Zoho Corporation

Actions

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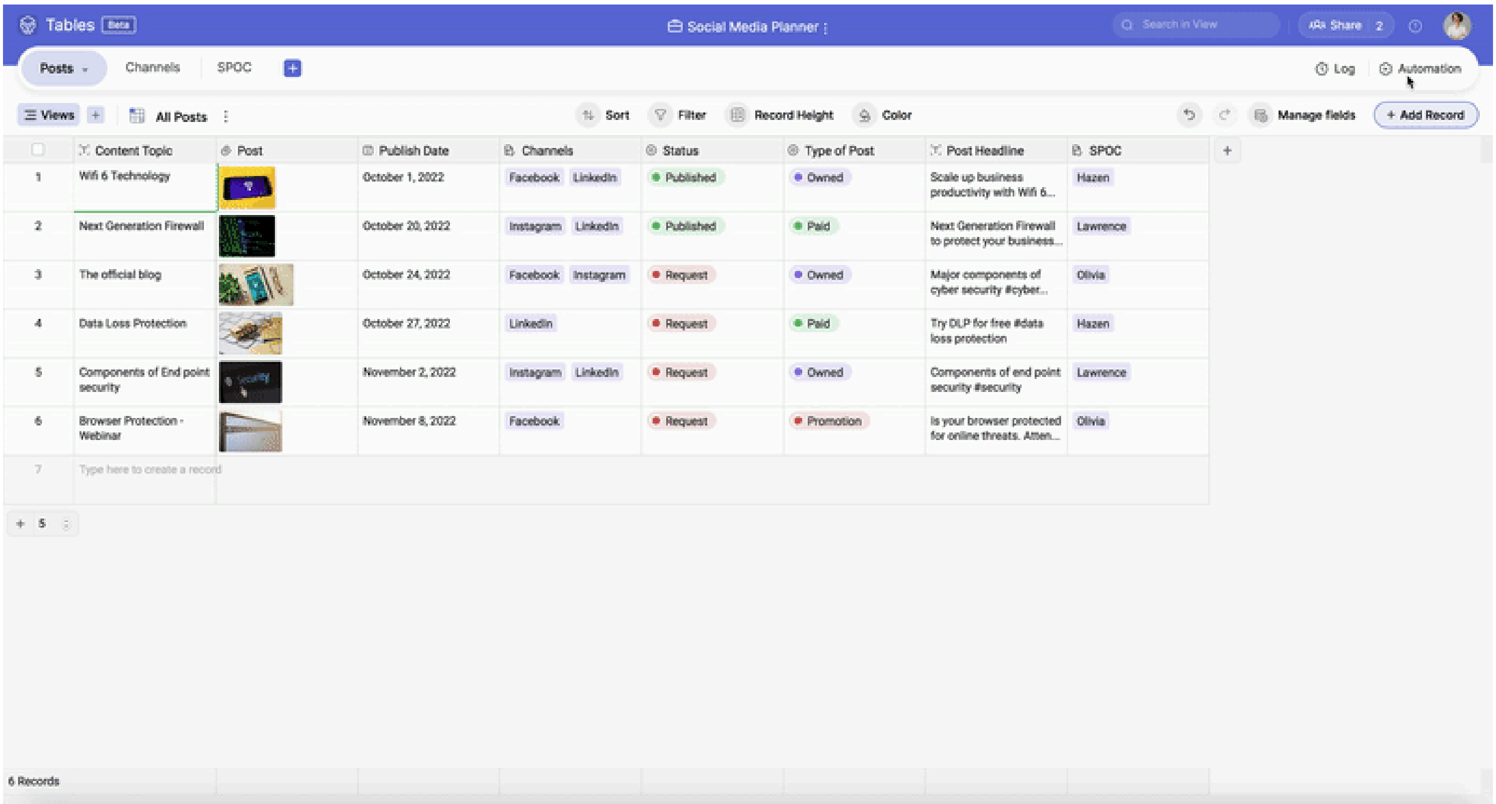
Zoho Tables offers three types of actions now. They are:
a) Send Email
b) Create record
c) Update record

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.

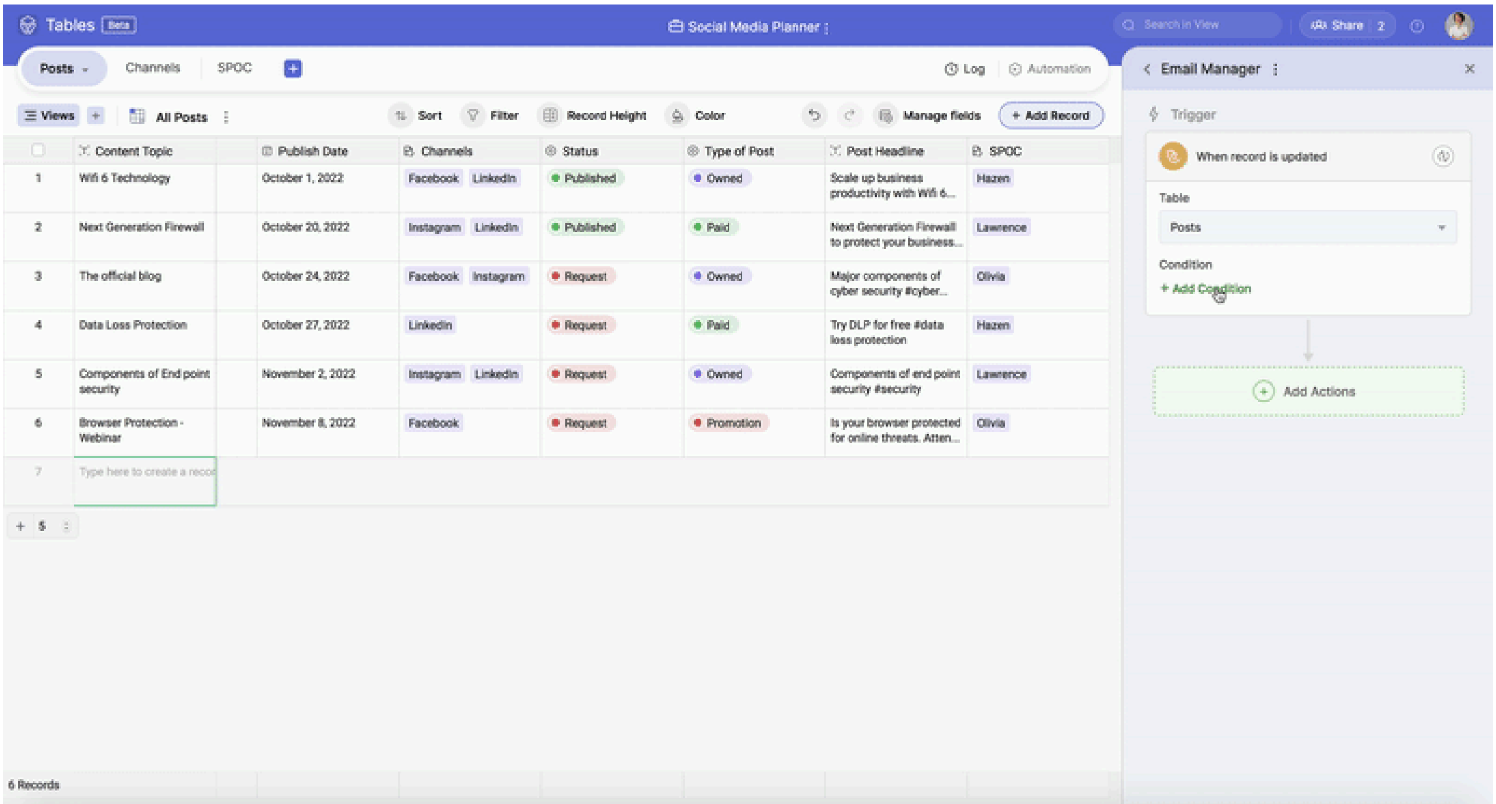
Choose a trigger
Select the table named "Posts" and choose the trigger, "When record is updated".



