Zoho Corporation

Using Filters During Zoho CRM Import to Zoho Tables

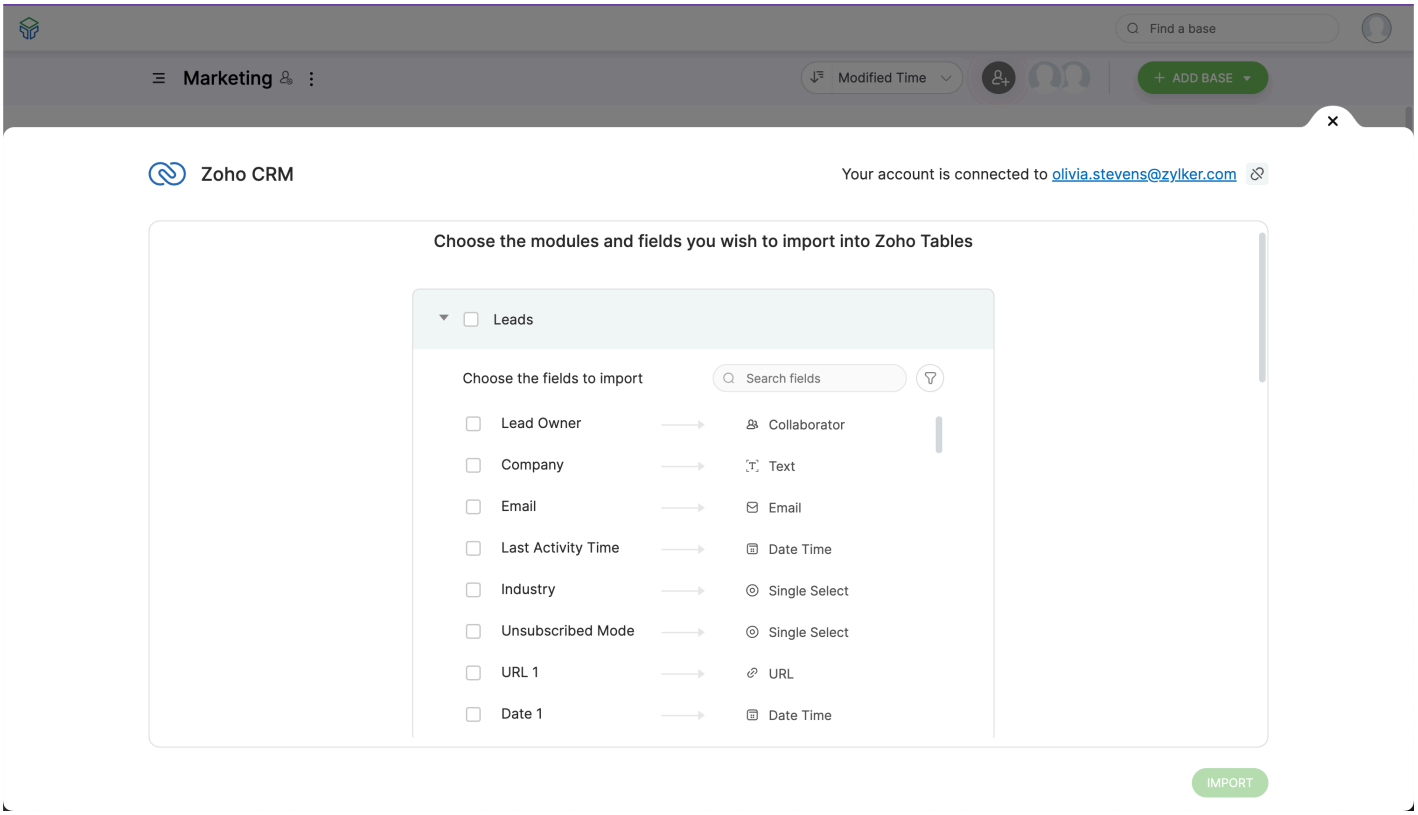
When importing data from Zoho CRM to Zoho Tables, you can apply filters to selectively import records based on specific criteria, helping you import only the data you need.

How Filters Work

Filters are applied to the fields in Zoho CRM, and only records that match the filter criteria will be imported into Zoho Tables.

