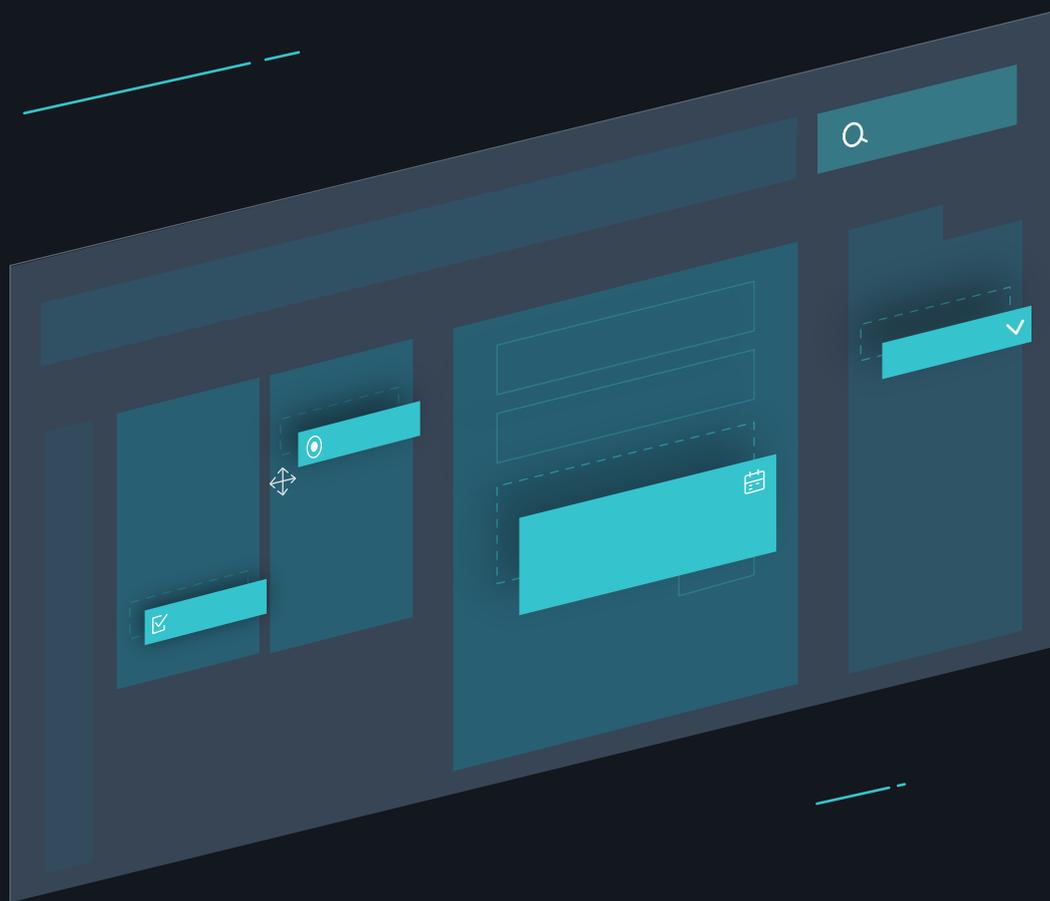


# Getting Started with Zoho Creator



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# How To Use This Guide

Whether you're new to Zoho Creator, or just want to know what it's all about, this guide is for you. You can get something out of this guide whether you're reading only the chapters you're interested in or reading cover to cover.

Building an app is easiest when you have a plan. This guide teaches you:

- ✔ What a Creator application is
- ✔ Why Creator applications can help your organization
- ✔ How to begin planning your custom application
- ✔ Fundamental concepts and terms found throughout Creator



💡 To help you understand how you can apply the steps in this guide to your business, the yellow pages will show you how Karen applied them to her business teaching cooking classes.

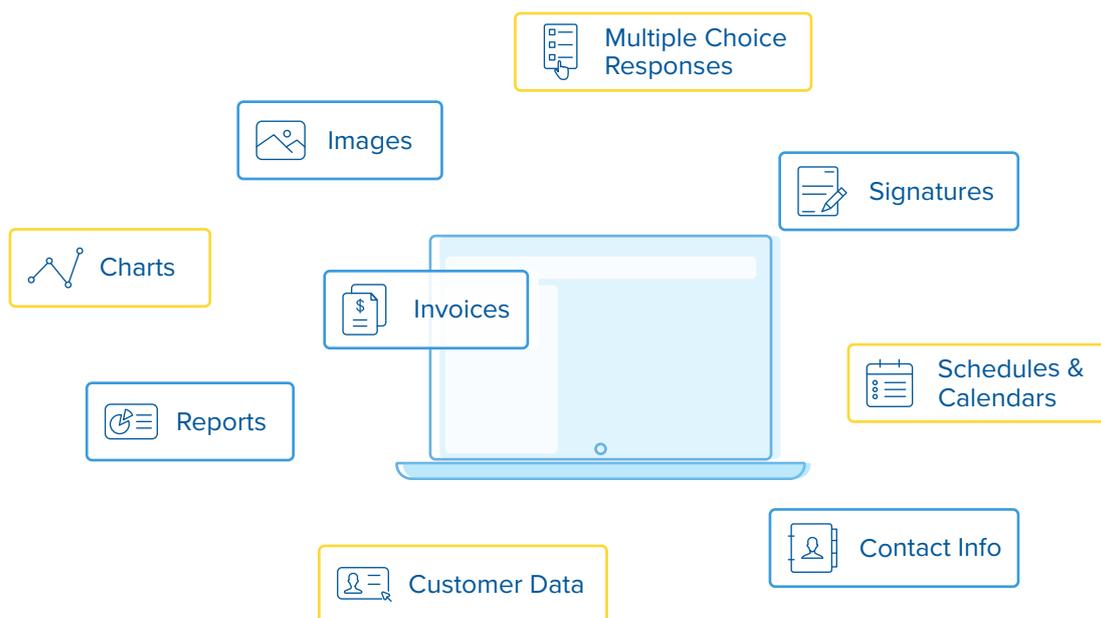
# What is a Creator Application?

Creator apps are custom web applications that help your business get more work done. Creator apps let you collect important information in one place, so you can use it to work faster. Since they're available online, you **won't have to download anything**; people can access Creator apps from **any operating system** or from their **mobile devices**.

A Creator app can help you:

- ✔ Collect and analyze information
- ✔ Move information between other applications you already use
- ✔ Do repetitive work for you
- ✔ Automatically send email and text messages

## What information can I put in a Creator app?



# Identify Your Problems



Every Creator application is unique, but the problems they solve are **usually common** to many businesses.

The first step in planning your app is figuring out which of your business processes you'd like to improve. Think about which parts of your workday are inefficient or difficult.

On the next page, we've listed some common problems that Creator apps are good at helping people solve.

# Common Problems

## **Everything is on paper**

You spend hours keeping your filing cabinets organized and looking for papers, and you can't find information unless you're in the office.

## **Collaborating with spreadsheets isn't working**

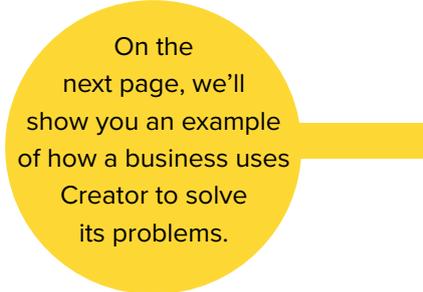
It's tough keeping everyone up to date when there are five versions of the same file being emailed back and forth.

