ZOHO Creator

Build a Vendor Selection app in 60 minutes

"It took me four-five months with Microsoft SharePoint to get to a point where it was deployable, and usable through all my users. With Zoho Creator, it literally took me about a week to get things up and running and rolling it out to my users."

Robert Brandt
IT Director, Telga Corporation

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Overview

Zoho Creator is a low-code platform for building scalable cloud-based custom apps that can be seamlessly deployed to organizations of all sizes. The apps built using Zoho Creator can be accessed from smartphones, tablets, and any web browser.

This guide illustrates how to build a **Vendor Selection** app using Zoho Creator and provides an overview of how you can deconstruct your business processes and build a customized app that fits the needs of your organization.

Vendor Selection app

Imagine you are an executive who is in charge of selecting vendors who will supply materials to your company. You've decided to build an app that collects and manages information about the vendors who apply.

This app should cater to the following participants:

- The **Vendors**, who apply for selection.
- The **Manager**, who meets the vendors and decides whether they are eligible to be selected or not.
- The **Selection Executive** (you), who is in charge of monitoring this process.

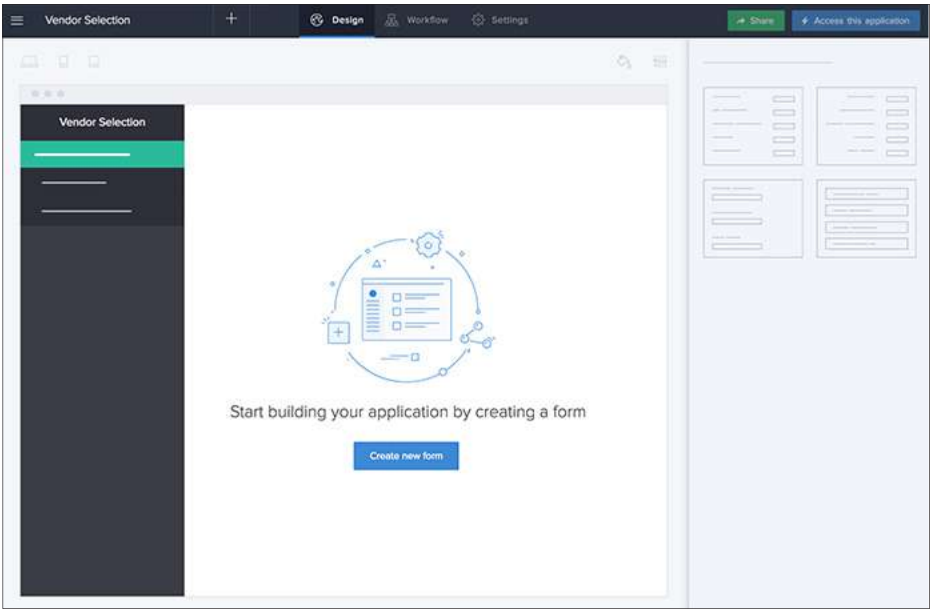
Flow of the app

1. Vendors apply for selection
2. Notify vendors that their applications were submitted successfully
3. Manager views the details of all vendors
4. Manager schedules a meeting with the vendors
5. Vendors receive a notification about the scheduled meeting
6. After each meeting, the manager updates the selection status
7. Selection executive follows the process via a dashboard

Create the Vendor Selection app

Let's start building the application.

1. Log in to https://creator.zoho.com. You will be taken to your account's Dashboard.
2. Click **New Application** near the top-right corner of the page
   If there are no apps in your account, click **Create Application** near the bottom of the page.
3. Select **Create from scratch** on the left.
4. Set the app's name as **Vendor Selection**, then click **Create**.
   You will be taken to the Design page of your app:



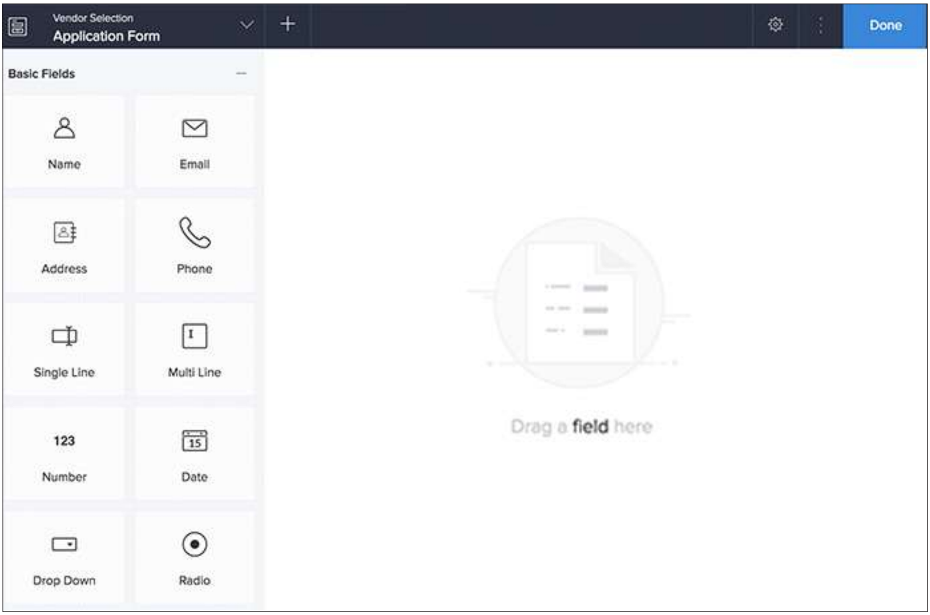
You've now created an app. However, the app does not have any components. You will need to start by creating the **Application form**, the component through which vendors enter data.

Create application form

Let's start by creating the **Application form**. Just like a spreadsheet has columns, forms in Zoho Creator have fields. Each entry submitted through a form is called a record.

Did you know?
You can add 'n' number of forms in your application.

5. Click **Create new form**, near the bottom of the Design page.
6. Select **Blank.**
7. Set the form's name as **Application Form**, then click **Create Form**. You will be taken to the form builder:



8. Drag and drop the **Name** field from the field palette (displayed on the left) to the form. Its **Field Properties** will appear on the right.
9. Each field consist of:

    - **Field name:** The text that is displayed next to an input area in a form. This lets the users know what information they are to enter in that field.
    - **Field link name:** The field link name is the name with which a field is internally referred by Zoho Creator.

Did you know?
The field link name is unique for fields in a form, i.e., there cannot be more than one field in a form with the same field link name.

10. Use the default names shown in the fields.
11. Set the **Name** field as Mandatory to ensure that a vendor cannot submit an application without entering their name.

    - Navigate to the **Field Properties** > **Validation** section
    - Check the checkbox next to **Mandatory**

12. Drag and drop the **Drop Down** field onto the form.

    a. Set the **Field name** to **Application Status**.
    b. Navigate to the **Field properties** > **Choices** section on the right, then set the choices as **Applied**, **Scheduled for Meeting**, **Selected**, and **Rejected**.
    c. Click the radio button next to **Applied.**

- The **Application status** field is used to track the vendors' progress in the selection process. It must not be shown to the vendors when they submit the form, but must be visible to the selection executive and manager when they view the records. To hide it on the form so vendors cannot see it:

    d. Navigate to the **Field Properties** > **Permissions** section and set the **Show field to** option as **Admin only.**

13. Drag and drop the following fields to your form:

Type of Field	Set its Field name as	Configure its Field Properties
Email	Email address	Set as mandatory
Phone	Phone number	-
File upload	Vendor portfolio	Set as mandatory

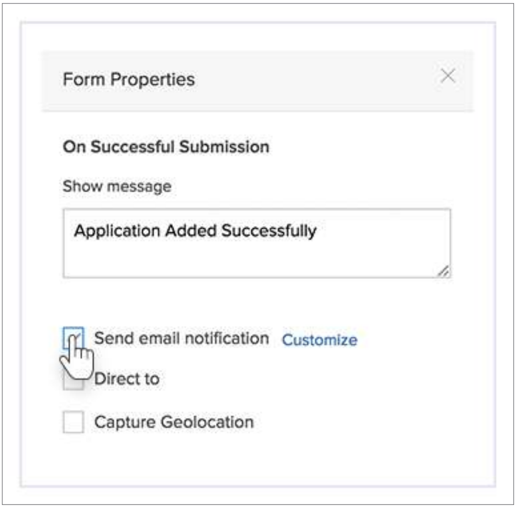
Configure email notification on form submission

Now that you have created the form for vendors to submit their applications, let's look at how to to automate notifying the vendors that their applications were submitted successfully.