Choose a trigger gif

Customize the condition

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

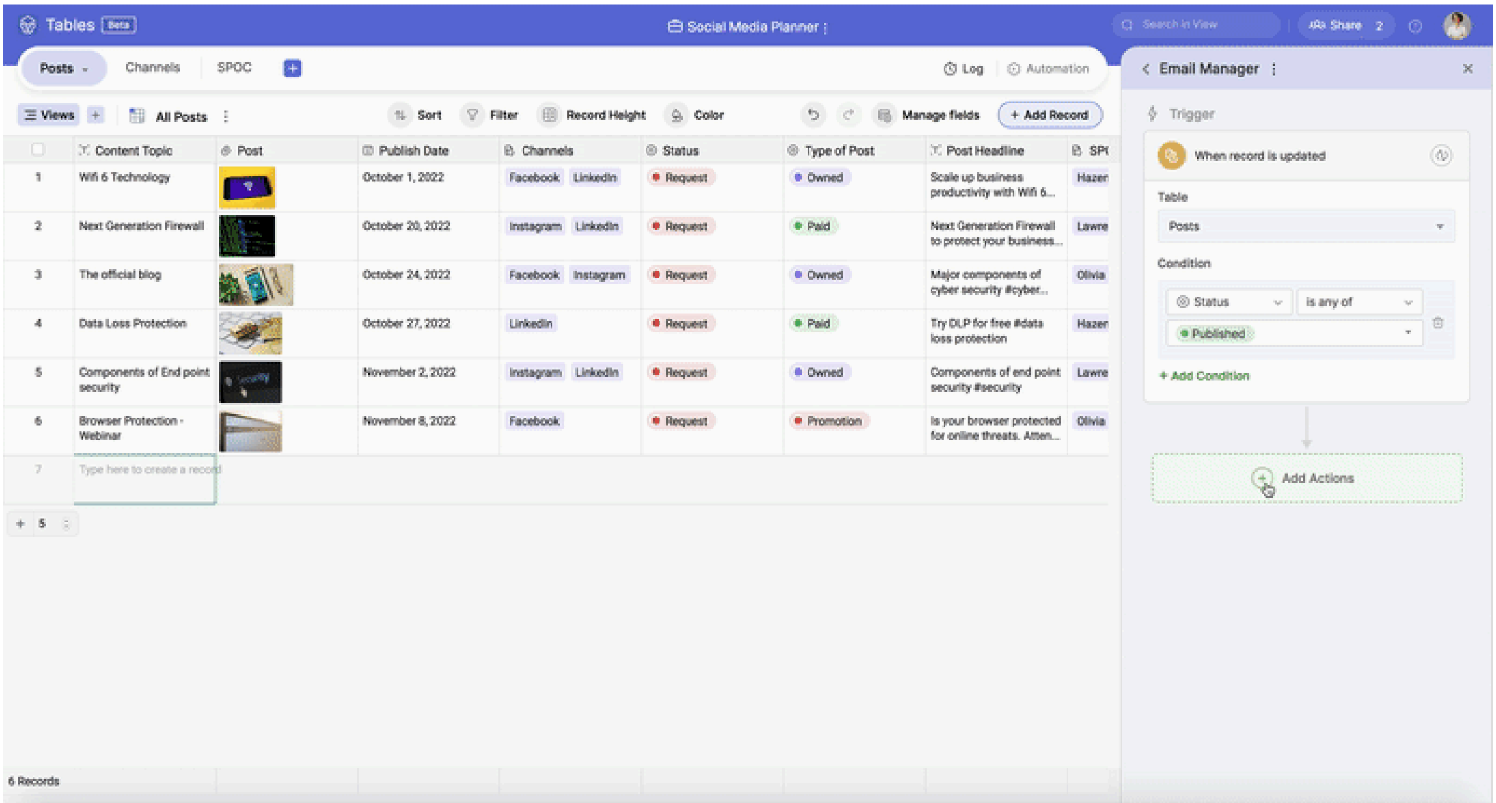


Customize the condition gif

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.



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.

