



Creating automations

Plan	Free and Professional
User Permissions	Manager
Platform	Web, Android, & iOS

Automations simplify routine tasks with a simple trigger and action logic.

Triggers

A *trigger* is the event that starts the automation. There are two triggers in Zoho Tables:

1. When a record is created
 - a. Choose the **When a record is created** trigger to initiate the automation whenever a new record is created by a form submission, empty record creation, or data duplication.
2. When a record is updated:
 - a. Choose the **When a record is updated** trigger to initiate the automation.
 - b. Choose the table where the trigger event happens.
 - c. Apply conditions that will trigger the automation. (e.g. 'Status' 'is any of' 'Ready for Review')

Actions

Actions are the tasks or operations that happens after the trigger is initiated. There are three actions in Zoho Tables' automation:

1. Send an email
 - a. Choose **Send an Email** to notify users when a trigger event happens.
 - b. Configure the email by filling out the recipients, subject, and email content. You can also include fields from the table by clicking the + icon.
 - c. Click **Activate** to activate the automation.
2. Create record

- a. Choose **Create record** to create a record in a table when the trigger event happens.
- b. Choose the table in which you want to create the record.
- c. Click the + icon to choose the fields from the trigger table whose values need to be added to the chosen table in the actions part.
- d. Click + **Choose fields** to choose additional fields to update.

3. Update record

- a. Choose **Update record** to update a record in a table when the trigger event happens.
- b. Choose the table in which you want to update the record.
- c. Click the + icon to choose the fields from the trigger table whose values need to be updated to the chosen table in the actions part.
- d. Click + **Choose fields** to choose additional fields to update.