

Zoho Creator 5 - Quick Start Guide

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Overview

Zoho Creator is a low-code platform used for building cloud-based enterprise apps that can be seamlessly deployed across smartphones, tablets, and web browsers.

This guide will help you get started building custom apps with Zoho Creator 5. This guide illustrates building a **Recruitment Management** app using Zoho Creator 5, in order to give you an overview of how you can deconstruct your business processes and build an app that fits the custom needs of your organization.

Note: You will need to submit a request through this [form](#) to gain access to Zoho Creator 5. Once you do, you will receive an email that will detail on how to access it.

Plan your app

Before you start building your app, it is crucial that you:

1. Identify the business processes that you'd like to automate
2. Outline the data that each process is based on, as well as the roles or profiles involved
3. Outline what you want your app to do

Recruitment Management app

Imagine that you are an executive who has been tasked with managing the recruitment of candidates, and that you've decided to build an app that collects and manages information about the candidates who apply to the recruitment process.

This app is designed to cater to the following participants:

1. The **Candidates**, who apply to the recruitment process
2. The **Manager**, who conducts the interviews and decides whether a candidate is eligible to be selected or not
3. The **Recruitment Executive** (yourself), who is in charge of monitoring this process

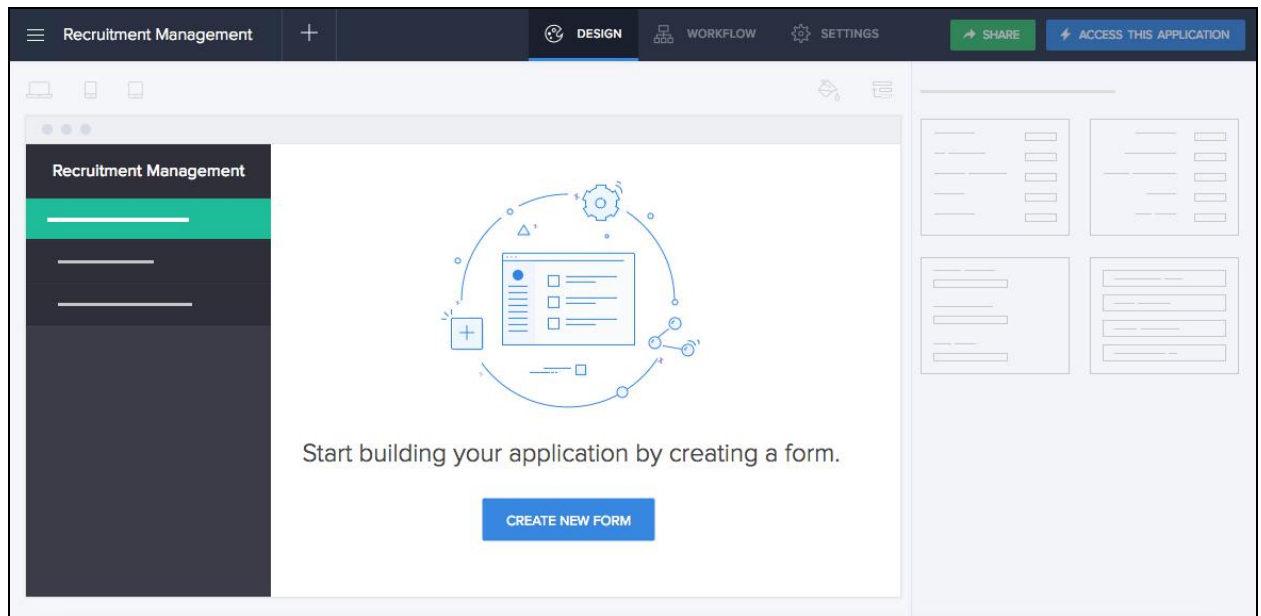
The following table lists the requirements that you would want your Zoho Creator app to address:

Requirement-solution mapping

Requirement	Solution in Zoho Creator
Provide a way for candidates to easily apply to the recruitment process	Create a form and publish it (make it publicly accessible)
Automate sending a confirmation to the candidates who apply	Create a workflow that sends emails when candidates submit their applications
Provide a way for the manager to view the details of all applicants	Create a list report and give the manager permission to view candidate records
Provide a way for the manager to schedule interviews with the candidates, and view the scheduled interviews	Create a form through which the manager schedules interviews and create a calendar report, based on this form, to view the scheduled interviews.
Automate notifying the candidates for when their interview is scheduled	Create a workflow that sends an email once the manager schedules an interview
Provide a way for the recruitment executive to quickly glance at the status of the process via a dashboard that displays the candidate information	Create a page

Create the app

1. Log in to <https://creator.zoho.com>. You will be taken to your *My Applications* page.
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 design page.
3. Select **CREATE FROM SCRATCH**, displayed on the left.
4. Set the app's name as 'Recruitment Management', then click **CREATE**. You will be taken to the *Design* page of your app, as shown below:

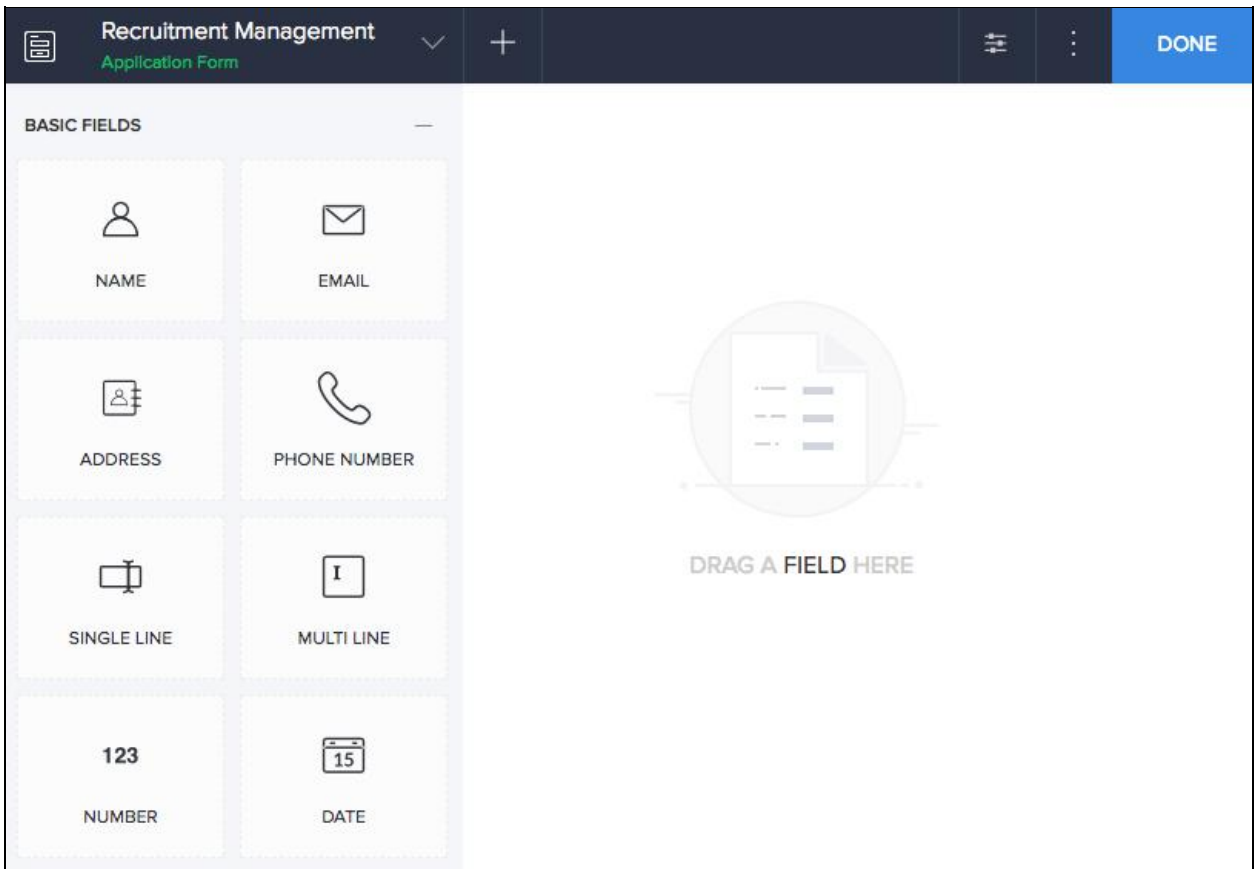


You've created an app, but there still aren't any components (form, report, page or workflow) in it. You will need to start by creating a Form—the component of a Zoho Creator app with which you enter or collect information.