As the vendors will be sharing their email addresses in the Application Form, we can notify them by sending an email when they submit the form. To enable sending an email on form submission:

14. Click the **Properties** icon near the top-right corner of the form builder, as shown below. The **Form Properties** pane will appear on the right.

15. Check the checkbox next to **Send email notification**, as shown below. The **Customize** link will appear:

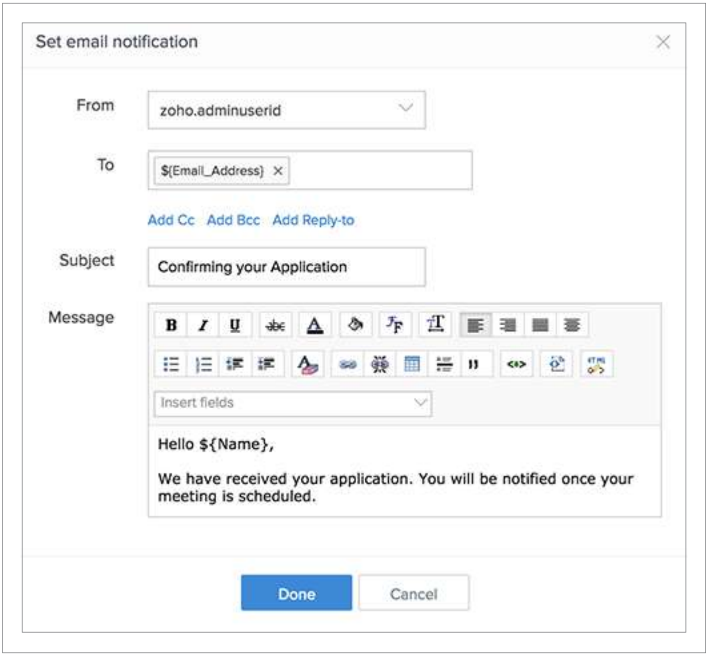


16. Click **Customize**. In the Set email notification pop-up window:

    a. Set **To**: Select the **Email Address** field from **Form Fields.**
    b. Enter **Subject** to 'Confirming your Application'.
    c. Enter **Message** as shown in the below screenshot. The **${Name}** can be added by selecting the **Name** field from the **Insert fields** dropdown in the **Message** field. Adding the **Name** field enables

you to send a personalized email message with the vendor's name in the greeting.

d. Click **Done.**



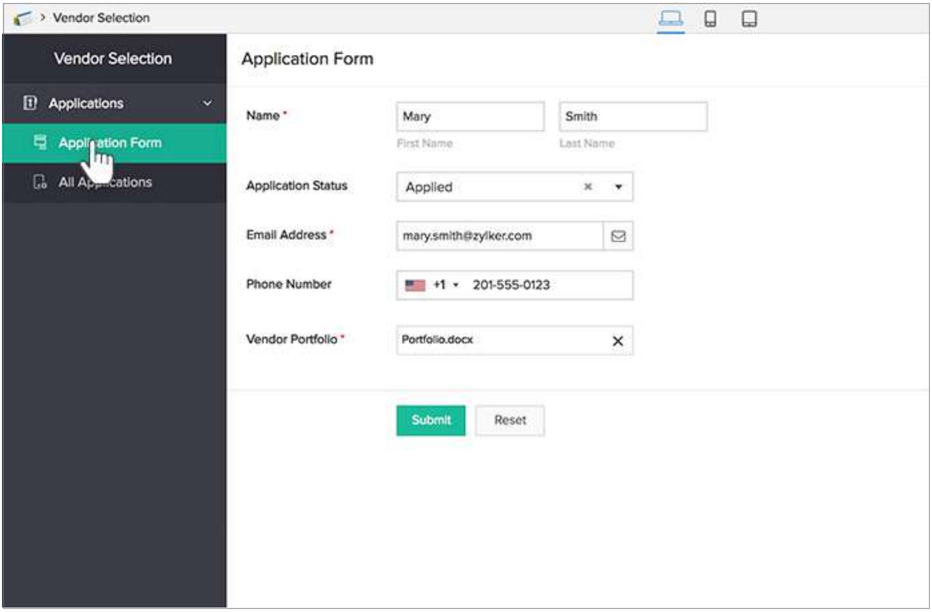
17. Close the **Form Properties**, then click **Done** at the top-right corner of the form builder.

Access the app to add a few records

We have created the **Application** form for the vendors to apply for the selection, and configured email notification to be triggered when they submit the application. Now let's see how to add and view the records.

18. Click **Access this application** in the top-right corner of the Design page.

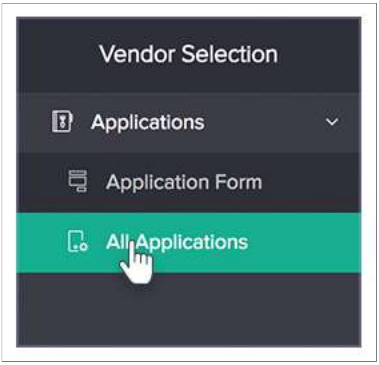
19. You can access the **Application Form.**



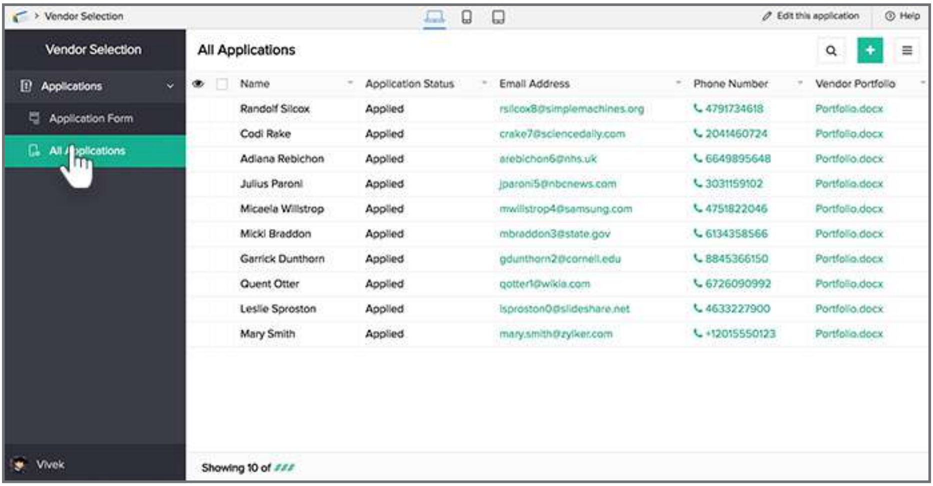
20. Try submitting a few sample entries in your form.

The data that you enter in your form can be viewed as a report. Zoho Creator creates a list report by default for every form that you create in the application. You can see all the records submitted through the form in this list report. **All Applications** is the list report created automatically for the **Application** form.

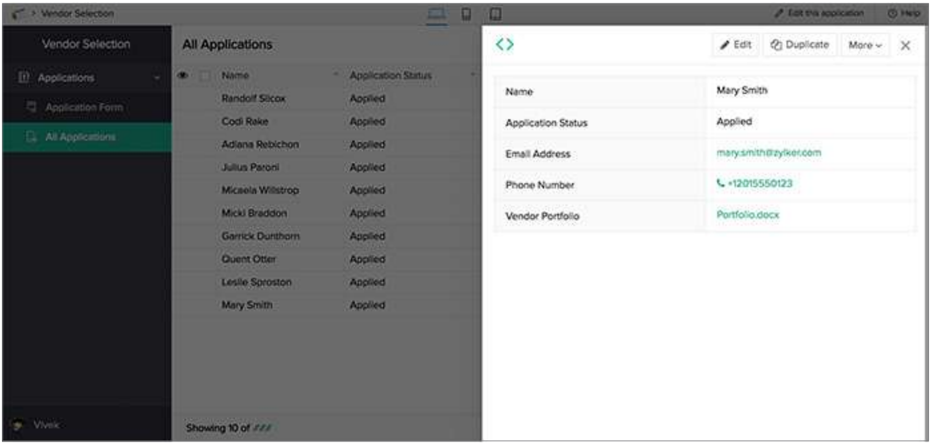
21. Click **All Applications** on the left menu as shown below. It will display all the records submitted through the **Application Form**.



