

learn the Basics

App-building, in plain English.

This guide has the very essentials to publish your application.

As in life, you can always learn the rest along the way...

Privacy Promise

We, ZOHO Corporation, are a licensee of the TRUSTe Privacy Program. TRUSTe is an independent organization whose mission is to build trust and confidence in the internet among users by promoting the use of fair information practices. Direct all your inquiries pertaining to this Privacy Policy Statement or the service to us.

Our mailing address is 4900, Hopyard Road, Suite 310, Pleasanton, California (CA) 94588. We can be reached via e-mail at privacy@zohocorp.com or you can reach Zoho Customer Support Services by telephone at 888 900 9646.

ZOHO Corporation complies with the provisions of the U.S-E.U Safe Harbor framework as set forth by the United States Department of Commerce, with regards to the collection, use and storage of personal information received from the European Union. For more information about the U.S-E.U Safe Harbor framework, visit <http://export.gov/safeharbor/>

We make every effort, including periodic reviews, to ensure that Personal Information provided by you is used in conformity with this Privacy Policy Statement. If you have any concerns regarding our adherence to this Privacy Policy Statement or the manner in which personal information is used for the purpose of providing Zoho Services, write to Zoho Customer Support Services at support@zohocorp.com. We will contact you to address your concerns, and will also co-operate with regulatory authorities in this regard if needed.

Data Security

Security of data is something of prime importance to us. We have employed state-of-the-art mechanism and measures to ensure your data is not compromised at any cost. These claims are deliberately stated in general, but Zoho's security practices, policies and infrastructure are proven to be reliable. We make sure your data remains safe at any cost, because it is not only your business that is at stake; ours too.

Physical Security

Our datacenters are hosted in some of the most secure facilities available today in locations that are protected from physical and logical attacks as well as from natural disasters.

- 7x24x365 Security
- Video Monitoring
- Controlled Entrance
- Biometric, two-Factor Authentication
- Undisclosed locations
- Bullet-resistant walls

Network Security

Our network security team and infrastructure helps protect your data against the most sophisticated electronic attacks. The following is a subset of our network security practices.

- 128/256-bit SSL
- IDS/IPS
- Control and Audit
- Secured / Sliced Down OS
- Virus Scanning

We monitor each service constantly for up-time and availability from independent servers. We let you see that too. Visit <http://status.zoho.com> for status of every service. We also have strict people-policies and audit & log all access to data. Breach of confidentiality is seriously dealt with.

And, this is more of a promise than just a solemn policy statement.



Hyther Nizam,
Director of Product Management, Zoho.

WHAT IS ZOHO CREATOR?	6
WHO IS IT FOR?	6
WHY WOULD YOU USE ZOHO CREATOR?	6
CREATING YOUR FIRST APPLICATION	
a) Creating from scratch	7
b) Import directly from Google Docs	8
c) Import .xls and .csv files	9
d) Import MS Access Database file (.mdb)	10
FIELDS AND THEIR PROPERTIES	11
WORKFLOW AND BUSINESS RULES	
DELUGE functions	12
ANALYZING YOUR DATA	
a) Searching	13
b) Sorting	14
c) Filtering	15
d) Grouping	16
CONFIGURING EMAIL NOTIFICATIONS	17
REPORTS	18
CUSTOMIZING YOUR APPLICATION	
a) HTML View	20
b) Layout	21
SHARING YOUR APPLICATION	22
REFERENCES	24

What is Zoho Creator?

Zoho Creator is an online platform to build custom applications for any business need, all by yourself. Our intuitive drag-drop interface makes application building easy for those of you with no technical expertise. Way more than building forms, there are business rules and workflow. These add power and intelligence to your applications, and implementing them is as easy as designing the application.

Who is it for?

Everyone. Seriously. Who wouldn't want a way to automate their tasks with custom applications? Regardless of the role you play in your organization, from the front-office to CEO, you can simplify your work with custom applications that automate monotonous processes. Zoho Creator has something for everyone.

Why would you choose Zoho Creator?