Each entry submitted through a form is called a **record**. Just like how a spreadsheet has columns, forms in Zoho Creator have **fields**.

Create form

1. Click **CREATE NEW FORM**, near the bottom of the *Design* page.
2. Select **BLANK**.
3. Set the form's name as 'Application Form', then click **CREATE FORM**. You will be taken to the form builder, as shown below:



4. Drag-and-drop the **NAME** field from the field palette (displayed on the left), to the form. The related **Field Properties** will appear on the right.
 - Each field comes set with a **Field Name** and **Field Link Name**.
 - The field name is the text displayed on the form next to the field's input area. This lets the user know what information the field is meant to capture.
 - You can use the default field name or edit it as required.

5. Set the name field as mandatory to ensure that a candidate cannot submit an application without entering a name.
 - Navigate to the **Field Properties -> Validation** section
 - Check the checkbox next to **Mandatory**

Field Properties

Field name

Name

Field Link Name

Name

Validation

Mandatory

6. Drag-and-drop the **DROPDOWN** field onto the form.
- Set its **Field Name** as 'Application Status'
 - Navigate to the **Field Properties -> Choices** section, displayed on the right
 - Set the choices as shown below:

Choices

Applied + - ⇄

Scheduled for Interview + - ⇄

Selected + - ⇄

Rejected + - ⇄

- Click the radio button next to 'Applied'.

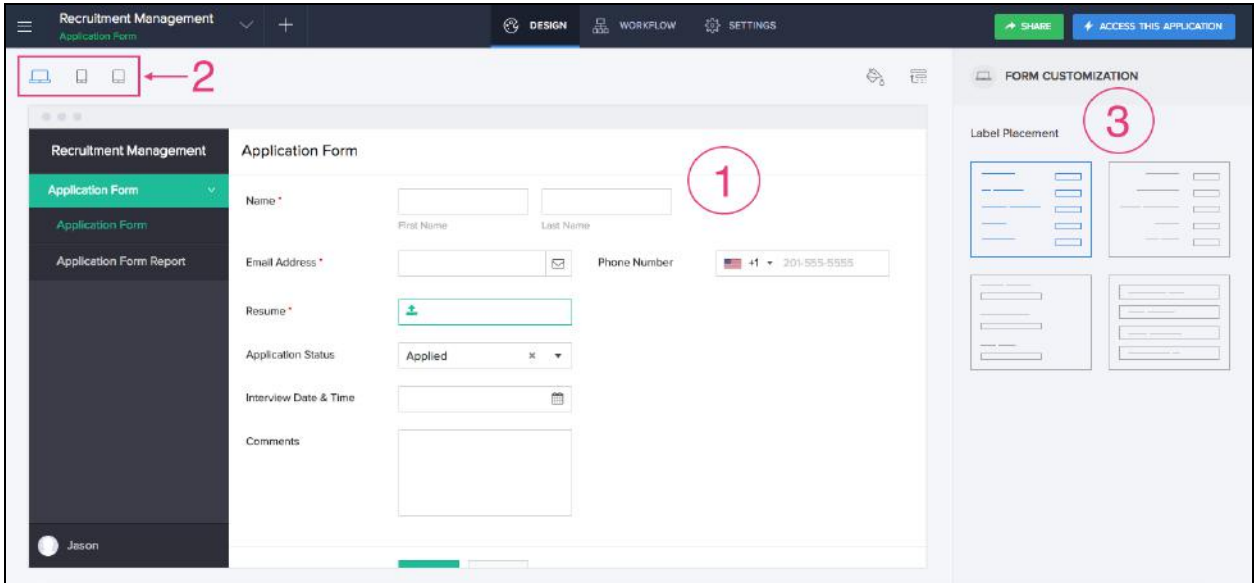
7. Drag-and-drop the following fields to your form:

Type of Field	Set Field Name as	Configure Field Properties
EMAIL	Email Address	Set as mandatory
PHONE NUMBER	Phone Number	-
FILE UPLOAD	Resume	Set as mandatory

8. Click **DONE**, displayed in the top-right corner.



You will be taken to the *Design* page of your form, where you can customize and preview your form's appearance, as shown below:



- 1 - This is where you will see a preview of your form's appearance
- 2 - Select a device: web browser, smartphone, or tablet, to customize your form's appearance on that device. The selected device will appear in the preview.
- 3 - Select a layout. Device-specific layouts will be displayed here. The selected layout will be applied in the preview.

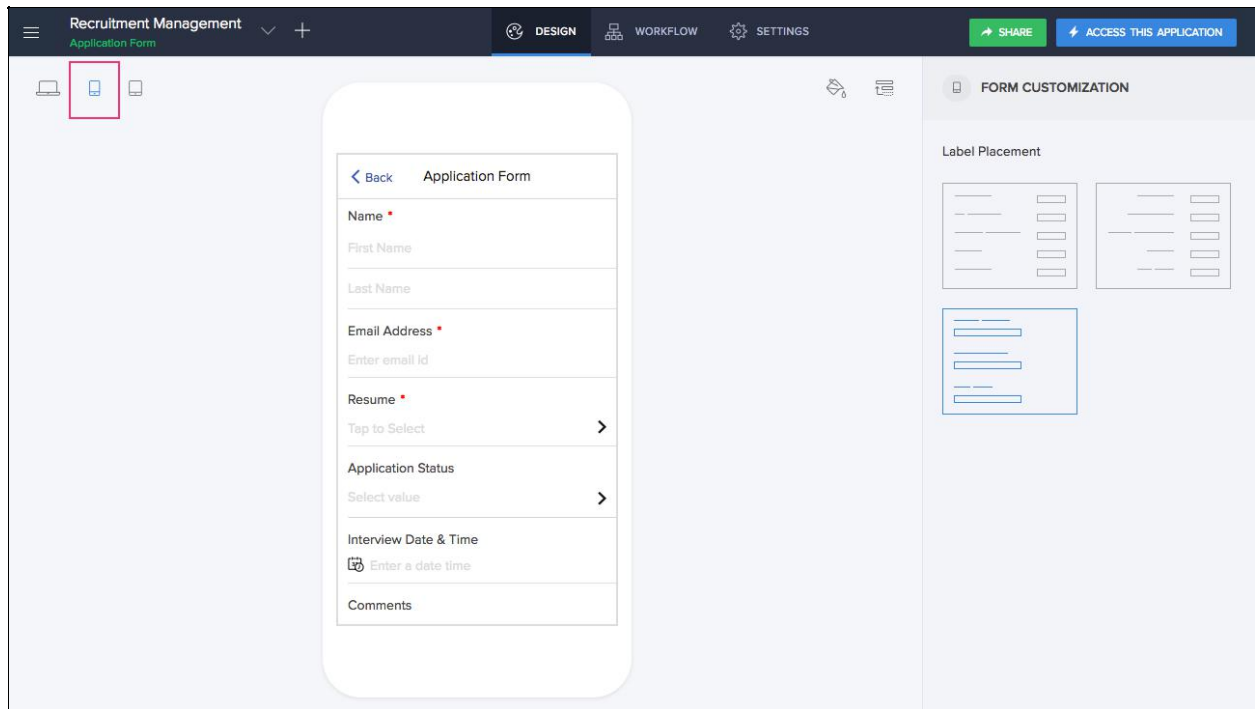


Image shows the Design page of the **Application Form**, with the preview of how it will look when accessed on a smartphone

