



Actions

- ^ Table of contents
- a) Send Email
- FAQs
- b) Create record
- FAQ
- c) Update record
- FAQs

Zoho Tables offers three types of actions now. They are:

[a\) Send Email](#)

[b\) Create record](#)

[c\) Update record](#)

Let's try to understand how these individual actions work.

a) Send Email

This action allows you to send an email to the selected email addresses when the trigger event occurs to execute the automation.

In the example below, an email is sent to the digital marketing manager every time a post is published.

Choose a trigger

Select the table named "Posts" and choose the trigger, "When record is updated".

	Content Topic	Post	Publish Date	Channels	Status	Type of Post	Post Headline	SPOC
1	Wifi 6 Technology		October 1, 2022	Facebook LinkedIn	Published	Owned	Scale up business productivity with Wifi 6...	Hazen
2	Next Generation Firewall		October 20, 2022	Instagram LinkedIn	Published	Paid	Next Generation Firewall to protect your business...	Lawrence
3	The official blog		October 24, 2022	Facebook Instagram	Request	Owned	Major components of cyber security #cyber...	Olivia
4	Data Loss Protection		October 27, 2022	LinkedIn	Request	Paid	Try DLP for free #data loss protection	Hazen
5	Components of End point security		November 2, 2022	Instagram LinkedIn	Request	Owned	Components of end point security #security	Lawrence
6	Browser Protection - Webinar		November 8, 2022	Facebook	Request	Promotion	Is your browser protected for online threats. Atten...	Olivia
7	Type here to create a record							

Choose a trigger gif

Customize the condition

Click on "+Add Condition" to set the filter condition as **Status is any of Published**.

Automation Panel: Email Manager

- Trigger:** When record is updated
- Table:** Posts
- Condition:** + Add Condition
- Actions:** + Add Actions

Customize the condition gif

Add the action

Now, click **+Add Action** & Select **Send Email**.

Enter your digital marketing manager's email ID, subject line & custom message.

Note: Ensure that you enable automation to complete the process.

The screenshot displays the Zoho Tables interface for a 'Social Media Planner' table. The main table lists 7 records with columns for Content Topic, Post, Publish Date, Channels, Status, Type of Post, Post Headline, and SPT. The status column shows 'Request', 'Paid', and 'Published' for different records. On the right, the 'Email Manager' panel is open, showing a trigger 'When record is updated' with a condition 'Status is any of Published'. Below the condition, there is an 'Add Actions' button.

	Content Topic	Post	Publish Date	Channels	Status	Type of Post	Post Headline	SPT
1	Wifi 6 Technology		October 1, 2022	Facebook, LinkedIn	Request	Owned	Scale up business productivity with Wifi 6...	Hazer
2	Next Generation Firewall		October 20, 2022	Instagram, LinkedIn	Request	Paid	Next Generation Firewall to protect your business...	Lawre
3	The official blog		October 24, 2022	Facebook, Instagram	Request	Owned	Major components of cyber security #cyber...	Olivia
4	Data Loss Protection		October 27, 2022	LinkedIn	Request	Paid	Try DLP for free #data loss protection	Hazer
5	Components of End point security		November 2, 2022	Instagram, LinkedIn	Request	Owned	Components of end point security #security	Lawre
6	Browser Protection - Webinar		November 8, 2022	Facebook	Request	Promotion	Is your browser protected for online threats. Atten...	Olivia
7	Type here to create a record							

GIF - Showing Action & Automation output

In the above GIF, you can see the digital marketing manager receiving an email once the **status of the record changes to "Published"** on the table named "Posts".

FAQs

1. What is the default sender's email address?

Ans. The sender's email address is no-reply@localnotifications.zohotables.com

2. Can we add attachments to the automation email?

Ans. As of now, Zoho Tables does not support adding attachments to an automation email. We are working on incorporating this feature and it will be released soon.

3. How can I format the emails I send out?

Ans. You'll be able to format the emails in the future version using the Rich text editor.

4. Can you only send automation emails to the base collaborators?

Ans. No, we can also send emails to recipients who are not collaborators of the base.

5. Can you send an automation email to more than one email address?

Ans. Yes, we can send emails to multiple email addresses.