## **Your information is scattered**

Your business data is sitting in apps and spreadsheets scattered across many different computers. You need to centralize your data before you can work with it.

## **Work is repetitive and monotonous**

You're constantly writing the same emails, running the same calculations, and making the same reports.



On the next page, we'll show you an example of how a business uses Creator to solve its problems.

# Karen's Business

Karen has a business teaching cooking classes. She loves the joyful looks on each student's face when they first taste an amazing dish that they've learned to how to make.

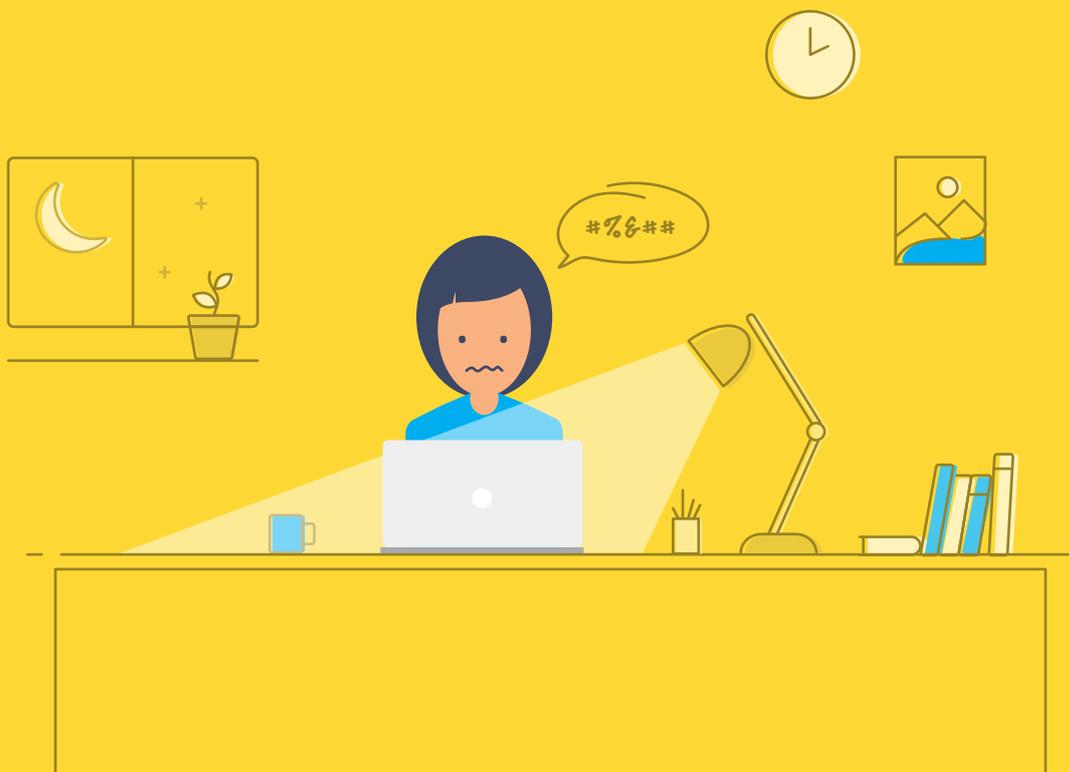


But **Karen has a problem**. Managing the prep work for all her classes is a drag. She's tired of copying and pasting information from emails and spreadsheets. There are a lot of moving parts she has to keep track of: who's enrolled in what classes, what time is best to schedule each class, and when to remind students about upcoming classes.

Because **her information is scattered** everywhere, analyzing her business is difficult. Karen doesn't know when she should schedule classes to maximize enrollment. She doesn't know which students are most valuable to her, and she's missing opportunities to cross-sell students on her other classes.

# Karen's Problems

- Her students don't have a good way to enroll in classes.
- Entering data in spreadsheets is monotonous and time consuming.
- Data is scattered and difficult to find. She can't track which students are most valuable to her business.
- She's losing money from failed communication. Without reminders to come to class, many students forget and then cancel their lessons.
- She needs to save student data in CRM, so she can keep her customers happier and grow her business.



# Karen's Plan

Karen wants to build an application that can do her busywork so she can focus on her true passion: teaching cooking.

**Goal:** Make it easy for students to enroll in classes

**Solution:** An online sign-up form for her students

**Goal:** Collect data in one place to get a complete picture of her business

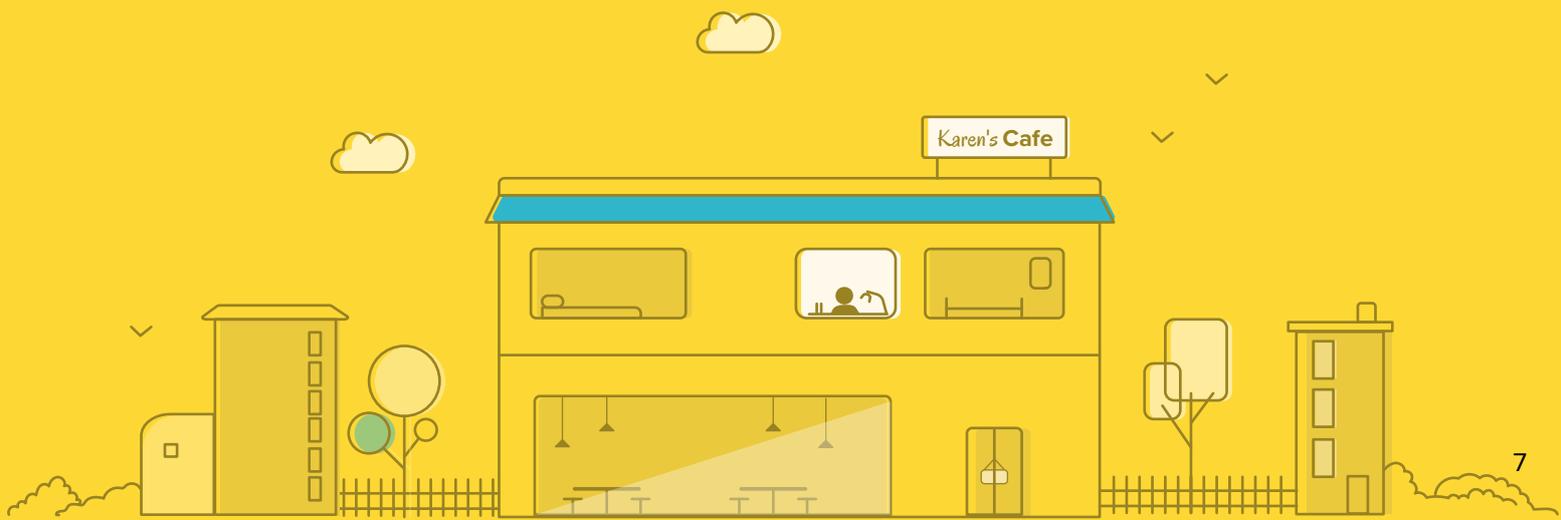
**Solution:** A collection of reports and charts that show her which classes have the best margins, which classes get the most students, and which times work best for her students

**Goal:** Automate repetitive tasks, like sending reminder emails

**Solution:** A workflow that automatically emails students reminding them to come to class and thanking them for signing up

**Goal:** Add student data in CRM to maximize cross-selling opportunities

**Solution:** An integration with her CRM software that helps her keep track of her relationship with every student



# Karen's Application

Creator applications are all made of the same three ingredients. These are the **three** main things Karen is adding to her application.

```
1 newlead = map();
2 newlead.put("First Name", input.First_Name);
3 newlead.put("Last Name", input.Last_Name);
4 newlead.put("Email", input.Email);
5 newlead.put("Class" , input.Class);
6 pushtocrm = zoho.crm.create("Contacts", newlead);
```