Access the app

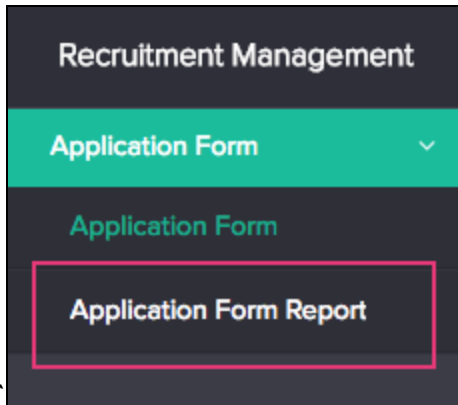
1. Click **ACCESS THIS APPLICATION** in the top-right corner of the *Design* page, as shown below:



You will be taken to your form, as shown below:

Note: Try submitting some dummy candidate records through your form. Doing this will help you to visualize your app as you continue to add components (reports, workflows, pages, etc.) to it.

2. Click **Application Form Report**, as shown below:



A list report will appear, displaying all the records that are submitted through the **Application Form**.

When you create a form, Zoho Creator automatically creates a list report for it. A report is the component of a Zoho Creator app with which you view the records submitted through a form. **Application Form Report** is the default list report for **Application Form**.

The screenshot shows the 'Application Form Report' in a Quick View layout. The table displays the following data:

<input type="checkbox"/>	Name	Email Address	Phone Number	Resume	Application Status	Interview Date & Time	Comments
<input type="checkbox"/>	Cornellus Howsden	cornellus.h22@zyker.com	+1951555044	Cornellus_H.pdf	Applied		
<input type="checkbox"/>	Kimberly Goater	kimberly.g@zyker.com	+12015555331	Kimberly_Goater.pdf	Applied		
<input type="checkbox"/>	Kimmlie Pinson	kimmlie.p@zyker.com		Kimmlie_P.pdf	Applied		
<input type="checkbox"/>	Barney Roswame	barney.r@zyker.com	+19515553453	Barney_R.pdf	Applied		
<input type="checkbox"/>	Dallas Cable	dallas.c@zyker.com		Dallas_Cable.pdf	Applied		
<input type="checkbox"/>	Cassandra Phippard	cassandra.p@zyker.com		Cassandra.pdf	Applied		
<input type="checkbox"/>	Demetre Pedrazzi	demetre.pedrazzi@zyker.com	+12015555234	Demetre_Pedrazzi.pdf	Applied		
<input type="checkbox"/>	Rois Brekonridge	rois.brekonridge@zyker.com		Rois_s_resume.pdf	Applied		
<input type="checkbox"/>	Jesselyn Figures	jesselyn@zyker.com	+19515555553	Jesselyn.pdf	Applied		
<input type="checkbox"/>	Adrien Pendre	adrien@zyker.com	+19515555551	resume.pdf	Applied		
<input type="checkbox"/>	Tabbie Meekan	tabbie@zyker.com	+19515555555	Tabbie_resume.pdf	Applied		
<input type="checkbox"/>	Iika Feare	iika.f@zyker.com		Resume_iika.pdf	Applied		
<input type="checkbox"/>	Osbert Bruta	osbert@zyker.com	+12015555151	Osbert.pdf	Applied		
<input type="checkbox"/>	Nissa Simeonov	nissa.s@zyker.com	+12015555523	nissa.pdf	Applied		
<input type="checkbox"/>	Dyan Noblet	dyan.noblet@zyker.com	+12015555511	dyan.pdf	Applied		
<input type="checkbox"/>	Jake Tyler	jake.tyler@zyker.com	+12015555551	Jake_T_-_resume.pdf	Applied		
<input type="checkbox"/>	John Smith	john.s@zyker.com	+12015555555	Resume_-_John.pdf	Applied		

Total: 25

Image shows the **Quick View** of the **Application Form Report**, in the default layout. The quick view enables you to view many records at the same time

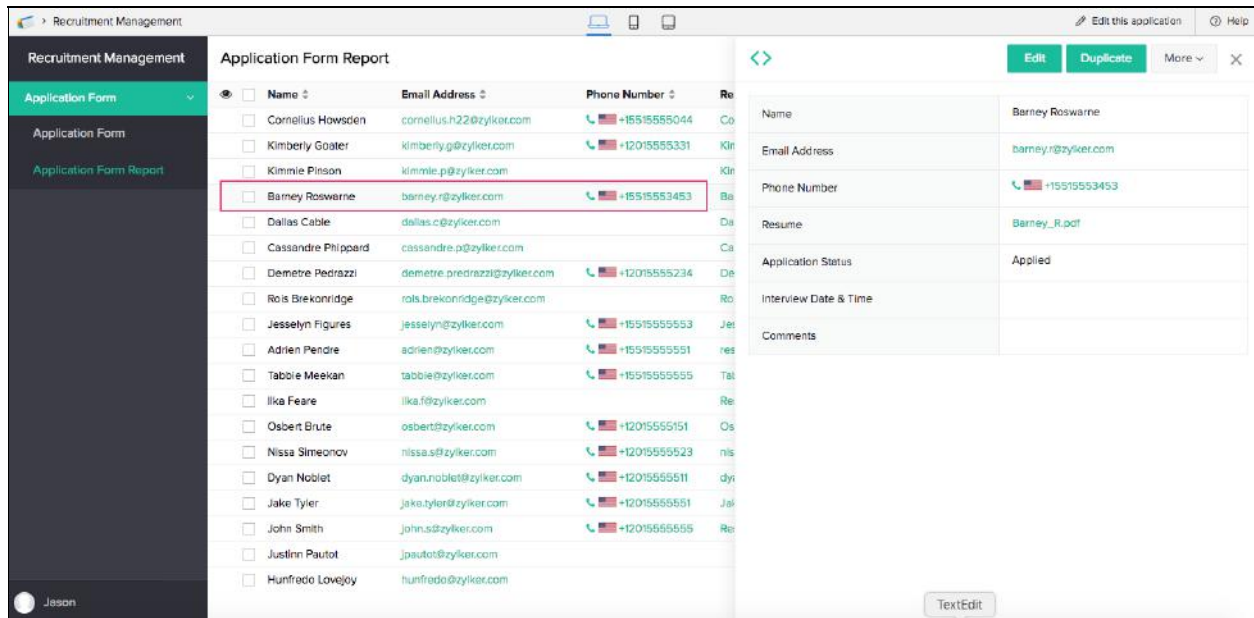
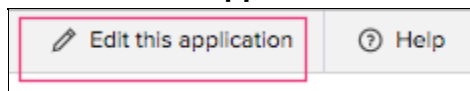


