

Zoho Creator 5

Release Notes

Application

What's New

- You can now build and deploy apps that enable a mobile-first experience
- You can install apps from the new App Deck, which features 50+ ready-to-use industry-specific apps
- The way you edit your app has undergone a major change. A new design page has been introduced, where you can build, customize, design, and preview your app's components.
- WYSIWYG-based design for Forms, Reports, and Pages, specific to three device types – Browser, Phone, and Tablet have been introduced. Toggle between them to set device-specific:
 - Customizations for the layouts and actions of the Forms, Reports, and Pages in your app
 - Arrangement and visibility of the components and sections in your app
 - Customization of your app's theme

What's Changed

- Sandbox, Backups, and Usage Logs have been moved under *Application Settings*

Forms

What's New

- The form builder's visual look and feel has been enhanced
- Create a form with a single click using the extended library of industry-specific form templates
- You can use the new visual form builder to build Forms for Zoho CRM, Salesforce, Zoho Recruit, Zoho Books, and Quickbooks. More services will be phased in.
- Location can be captured on form submission. This data will be stored in the Added Location and Modified Location system fields.
- Geo-fencing a form now applies when accessed from a web browser as well as from a mobile device
- The Zoho CRM field has evolved into the Integration field, which you can use to look up data stored in Zoho CRM, Salesforce, Zoho Recruit, Zoho Books, and QuickBooks. More services will be phased in.
- Device-specific alignment of field labels is now available
- Fields can now be arranged in sections, using the Section field
- A form can now contain fields arranged in a mixture of single-column, two-column, and three-column layouts
- Use the Name field to individually capture Prefix, First Name, Last Name, and Suffix
- Use the Phone field to capture a valid, international phone number
- Use the Address field to pick an address from a map, or type one manually. It features individual fields for capturing Address Line 1, Address Line 2, City/District, State/Province, Postal Code, and Country.
- Record audio in forms using the Audio field
- Record video in forms using the Video field
- The Annotation feature has been introduced in the Image field. Insert text, shapes, lines, and arrows in images you capture from a phone or tablet.

What's Changed

(in Forms)

- Stateless forms can now be created while duplicating existing forms
- Notification and Form Automation have been moved under *Workflows*
- Payment has been made part of workflows:
 - Collect payments by integrating with the following payment gateways powered by Zoho Checkout: Razorpay, PayPal, Payflow Pro, Payments Pro, Authorize.Net, Forte, and WorldPay
 - PayPal integrations configured under Form Settings > Payment, cannot be edited in Zoho Creator 5. However, upon migrating, you will be able to continue collecting payments as per the existing configuration.
 - Once you define a payment integration for a form in Zoho Creator 5, it will override that form's existing payment configuration
- Record Audit has been renamed Audit Trail, and is available under *Application Settings*
- Record Summary has been renamed Record Templates, and is available under *Application Settings*

Reports

What's New

- Use Kanban Report to view a Kanban Board-like grouping of records based on the values stored in a field
- Use Timeline Report to view a graphical representation of records in relation to date or date-time values
- Use Map Report to view records that store an address on a map
- Introducing Quick View and Detail View for reports:
 - Quick View is what you see when you access a report. It enables you to view multiple records in one glance.
 - You will see Detail View when you click or tap on a record. It enables you to view the selected record in detail, and incorporate data from its related records.
- Record Summary has been renamed Record Templates (under *Application Settings*), and can be used for printing records and including user submitted data in email notifications.
- Perform the following customizations for the Quick View and Detail View of each type of report:
 - Customize new card-based layouts
 - Customize the default menu action items and add new action items using workflows for the following record actions on a web browser:
 - On Click of a Record
 - For Single Record
 - For Right Click of a Record
 - For Multiple Records
 - Customize the default menu action items, and add new action items using workflows for the following record actions on a phone and tablet:
 - On Tap of a Record
 - For Single Record
 - For Long Press of a Record
 - For Swipe Left of a Record
 - For Swipe Right of a Record
 - For Multiple Records

(What's New in Reports ... continued)