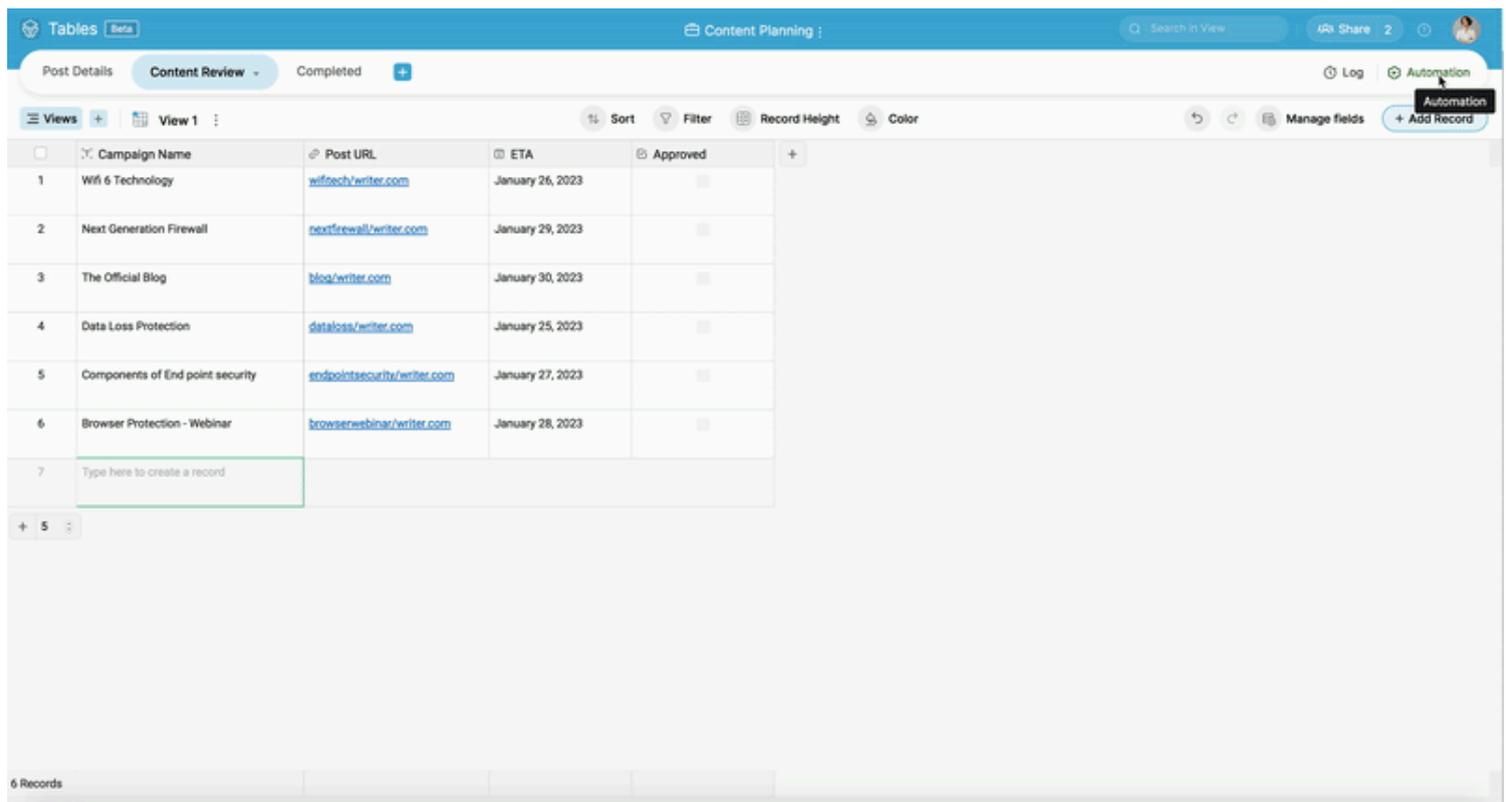
b) Create record

This action allows you to create a new record in your base when the trigger event occurs to perform the automation.

In the below example, as part of our content creation process we have a table consisting of all the content that needs to be reviewed by the manager. What if we want to create a separate table that shows only the list of content that is approved upon the review process? This can be achieved using Create record.