The view that you see on accessing the **All Applications** report is its **Quick View**. The Quick View of a report enables your users to view multiple records in one glance.



When you click on a record, the **Detail View** will slide in from the right. The **Detail View** of a report enables your users to view a single record in detail.

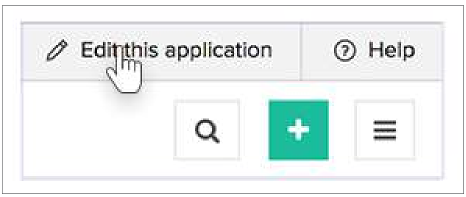


Create Schedule Meeting form

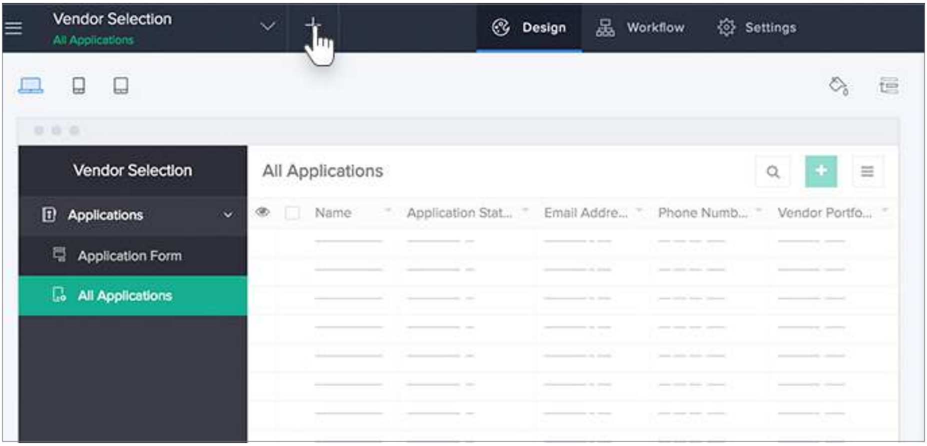
At this stage, your app only has one form: the **Application Form**. To schedule meetings with the vendors, you need to create another form. The manager should be able to select a vendor name and set a meeting date in this form.

Let's create a **Schedule Meeting** form with the required fields.

22. Click **Edit this application** at the top-right corner of the app:



23. Click the **Add New** icon displayed at the top of the Design page.

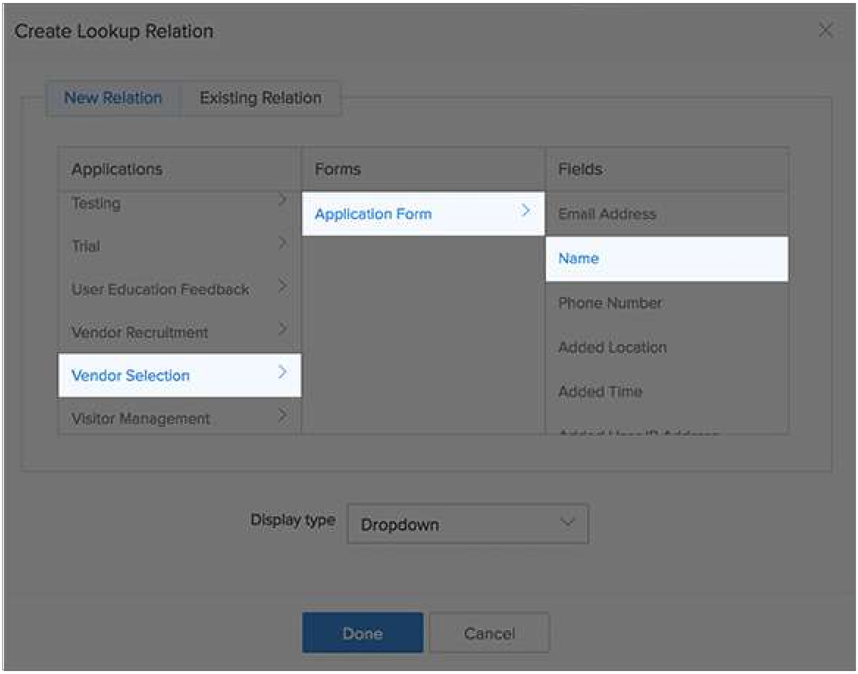


24. Select **Form**, and then **Blank**.
25. Name the form **Schedule Meeting**, then click **Create Form**.

You have created the **Schedule Meeting** form. We need a field with the vendor names for the manager to the choose the vendor and schedule the meeting. The vendor names are collected through the **Application** form. You will use a **lookup** field to let the manager select the vendor name from the **Application** form.

26. Drag and drop a **Lookup** field onto the form.

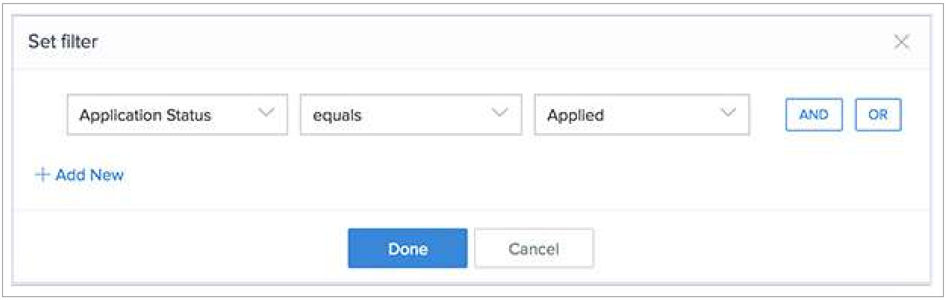
    a. Select **New Relation.**
    b. Select the **Vendor Selection** app, then the **Application Form**, and then the **Name** field.
    c. Set the **Display Type** as **Dropdown.**
    d. Click **Done.**



27. Go to **Field Properties** on the right pane:

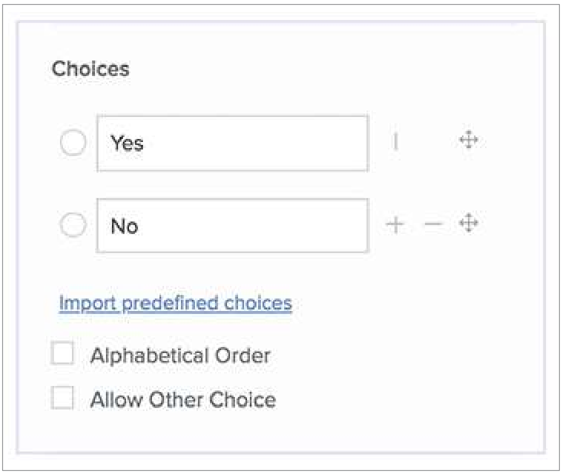
    a. Set its **Field Name** as **Vendor.**
    b. Navigate to the **Validation** section and check the checkbox next to **Mandatory.**
    c. Navigate to the **Choices** section and check the checkbox next to **Set Filter** Select the **Application Status** field, then the equals operator, then **Applied**, and then click **Done.**

By default, when you access the application, the **Vendor** field will display all the vendors who are in different stages of the selection process. By setting the above filter with the **Status** equals **Applied**, the manager will only see the vendors whose interviews are yet to be scheduled.



28. Drag and drop the **Radio** field onto the form:

   a. Enter the **Field Name** as **'Selected?'**
   b. Navigate to the **Field Properties** > **Choices** section on the right, and set the choices as shown below:



29. Drag and drop the following fields onto the form:

Type of Field	Set its Field name as	Configure its Field Properties
Date-Time	Meeting Date & Time	Set as mandatory
Multi Line	Comments	-

30. Click **Done** at the top-right corner of the form builder. You will be taken to the form's Design page.

You have created the Schedule Meeting form. The manager can schedule interviews with the vendors using this form.