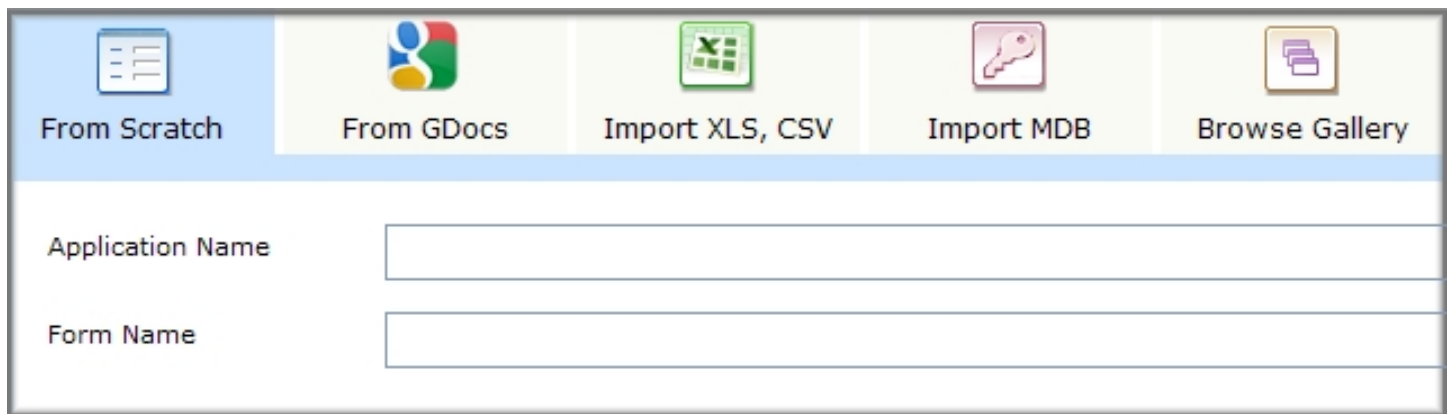
Accessible	: whenever and wherever you need it
Affordable	: for small businesses and even bootstrappers
Collaborative	: as it is all online
Customizable	: to suit your need
Efficient	: in automating tasks
Empowering	: you to build applications yourself
Integrated	: with Zoho CRM, Zoho Invoice, Zoho Reports, Google Apps and Paypal
Scalable	: grows with your business
Secure	: against breaches
Easy	: as you need no technical expertise






Creating your first application

You can begin by building your database application from scratch. Or, if you already have collected data, you can import them from your computer or directly from Google Docs into Zoho Creator. Zoho Creator supports importing of spreadsheets, Microsoft Access databases, CSV and TSV files.

Creating from scratch

If you don't have any application in your account yet, the first screen you see would be the new-application page. “From Scratch” option will be selected by default.