Choose a trigger

- Select the table "Content Review" which shows the complete list of content to be approved.
- Choose the trigger, "When record matches a condition".



	Campaign Name	Post URL	ETA	Approved
1	Wifi 6 Technology	wifitech/writer.com	January 26, 2023	<input type="checkbox"/>
2	Next Generation Firewall	nextfirewall/writer.com	January 29, 2023	<input type="checkbox"/>
3	The Official Blog	blog/writer.com	January 30, 2023	<input type="checkbox"/>
4	Data Loss Protection	dataloss/writer.com	January 25, 2023	<input type="checkbox"/>
5	Components of End point security	endpointsecurity/writer.com	January 27, 2023	<input type="checkbox"/>
6	Browser Protection - Webinar	browserwebinar/writer.com	January 28, 2023	<input type="checkbox"/>
7	Type here to create a record			

Choose a trigger gif

Customize the condition

Click on "+Add Condition" to set a condition where the trigger sets off every time the field, Approved is ✓(checked).

The screenshot displays the Zoho Tables interface. On the left, a table titled 'Content Review' is shown with columns: Campaign Name, Post URL, ETA, and Approved. The table contains 6 records. On the right, the 'Populate Table' automation panel is open, showing a trigger 'When record is updated' for the 'Content Review' table. Below the trigger, there is a 'Condition' section with a '+ Add Condition' button, and an 'Add Actions' button below that.

	Campaign Name	Post URL	ETA	Approved
1	Wifi 6 Technology	wifitech/writer.com	January 26, 2023	<input type="checkbox"/>
2	Next Generation Firewall	nextfirewall/writer.com	January 29, 2023	<input type="checkbox"/>
3	The Official Blog	Moq/writer.com	January 30, 2023	<input type="checkbox"/>
4	Data Loss Protection	dataloss/writer.com	January 25, 2023	<input type="checkbox"/>
5	Components of End point security	endpointsecurity/writer.com	January 27, 2023	<input type="checkbox"/>
6	Browser Protection - Webinar	browserwebinar/writer.com	January 28, 2023	<input type="checkbox"/>
7	Type here to create a record			