Create workflow to hide fields, send email & update record

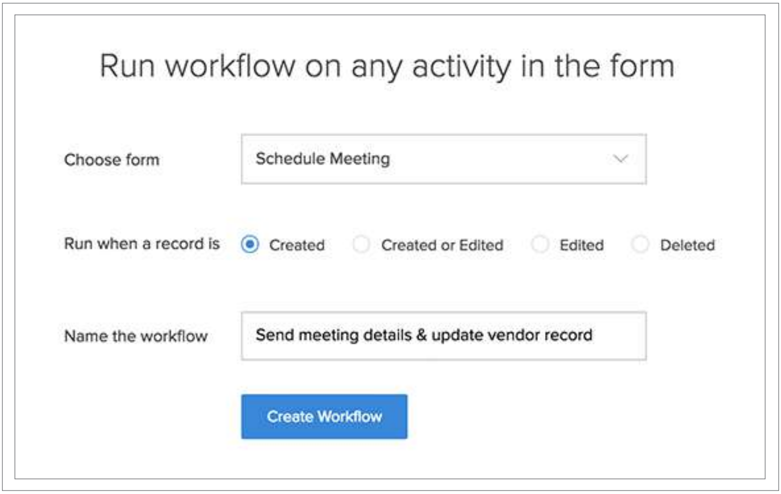
When the manager schedules a meeting for a vendor:

- The vendor should receive an email stating the date and time of the meeting.
- Their **Application Status** in the **Application Form** must be updated from **Applied** to **Scheduled for Meeting**. (This is to ensure that the manager does not schedule another meeting for the same vendor. This supplements the filter we added to the **Vendor** lookup field in the **Schedule Meeting** form).

- You also need to hide the **Selected?** and **Comments** fields when a manager schedules a meeting. It doesn't make sense for the manager to see these fields when scheduling a meeting. They're only needed when the meeting between the manager and vendor has taken place.

To achieve these goals, you can create a workflow to be triggered when the **Schedule Meeting** form is used. To create this workflow:

31. Click the **Add New** icon at the top of the Workflow or Design page of your app.
32. Select **Workflow**.
33. Select **While using the form**.
34. Select **Schedule Meeting** from the dropdown next to **Choose form**.
35. Select the choice **Created** for **Run when a record is**.
36. Set the workflow's name as **Send meeting details & update vendor record**, then click **Create Workflow**.



37. Click **Add New Action** in the workflow builder.
38. To hide fields:
    a. Select **Field actions.**
    b. Select **Hide fields.**
    c. Select the **Selected?** and **Comments** fields from the dropdown.
    d. Click **Save** at the bottom-right corner.
39. To send meeting details to vendors and update the application status of the vendor, you first need to fetch the vendor record from the **Application Form**.
    a. Select **Add New Action.**
    b. Select **Deluge Script.**
    c. Select **On success**. The script builder will open.

d. Drag and drop the **fetch records** task on the script builder. The syntax of the task will appear.

e. Replace the variables in the syntax with following names as shown in the table below:

Syntax	Variable Name
<Variable>	vendor_record
<form>	Application_Form
<field>	ID
<opr>	=
<expression>	input.Vendor

The fetch record task that you have defined should be same as the one shown below:

```
vendor_record = Application_Form[ID = input.Vendor];
```

40. Use the **Send mail** task to send an email to the vendor's email address with the meeting date and time. To do this:

- Drag and drop the **Send mail** task on the script builder.
- Replace the variables in the syntax with the names listed in the table below:

Syntax	Variable Name
from: <expression>	from :zoho.adminuserid
to: <expression>	to :vendor_record.Email_Address
subject: <expression>	subject :"Meeting Scheduled"
message: <expression>	message :"Hello " + vendor_record. Name + " Your meeting has been scheduled on " + input.Meeting_Date_Time

The send mail task that you have defined should be same as the one shown below:

```
sendmail
[
from :zoho.adminuserid
to :vendor_record.Email_Address
subject :"Meeting Scheduled"
message :"Hello " + vendor_record.Name + " Your meeting
has been scheduled on " + input.Meeting_Date_Time
]
```

41. The next step is to update the vendor's status to **Scheduled for meeting**. To do this:

   - Drag and drop the **Update records** task.
   - Replace the variables in the syntax with the following names listed in the table below:

Syntax	Variable Name
<collection_variable>	vendor_record
<field>	Application_Status
<expression>	“Scheduled for Meeting”

The Update record task that you have defined should be same as the one shown below:

```
vendor_record.Application_Status = ”Scheduled
for Meeting”;
```

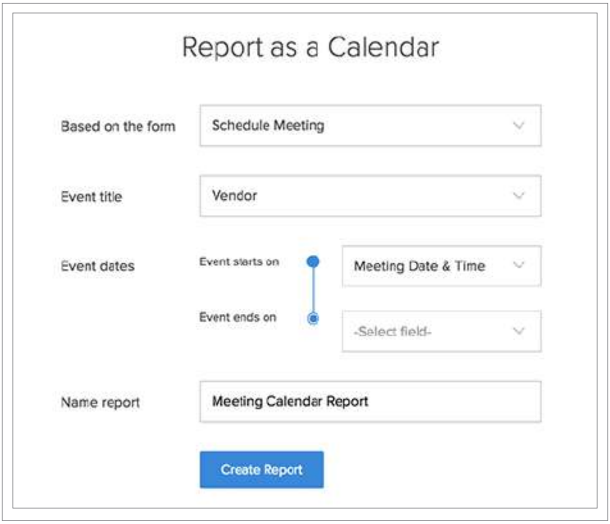
42. Click **Save** and close the script editor.
43. Click **Done** at the top-right corner of the workflow builder. You will be taken to your app’s Workflow page.

Create calendar to schedule meetings

The manager can easily schedule vendor meetings using a calendar. Zoho Creator enables you to create a **Calendar** report to schedule meetings and view the data collected using the **Schedule Meeting** form. To create a calendar report for this form:

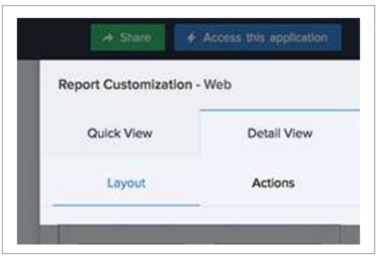
44. Click the **Add New** icon at the top of the Design page.
45. Select **Report**, then **Calendar**.
46. Select **Schedule Meeting** from the dropdown next to **Based on the form**.
47. Select the **Vendor** field from the dropdown next to **Event title**.

48. Select the **Meeting Date & Time** field from the dropdown next to **Event starts on**.
49. Set the report's name as **Meeting Calendar Report,** then click **Create Report**.



You will be taken to the report's Design page. Customize it as follows:

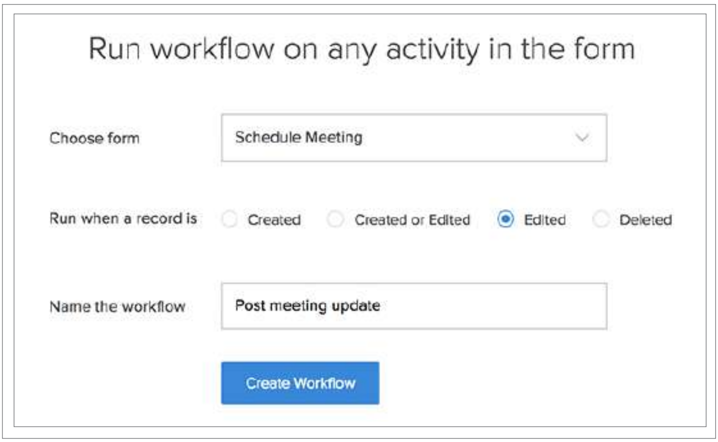
50. Click **Detail View** on the right.
51. Click **Layout**.
52. Select the second layout as shown below. Close the **Configure fields** window that slides in from the right.



Create a workflow to update the status of selection

Once the meeting is over, the manager either selects or rejects the vendor by editing the record in the **Schedule Meeting** form. This should automatically update the **Application Status** field in the **Application Form**. To set this up:

53. Click the **Add New** icon at the top of the **Workflow** or **Design** page of your app.
54. Select **Workflow**.
55. Select **While using the form**.
56. Select **Schedule Meeting** from the dropdown next to **Choose form**.
57. Select the choice **Edited** for **Run when a record is**.
58. Set the workflow's name as **Post meeting update**, then click **Create Workflow**.