A workflow that automatically emails her students and saves them in her CRM account

Classes

Class Name

Description

Start Date

Number of Sessions

Price to Enroll  \$

Cost of Ingredients  \$

Enrollment

First Name

Last Name

Phone Number

Email

Describe your past experience

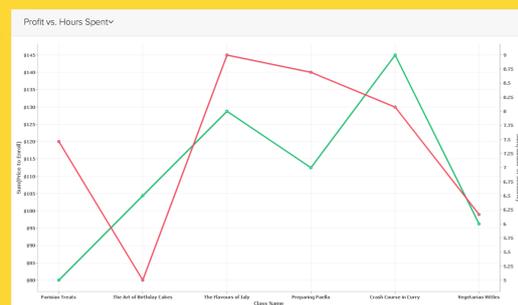
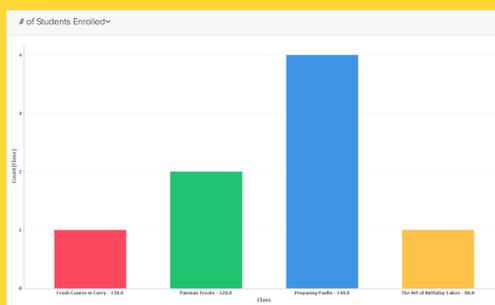
I'm new to cooking

I can cook a few things

I'm an iron chef!

Class  ▼

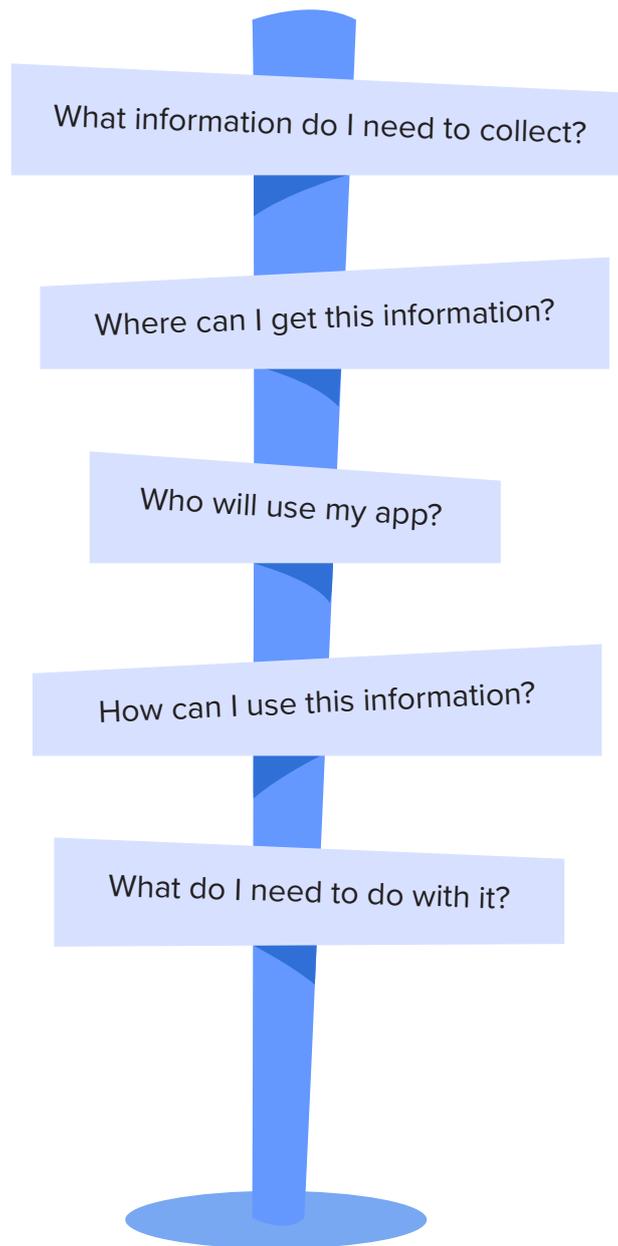
A form for Karen to keep track of the classes she'll teach, and a form for her students to enroll in them



Reports that help Karen analyze her business

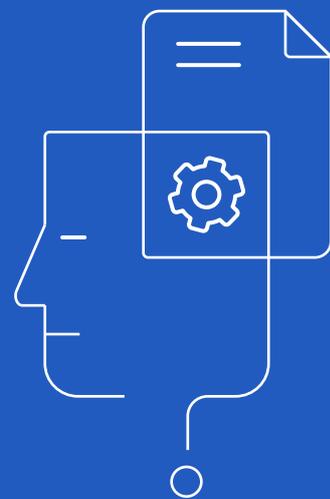
# Ask yourself these Questions

To begin planning your app ask yourself these questions:



# 01

Decide what  
information  
you need



# Step 1

Think about what kind of information you need. Sometimes, what you want in your application is **already saved in spreadsheets**. You can start building your app by importing spreadsheets to Creator.

Other times, you'll want to start your app from scratch. In this case, you'll begin by building a form to collect information. We'll talk more about forms on the next page.

## Do you need to know...

- Contact info for employees or customers?
- Product info like the number of products in stock, prices, or bar code numbers?
- Dates and times to schedule shipments, reminders, or events?

# Collect Data with Forms

To collect information with Creator applications, you use **Forms**.

Forms should be familiar to you. You encounter them all the time, like when you go to the doctor's office or sign up for something online.

New Student

Student's name	<input type="text"/>
Student's age	<input type="text"/>
Date of joining	<input type="text"/> 
Parent's email	<input type="text"/> 
Contact number	<input type="text"/>
Parent's signature	<div>Put your signature here. <a href="#">Clear</a></div> <div><hr/></div>

# Collect Data with Fields

In Zoho Creator, each piece of information gets collected in a **Field**.

Some fields have specific uses. For example, the email field lets people enter emails, and the signature field lets them sign their name.

Other fields have broad uses. For example, you can use a single line field to collect someone's name, an address, or a product code.

For a detailed look at what each field does, check out the appendix at the end of this ebook.

FIELDS	
 Single Line	 Multi Line
 Email	 Rich Text
 Date	 Date-Time
 Drop Down	 Radio
 Multi Select	 Checkbox
 Number	 Decimal
 Percent	 Currency
 Url	 Image
 Decision box	 File upload
 Lookup	 Add Notes
 SubForm	 Zoho CRM
 Auto Number	 Formula
 Signature	

 **TIP:** Your data will be easier to search through when you break it into as many fields as possible. (e.g. Try using different fields for first names and last names.)

# Viewing Data: Records

Every time someone submits a form, all of the data they enter gets saved as a **record** in your application's database. The image below shows a **list report** that's useful for viewing lots of records at once.

A simple way to visualize a record is to think of a spreadsheet. Each field on your form becomes a column, and each record becomes a row. Zoho Creator lets you see all your data by displaying it in tables.

**1 Record** **Fields**

<input type="checkbox"/>	Name ↕	Date of joining ↕	Contact email ↕	Contact number ↕	Parent's signature ↕	Student's age ↕
<input type="checkbox"/>	Cynthia	01-Jun-2016	<a href="mailto:joseph@zoho.com">joseph@zoho.com</a>	5557685342		5
<input type="checkbox"/>	Cindy	01-Jun-2016	<a href="mailto:daryl@zoho.com">daryl@zoho.com</a>	5553786276		10
<input type="checkbox"/>	Peter	01-Jun-2016	<a href="mailto:richard@zoho.com">richard@zoho.com</a>	5558742563		8
<input type="checkbox"/>	Karen	01-Jun-2016	<a href="mailto:pam@zoho.com">pam@zoho.com</a>	5556753729		5

# The Form Builder

Making a form is easy. All you do is drag a field onto it.