Customize condition gif

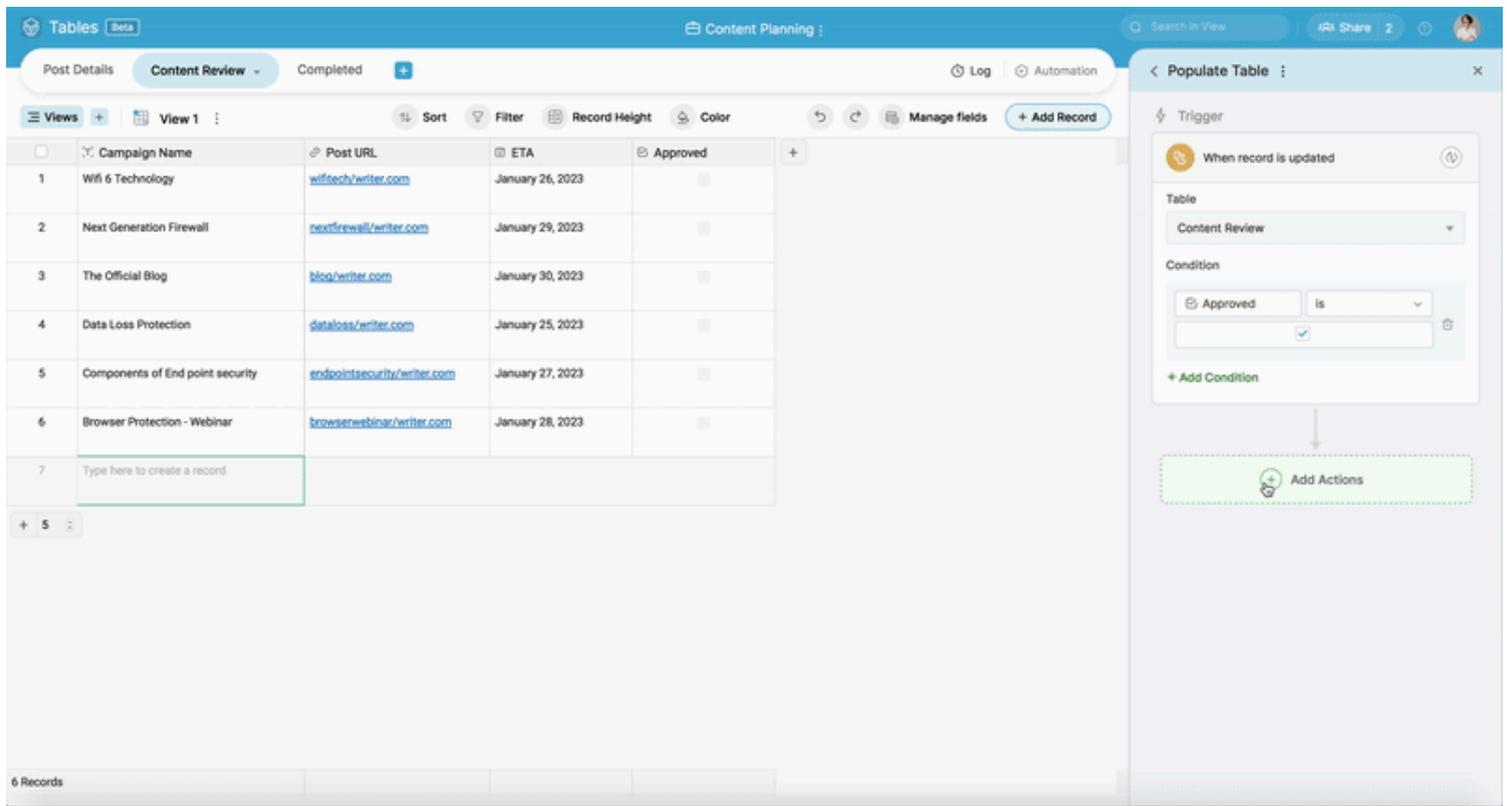
Add the action

- a) Click + Add action and choose the action "Create Record". Select the table "Completed" (where the new record will be created).
- b) Click + Choose field
- c) From the combo box, click the + icon to select the desired field value(s) that you want to populate into the "Completed" table we created. You can choose as many fields as you prefer.

Note: Ensure that you enable automation to complete the process.

See it in action

In the below GIF, you can see the list of approved contents created as new records in a separate table "Completed".

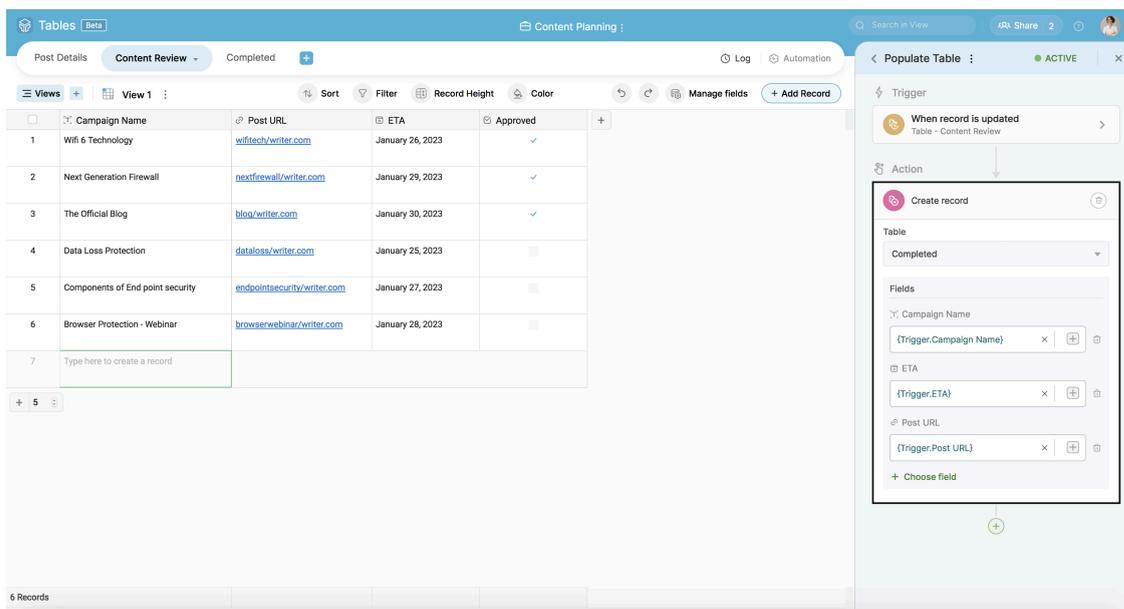


GIF - Showing Action & Automation output

FAQ

1. When a record is created on a new table, how do we ensure that all the fields from the previous table are also inserted?