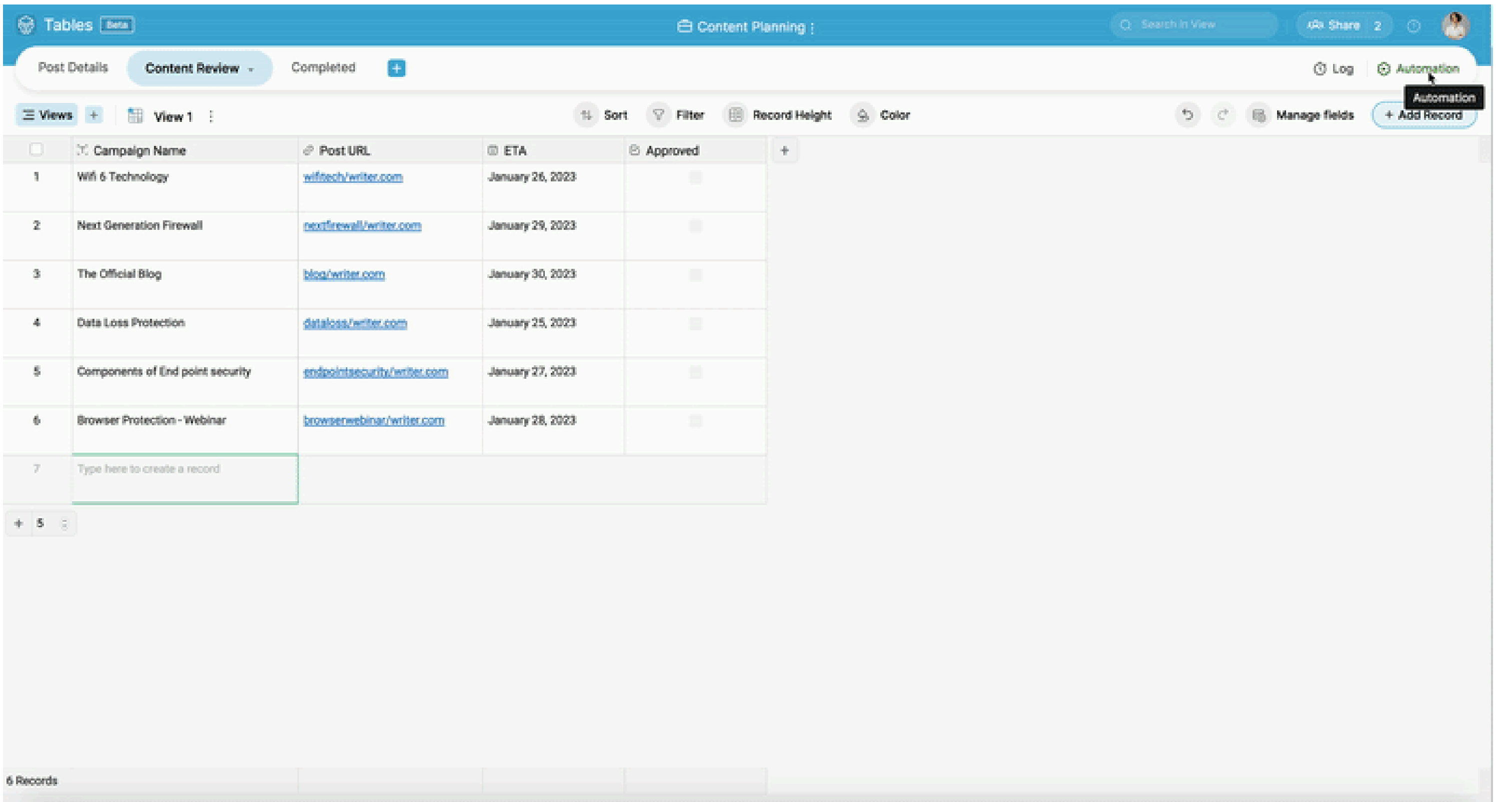
5. Can you send an automation email to more than one email address?
Ans. Yes, we can send emails to multiple email addresses.

b) Create record

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

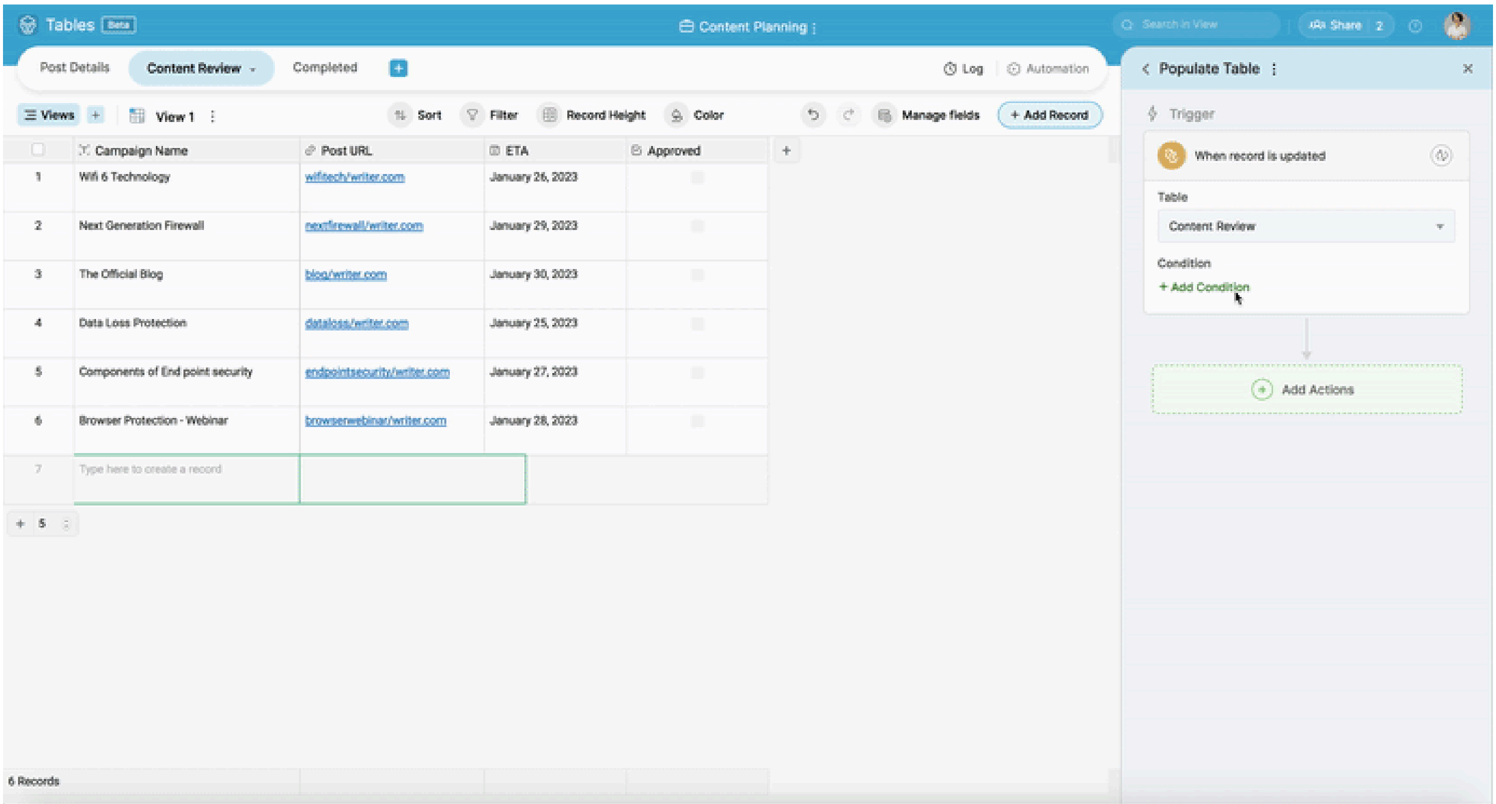
In the below example, as part of our content creation process we have a table consisting of all the content that needs to be reviewed by the manager. What if we want to create a separate table that shows only the list of content that is approved upon the review process? This can be achieved using Create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