The screenshot displays a form builder interface. On the left, a 'FIELDS' panel lists various input types: Single Line, Multi Line, Email, Rich Text, Date, Date-Time, Drop Down, Radio, Multi Select, Checkbox, Number, Decimal, Percent, Currency, Url, Image, Decision box, File upload, Lookup, Add Notes, SubForm, Zoho CRM, Auto Number, Formula, and Signature. The main area shows a form titled 'New Student' with the following fields: 'Student's name' (text input), 'Student's age' (text input), 'Date of joining' (date picker), 'Parent's email' (text input), 'Contact number' (text input), and 'Parent's signature' (signature field containing a sample signature). At the bottom right, there are 'Submit' and 'Reset' buttons.

# Karen's Classes Form

Karen wants to keep track of all the classes she's scheduled, so she makes a form with information about them.

She adds fields that allow her to track when her classes start, how many sessions there will be, how much she'll charge each student, and how expensive her ingredients will be.

She keeps this form private, since it's just for her to use.

### Classes

Class Name	<input type="text"/>
Description	<input type="text"/>
Start Date	<input type="text"/> 
Number of Sessions	<input type="text"/>
Price to Enroll	<input type="text"/> \$
Cost of Ingredients	<input type="text"/> \$

# Karen's Fields

Making forms is the easiest part of building her application. After deciding which data she needs, Karen just drags fields onto Creator's form builder and drops them in place.

The image shows a form builder interface for a form titled "Classes". The form contains several input fields, each with a label and a corresponding field type annotation:

- Class Name**: A single-line text input field, annotated as "Single Line".
- Description**: A multi-line text input field, annotated as "Multi Line".
- Start Date**: A date input field with a calendar icon, annotated as "Date".
- Number of Sessions**: A number input field, annotated as "Number".
- Price to Enroll**: A currency input field with a dollar sign, annotated as "Currency".
- Cost of Ingredients**: A currency input field with a dollar sign, also annotated as "Currency".

At the bottom of the form, there are two buttons: "Submit" and "Reset". To the right of the form, the text "Fields Used:" is displayed, with lines pointing to the field type annotations.

 TIP: Learn more about when to use each type of field in this video.

# Karen's Enrollment Form

Karen also wants a way for her students to sign up for classes online. She adds an enrollment form that lets students pick classes.

She includes a variety of fields to learn more about her students. Later, she'll push this information to her CRM to help keep track of who's taking her classes.

When it's ready, she embeds the enrollment form on her website.

### Enrollment

First Name	<input type="text"/>
Last Name	<input type="text"/>
Phone Number	<input type="text"/>
Email	<input type="text"/> 
Describe your past experience	<input type="radio"/> I'm new to cooking <input type="radio"/> I can cook a few things <input type="radio"/> I'm an iron chef!
Class	<input type="text" value="-Select-"/> 

# Relating Forms

In Creator you can make **relationships** between forms so the information from one appears in another. This is useful because it:

- ✔ Allows you to connect information and makes it easier to analyze
- ✔ Saves you time – updating data in one place simultaneously updates it in other places

## Example

Sometimes you'll need to use **different forms to collect related data**. For example, your customers might use an order form to buy products, but your warehouse might use an inventory form to keep track of stock. You can make a relationship between these forms so your customers will know which items are in stock when they go to make an order.

# When to Create Relationships Between Forms

Whenever a record in one form is connected to a group of records in another form, you should create a **relationship** between them.

For example, you could have one record with information about a customer and five records of the purchases they've made.

Creating a relationship between the form with customer info and the form with purchase info would let you see each of your customers' sales history.

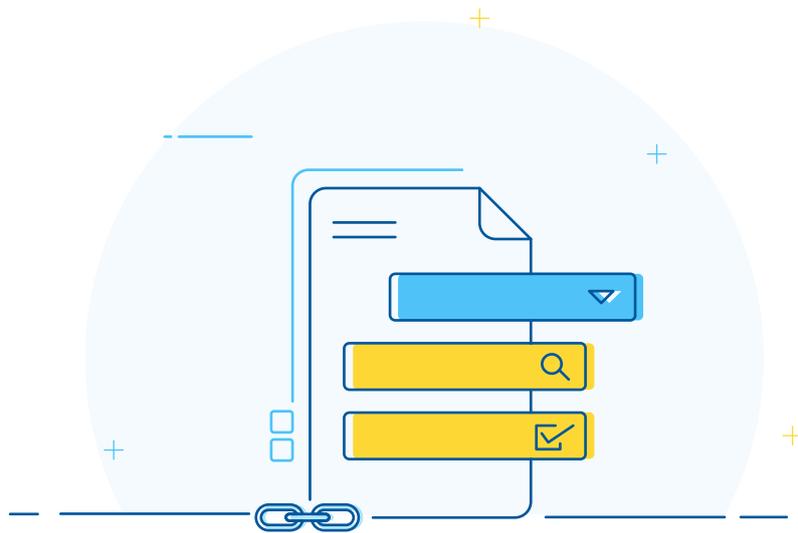
Create a relationship between forms when:

- You're collecting **one** piece of data that's related to **multiple others**
- You need to relate data that can't be entered in the same form. (e.g. A customer-facing order form and an employee-facing inventory form)

# How to Create Relationships Between Forms

To create relationships between forms, add a Lookup Field to one of them.

Lookup Fields pull data from one form and display it in another. They also link this data which makes creating reports more useful and easy.



See how  
Karen used a  
Lookup Field to make a  
relationship between  
two forms.

# Karen Links Her Forms

In her Classes form, Karen starts entering the classes she plans to teach. Using her Enrollment form, Karen's students start registering for classes.

She's begun the process of taking the information that's scattered across all her spreadsheets and **condensing it in one place**.

Now Karen wants to improve her enrollment process. She links the data from her Classes form with her new Enrollment form. Now she **doesn't have to waste time** manually updating class listings every time she comes up with a new class to teach.

The image shows two screenshots of forms. The top screenshot is the 'Classes' form, which has a 'Class Name' field containing 'Vegetarian Vittles' and a 'Description' field with the text: 'Learn how to make an easy, meatless meal called vegetarian vittles. We'll teach you to make different dinner recipes, great and filling.' The bottom screenshot is the 'Enrollment' form. It has a section 'Describe your past experience' with three radio button options: 'I'm new to cooking', 'I can cook a few things' (which is selected), and 'I'm an iron chef!'. Below this is a 'Class' dropdown menu. The dropdown is open, showing a list of classes with their names and prices: 'Vegetarian Vittles - 99.0', 'Parisian Treats - 120.0', 'The Flavors of Italy - 145.0', 'Crash Course in Curry - 130.0', 'Preparing Paella - 140.0', and 'The Art of Birthday Cakes - 80.0'. A blue highlight is visible on the first item, 'Vegetarian Vittles - 99.0'.

The lookup field in Karen's Enrollment form pulls classes that she enters in her Classes form.

# The Relationship Between Forms

This is the lookup field in the form Karen's students use. It shows the class name and price of enrollment.