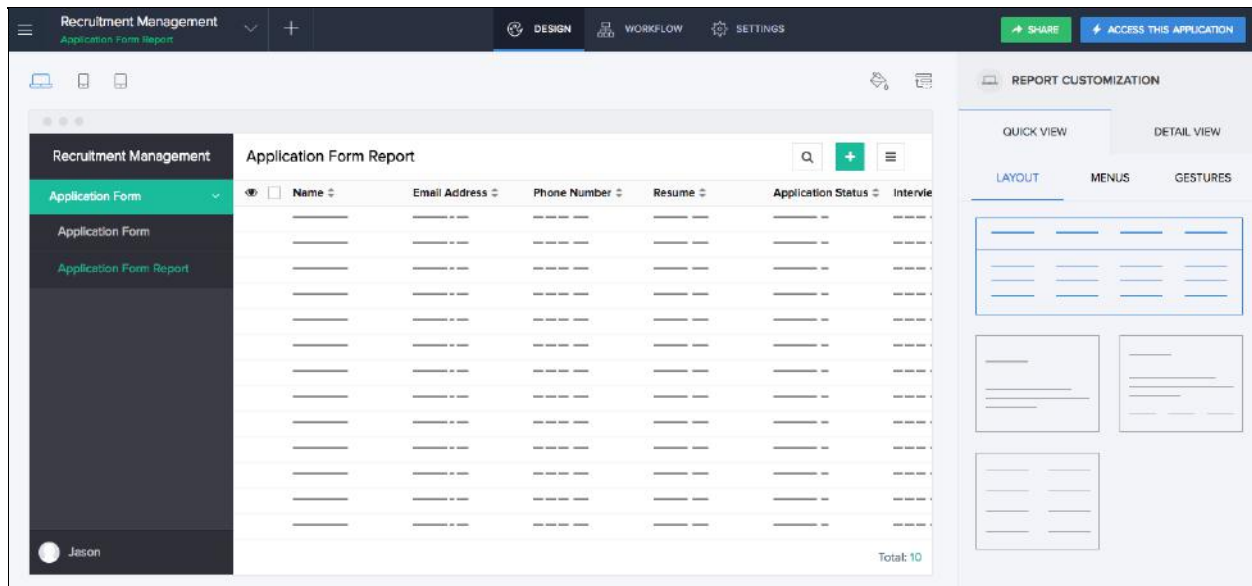
Image shows the **Detail View** of the **Application Form Report**, in the default layout. The detail view enables you to get more information about a selected record

Edit the app

Click **Edit this application** in the top-right corner of the app, as shown below:



Since you clicked this while accessing the list report, you will be redirected to the app's **Design** page, as shown below:



You can customize the layout, menus, and gestures for the device-specific quick and detail views of this report. Just select the device from the top-left of the *Design* page and configure the layout, menus, and gestures in the **REPORT CUSTOMIZATION** section, displayed on the right.

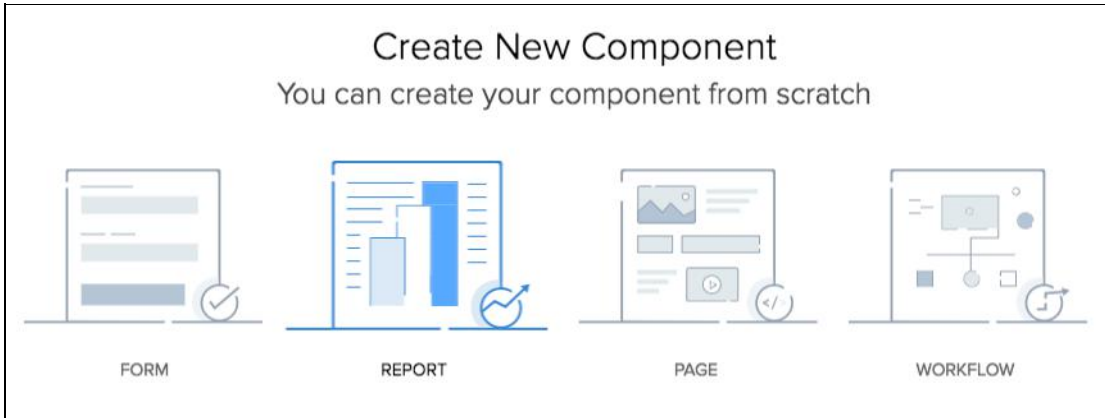
Create calendar report

In addition to the list report, the following types of reports are available in Zoho Creator 5: Pivot Table, Pivot Chart, Spreadsheet, Kanban, Calendar, Timeline, and Map.

Each report enables a specific user experience. For example, a spreadsheet report enables you to view and edit records as if working on a spreadsheet. Different report types require the records it will display to contain certain types of information.

For creating a calendar report, you'll need a date or date-time field. The **Interview Date & Time** field that you added in the **Application Form** is a date-time field. Follow the below steps to create a calendar report:

1. Click the add (+) icon displayed on the top of the *Design* page.
2. Select **REPORT**, as shown below:



3. Select **CALENDAR**.
4. In the **Report as a Calendar** window:
 - Select **Application Form** from the drop-down next to **Based on the Form**.
 - Select the **Name** field from the drop-down next to **Event Title**.
 - Select the **Interview Date & Time** field from the drop-down next to **Event starts on**.
 - Enter a name for the calendar report in the input box next to **Name Your Report**.

Report as a Calendar

Based on the Form

Event Title

Event Dates

Event starts on

Event ends on

Name Your Report

CREATE REPORT

5. Click **CREATE REPORT**. You will be taken to the *Design* page of this report.

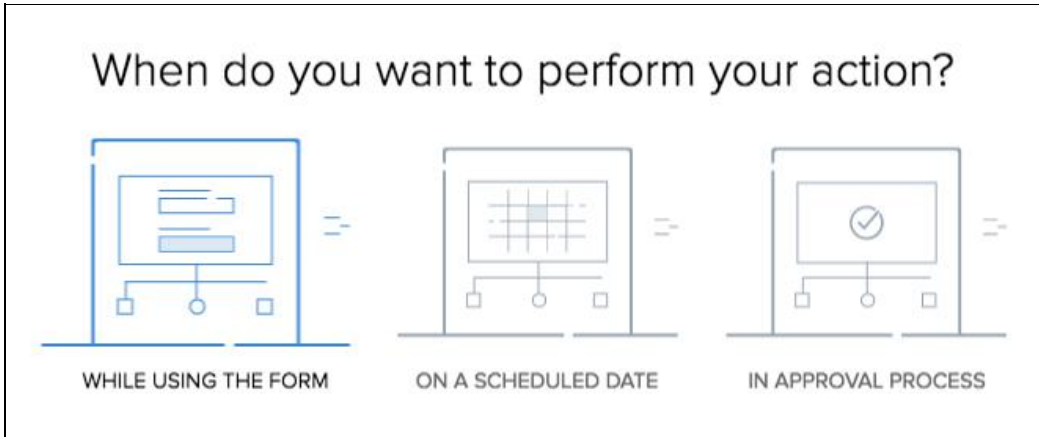
Create workflow to hide fields

The following fields in the **Application Form** are meant to assist the recruitment executive (yourself) and the manager to process the candidate records. They are not something that a candidate will fill out when submitting the form.

- Application Status
- Interview Date & Time
- Comments

Thus, these fields must be hidden from the candidates but be visible to the recruitment executive and the manager. As it will be the candidates who create the records in this app, these fields need to be hid when a record is created. For this:

1. Click the add (+) icon displayed on the top of the *Design* page.
2. Select **WORKFLOW**.
3. Select **WHILE USING THE FORM**, as shown below:



4. Select **Application Form** from the drop-down. Select the choice **Created** and name the workflow, then click **CREATE WORKFLOW**.