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



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).



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).

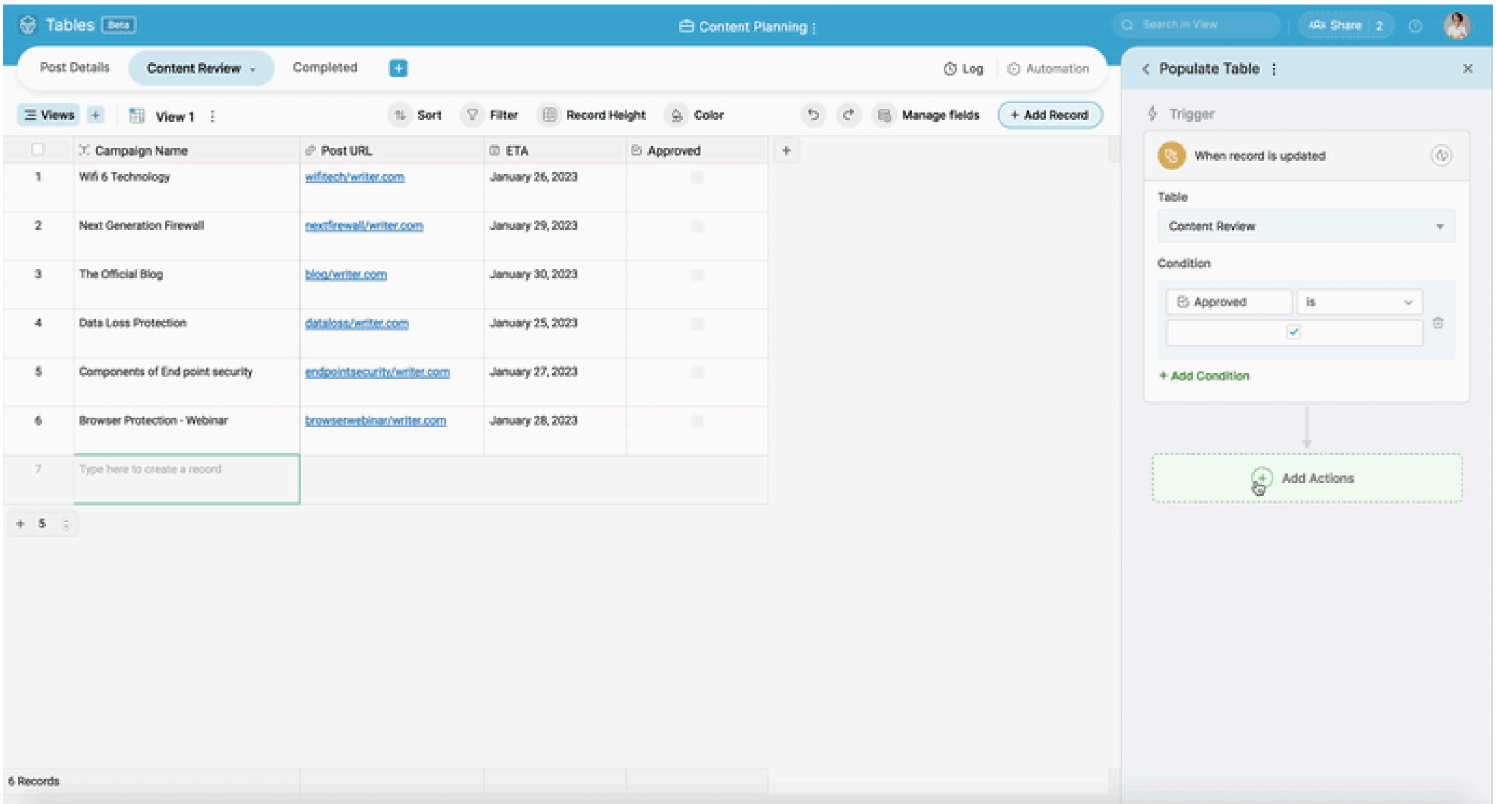
b) Click + Choose field

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".