### Enrollment

First Name	<input type="text" value="Pat"/>
Last Name	<input type="text" value="Boyle"/>
Phone Number	<input type="text" value="5558764367"/>
Email	<input type="text" value="pboyle@zylker.com"/> 
Describe your past experience	<input checked="" type="radio"/> I'm new to cooking <input type="radio"/> I can cook a few things <input type="radio"/> I'm an iron chef!
Class	<input type="text" value="Vegetarian Vittles - 99.0"/> ▼

The info displayed in this lookup field is being pulled from the Classes form, which Karen created.

### Classes

Class Name	<input type="text" value="Vegetarian Vittles"/>
Description	<input type="text" value="Learn how to make an easy, meatless meal called vegetarian vittles. We'll teach you to make different dinner recipes, great and filling."/>
Start Date	<input type="text" value="10-Jun-2016"/> 
Number of Sessions	<input type="text" value="1"/>
Price to Enroll	<input type="text" value="99"/> \$
Cost of Ingredients	<input type="text" value="30"/> \$

Karen chooses which data from the Classes form to show her students; they can see the Class Name and Price to Enroll fields. Behind the scenes, Karen can relate any data she enters in her Classes form to her students. The relationship between forms makes it easy to figure out which students are her best customers, and which classes are most popular.

### Classes

Class Name	<input type="text" value="Vegetarian Vittles"/>
Description	<input type="text" value="Learn how to make an easy, meatless meal called vegetarian vittles. We'll teach you to make different dinner recipes, great and filling."/>
Start Date	<input type="text" value="10-Jun-2016"/>
Number of Sessions	<input type="text" value="1"/>
Price to Enroll	<input type="text" value="99"/> \$
Cost of Ingredients	<input type="text" value="30"/> \$

### Enrollment

First Name	<input type="text" value="Rachel"/>
Last Name	<input type="text" value="Green"/>
Phone Number	<input type="text" value="5557658973"/>
Email	<input type="text" value="rachel@centrelperk.com"/>
Describe your past experience	<input type="radio"/> I'm new to cooking <input checked="" type="radio"/> I can cook a few things <input type="radio"/> I'm an iron chef!
Class	<input type="text" value="-Select-"/> <ul style="list-style-type: none"> <li><input type="checkbox"/> Vegetarian Vittles - 99.0</li> <li><input type="checkbox"/> Parisian Treats - 120.0</li> <li><input type="checkbox"/> The Flavors of Italy - 145.0</li> <li><input type="checkbox"/> Crash Course in Curry - 130.0</li> <li><input type="checkbox"/> Preparing Paella - 140.0</li> <li><input type="checkbox"/> The Art of Birthday Cakes - 80.0</li> </ul>

Any class she adds shows up in the enrollment form her students use.

# Karen's Lookup Field

Karen wants to figure out which students are her most valuable customers by using a lookup field to link her enrollment form with her available classes form.

She adds a lookup field to her enrollment form so her students can look up which classes are available when they sign up.

By linking these forms together, she can see all the classes each student has signed up for. Relating the two forms lets her calculate how much her students spend on her classes.

Vegetarian Vittles - 99.0 ▼

Vegetarian Vittles - 99.0

Parisian Treats - 120.0

The Flavors of Italy - 145.0

Crash Course in Curry - 130.0

Preparing Paella - 140.0

The Art of Birthday Cakes - 80.0

When students sign up for classes, the lookup field (on the left) pulls records from the Classes form to show them which ones are available.

Classes Report	
<input type="checkbox"/> Class name ↕	Price to Enroll ↕
<input type="checkbox"/> The Art of Birthday Cakes	\$ 80.00
<input type="checkbox"/> Preparing Paella	\$ 140.00
<input type="checkbox"/> Crash Course in Curry	\$ 130.00
<input type="checkbox"/> The Flavours of laly	\$ 145.00
<input type="checkbox"/> Parisian Treats	\$ 120.00
<input type="checkbox"/> Vegetarian Vittles	\$ 99.00

# 02

Decide where  
you'll use your  
app



## Step 2



Think about where you'll need to collect or view data. If you want to use your app on the go, you should download the **Creator mobile app**. It will run any apps you make on your smartphone.

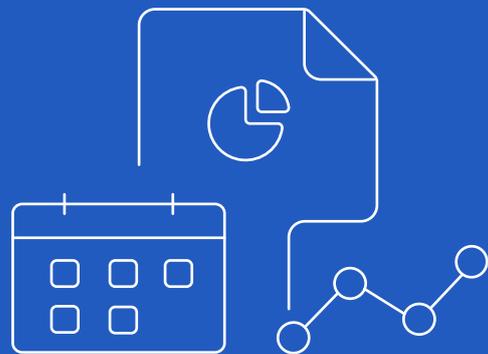
The mobile app is particularly useful if you want an app that can **scan bar codes** using a smart phone's camera. You can restrict where people use your app with geo-fencing, but right now this only works if they're using your app on their smart phones.

Creator apps will run on:

- ✓ The web
- ✓ iOS devices
- ✓ Android devices

# 03

Decide what  
you want to  
learn

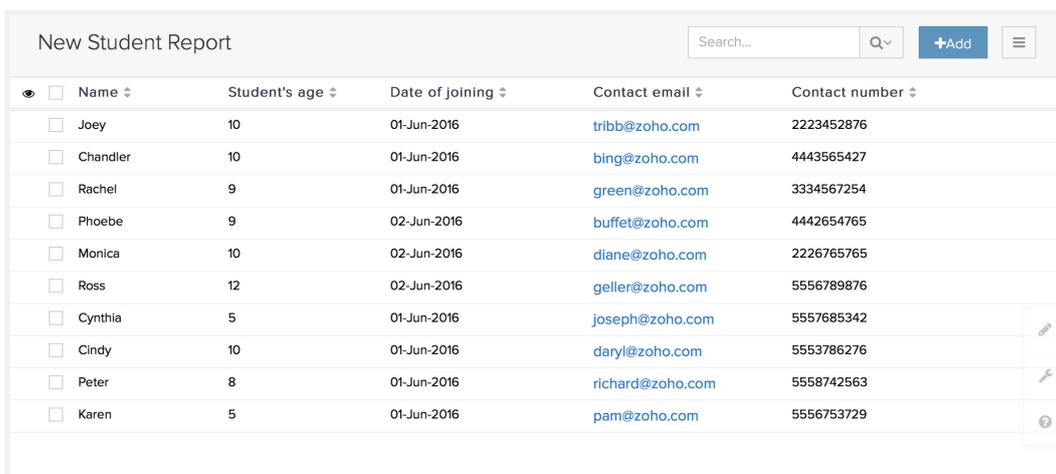


# Step 3

Think about what you'd like to learn from the information you gather with your application.

In Creator, it's easy to analyze your data with **Reports**. There are many ways to lay out reports depending on what you'd like to learn about your business. Here are some of the common types of reports.

- ✔ **List** - Search through your data for one specific piece of information, or sort it any way you can think of.
- ✔ **Calendar** - See what's up next by displaying every piece of data in a calendar.
- ✔ **Pivot Charts** - Versatile graphical charts. Display your data in a pie chart, bar chart, line chart, scatter plot, and more.