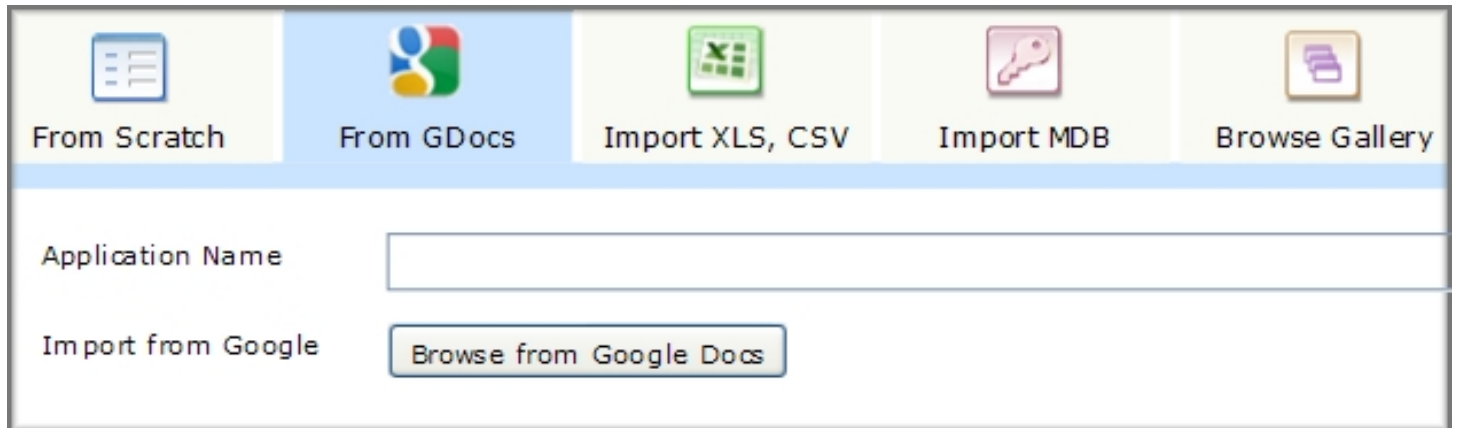


	 From Scratch	 From GDocs	 Import XLS, CSV	 Import MDB	 Browse Gallery
Application Name	<input type="text"/>				
Form Name	<input type="text"/>				

1. Specify a name for the application and the first form in your application. These can be modified later.
2. Click on “Create” button.

Import files directly from Google Docs

This comes as an extension to the integration with Google. If your files are on Google Docs, be it spreadsheets or Google forms, you can import them into Zoho Creator directly by authenticating yourself with your Google account.