Run workflow on any activity in the form

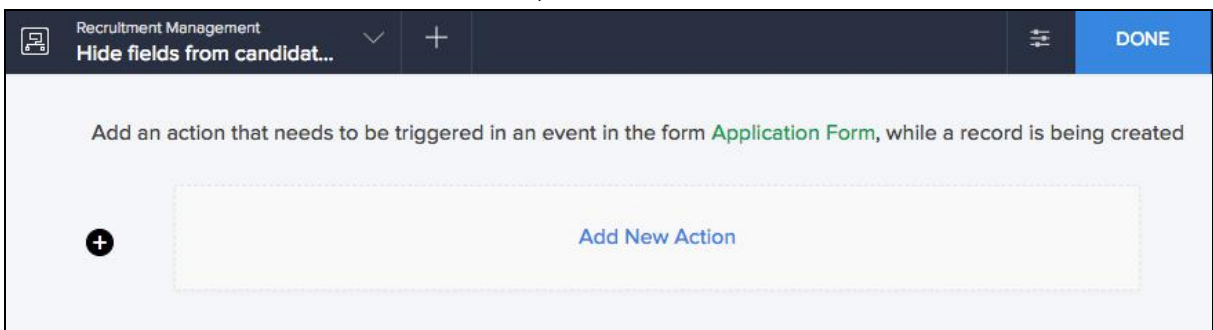
Choose Form: Application Form

Run when a record is: Created Created or Edited Edited Deleted

Name your Workflow: Hide fields from candidates

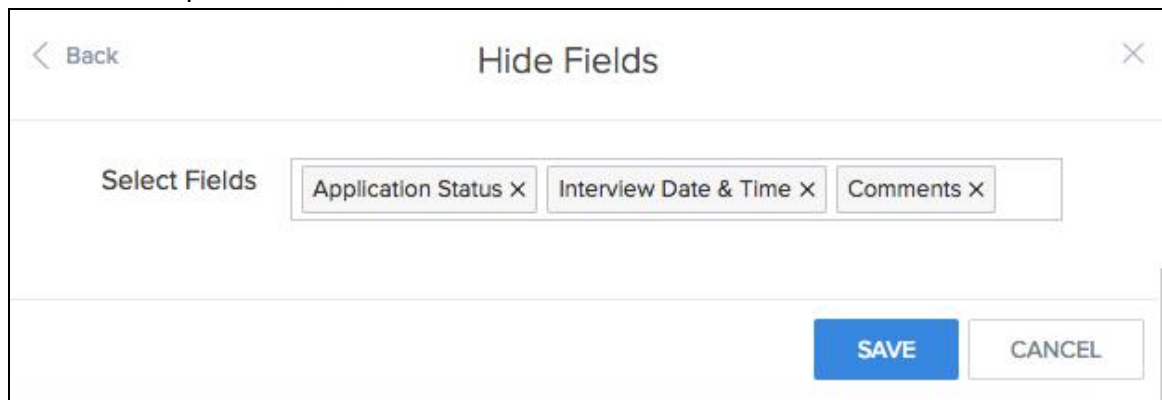
CREATE WORKFLOW

You will be taken to the workflow builder, as shown below:



5. Click **Add New Action**. Select **FIELD ACTIONS**, from the pane that appears on the right.

6. Select the **Hide Fields** task.
7. Select the required fields, then click **SAVE**.



The screenshot shows a mobile-style dialog box titled "Hide Fields". At the top left is a back arrow and the text "Back". At the top right is a close "X" icon. Below the title bar, the text "Select Fields" is followed by a list of three selected fields: "Application Status x", "Interview Date & Time x", and "Comments x". At the bottom right, there are two buttons: a blue "SAVE" button and a white "CANCEL" button with a grey border.

8. Click **DONE**, displayed in the top-right corner of the workflow builder. You will be taken to the **WORKFLOW** page of your app.

When you access the **Application Form** hereafter, the selected fields will not appear.

Create workflow to send notifications

As per the requirement-solution mapping mentioned in this [section](#), this app is to:

1. Send an email to the candidates when they submit their applications
2. Send an email to the candidates when the manager schedules their interview

Though both of these are about sending emails, the instances at which the emails are to be sent, are different. You will thus need to create two separate workflows.

To send an email to candidates when they submit their applications:

1. Click the add (+) icon displayed on the top of the *Workflow / Design* page of your app.
2. Select **WORKFLOW**.
3. Select **WHILE USING THE FORM**.
 - Select **Application Form** from the drop-down
 - Select the choice **Created**
 - Enter a name for the workflow, then click **CREATE WORKFLOW**.

Run workflow on any activity in the form

Choose Form

Run when a record is Created Created or Edited Edited Deleted

Name your Workflow

CREATE WORKFLOW

4. Click **Add New Action** in the workflow builder. Select **NOTIFICATION**, from the pane that appears on the right.
5. Select the **Send Email** task. In the window that appears:
 - Click the drop-down next to **From** and select **AdminUserId**
 - Click the input box next to **To** and select the **Email Address** field
 - Set "Application Confirmation" as the **Subject**
 - **Check the checkbox next to Include user submitted data**
 - Click **SAVE**.

< Back ×

From*

To*

[Add Cc](#) [Add Bcc](#) [Add Reply-to](#)

Subject

Message

B **I** **U** abc **A** **F** **T**

Include user submitted data

Insert template as inline content Attach template as PDF

Content Type

SAVE **CANCEL**

To send an email to candidates when the manager schedules their interview:

1. Click the add (+) icon displayed on the top of the *Workflow / Design* page of your app.
2. Select **WORKFLOW**.
3. Select **WHILE USING THE FORM**.
 - Select **Application Form** from the drop-down
 - Select the choice **Edited**
 - Enter a name for the workflow, then click **CREATE WORKFLOW**.

Run workflow on any activity in the form

Choose Form

Run when a record is Created Created or Edited Edited Deleted

Name your Workflow

CREATE WORKFLOW

4. Click **Add New Action** in the workflow builder. Select **NOTIFICATION**, from the pane that appears on the right.
5. Select the **Send Email** task. In the window that appears:
 - Click the drop-down next to **From** and select **AdminUserId**
 - Click the input box next to **To** and select the **Email Address** field
 - Set "Application Confirmation" as the **Subject**
 - **Check the checkbox next to Include user submitted data**
 - Click **SAVE**.

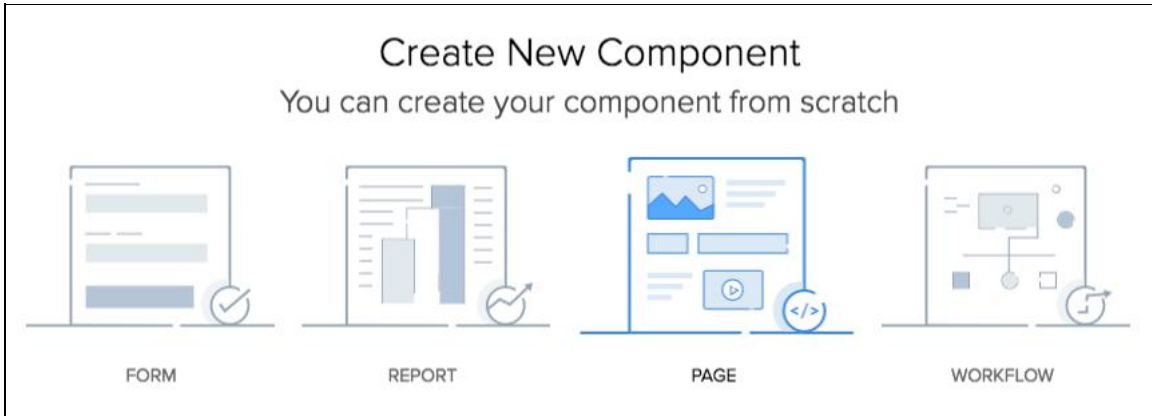
screenshot;