59. Click **Add New** Action in the workflow builder.
60. Select **Deluge Script**.
61. Select **On success.**
62. Drag and drop the **Fetch Records** task onto the script builder. The syntax of the task will appear.
63. Replace the variables in the syntax with following names as shown in the table below:

Syntax	Variable Name
<Variable>	vendor_record
<form>	Application_Form
<field>	ID
<opr>	=
<expression>	input.Vendor

The **Fetch Record** task that you have defined should be same as the one shown below:

```
vendor_record = Application_Form[ID = input.Vendor];
```

64. Drag and drop the **if** task onto the editor. The syntax of the task will appear.
65. Replace the variables in the syntax with following names as shown in the table below:

Syntax	Variable Name
<variable>	input.Selected
<opr>	==
<expression>	“Yes”

66. Drag and drop the **Update record** task between the braces of the **if** task defined in the previous step. The syntax of the task will appear.
67. Replace the variables in the syntax with the names shown in the table below:

Syntax	Variable Name
<collection_variable>	vendor_record
<field>	Application_Status
<expression>	“Selected”

The **If** and the **Update record** tasks that you have defined should be same as the one shown below:

```
if (input.Selected == “Yes”)
{
vendor_record.Application_Status = “Selected”;
}
```

68. Drag and drop the **Else** task onto the editor. The syntax of the task will appear.

69. Drag and drop the **Update record** task between the braces of the **Else** task defined in the previous step. The syntax of the task will appear.
70. Replace the variables in the syntax with the names shown in the table below:

Syntax	Variable Name
<collection_variable>	vendor_record
<field>	Application_Status
<expression>	“Rejected”

The **Else** and the **update record** task that you have defined should be same as the one shown below:

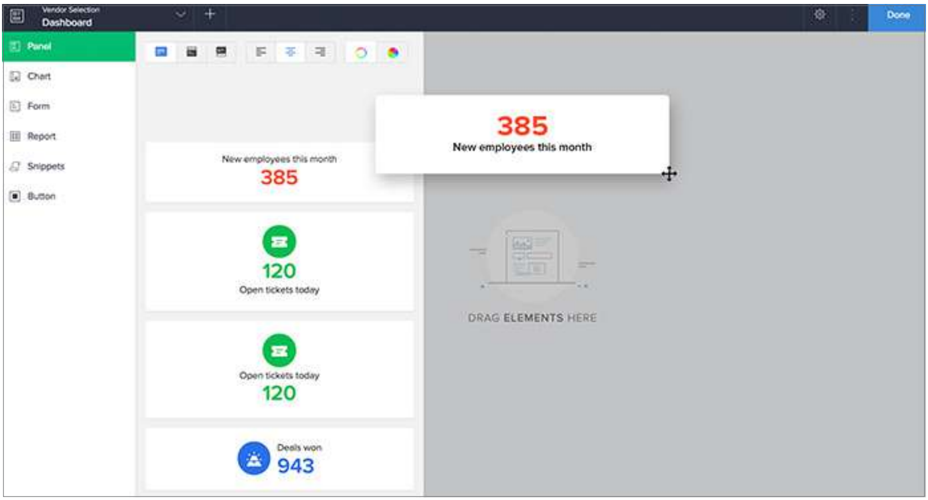
```
else
{
vendor_record.Application_Status = “Rejected”;
}
```

71. Click **Save** and close the script editor.
72. Click **Done** in the top-right corner of the workflow builder.

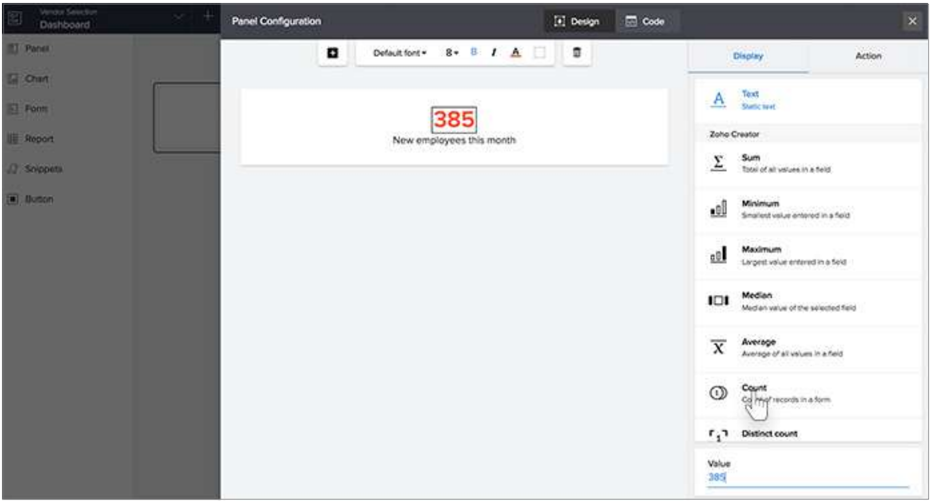
Create dashboard to view key metrics

Zoho Creator allows you to create a dashboard where you can view and keep track of key metrics such as the number of the vendors who are in different stages of the selection process. To create this dashboard:

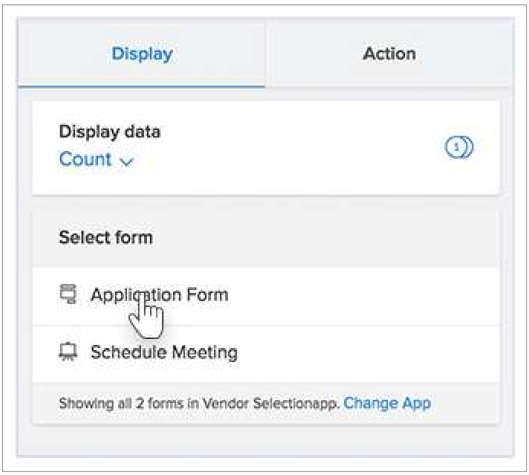
73. Click the **Add New** icon at the top of the Design page.
74. Select **Page.**
75. Set the page name to **Dashboard**, then click **Create Page**. You will be taken to the page builder.
76. Drag and drop the first panel. The Panel Configuration pane will slide in from the right.



77. Select **Count** under **Display**.

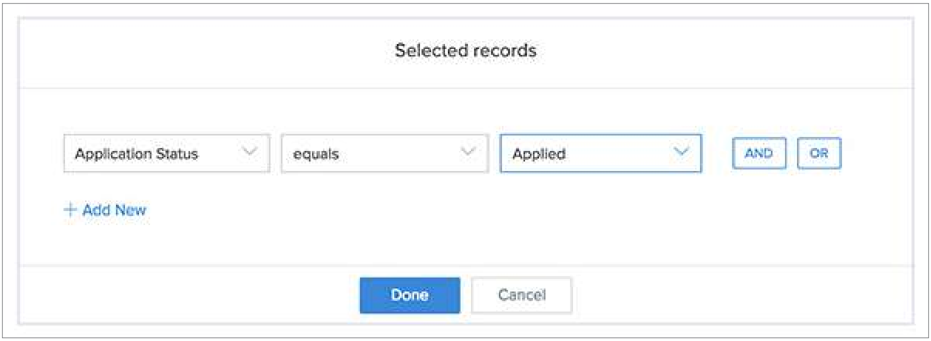


78. Select the **Application Form**.

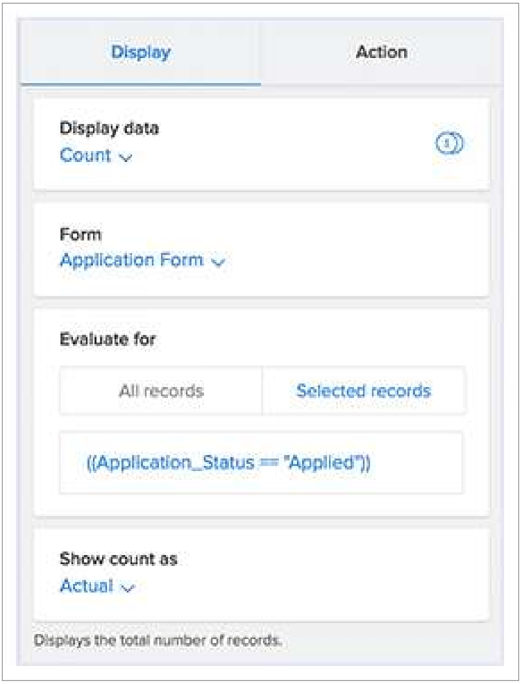


79. Select **Selected Records** under **Evaluate for**.

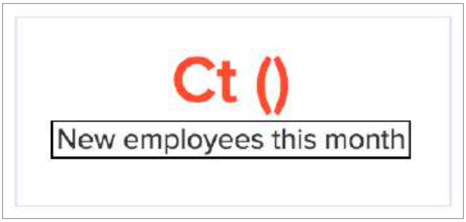
80. Define the records to be counted using the expression, as shown below, then click **Done**.