- The Detail View can be customized to present data in multiple blocks:
 - Each block can be customized to display data from a record and the data from its related records (related via a lookup field or subform)
 - For example, in an order management scenario, the Detail View of a customer's profile can have a block for displaying each of the following:
 - Their picture, name, and email address
 - Some of their latest orders
 - Products they recently added to their wish list
 - Their most-rated product reviews
- In addition to displaying the aggregate values for numeric fields, the following field-level customizations can be performed:
 - Name field:
 - Display just the required data. For example: just the First Name, just the Last Name, both First Name and Last Name.
 - Display the First Name first, or the Last Name first
 - Phone field:
 - Call the phone number by clicking or tapping it
 - Display plain or formatted phone numbers
 - Address field:
 - Point out the address in a map on clicking or tapping it
 - Display just the required data. For example: just Address Line 1 and Address Line 2, just the City/District, just the Postal Code, just the Country.
 - Date field: Display the full date, parts of it, what day of the week it is, or just the month and the year
 - Date-time field: Display just the time, just the date, parts of the date, or just the month and the year
 - Multi Select and Checkbox fields: Display the selected choices in separate lines, or separate them using a comma
 - Image field: Display images as thumbnails as well as in a defined size, or their actual size
 - Rich Text field: Display the data as formatted text, or as plain text
- You can define a custom order for grouping and sorting data, in addition to the default ascending and descending orders

What's Changed

(in Reports)

- Custom Actions has been moved under *Layout*
- Record Summary's functions have been moved to Detail View (under Reports) and Record Templates (under *Application Settings*)
 - As a template for viewing a record in reports: Previously when you clicked on a record in a report, its active Record Summary template would appear. With the new update:
 - If you were using a custom Record Summary template, you will continue to see it when you click on a record. However, you will no longer be able to edit that template for viewing a record. When you select a layout, the Detail View will appear instead of the Record Summary template.
 - If you were using the default Record Summary template, the default Detail View layout will appear instead
 - As a template for printing a record or attaching it in email notifications:
 - Record Summary has been renamed Record Templates, and is available under *Application Settings*
 - If you created any custom Record Summary templates, they will be available under Record Templates. The Record Summary template that you were using will be applied when you print a record from reports.
- Customizable card-based layouts have been introduced for the Quick View of reports. The Summary Report has been deprecated.

Pages

What's New

- You can create intuitive and dynamic dashboards using the new Page Builder
- The new, easy-to-use Zoho Markup Language (ZML) has been introduced to create custom panels
- The Page Builder features the following out-of-the-box components:
 - 50 pre-built panels that can display:
 - Aggregated metrics from the data in your Zoho Creator apps: Sum, Minimum, Maximum, Average, Count, and Distinct Count
 - Cell values from Zoho Sheet
 - Task Count, Bug Count, and Milestone Count from Zoho Projects
 - Aggregate metrics from other Zoho services and popular SaaS products will be phased in.
 - 16 different charts, categorized as Column Charts, Bar Charts, Line Charts, Scatter Charts, Area Charts, Web Charts, Funnel Charts, and Pie Charts
 - Buttons to invoke workflows
 - ZML snippets and HTML snippets that support Deluge scripting
 - Embedding of forms, reports, and iframe snippets
- Execute workflows like opening a URL or triggering a custom function when each panel and any of their components is clicked or tapped on

What's Changed

- Existing HTML and CSS-based pages have been moved to the new Page Builder as HTML snippets

Workflows

What's New

- Workflows have been organized as Form Workflows, Schedules, Approvals, and Payments
- Workflows can now be defined using a point-and-click interface
- Approval Process is available as a built-in workflow type. It can be defined using a point-and-click interface.
- Use Payment Integration to collect payments through the following payment gateways powered by Zoho Checkout: Razorpay, PayPal, Payflow Pro, Payments Pro, Authorize.Net, Forte, and WorldPay
- The following data access tasks can now be defined using a point-and-click interface:
 - Add a record
 - Update records that satisfy a criteria
 - Delete records that satisfy a criteria
- The Integration task has been introduced. Use a point-and-click interface to add records to Zoho CRM, Salesforce, Zoho Recruit, Zoho Books, and QuickBooks. More services will be phased in.

What's Changed

- Workflows are now explicitly treated as a component of an app
- Deluge scripting and Form Automation have been brought under *Workflows*
- Schedules are now a type of workflow
- Custom Functions have been moved under *Application Settings*

Share

- The process of sharing an app has been improved
- Profiles has been renamed Permissions
- Permission to access, view, edit, delete, import, and export records can be set as part of the new sharing process
- Field permissions can be set as part of the new sharing process
- The option to restrict visibility of a report can be set as part of the new sharing process

Application Settings

What's New

- Download Mobile App: Users can now download their Zoho Creator apps as native iOS and Android apps
- Users can distribute their apps on App Store, Play Store, and internal Mobile Device Management (MDM) platforms
- The new Relationship Diagram allows you to view your app's structure – the forms in your app, the fields they contain, and how the forms are related to one another
- Application IDE, a built-in code editor that allows an app developer to manage their app's source code, has been introduced

What's Changed

- Translation has been renamed Localization
- Sections has been moved to the *Design* page, allowing you to perform device-specific customizations for the sections of the app