Ans. While adding the action, under the section fields ensure you insert each field from the original table. You can select as many desired fields by clicking the +icon from the combo box.



There could be instances where the field names between tables may not exactly be the same, so make sure to

double-check if you're mapping the right field names together.

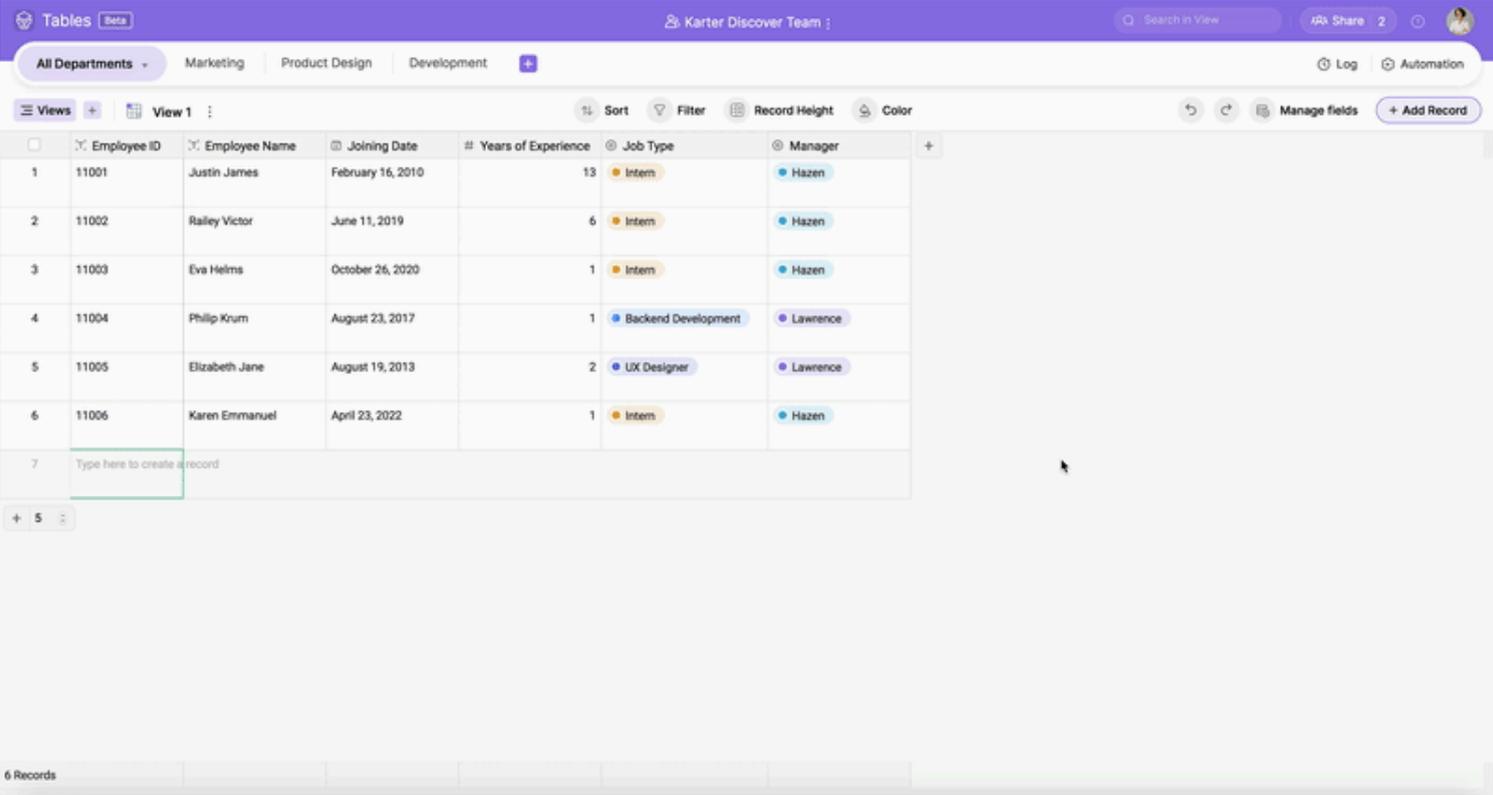
c) Update record

This action allows you to update the existing records in your base when the trigger event occurs.