The image shows a screenshot of a 'New Student Report' interface. At the top, there is a search bar with the text 'Search...' and a magnifying glass icon, followed by a '+Add' button and a menu icon. Below this is a table with the following columns: Name, Student's age, Date of joining, Contact email, and Contact number. The table contains 10 rows of student data. Each row has a checkbox to its left. The data is as follows:

<input type="checkbox"/> Name	Student's age	Date of joining	Contact email	Contact number
<input type="checkbox"/> Joey	10	01-Jun-2016	<a href="mailto:tribb@zoho.com">tribb@zoho.com</a>	2223452876
<input type="checkbox"/> Chandler	10	01-Jun-2016	<a href="mailto:bing@zoho.com">bing@zoho.com</a>	4443565427
<input type="checkbox"/> Rachel	9	01-Jun-2016	<a href="mailto:green@zoho.com">green@zoho.com</a>	3334567254
<input type="checkbox"/> Phoebe	9	02-Jun-2016	<a href="mailto:buffet@zoho.com">buffet@zoho.com</a>	4442654765
<input type="checkbox"/> Monica	10	02-Jun-2016	<a href="mailto:diane@zoho.com">diane@zoho.com</a>	2226765765
<input type="checkbox"/> Ross	12	02-Jun-2016	<a href="mailto:geller@zoho.com">geller@zoho.com</a>	5556789876
<input type="checkbox"/> Cynthia	5	01-Jun-2016	<a href="mailto:joseph@zoho.com">joseph@zoho.com</a>	5557685342
<input type="checkbox"/> Cindy	10	01-Jun-2016	<a href="mailto:daryl@zoho.com">daryl@zoho.com</a>	5553786276
<input type="checkbox"/> Peter	8	01-Jun-2016	<a href="mailto:richard@zoho.com">richard@zoho.com</a>	5558742563
<input type="checkbox"/> Karen	5	01-Jun-2016	<a href="mailto:pam@zoho.com">pam@zoho.com</a>	5556753729

The image above is an example of a list report. It looks a lot like a spreadsheet, but it's much easier to sort and search through.

# Karen's Calendar

Once Karen got her forms up and running, she wanted to use all the information she gathered to stay organized and learn more about her business.

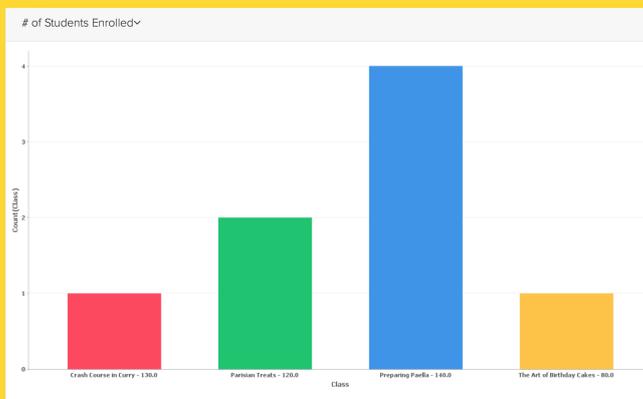
The first thing she did was create a calendar report to see her class schedule. When she clicks on a class, she can quickly view any information she needs to know about it like how many students signed up, how much the ingredients cost, and what time of day it begins.

The screenshot shows a calendar for June 2016. At the top, there are navigation arrows, the text "June, 2016", and view options for "Month", "Week", and "Day". The calendar grid has columns for days of the week: Wednesday, Thursday, Friday, and Saturday. The dates 1 through 18 are visible. Three class events are shown as grey bars: "Preparing Paella" on Thursday (date 2), "Crash Course in Curry" on Friday (date 3), and "Vegetarian Vittles" on Friday (date 10). A yellow highlight covers the dates 8 and 9. On the right side, there is a vertical toolbar with icons for a calendar, a key, and a question mark.

June, 2016		Month	Week	Day
Wednesday	Thursday	Friday	Saturday	
1	2 Preparing Paella	3 Crash Course in Curry	4	
8	9	10 Vegetarian Vittles		
15	16	17	18	

# Karen's Pivot Charts

Karen also added pivot charts to her application so she could quickly see trends about her business. Her line chart lets her track how many hours of work she put into each type of class, and how much money she made teaching them. Now it's easy to tell which classes are most worth repeating.



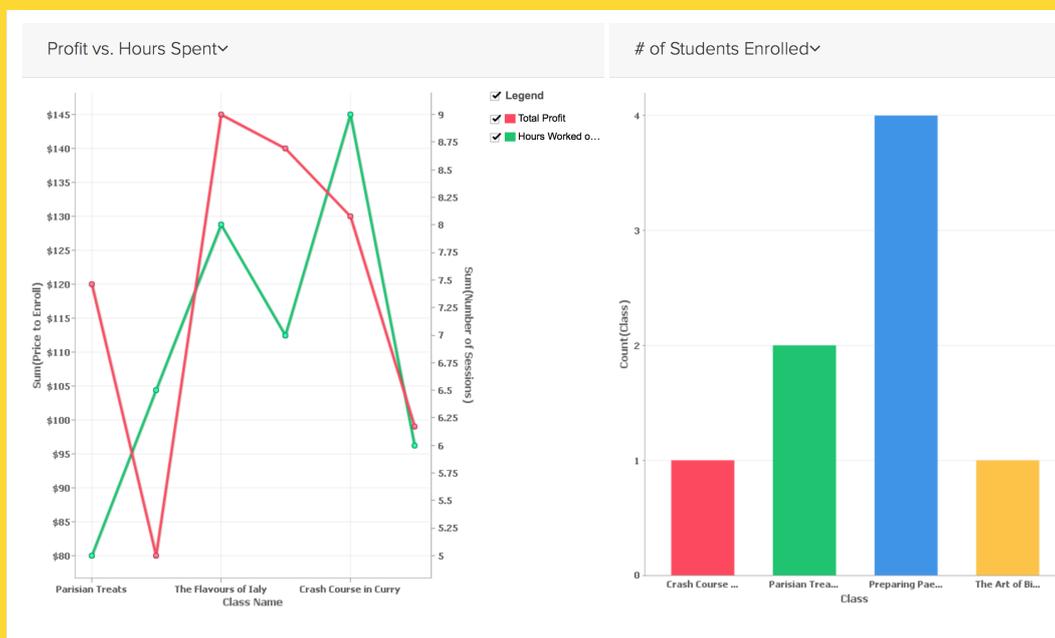
Karen's bar chart shows how many students she can expect in each of her upcoming classes.



The green line shows how many hours Karen spent working on each class. The red line shows how much money she made on the class.

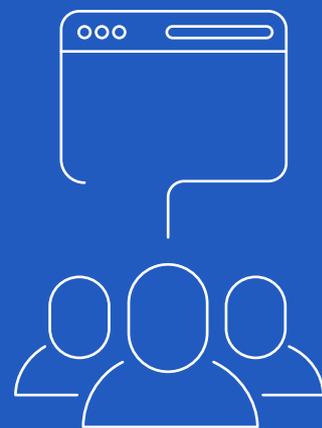
# Karen's Dashboard

Karen takes a few of her most important reports and combines them using a page. Pages in Creator are used to make dashboards. Karen's page allows her to quickly check up on key stats to see how well her business has been doing.



# 04

Decide who  
will use your  
app



# Step 4

Will your application be used by your staff? Your customers? Both? In Zoho Creator, you can control who gets access to each form and report in your applications.

That means you can **publish** a form on your website for any customer to use, but keep their data secure by only **sharing** your report with people who work at your business.

When sharing apps with other Zoho Creator users on your account, you can give them each a **role** and **profile** to keep track of what information they can see and edit.

