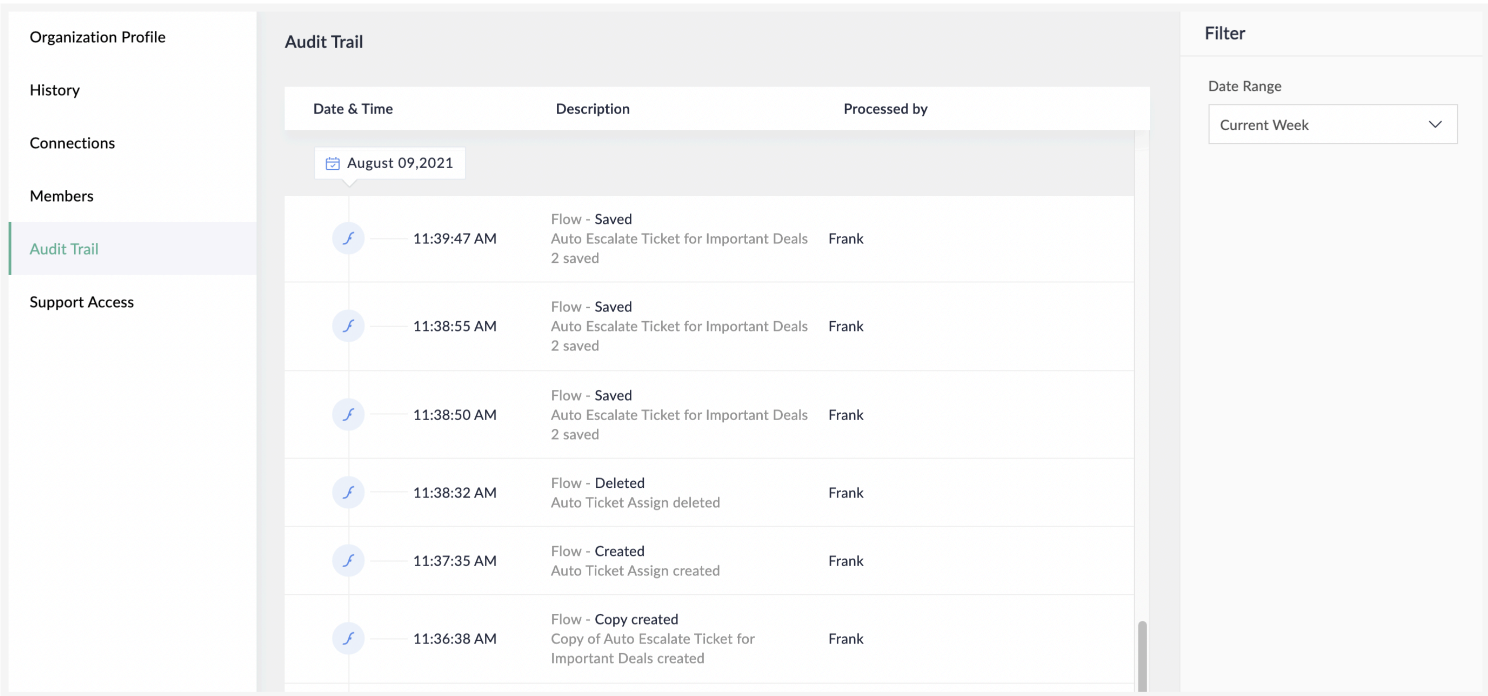
To remove a member or an invitee, select the checkbox for the user and click **Delete**.



Audit Trail

The audit trail is an organization-wide log of activities. Use it to track what is happening in your Flow organization. To view activities for a specific period only, use the filter option on the right.

Note: This subsection will only be visible to the owner and admins of the organization.



Restore Deleted Flows

Deleted flows can be restored up to 90 days after the date of deletion. To do so:

1. Navigate to **Settings** > **Audit Trail**.
2. Locate the entry corresponding to the deleted flow.
3. Click **Restore**.