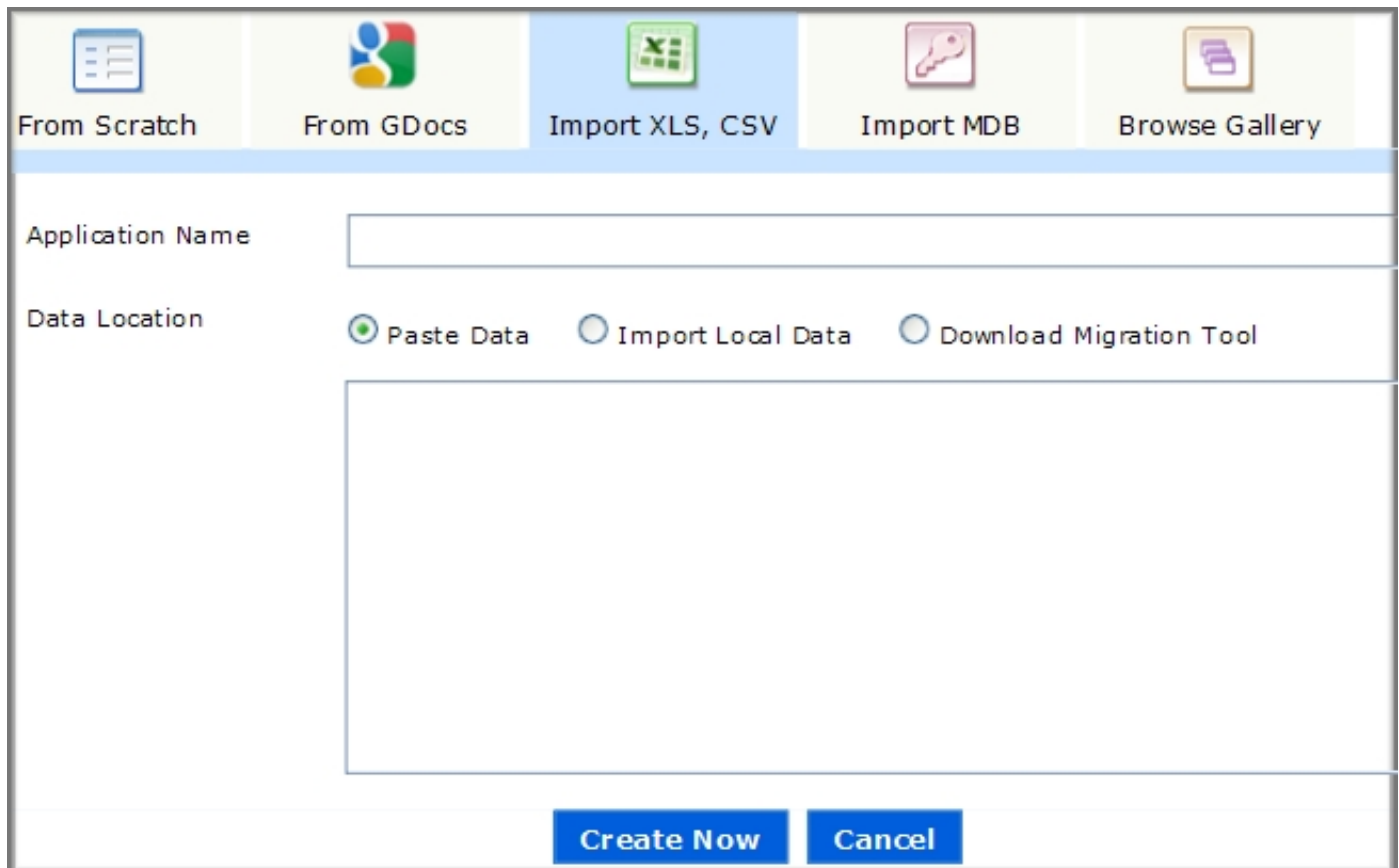
The screenshot shows the 'Create new application' interface in Zoho Creator. At the top, there are five tabs: 'From Scratch', 'From GDocs', 'Import XLS, CSV', 'Import MDB', and 'Browse Gallery'. The 'From GDocs' tab is currently selected and highlighted in blue. Below the tabs, there is a text input field labeled 'Application Name'. Underneath this field, on the left, is the text 'Import from Google', and on the right is a button labeled 'Browse from Google Docs'.