In the below example, as part of our job delegation process, we want to update the department manager's name based on the assignee's job type.

Choose a trigger

Select the table "All Departments" and choose the trigger, "When record is updated".

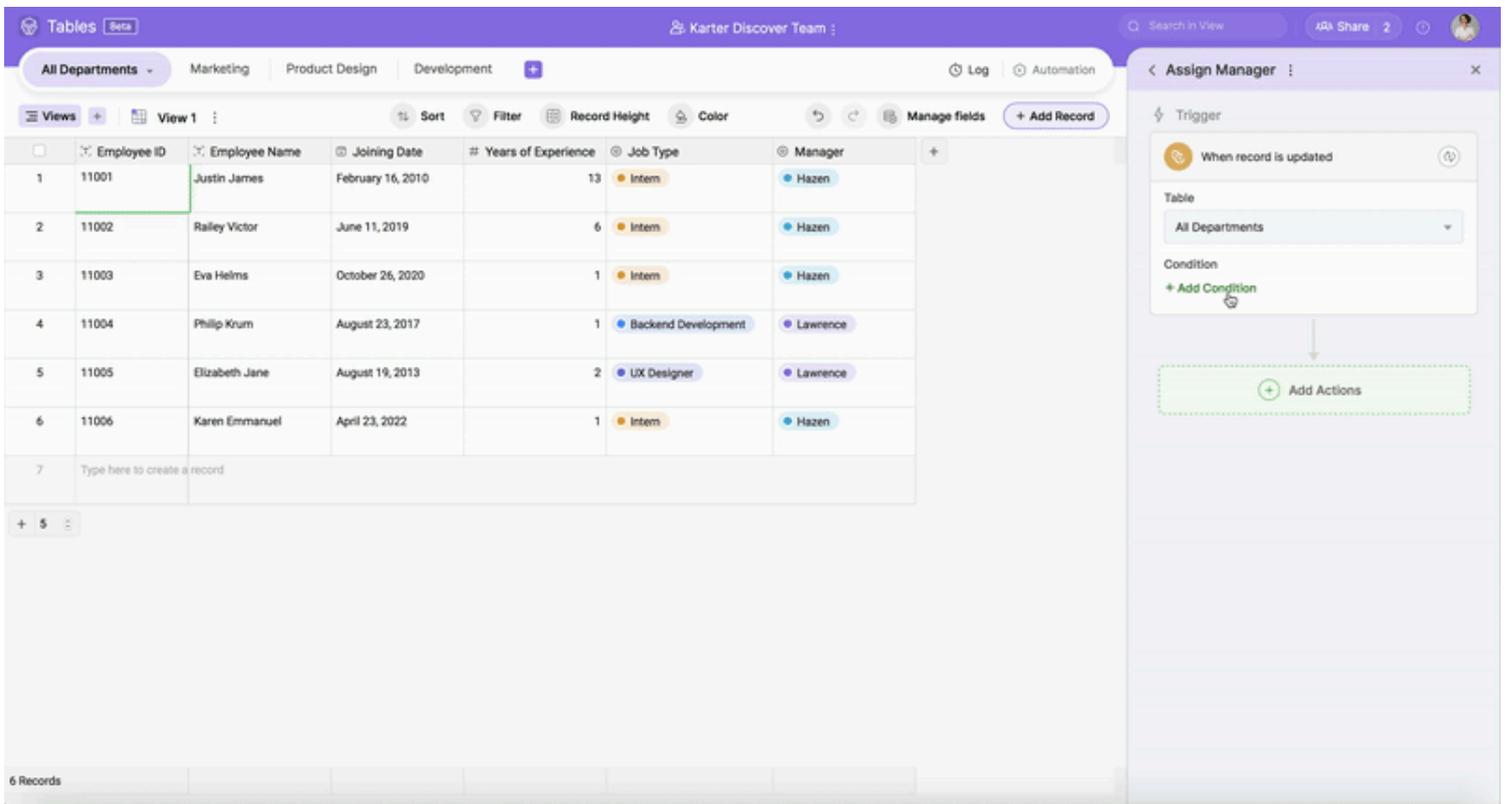


	Employee ID	Employee Name	Joining Date	# Years of Experience	Job Type	Manager
1	11001	Justin James	February 16, 2010	13	Intern	Hazen
2	11002	Railey Victor	June 11, 2019	6	Intern	Hazen
3	11003	Eva Helms	October 26, 2020	1	Intern	Hazen
4	11004	Philip Krum	August 23, 2017	1	Backend Development	Lawrence
5	11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence
6	11006	Karen Emmanuel	April 23, 2022	1	Intern	Hazen
7	Type here to create a record					

Choose a trigger gif

Customize the condition

Click on "+Add Condition" and set the condition as **Job Type is any of Marketing Lead/Product Marketer/Content Writer/ Product Marketing Associate.**