**Publishing** – Makes a form or report public on the web.

**Sharing** – Allows other users of Zoho Creator to use your app.

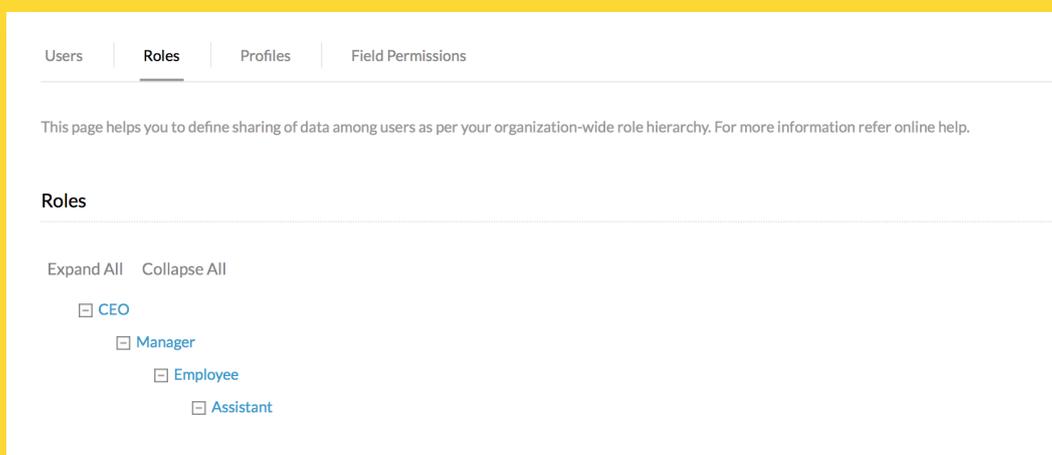
**Roles** – Let you control which users records each user can see. Use roles to recreate your organization's hierarchy in Zoho Creator.

**Profiles** – Let you control what data each user can view and edit.

# How Karen Shared Her App

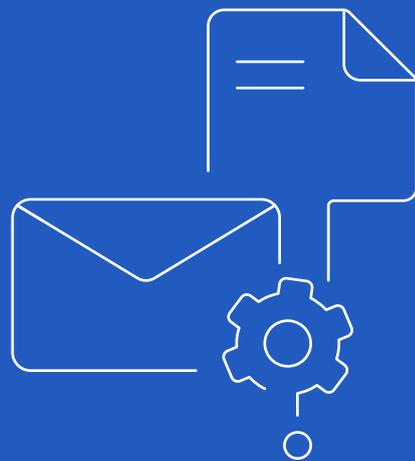
Karen published her enrollment form and her calendar report on her website. Now students can quickly see all the upcoming classes that work with their schedules. Karen chooses to keep the reports about how much money her business is making private.

Karen also has some assistants using her app who help her teach classes. When she shares her app with them, she gives their accounts a lower role than hers to control what they are allowed to see. For example, Karen can see how much money every assistant gets paid; however, each assistant is only able to see how much they've been paid.



# 05

Decide how  
you'll use your  
information



# Step 5

Once people enter data in your application, you'll need to decide what to do with it. If you find yourself constantly writing the same emails and repeating the same tasks, you can save yourself time by making your app do these things for you automatically.

In Zoho Creator, you can automate actions using **Rules** and **Workflows**. This is particularly useful if you want to:

- ✔ Send people emails and text messages
- ✔ Change how your app interacts with people based on what they do
- ✔ Connect your application to other applications you already use

Rules are the simple way to automate. For more complex tasks, you can create workflows using Creator's scripting language, Deluge.

Think about rules and workflows like a series of if-then statements. Start by thinking about a repetitive task you already do.

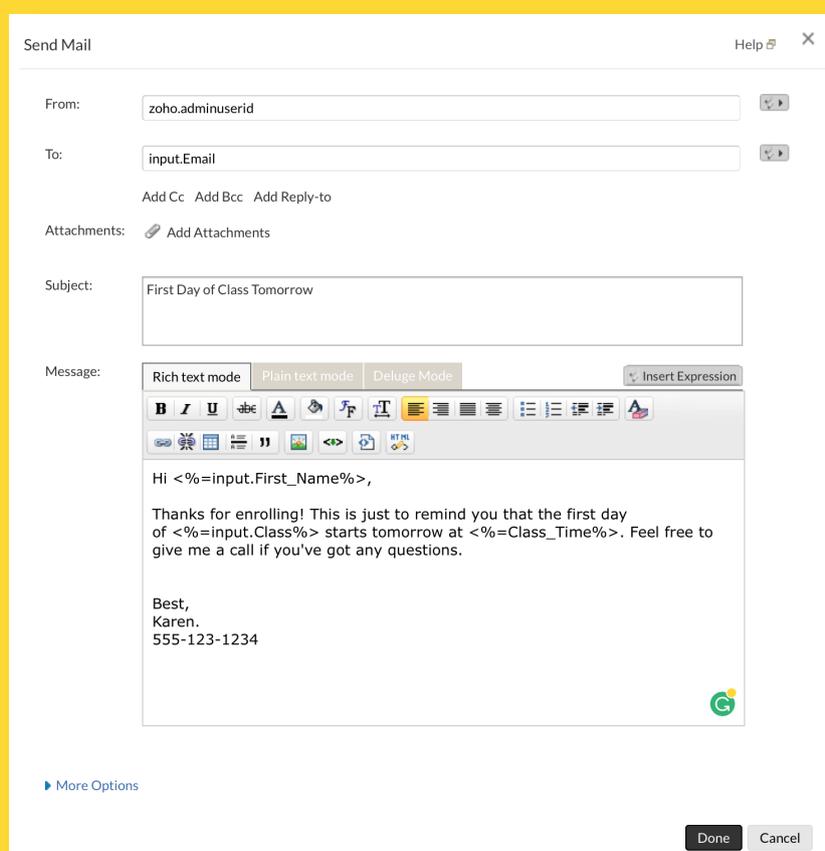
**Example:**

**If** a student enrolls in my class, **then** I'll send them an email thanking them and reminding them when it begins.

# Karen's Automation

Even though Karen wasn't experienced with programming, she was able to make her application automatically email students who enrolled in her classes. The day before each class began, she sent them a reminder about the class starting. Karen was happy to see that her reminders reduced the number of people who cancelled classes.

She added another rule that emailed students on the last day of class and showed them a list of her upcoming classes. Now Karen gets more repeat customers and she's developed a stronger relationship with many of her students.



The screenshot shows a 'Send Mail' dialog box with the following fields and content:

- From:** zoho.adminuserid
- To:** input.Email
- Subject:** First Day of Class Tomorrow
- Message:**
  - Mode: Rich text mode (selected), Plain text mode, Deluge Mode
  - Buttons: Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Video, Table, Undo, Redo, Refresh, Print, Spell Check, Insert Expression
  - Text: Hi <%=input.First\_Name%>,  
Thanks for enrolling! This is just to remind you that the first day of <%=input.Class%> starts tomorrow at <%=Class\_Time%>. Feel free to give me a call if you've got any questions.  
Best,  
Karen.  
555-123-1234

At the bottom, there is a 'More Options' link and 'Done' and 'Cancel' buttons.

# Karen's Integration

Karen's app works great. It's easier than ever for students to enroll in classes, communication is consistent, and Karen knows more about how her business is doing than she ever had before.