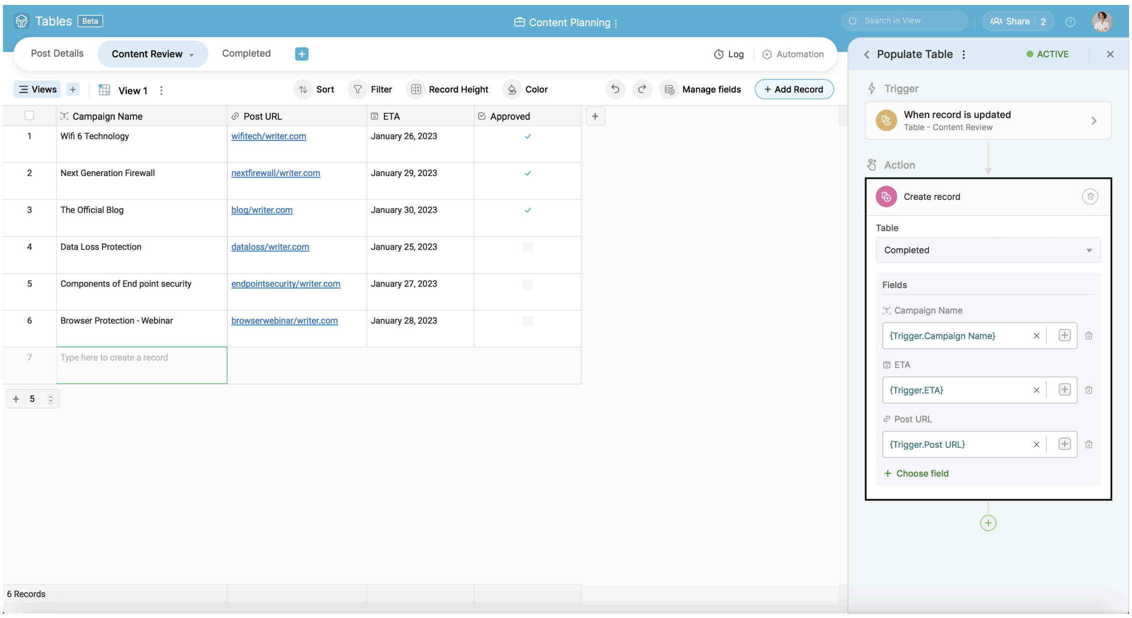


GIF - Showing Action & Automation output

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.



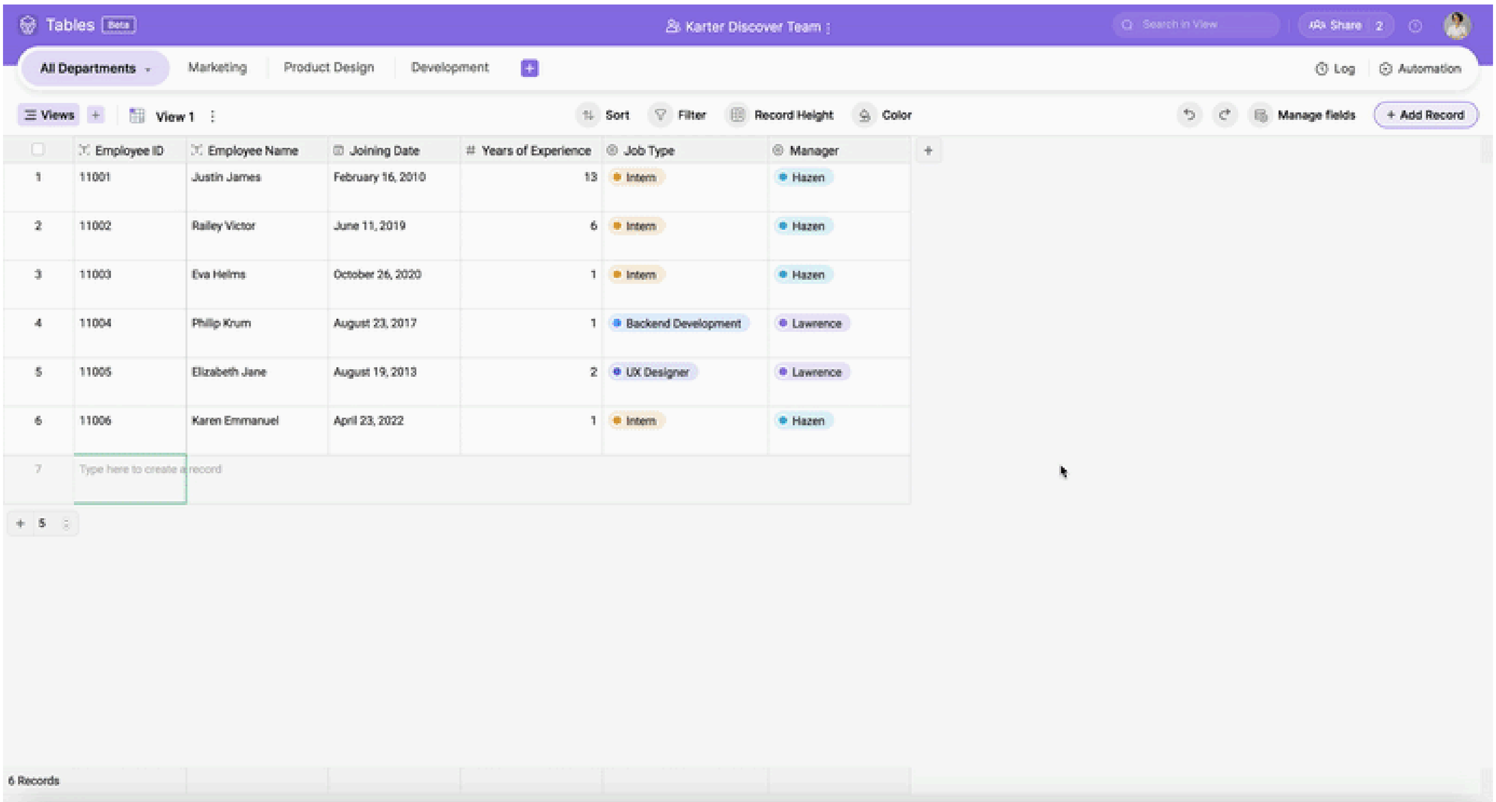
There could be instances where the field names between tables may not exactly be the same, so make sure to double-check if you're mapping the right field names together.