Note:

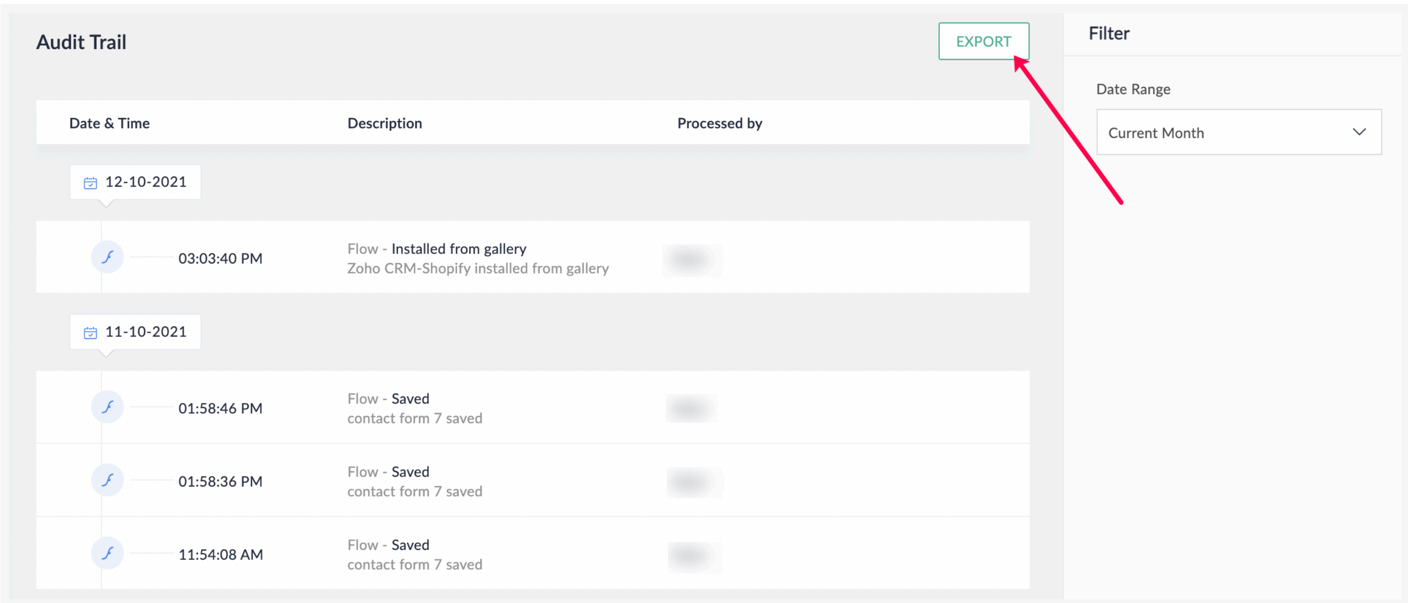
- The deleted flow will be restored to the My Flows page, regardless of its original location.
- Only the owner or administrators of an organization can restore deleted flows.

How to Export Audit Trail

Export Audit Trail allows the owner or the admins of an organization to receive the audit logs for a selected period to their email inbox. The file will be in CSV format.

To export your logs:

1. Navigate to **Settings** > **Audit Trail**.
2. Under **Filter**, select a date range that is **less than 90 days**.
3. Click **Export**.