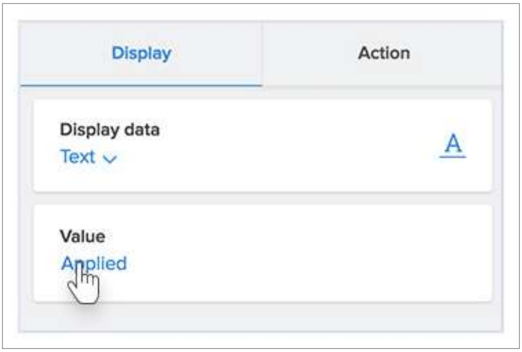
81. You'll see the following on the right.



82. Select the text box that is displayed below the count.



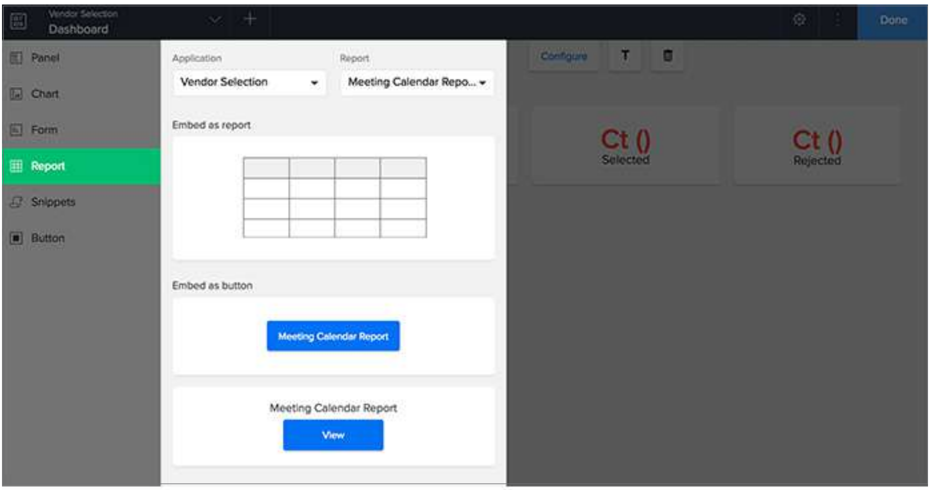
83. Set its **Value** to **Applied** on the right.



84. Click the **Close** icon at the top-right corner of the Panel Configuration pane.

85. Click **Panel** on the left, then repeat steps **76 to 84** until that you have a total of 4 panels in your page that show the total number of records from the **Application Form** where the **Application Status** is ‘Applied’, ‘Scheduled for Meeting’, ‘Selected’, and ‘Rejected’.

86. Select **Report** on the left, then select the **Vendor Selection** application, then the **Meeting Calendar Report**.

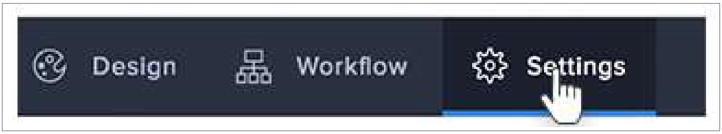


87. Drag and drop the **Embed as Report** widget onto your page.
88. Click **Done** at the top-right corner of the page builder.

Publish an application form for public access

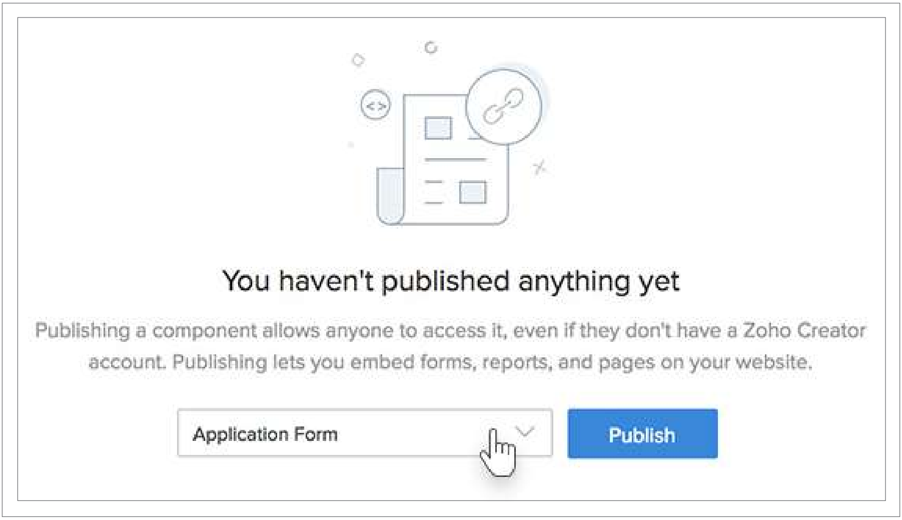
By default, only you and the users you share your app with (using their email addresses) can access it. The Application Form must be accessible to all vendors, even if you do not know their email addresses. To let anyone access the **Application Form**, use the **Publish** feature in Zoho Creator. Once your app is published, the link can be posted publicly or embedded in your website and accessed by anyone. To publish this form:

89. **Click Settings**. You will be taken to your app's Settings page.