c) Update record

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

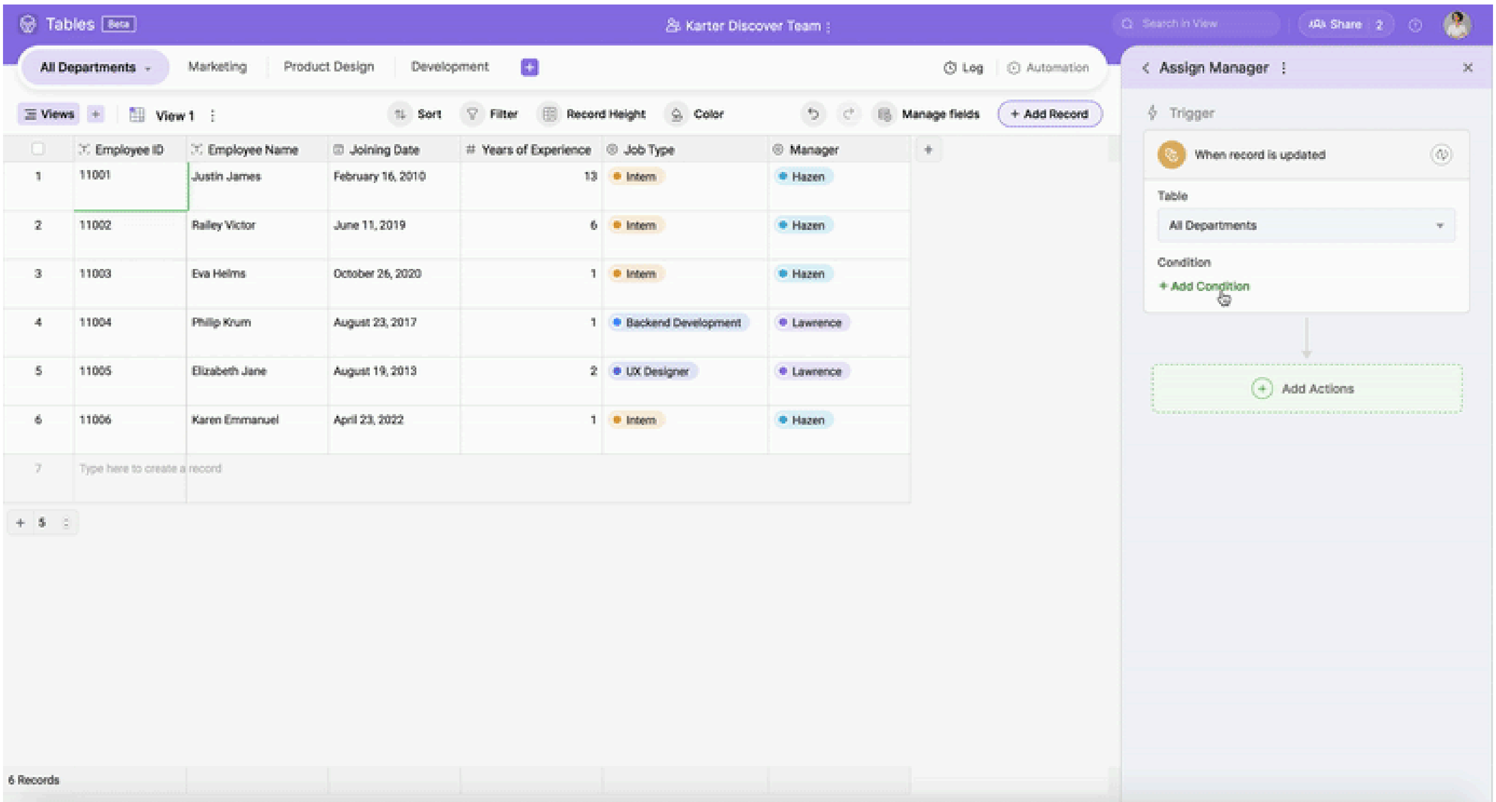
In the below example, as part of our job delegation process, we want to update the department manager's name based on the assignee's job type.

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



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.***

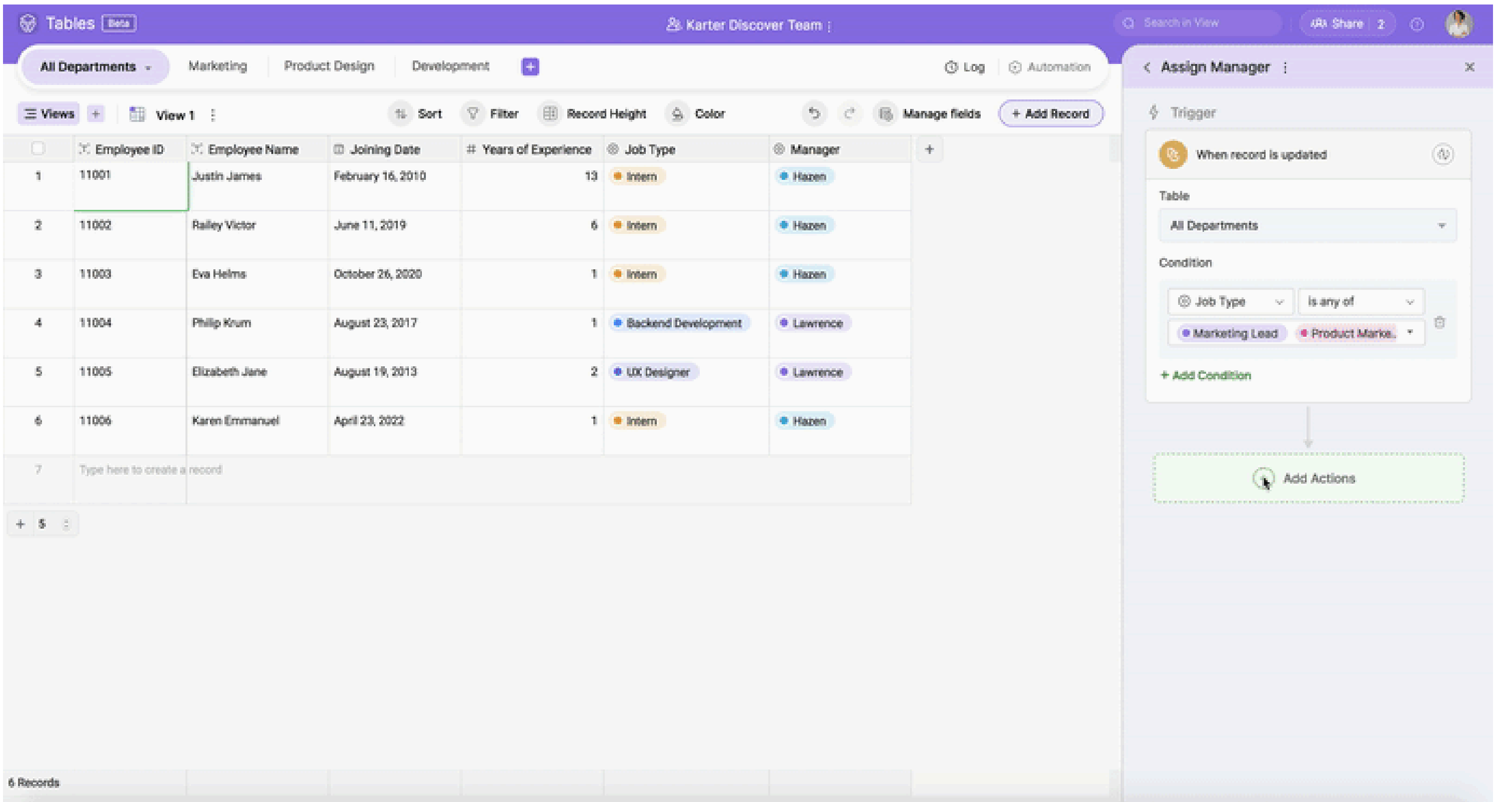


Customize the condition gif

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.