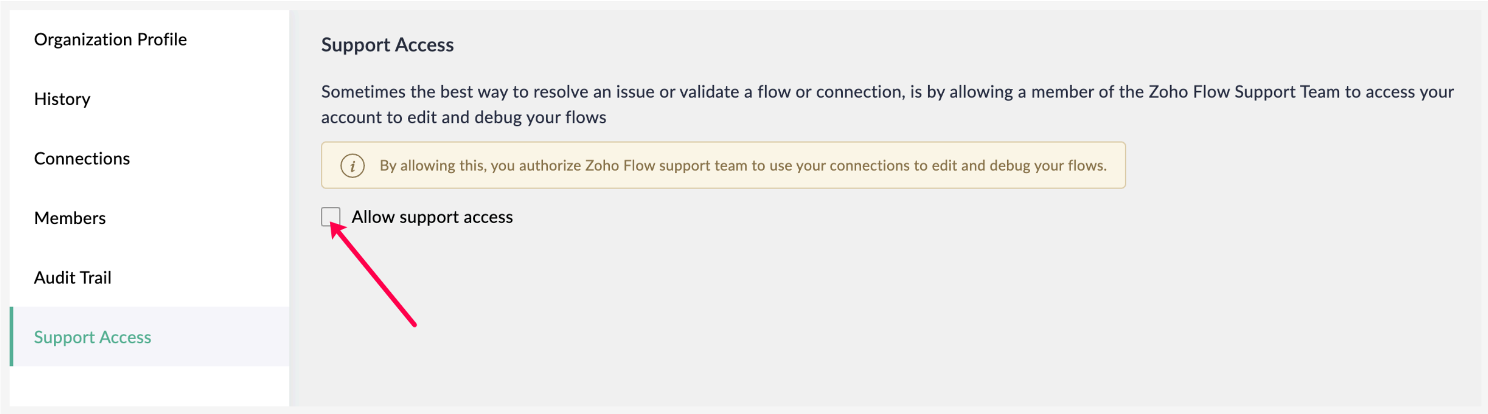
4. Once you receive the email, download the attached file.

Note: The logs will be sent to the email address associated with the admin or owner exporting them.

Support Access

Enabling support access allows the Zoho Flow team to use your connections to edit and debug your flows.

Click the checkbox next to **Allow support access** to grant the Zoho Flow team access to your organization's connections so we can work to resolve your issue faster .



- Support access will automatically expire after **15 days** from the date you enabled it. You can also uncheck the box to disable support access manually.
- Support access can be enabled only by the owner or admins of an organization.

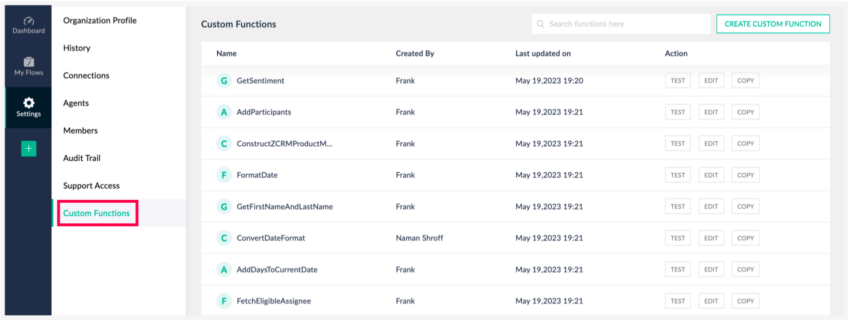
Custom Functions

You can write your own custom functions to extend the functionality of Zoho Flow. You can write them in Deluge to perform complex operations that cannot be done with the built-in logic elements or actions and triggers in Zoho Flow. You'll find the list of all the custom functions created in your organization in this page.

Create a Custom Function

To create a new custom function:

1. Navigate to **Settings** > **Custom Functions**.



2. Click **Create Custom Function**.
3. Enter a name. Remember that the name must start with a letter or underscore and can only include alphanumeric characters and underscores. For example: _discount_calculation_1, autofill_zipcode
   You can rename an existing custom function any time by clicking the edit icon next to the name.
4. Select a **return type** (output data type) and optionally specify the parameter (input) and its **data type**.
5. Enter your Deluge script, then click **Save**.

Test a Function

You can test your custom function to ensure that it is working as expected by providing a sample input.

Edit a Function

If you need to make changes to an existing custom function, you can click the **Edit** button. Here, you can use the function editor to test as well as save your new function.

Duplicate a Function

Duplicating a custom function allows you to create a copy of an existing function, so that you can experiment with different code without worrying about affecting the original script. This is useful if you want to create variations of a function, or if you want to test different approaches to a particular problem.