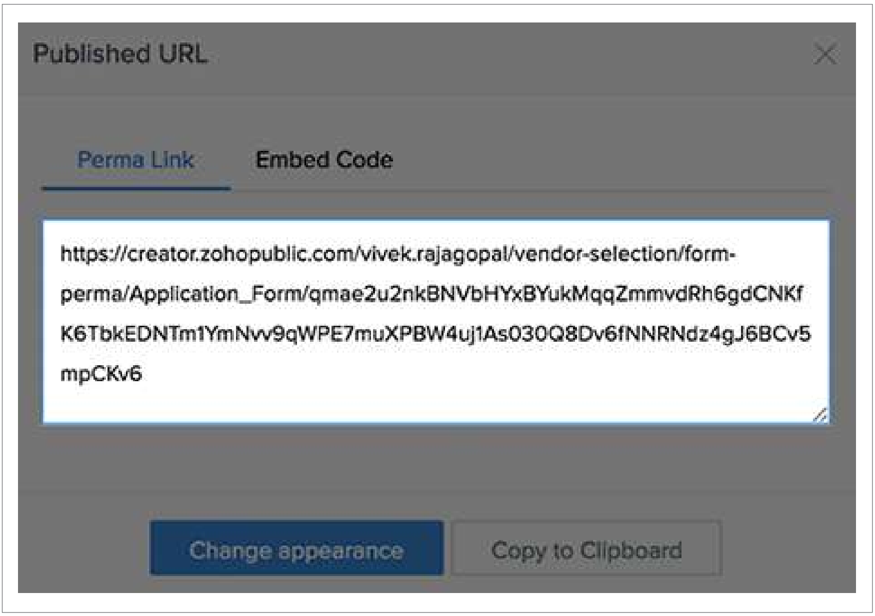


90. Click **Publish** under **Users and Control**.

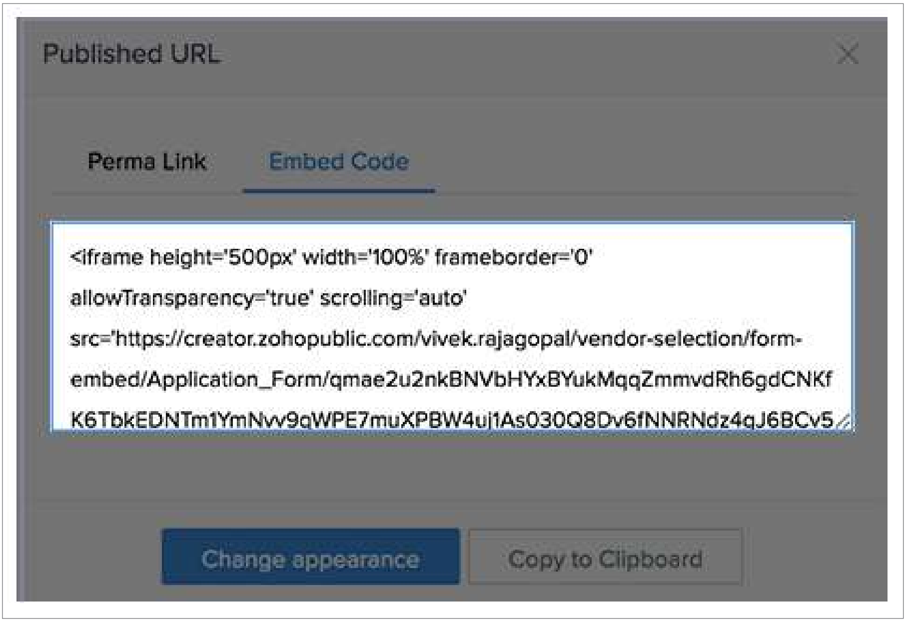
91. Select **Application Form** from the dropdown, then click **Publish**.



92. Copy the **Perma Link** that appears in the Published URL pop-up window. You can use the **perma** link to post a public link or send in a email campaign.



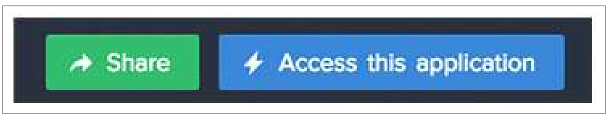
93. If you want to embed this form in your website, use the **Embed Code**.



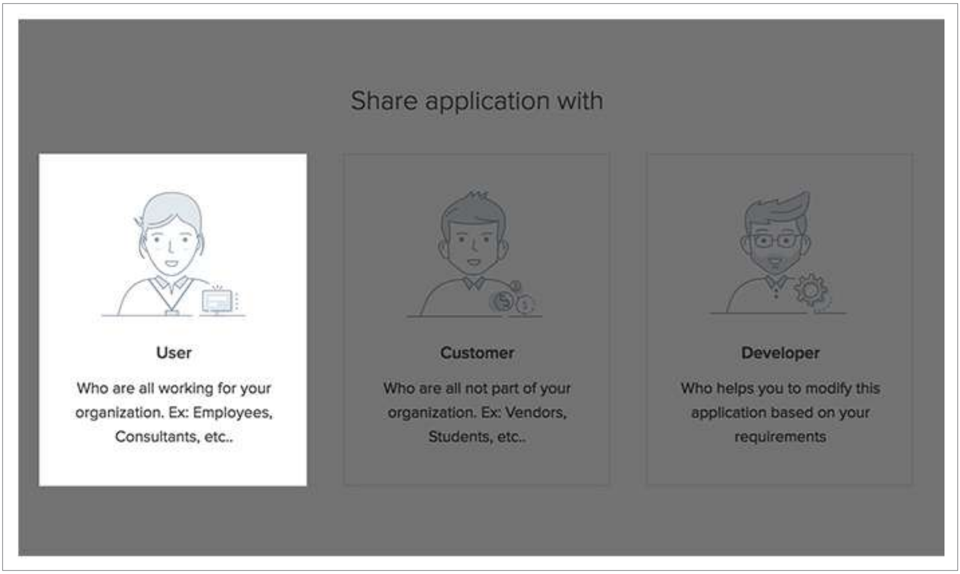
Share the app with managers

Now that you've built an app and customized it to suit your business process, the last step is to share the app to the manager. Sharing an app means granting access to some or all components in it. To share the app:

94. Click **Share** at the top-right corner of the Design page:

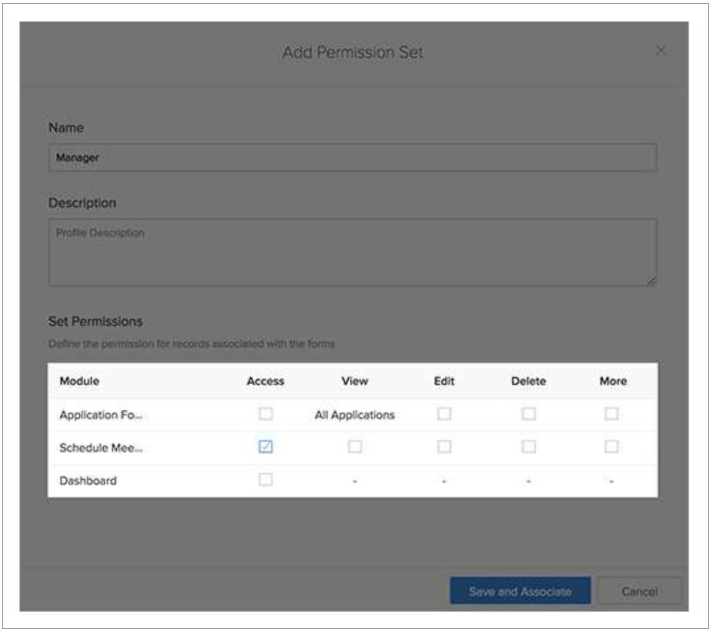


95. Select **User**.



96. Enter the email address of the manager you want to share your app with in the textbox below **Add Users**.
97. Select **Add Permission Set** in the **Choose a permission** dropdown. The Add Permission Set pane will appear.
98. Enter the name 'Manager' and a description (optional) for the permission set.
99. Select the components that you want the manager to be able to access and the actions they can perform. For the Vendor Selection app:

a. Check the **View** checkbox for the **Application** form, then select the **All Applications** report. (The manager should not be able to add records to the form; they should be able to view all records submitted; they should not be able to edit any of the records).
b. Check the **Access** checkbox for the **Schedule Meeting** form, as the manager should be able to add records through it.

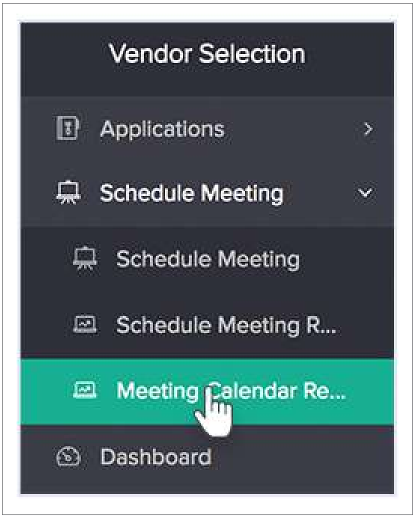


c. Click **Save and Associate.**
d. Click **Share.**

Access the app to schedule a meeting

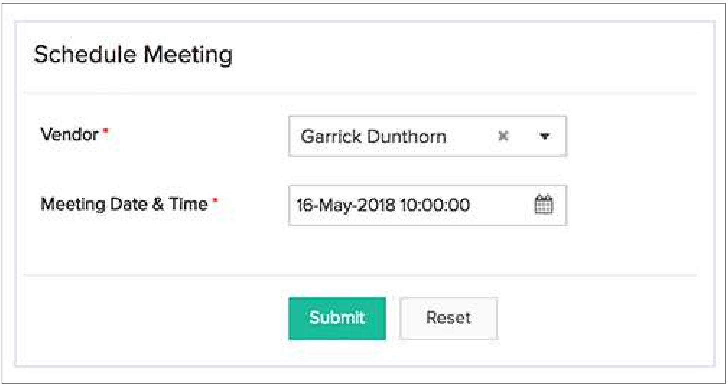
The manager can schedule a meeting with the vendor using the **Calendar** report created above. To do this, the manager uses the link received via email.