1. In the “Create new application” page, the second option you see will be “From Gdocs”. Select it.
2. If you are logged into Google, all your files would be listed on the "Import from Google" list box. You can name your application, and select the file to import. If you are not logged into Google, you'll be prompted to do so.

Import spreadsheets

If you've been maintaining your data in spreadsheets or csv files, you can import them into Zoho Creator. This will create the application automatically upon import.

1. On the new-application page, select the third tab, "Import XLS, CSV".



The screenshot shows the 'Import XLS, CSV' tab selected in the Zoho Creator interface. At the top, there are five tabs: 'From Scratch', 'From GDocs', 'Import XLS, CSV' (highlighted), 'Import MDB', and 'Browse Gallery'. Below the tabs, there is a form with the following elements:

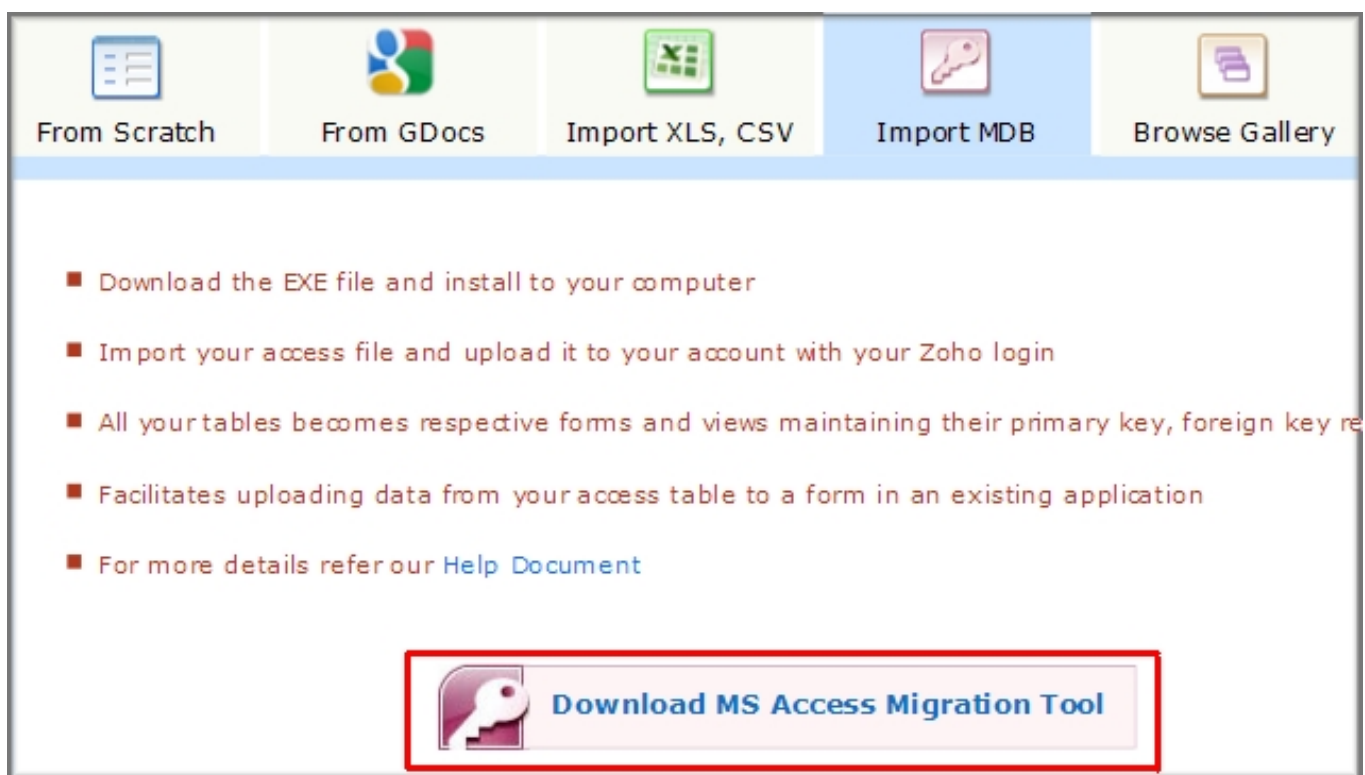
- Application Name:** A text input field.
- Data Location:** Three radio button options:
☒ Paste Data
☐ Import Local Data
☐ Download Migration Tool
- Text Box:** A large, empty rectangular text area for pasting data.
- Buttons:** Two blue buttons at the bottom right: 'Create Now' and 'Cancel'.

2. Select the preferred option: paste the data from the file into the text box provided, or locate the file on your computer and upload it.
3. The third option is to download the migration tool. This executable tool acts as an interface between the data in the spreadsheet and Zoho Creator. Using this tool, you can either import the data into an existing application or create a new application as you import.

Import MS Access Databases (.mdb)

Spreadsheets can be imported directly, but importing MS Access databases (.mdb) involves a unique process. You need to do it through a migration-tool that we provide. This is an executable tool that acts as an interface between your MS Access database and Zoho Creator.

1. On the application creation page, click on the third tab, “Import MDB”.
2. Download and execute the migration tool.
3. Use your Zoho credentials to login to the tool.



4. From File menu, select the option, Import an MS Access database.
5. Browse for the file on your computer to upload it.
6. The tool will list all the fields and their data types. You can modify the field types by selecting from the drop-down boxes beside each field.
7. Once your done changing the types, you can either upload the data to an already existing Zoho Creator application, or create a corresponding application dynamically during import.

Fields and their properties

Zoho Creator supports 22 field (data) types. Each field has specific properties that need to be configured before it can be added to the form. Some common properties are, mandatory field, default value and field width.



Basic Fields are as their names specify. Of the four advanced fields,

- “Zoho CRM” is used to fetch details from your Zoho CRM modules.
- “Formula” field automatically calculates a value based on the input of other fields. In applications such as commission calculation and other monetary applications.
- “Lookup” fields are for creating a relationship between two forms. The look-up field on one form can fetch the data entered into a field on another form.

Based on what information you want your users to enter, you can insert fields into your form. In a contact form for instance, name, email address and telephone number are the most important fields, and can be specified as mandatory.

Workflow and Business Rules

DELUGE is our very own, user-friendly scripting language incorporated into the form-builder. Custom workflow and business rules are essential in adding robustness and intelligence to your applications. That is what DELUGE helps you do. Workflow ranges from simple if-else scenarios to user-role based sharing and approval modules. Here is a list of elements that you could use to automate and add power to your applications.

