



How to use Automation?

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▸ Setting up Automation

Plan	Free & Professional
User Permissions	Portal Owner, Portal Manager, Workspace Manager, Workspace Editor, Base Manager & Base Editor
Platform	Web, Android, & iOS

Let's look into how you can use Zoho Tables Automation:

Setting up Automation

To set up Zoho Tables Automation, follow these steps:

1. Open the base that you want to automate.
2. Click on "Automation" at the top right corner of the page.
3. It opens up the automation set up panel to Click the "+ Create New" button.

Tables **Beta** | Event Tracker | Search in View | Share 2 | Log | Automation

Coordinators | Tasks | Agenda | **Speakers** | Venue | Expenses | +

Views + | Speakers List | Sort | Filter | Record Height | Color | Manage fields | + Add Record

Speaker	Title	Email	Availability	Link to Agenda
1 Steve Rogers	CEO & Founder - Zyker Corp	steve@zyker.com	Confirmed	Keynote
2 Edward Martin	Director of Engineering - Zyker Corp	edward@zyker.com	In Talks	Digital Transformation for Manufacturers
3 Richard Alvero	VP - Marketing - Zyker Corp	richard@zyker.com	Confirmed	Challenges faced by industries in the digital era
4 Alicia Andrew	Manager Customer Engagement - Zyker Corp	alicia@zyker.com	In Talks	IoT comes to your rescue
5 Joseph Gracia	Senior Product Marketer - Zyker Corp	joseph@zyker.com	Confirmed	Power of Augmented Reality
6 Edwina Lawson	Product Marketer - Zyker Corp	edwina@zyker.com	Confirmed	How to improve operational efficiency
7 Stephan Lewis	Business Development Manager - Zyker Corp	stephan@zyker.com	Unavailable	Harness the Power of Artificial Intelligence
8 Mark Patrick	Head of Business Development - Zyker Corp	mark@zyker.com	In Talks	Streamline Your Product Lifecycle Managem...
9 Tim	CHRO - Zyker Corp	tim@zyker.com	Confirmed	Keynote
10	Type here to create a record			

+ 5

9 Records

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+ 5

9 Records

4. In the "Trigger" panel, choose an event of your choice that will trigger your automation. For example, you can choose to trigger the automation when a record matches a condition in the table.

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Views + | Speakers List | Sort | Filter | Record Height | Color | Manage fields | + Add Record

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+ 5

9 Records

Automation 1

Choose a Trigger

Add one of these options to trigger block. This is where the automation starts.

- When record is created
- When record is updated

↑
Trigger Panel

5. Click + Add Action to open the "Action" panel and choose the action you want to perform when the trigger sets off. For example, you can send an email every time a record is updated in the table.

The screenshot shows the Zoho Tables interface for an 'Event Tracker' table. The table has columns for Speaker, Title, Email, Availability, and Link to Agenda. The 'Automation 1' panel is open, showing a trigger 'When record is updated' for the 'Speakers' table. The condition is set to 'Speaker is not empty'. Below the condition is a button labeled 'Add Actions'.

Speaker	Title	Email	Availability	Link to Agenda
Edward Martin	Director of Engineering - Zylker Corp	edward@zylker.com	In Talks	Digital Transformation for Manufacturers
Richard Alvero	VP - Marketing - Zylker Corp	richard@zylker.com	Confirmed	Challenges faced by industries in the digital era
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Tim	CHRO - Zylker Corp	tim@zylker.com	Confirmed	Keynote

The screenshot shows the same Zoho Tables interface, but the 'Automation 1' panel is now in the 'Choose a Action' step. It lists three available actions: 'Send Email', 'Create record', and 'Update record'. An arrow points to this panel with the label 'Action Panel'.

6. Configure the details of your action For example, if you choose to send an email, you can specify the recipient's email address, subject line, and content of the email.

The screenshot shows the Zoho Tables interface with a table named 'Speakers List' and an automation configuration panel for 'Automation 1'. The table has columns for Speaker, Title, Email, Availability, and Link to Agenda. The automation is configured with a trigger 'When record is updated' and an action 'Send Email' to 'Hazen' with a subject 'Speaker Availability' and a message 'The speaker is available and has confirmed their presence.' An arrow points to the 'Action Configuration Panel'.

Speaker	Title	Email	Availability	Link to Agenda
1 Steve Rogers	CEO & Founder - Zylker Corp	steve@zylker.com	Confirmed	Keynote
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- To rename your automation click on the 3 dot icon next to the automation name and choose Rename.
- Click on the "Active" button at the bottom right to activate your automation.

The screenshot shows the Zoho Tables interface with the 'Automation 1' configuration panel. The automation is currently inactive. The trigger is 'When record is updated' and the action is 'Send Email'. The 'Send Email' action is selected, and the 'Activate' button is visible at the bottom right.

After you have set up your automation, your automation will execute the action whenever the trigger event occurs.

You can also edit or delete an automation by clicking on the same "Automation tab" and making the desired changes.