100. The manager accesses the **Meeting Calendar** report.



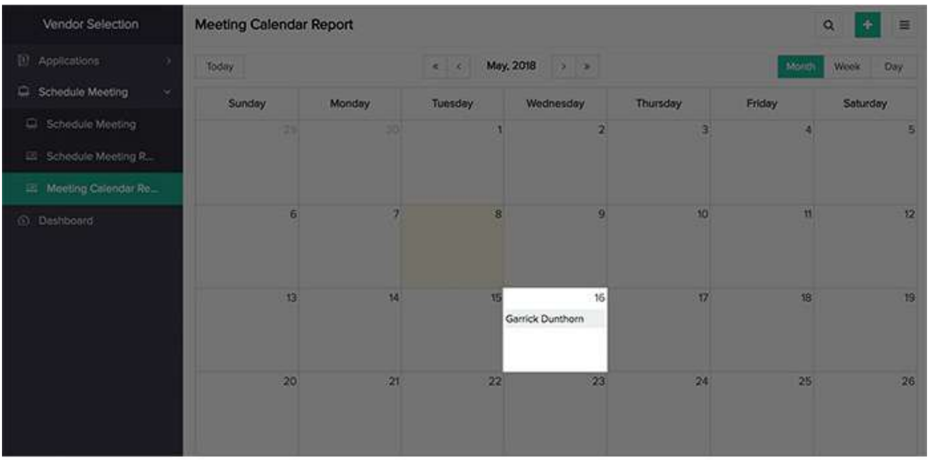
101. The manager schedules a meeting by clicking on the required date in this report.

   a. This will open the **Schedule Meeting** form, as shown below:
   b. The manager will select a vendor and set their meeting's date and time, and then click **Submit.**



102. Once the manager schedules an meeting, the following events happen:

a. A record appears in the **Meeting Calendar** report.

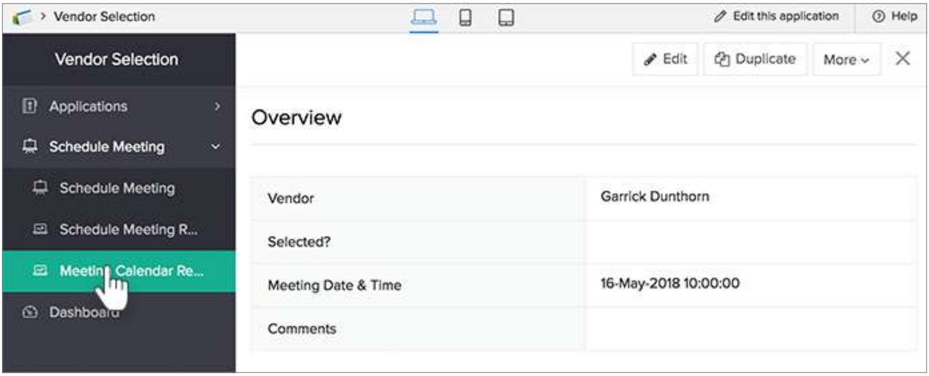


b. The vendor's Application Status is updated from Applied to Scheduled for Meeting.

c. An email is sent to the vendor, informing them of the date and time of their meeting.

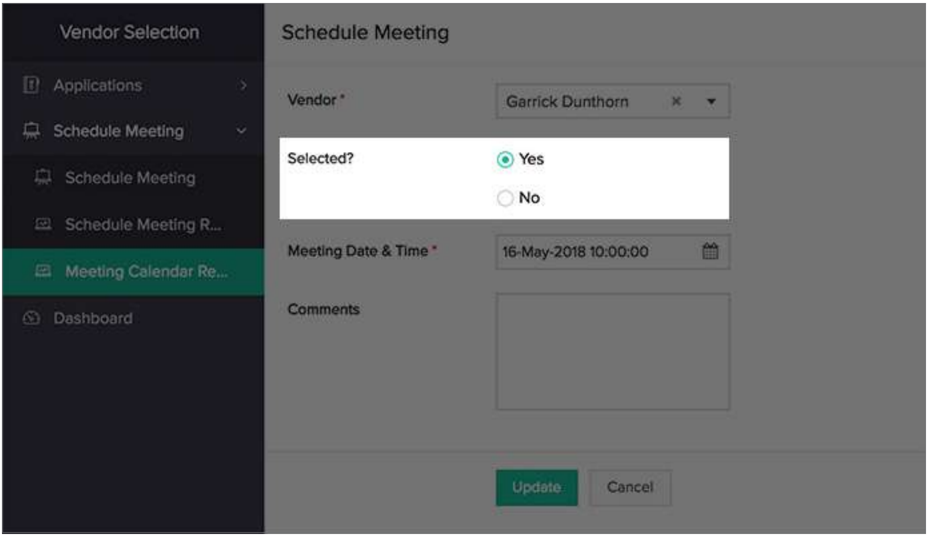
103. Once the meeting has taken place, the manager can update whether the vendor has been selected or not:

a. Select the required record in the Meeting Calendar Report. The **Detail View** will appear:



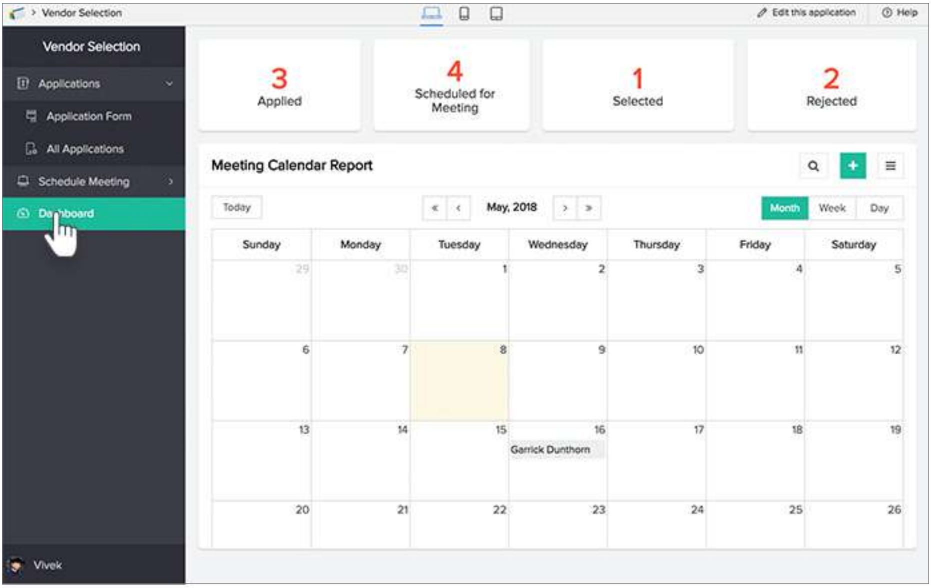
b. Click the **Edit** button. The **Schedule Meeting** form will open showing the details of the selected record.

c. Set the **Selected?** field to **Yes** to select that vendor, or **No** to reject the vendor, then click **Update**.



104. Based on the manager's selection, the vendor's **Application Status** is updated to either **Selected** or **Rejected** in the **All Applications Report**.

The selection executive (you), as the administrator of the app, has access to all its components. You can use the Dashboard page to view all of the selection-related information in one place.



Application recap

The following table lists the requirements of the selection process and how the **Vendor Selection** app has addressed them.

...

Requirement	Solution in Zoho Creator
Provide a way for vendors to easily apply to the selection process	Create a Form and Publish it (make it publicly accessible)
Automate notifying vendors that their applications were submitted successfully	Enable sending email notification whenever a vendors submits the Form
Provide a way for the manager to view the details of all vendors	Create a List Report and give the manager permission to view vendor records
Provide a way for the manager to schedule meetings with the vendors, and view the scheduled meetings	Create a Form through which the manager schedules meetings and create a Calendar Report, based on this Form, to view the scheduled meetings
Automate notifying the vendors as and when the manager schedules their meetings	Create a Workflow that sends an email once the manager schedules a meeting
Update the Application status of the vendor after each meeting	Create a workflow to update the vendor's Application status automatically based on the manager's decision
Provide a way for the selection executive to quickly glance at the status of the process via a dashboard that displays the vendor information	Create a page

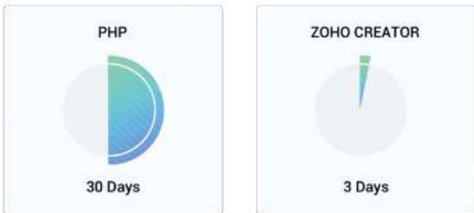
Notes:

Notes:

From idea to app, faster than ever before.

School Management

Sales Management



People Management

Inventory Management

For additional resources,
visit: zoho.to/zchelp

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