DELUGE functions

Condition	
if	>>
else if	>>
else	>>
conditional if	>>
Data access	
add record	>>
delete records	>>
for each record	>>
for each list value	>>
fetch records	>>
update records	>>
aggregate records	>>
Client functions	
hide show	>>
enable disable	>>
add item	>>
select	>>
deselect	>>
clear items	>>
alert box	>>
Reload form	>>
Miscellaneous	
set variable	>>
call function	>>
send mail	>>
share unshare	>>
add comment	>>

Condition:

Conditional functions help in implementing specific statements when conditions are met.

Data Access:

These are functions for performing operations on records entered in forms.

Client functions:

Client functions suggests the operations performed when the user is accessing the form to enter data. You can hide certain fields for select users, display them on user input and so on.

Misc:

Generic functions to send mail, invoke a function and modify sharing permissions are listed under Misc.

Data Analysis

These are options that help you in mining out that titbit of an information from the entire lot, instantly.

- Searching
- Sorting
- Filtering

Searching

You can narrow down on the exact piece of data you want by specifying multiple criteria to search for. Search your data by any field on your form. Here is how:

The screenshot shows the 'travel view-approver' application interface. At the top, there's a header with 'travel view-approver' and a 'More Actions' dropdown. Below the header, there's a toolbar with buttons: 'Add', 'Bulk Edit', 'Duplicate', 'Delete', 'Search' (highlighted with a dashed border), and a 'Filter' dropdown set to '----- All -----'. To the right of the filter are navigation icons and a '20 per page' dropdown. Below the toolbar is a table with columns: 'Travel type', 'Email', 'Purpose of travel', 'From', 'To', 'Name', 'Travel Destination', and 'Travel D'. Each column has a search dropdown menu (e.g., 'Contains', 'Is') and an input field for the search criteria.

1. In the live-mode of your application, click on Search located right below the header.
2. Combining the values of multiple fields, you can get closer to the information you are looking for.

Sorting

By default, Views list data in the order in which they were entered. With sort-functionality, you can rearrange data in either ascending or descending order, by any one or multiple columns.

1. In Edit-mode, select the View in question.
2. Select "Set Sorting" from the list of options on the left.

The screenshot shows the 'Set Sorting' configuration window for a view named 'travel view-approver'. On the left is a sidebar with a 'VIEW CONFIGURATION' menu. Under 'DISPLAY', 'Set Sorting' is highlighted with a red box. Below this are 'RECORDS' and 'ACTIONS' sections. The main area is titled 'Set Sorting' and contains instructions: 'In a view, records are sorted by the order in which they are added. Latest records come on top. To sort by another field, select the field from Left Hand Side and add it to the Right Hand Side. To change the order of sort field and click the "Sort Asc/Desc" button. To sort by multiple fields, select multiple fields from Left Hand Side and add the hand side. You can move up and down to change the sequence by which the records will be sorted.'

The configuration area includes a list of 'User Defined Fields' on the left: 'Approve for visa processing too', 'Approver's Email', 'City', 'Comments', 'Date of expiry', 'Date of Issue', 'Email', 'Food', and 'From'. To the right of this list are buttons: 'Add >>', '<< Remove', 'Move Up', 'Move Down', and 'Sort Asc/Desc'. On the far right is an empty box for the sorted fields, with a small upward arrow at the top right corner.

3. Select one column at a time and add it to the box on the right using the Add button.
4. To modify the order of columns to sort by, select the column in the box and move it up or down the list using the arrows.
5. "Sort Asc / Desc" button is to switch between ascending and descending order sort.

Filtering

By default, Views display the entire list of data in the database. Filters are used to restrict the records displayed in the View. If you have the following fields on your form, filters will be created automatically.

- Drop-down fields
- Multi Select fields
- Look-up fields
- Date and Time fields

For other fields, you can manually create filters as needed.