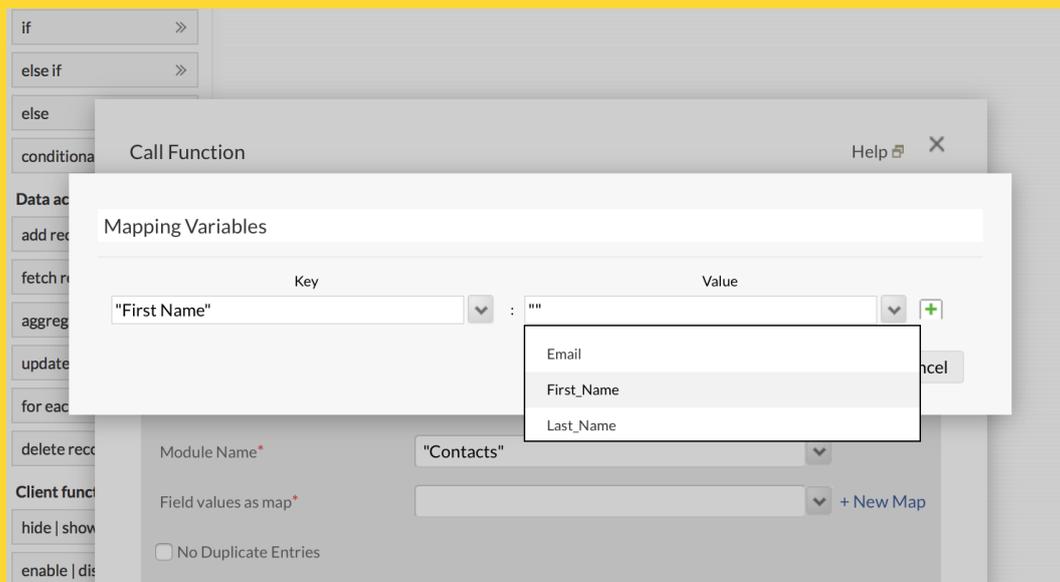
After a few months, Karen decides to take her app even further by integrating it with her CRM software. She uses a CRM system to keep track of her relationship with every student. Whenever a student calls her, she can glance at her CRM system and know exactly who that student is and which classes they've taken with her.

Using a Workflow Karen tells her app to save every student who enrolls in a class to her CRM. By adding more people to her CRM system, she gets even more insights about how she can expand her business.

# How Karen Integrated Her Applications

Karen was very busy teaching her classes, so she didn't have the time to learn Creator's scripting language in depth.

Fortunately, she didn't have to learn everything to get her workflow running. Since Creator lets you build workflows by dragging and dropping bits of script, Karen was able to connect with her CRM system by filling out a pop-up that guided her through the process.



# Glossary

**Form** - A group of related information you're collecting with your app.

**Field** - One piece of data that you collect in a form.

**Report** - A visual representation of your data.

**Workflow** - A set of instructions written in Deluge to automate your app and integrate with other services.

**Rule** - The simple way to automate apps without using any script.

**Record** - All the information that gets submitted each time someone fills out a form.

**Page** - A place to make dashboards for quickly viewing information and customize the app interface using HTML.

**Deluge** - Zoho's own scripting language that's used for making workflows.

# Appendix - Basic Fields

There are a lot of different fields in Creator. Which one should you pick?  
We'll briefly review them.

FIELDS	
 Single Line	 Multi Line
 Email	 Rich Text
 Date	 Date-Time
 Drop Down	 Radio
 Multi Select	 Checkbox
 Number	 Decimal
 Percent	 Currency
 Url	 Image
 Decision box	 File upload
 Lookup	 Add Notes
 SubForm	 Zoho CRM
 Auto Number	 Formula
 Signature	

## Single or Multi Line fields

Lets people type something in, but not format it. Multi Line works well for longer entries.

## Rich Text

Lets people write lengthy entries. They're allowed to format their text.

## Email

Checks if someone wrote a valid address in the box.

## Date or Date-Time

Gives people a little calendar to pick a day quickly. Date-Time also includes the time of day.

# Appendix - Selection Fields

Selection fields let people pick something from a list. If it's important to have standardized records, these work better than basic fields.

FIELDS	
 Single Line	 Multi Line
 Email	 Rich Text
 Date	 Date-Time
 Drop Down	 Radio
 Multi Select	 Checkbox
 Number	 Decimal
 Percent	 Currency
 Url	 Image
 Decision box	 File upload
 Lookup	 Add Notes
 SubForm	 Zoho CRM
 Auto Number	 Formula
 Signature	

When there are a lot of choices use:

## Drop Down Field

You can only choose one item.

## Multi Select

You can choose as many items as you'd like.

When there are only a few choices use:

## Radio

You can only choose one item.

## Checkbox

You can choose as many items as you'd like.

# Appendix - Numeric Fields

Use these fields only for numbers. Creator won't let you submit something like a license plate number that has a combination of letters and numbers using a number field.

FIELDS	
 Single Line	 Multi Line
 Email	 Rich Text
 Date	 Date-Time
 Drop Down	 Radio
 Multi Select	 Checkbox
 123 Number	 .00 Decimal
 % Percent	 \$ Currency
 Url	 Image
 Decision box	 File upload
 Lookup	 Add Notes
 SubForm	 Zoho CRM
 1/2 Auto Number	 f(x) Formula
 Signature	

## Number

For whole numbers or integers.

## Decimal

Accepts numbers with decimals.

## Percent

For percentages.

## Currency

Choose which currency you're dealing with.

# Appendix - Advanced Fields

FIELDS	
 Single Line	 Multi Line
 Email	 Rich Text
 Date	 Date-Time
 Drop Down	 Radio
 Multi Select	 Checkbox
 Number	 Decimal
 Percent	 Currency
 Url	 Image
 Decision box	 File upload
 Lookup	 Add Notes
 SubForm	 Zoho CRM
 Auto Number	 Formula
 Signature	

## URL

Checks if a valid link was submitted

## Image

Lets users upload images to Creator

## Decision box

Won't let users submit the form until they've checked the decision box. Useful for mandatory agreements.

## File upload

Lets users upload files to Creator

## Lookup

Lets users pick an option that's stored in another form. Lookups can be displayed like any of the selection fields.

## Add Notes

Users can't interact with this field. Useful for leaving instructions about how to fill out a form.

# Appendix - Advanced Fields II

FIELDS	
 Single Line	 Multi Line
 Email	 Rich Text
 Date	 Date-Time
 Drop Down	 Radio
 Multi Select	 Checkbox
 Number	 Decimal
 Percent	 Currency
 Url	 Image
 Decision box	 File upload
 Lookup	 Add Notes
 SubForm	 Zoho CRM
 Auto Number	 Formula
 Signature	

## Subform

Lets you put a form within your form. Useful when one record needs to be related to a few others. For example, when you make an order online your address gets associated with info about a few items you're ordering.

## Zoho CRM

Lets you look up information in Zoho CRM.

## Auto Number

Records a number for each record submitted. Useful for assigning ID numbers or tracking the number of records submitted.

# Appendix - Advanced Fields III

FIELDS	
 Single Line	 Multi Line
 Email	 Rich Text
 Date	 Date-Time
 Drop Down	 Radio
 Multi Select	 Checkbox
 Number	 Decimal
 Percent	 Currency
 Url	 Image
 Decision box	 File upload
 Lookup	 Add Notes
 SubForm	 Zoho CRM
 Auto Number	 Formula
 Signature	

## Formula

Use what's entered in other fields in a formula. For example, you could multiply a price by a percent to calculate a discount.

## Signature

Lets people sign your form.

## Users

Pick a user from your Creator app. Useful if you're assigning work to someone.

# LEARN MORE

Visit The Creator Help Guide

Contact us at [gettingstarted@zohocreator.com](mailto:gettingstarted@zohocreator.com)

or

USA : +1 (888) 900 9646

UK : +44 (20) 35647890

Australia : +61-2-80662898

India : +91-44-67447000

# FEEDBACK?

We'd love to hear it! We want to help you get the most out of Zoho Creator. Let us know what support materials you've liked, and what you'd like more of.

Email us at [feedback@zohocreator.com](mailto:feedback@zohocreator.com)