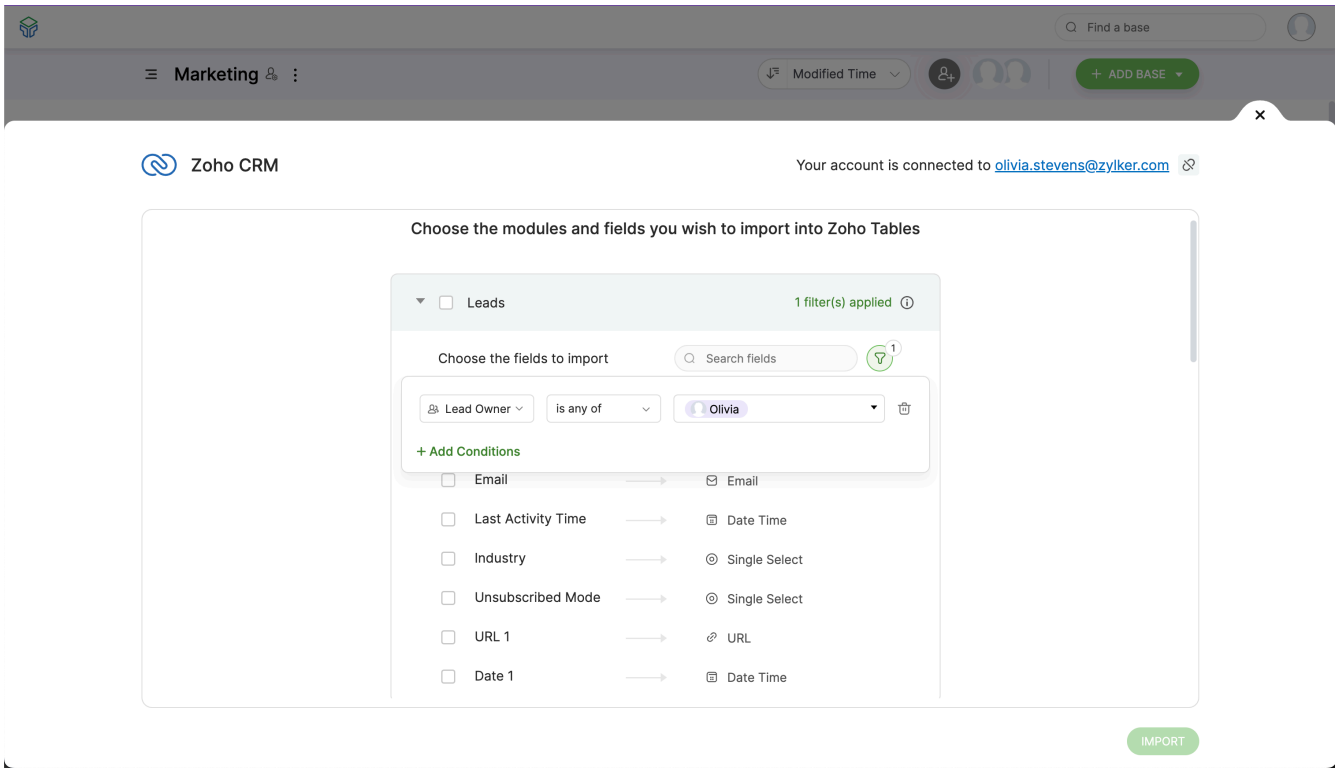
Setting Up Filters for Import

1. Navigate to your Zoho Tables workspace.
2. Choose **Import**, and choose **Zoho CRM** as the data source.
3. Choose the Zoho CRM module (e.g., Leads, Contacts, Accounts, etc.) you want to import data from.



4. On the import settings screen, you will find an option to apply **Filters**. Here, you can define the filter criteria.
    a. Filter Fields: Choose the fields from Zoho CRM on which you want to apply filters (e.g., Lead Status, Account Type, etc.).

b. Filter Conditions: Define the condition for the filter (e.g., "equals", "contains", "greater than", etc.). You can also specify specific values for these conditions (e.g., Lead Status equals "Open")



5. Once you're satisfied with the filter settings, proceed with the import. Only the records that match your filter conditions will be imported into Zoho Tables.

Note: Zoho Tables supports a variety of filtering options to help you customize your data import; however, there are certain fields in Zoho CRM that may not be compatible with Zoho Tables and would be disabled while filtering while import.

Limitations

1. Only the most recent 10,000 records can fetched while importing to Zoho Tables.
2. A maximum of 10 criteria can be used while filtering data in modules.
3. A total of only 50 fields can be selected for import.
4. Lookup fields in Zoho CRM will be imported as RecordIDs in Zoho Tables
5. Filter criteria aren't available for **Lookup**, **Rollup**, **Formula**, and **Multiline (TextArea)** fields, but can be chosen among the 50 fields for import.
6. The **Pricing_Details** and **Product_Details** in **Price Books** and **Quotes** module; and **Participants** field in **Events** module wouldn't be available for filtering and cannot be imported among the 50 fields.
7. Additionally, ImageUpload, FileUpoad, Territory, MultiSelectLookup will also not be available for filtering and import.