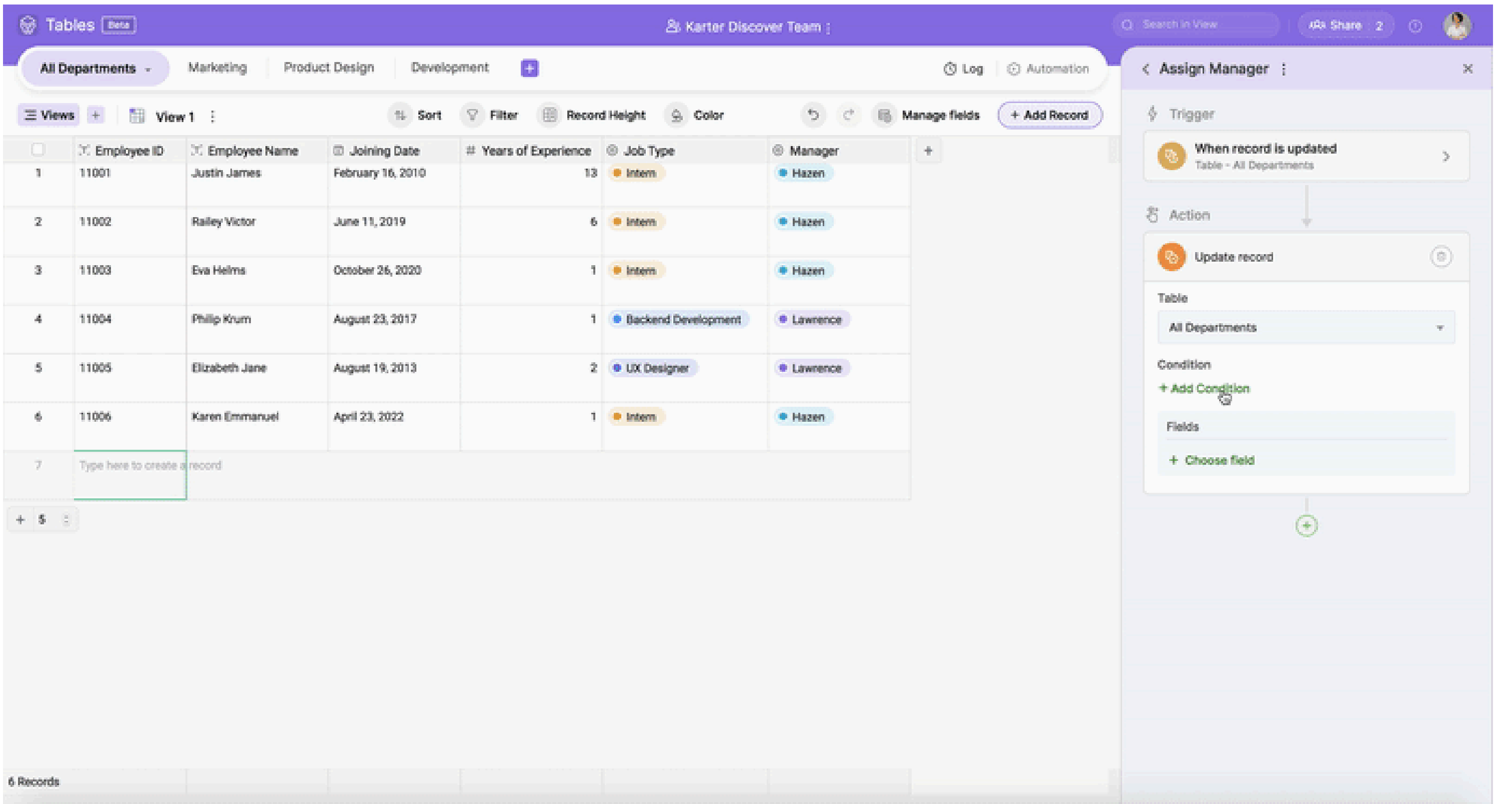
In this case we use the same table for both trigger and action.