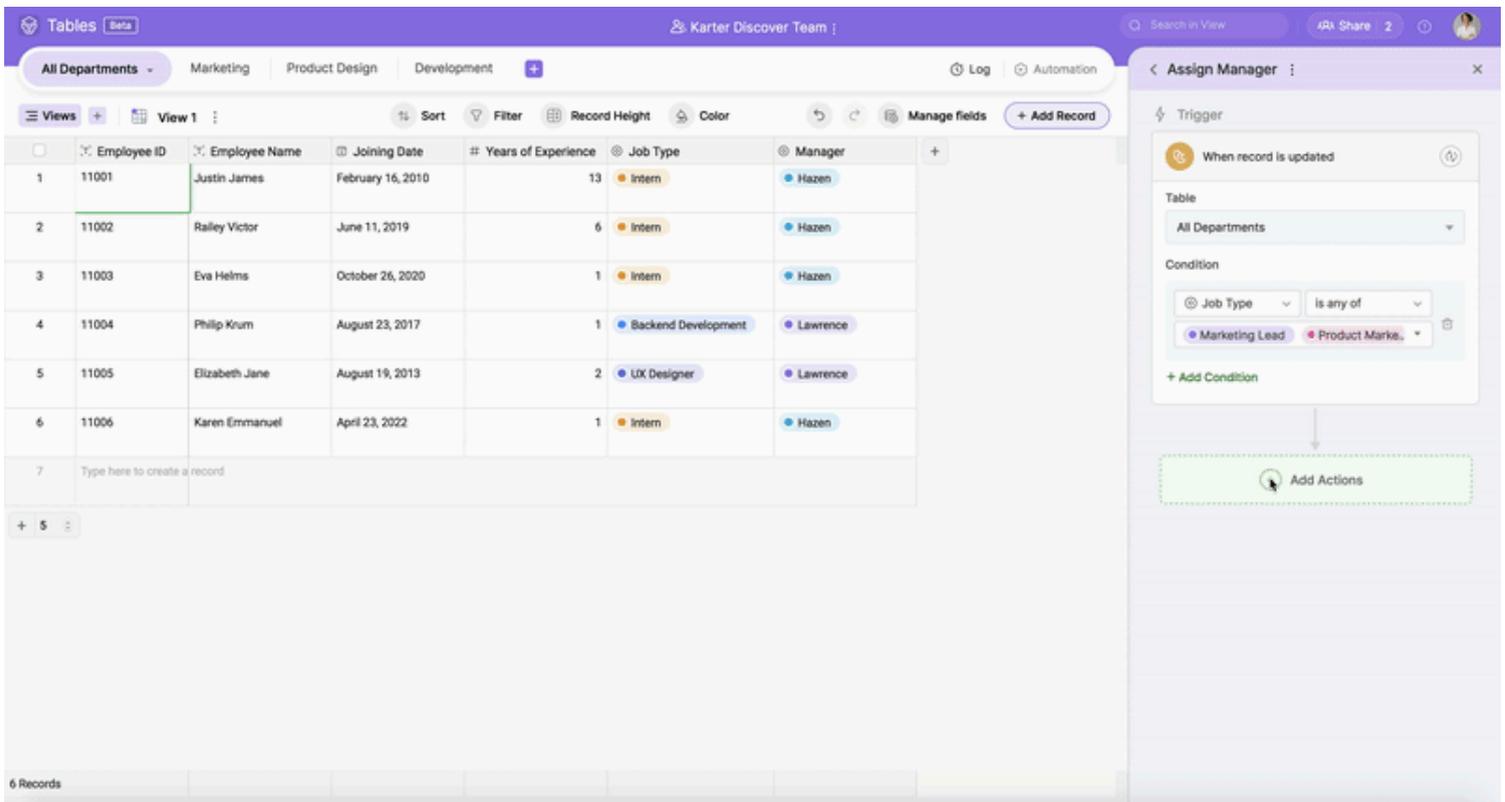


Customize the condition gif

Add the action

a) Click **+ Add Actions** and choose the action "Update record". Select the table "All Departments" where you want to update the record.

In this case we use the same table for both trigger and action.



Add the action gif

b) Now **update your record condition** to filter out the exact *Record* you would like to change from the list of records available.

In this case, to update a record with the trigger step, repeat the same condition.

click + Add Condition and choose ***Job Type is any of Marketing Lead/Product Marketer/Content Writer/Product Marketing Associate.***

The screenshot displays the Zoho Tables interface. On the left, a table lists employee records with columns for Employee ID, Employee Name, Joining Date, Years of Experience, Job Type, and Manager. The 'Job Type' column is highlighted in orange for 'Intern' and blue for 'Backend Development', 'UX Designer', and 'Lawrence'. On the right, the 'Assign Manager' automation configuration panel is open. It shows a trigger 'When record is updated' and an action 'Update record'. The 'Table' is set to 'All Departments'. Under the 'Condition' section, there is a '+ Add Condition' button. Under the 'Fields' section, there is a '+ Choose field' button.

	Employee ID	Employee Name	Joining Date	# Years of Experience	Job Type	Manager
1	11001	Justin James	February 16, 2010	13	Intern	Hazen
2	11002	Railey Victor	June 11, 2019	6	Intern	Hazen
3	11003	Eva Helms	October 26, 2020	1	Intern	Hazen
4	11004	Philip Krum	August 23, 2017	1	Backend Development	Lawrence
5	11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence
6	11006	Karen Emmanuel	April 23, 2022	1	Intern	Hazen
7	Type here to create a record					

GIF showing record condition

c) Now choose the field that needs to be updated. Click + **Choose field**, and select the field "Manager". Then, choose the value with which the field must be updated. In the below example, we have selected the manager "Olivia" from the dropdown menu.

Employee ID	Employee Name	Joining Date	# Years of Experience	Job Type	Manager
11001	Justin James	February 16, 2010	13	Intern	Hazen
11002	Railey Victor	June 11, 2019	6	Intern	Hazen
11003	Eva Helms	October 26, 2020	1	Intern	Hazen
11004	Philip Krum	August 23, 2017	1	Backend Development	Lawrence
11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence
11006	Karen Emmanuel	April 23, 2022	1	Intern	Hazen

GIF showing choose field and value

Note: Ensure that you enable automation to complete the process.

See it in action

In the below GIF, you can see the department manager's name being updated based on the assignee's job type.

Employee ID	Employee Name	Joining Date	# Years of Experience	Job Type	Manager
11001	Justin James	February 16, 2010	13	Intern	Hazen
11002	Railey Victor	June 11, 2019	6	Intern	Hazen
11003	Eva Helms	October 26, 2020	1	Intern	Hazen
11004	Philip Krum	August 23, 2017	1	Backend Development	Lawrence
11005	Elizabeth Jane	August 19, 2013	2	UX Designer	Lawrence
11006	Karen Emmanuel	April 23, 2022	1	Intern	Hazen

The above GIF showing the automation output gif

FAQs

1. Can multiple records and fields be updated using the update record action?

Ans. Yes, you can update multiple records and fields in one go using the update record action.