Create page

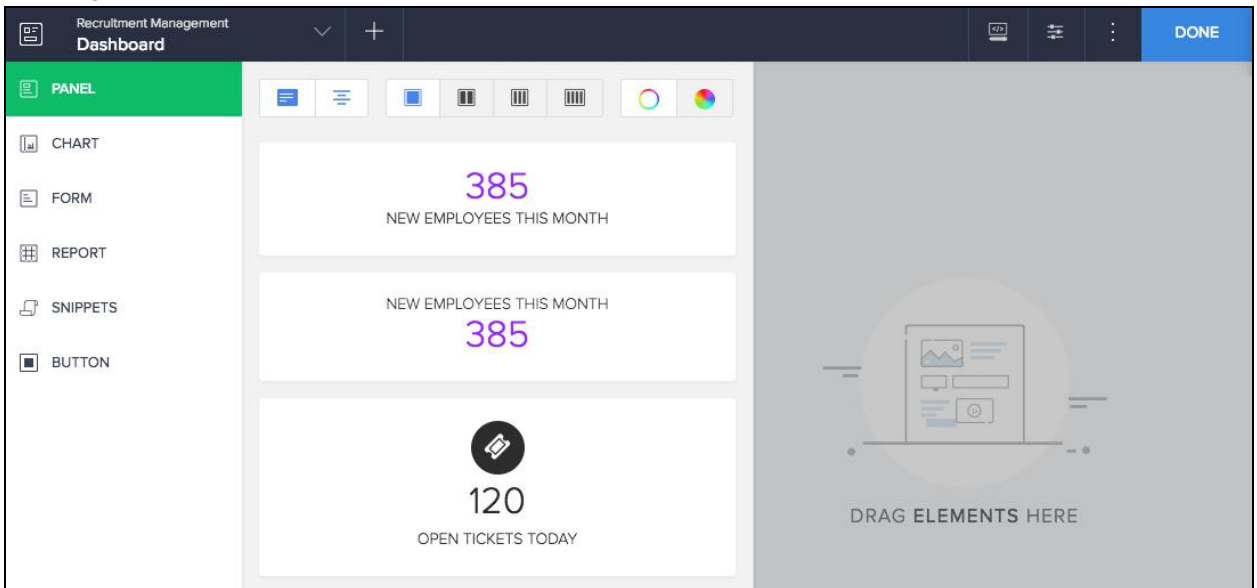
Page is the component of a Zoho Creator app with which you can, amongst other things, have a birds-eye view of the information managed by your app.

To create the page for this **Recruitment Management** app:

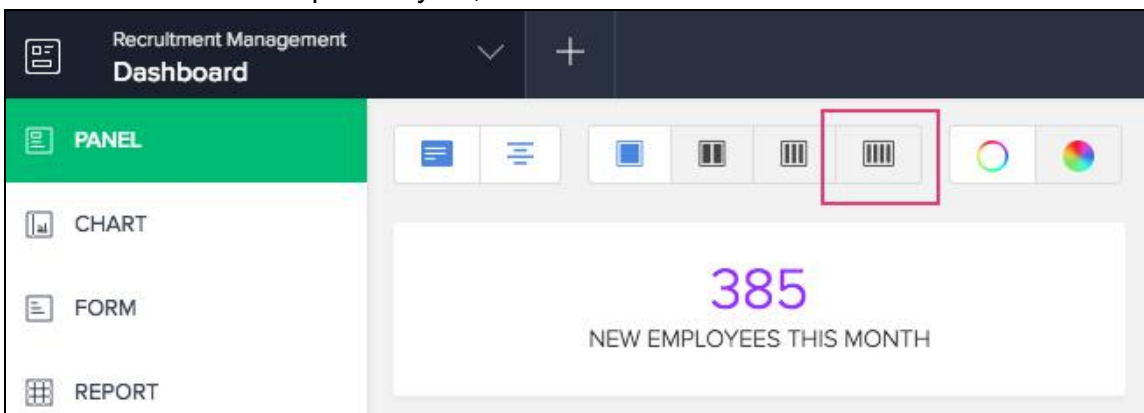
1. Click the add (+) icon displayed on the top of the *Design* page.
2. Select **PAGE**, as shown below:



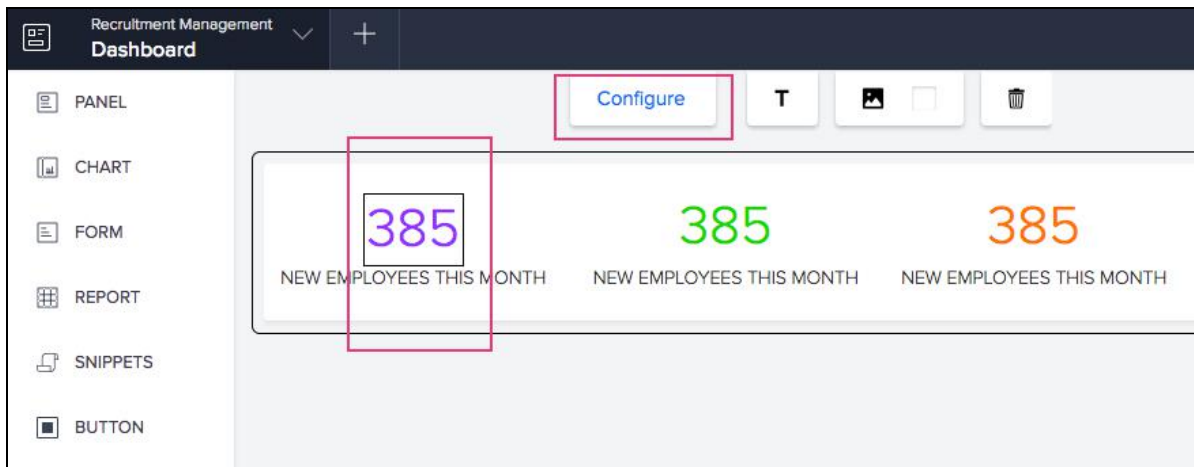
3. Set "Dashboard" as the page's name, then click **CREATE PAGE**. You will be taken to the page builder, as shown below:



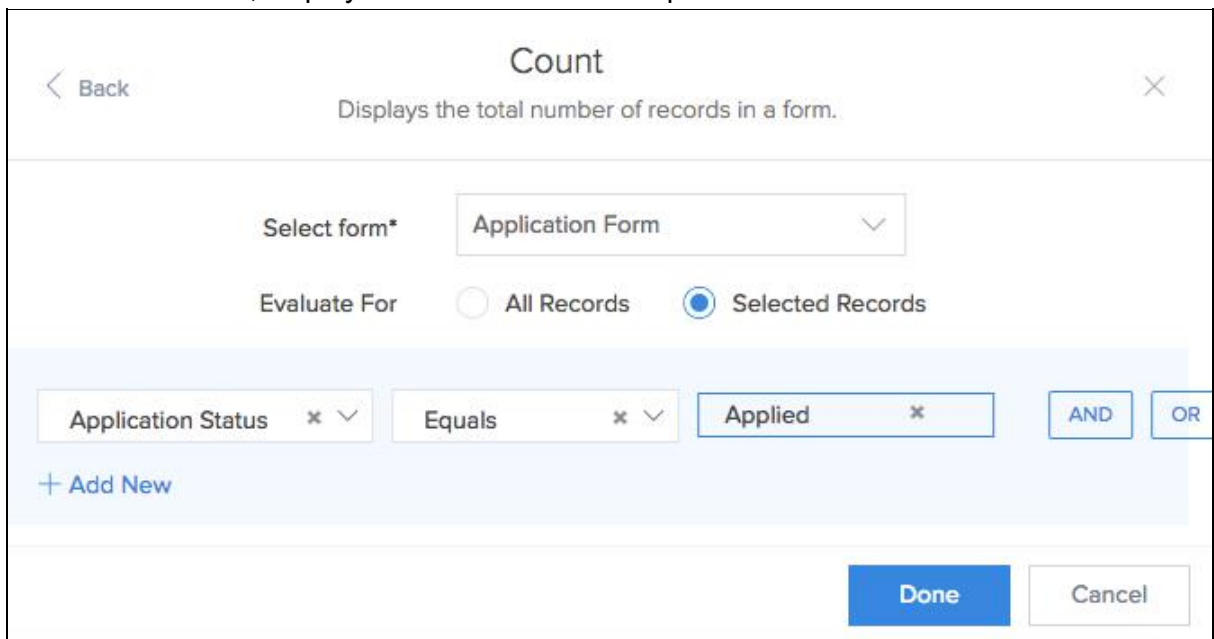
4. Select the four-column panel layout, as shown below:



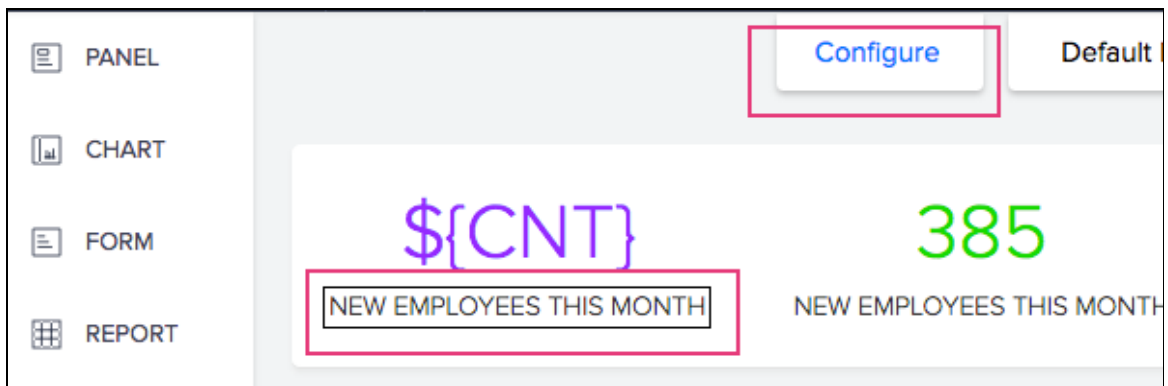
5. Drag-and-drop the first panel onto the page.
6. Select the number displayed in a column of the panel. then click **Configure** as shown below:



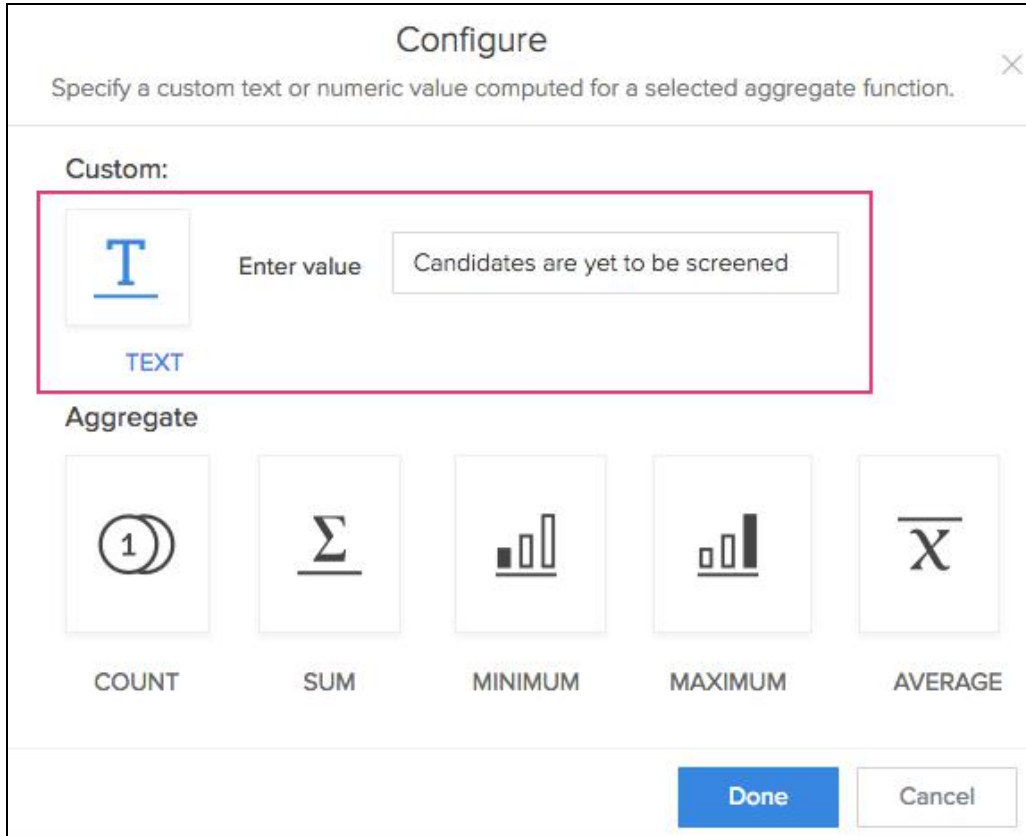
7. Select **COUNT**, displayed near the bottom of the pane that appears on the right.
 - Select **Application Form** from the drop-down.
 - Select the choice **Selected Records**. An expression builder will appear below.
 - Select **Application Status** field, then the **Equals** operator, then the value 'Applied' from the drop-downs.
 - Click **Done**, displayed at the bottom of the pane.



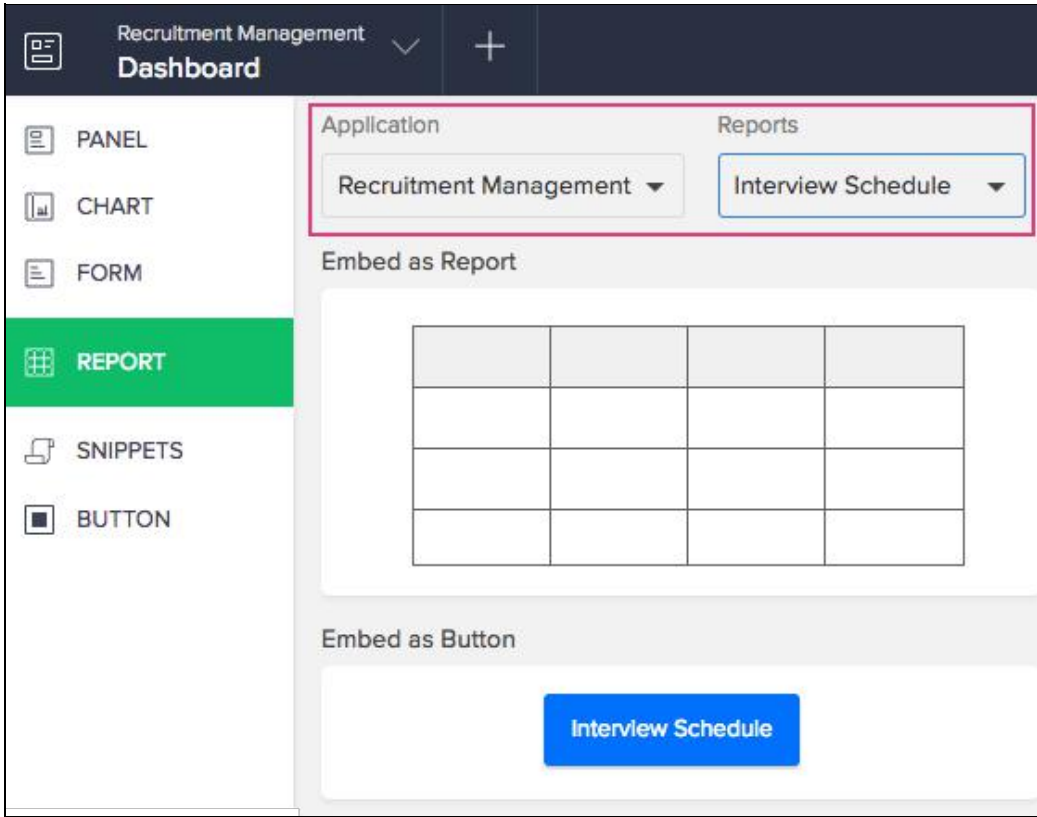
8. Select the text box that is displayed below the number, then click **Configure** as shown below:



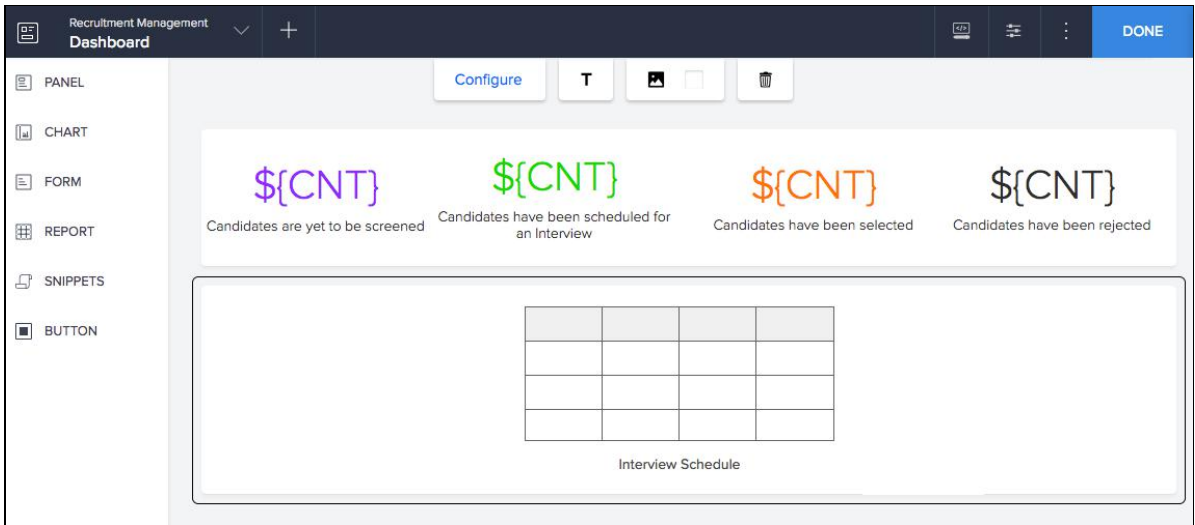
9. Type "Candidates are yet to be screened" in the input box, then click **Done**.



10. Repeat steps 6 to 9 such that the count is displayed for the other 3 values of the **Application Status** field ("Scheduled for Interview", "Selected", and "Rejected").
11. Select **REPORT** from the menu on the left. Select the **Recruitment Management** application, then select the **Interview Schedule** report, as shown below:



12. Drag-and-drop the **Embed as Report** widget onto the page. Your page will look like this:



13. Click **DONE**, displayed in the top-right corner of the page builder.

Publish the form

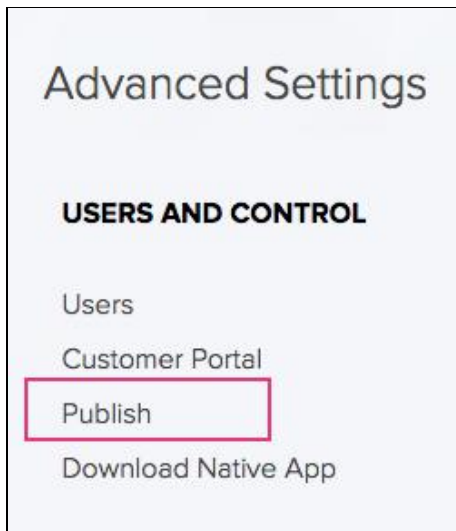
As per this app's requirement-solution mapping, the **Application Form** needs to be made publicly accessible. In Zoho Creator's terms, the form needs to be **published**.

1. Click **SETTINGS**, as shown below:

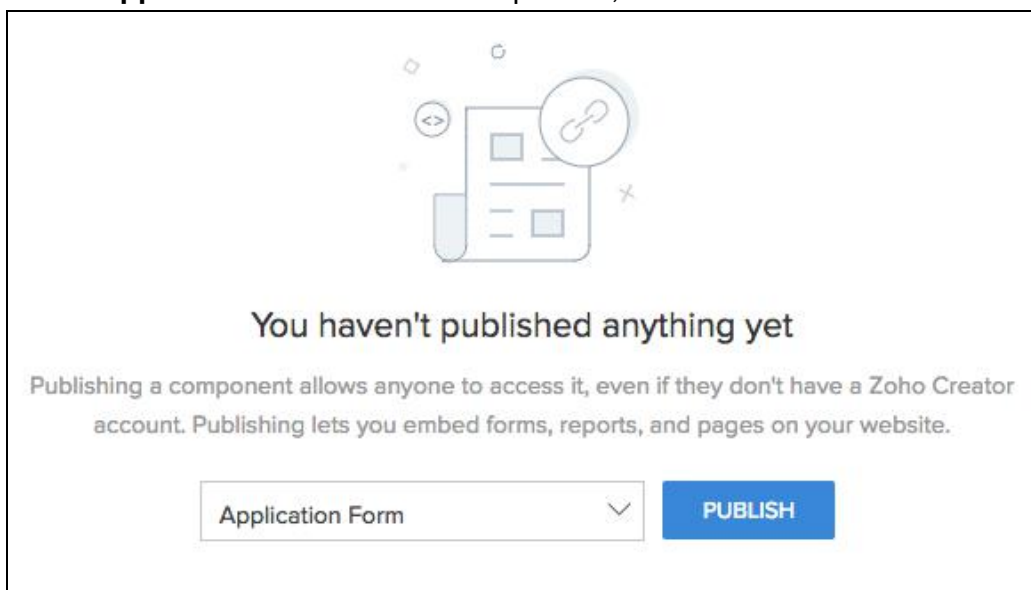


You will be taken to your app's settings page.

2. Click **Publish** under **USERS AND CONTROL**, as shown below:



3. Select **Application Form** from the drop-down, then click **PUBLISH**.



Copy the **PERMA LINK** that appears in the **Published URL** pop-up window. Use it to publicly access your form. To embed your form in your website:

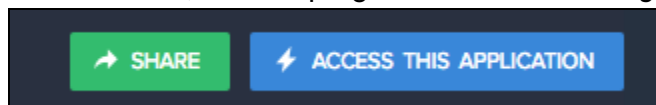
1. Click **EMBED CODE**. Copy the code that appears
2. Paste the code in the required page in your website

Share the app

Now that you've built an app and customized it to your requirements, the only step remaining is to share it. Sharing an app means to give someone access to some or all components in that app.

In this **Recruitment Management** app, the **Manager** needs to be given access to the app. For this:

1. Click **SHARE**, in the top-right corner of the *Design* page, as shown below:



2. Select **User** in the pane that appears on the right.
3. Select **Custom**.
4. Set the required access permissions:
 - As the manager needs to be able to view and edit candidate records, enable **VIEW RECORDS** permission for the **Application Form Report** and **Interview Schedule** (calendar report).

Solution achieved

1. The candidates can apply to the recruitment process using the published **Application Form**.
2. The manager has access to the **Application Form Report**—the list report that displays the details of candidates who have applied. From here, the manager can edit individual candidate records, set the **Interview Date & Time** (date-time field) and thereby schedule interviews for candidates.
3. As interviews get scheduled, entries begin to appear in the **Interview Schedule** calendar report, as shown below:

Interview Schedule							Q	+	☰	
Today		<< < August, 2017 > >>			Month Week Day					
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday				
30	31	1	2	3	4	5				
6	7	8	9	10	11	12				
13	14	15	16	17	18	19				
20	21	22	23	24	25	26				
		Cornelius Howsden	Rois Brekonridge	Adrien Pendre						
		Cassandre Phippard	Kimberly Goater							
			Dallas Cable							

Having the permission to edit records from this report, the manager can click on a record, and update their **Application Status** with the required value of "Selected" or "Rejected", depending on how the interview went.

4. The **Recruitment Executive** (yourself), as the "Administrator" or admin of the app, has access to all the components in the app. You can use the *Dashboard* page to view all of the recruitment-related information in one place.