Add the action gif

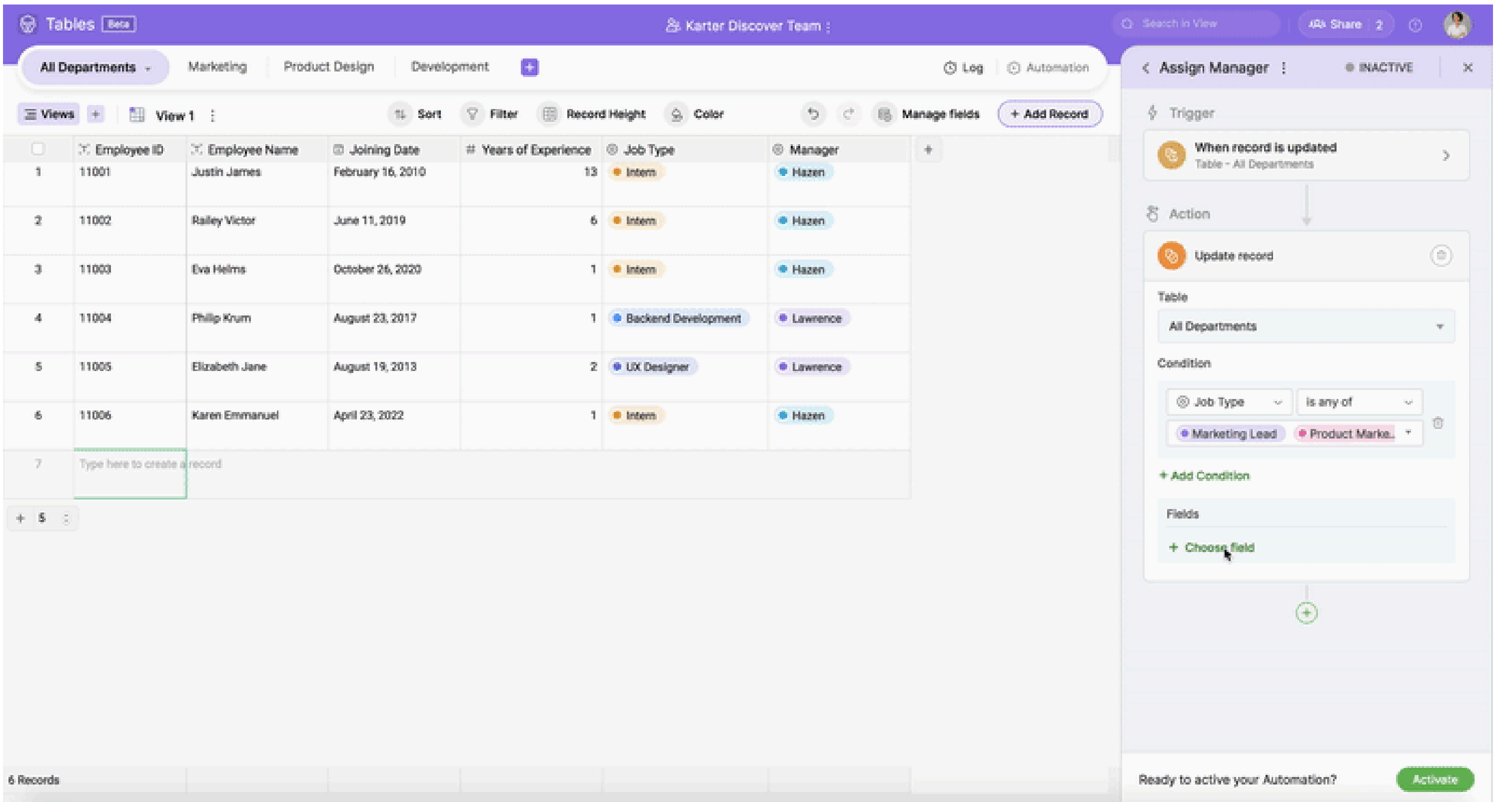
b) Now **update your record condition** to filter out the exact *Record* you would like to change from the list of records available.

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.***



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.

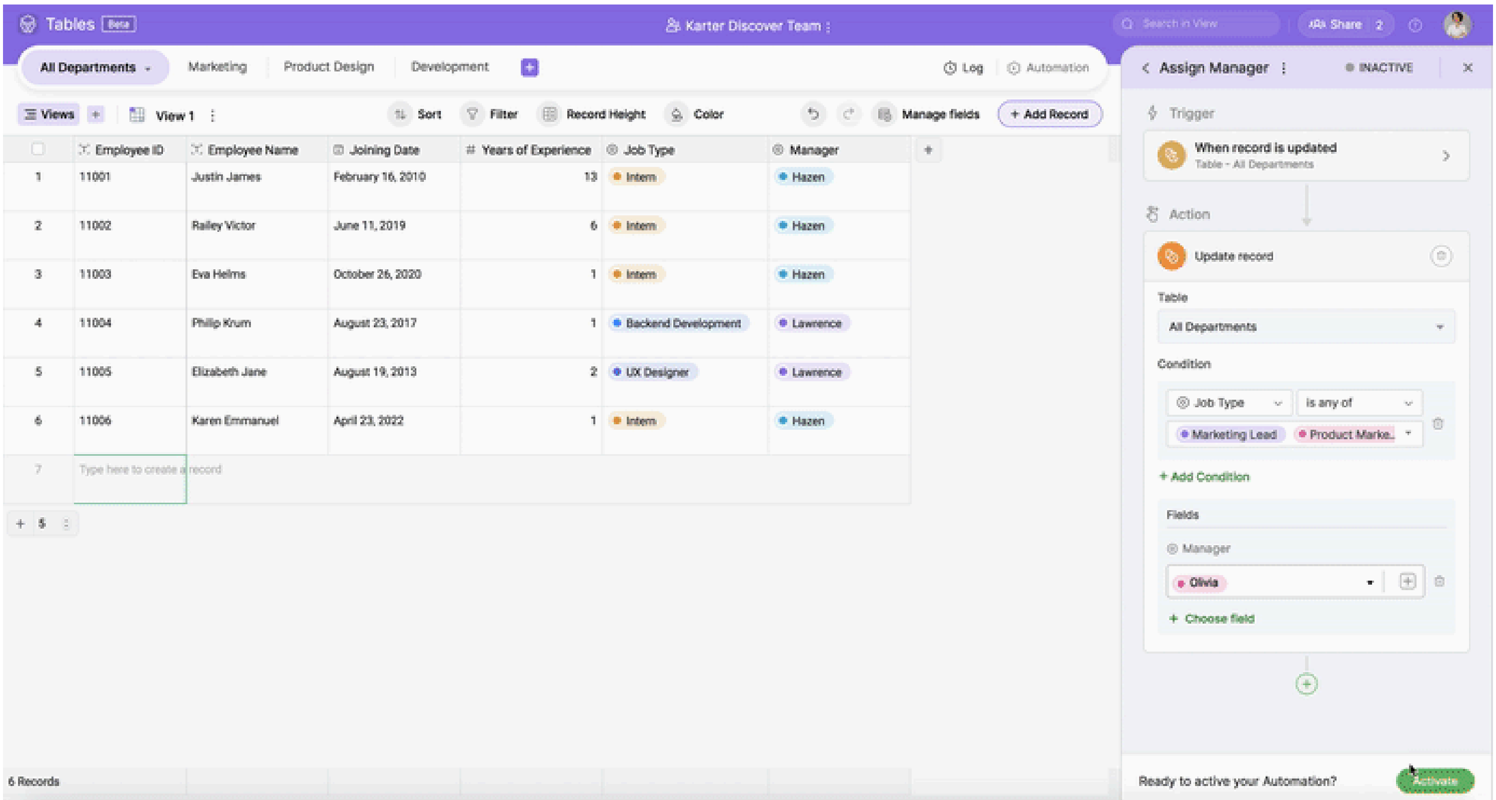


GIF showing choose field and value

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.



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.