1. Navigate to the View for which you want to set filters.
2. Select "Set Filters" from the list on the left.

The screenshot shows a software interface for setting filters. On the left, there is a sidebar with two sections: 'RECORDS' and 'ACTIONS'. Under 'RECORDS', the options are 'Set Criteria', 'Set Filters' (highlighted with a red box), 'Set Grouping', and 'Set Sorting'. Under 'ACTIONS', the options are 'Set Permissions', 'Custom Actions', and 'Create Report for View'. The main area of the interface displays a list of fields with checkboxes to show or hide them. The fields are: 'Travel type' (checked), 'Travel Destination' (unchecked), 'From' (checked), 'To' (checked), 'Preferred Mode of Travel' (checked), 'Approver's Email' (unchecked), 'Date of Issue' (checked), 'Date of expiry' (checked), 'Seating' (checked), 'Food' (checked), and 'Status' (checked). At the bottom right, there is a button labeled 'New Custom Filter' (highlighted with a red box).

3. Click on "New Custom Filter".
4. In the dialog box that appears, specify any number of criteria to filter records.

Grouping

Grouping makes large volumes of records easily manageable. Records can be categorized based on the value of any field. For instance, if your records are the details of students in a college, you could group the records based on the field of study, so that all science grads are grouped together and listed consecutively. Likewise, the other streams too, making it more organized.

1. Select the View.
2. Click on Set Grouping from the options on the left.




3. Select the fields by which you want to group the data, and click on Add.
4. The records will be grouped in the order in which the columns are listed. To alter the order, use the Move Up/Move Down buttons.
5. Use the Sort Asc/Desc button to switch between displaying records in ascending and descending orders.
6. Once done, click on Done to update the changes.


Email Notifications

Notifications help you to stay informed on the data in your database. Whenever someone adds or modifies records on your application, you receive email alerts to your preferred email inbox.

1. Navigate to the form for which you want notifications enabled.
2. Point to "More actions", and select "Email Notifications" from the list that expands.

Set Email Notification... [Help](#)


From : 

To : 

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



Subject:

Message:

 **Insert Field**

☐ Include user submitted data

[More Options](#)

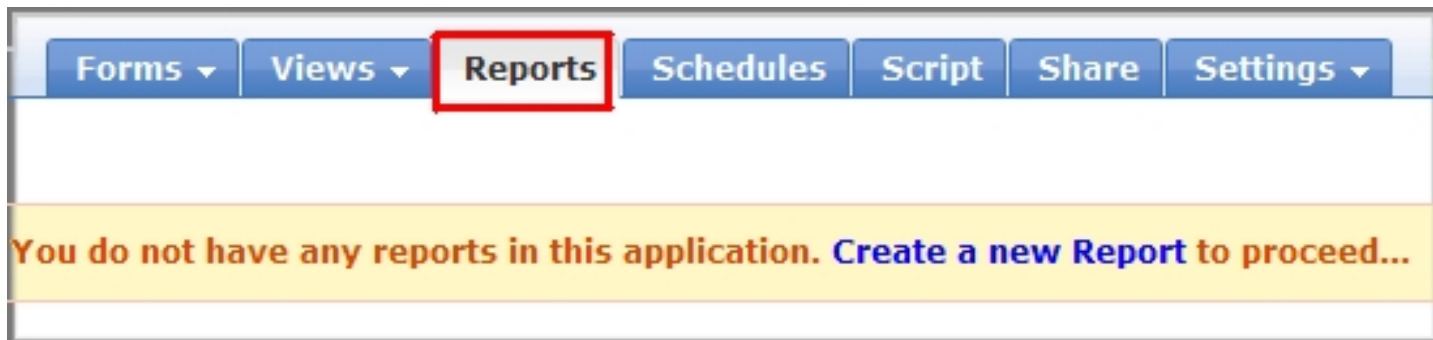
Email Notification is:  Enabled  Disabled

Done **Cancel**

3. Configure the inbox you want your notifications in. Even multiple mailboxes, separated by comma.

Reporting


Reports help in graphically displaying otherwise-monotonous data. Plot the values you want on a chart or table that matches your website's color scheme and embed it to support your claim. There are two types of reports; Pivot Charts and Pivot Tables.




1. To create a new report or to modify an existing one, click on Reports Tab in the Edit-Mode.
2. Choose between the two types; Pivot Table and Pivot Chart.

► New Report

Select Report Type:


Pivot Table


Pivot Chart

Specify Report Title:


Specify a name for your report. Can contain

Report Based on:

-- Select --

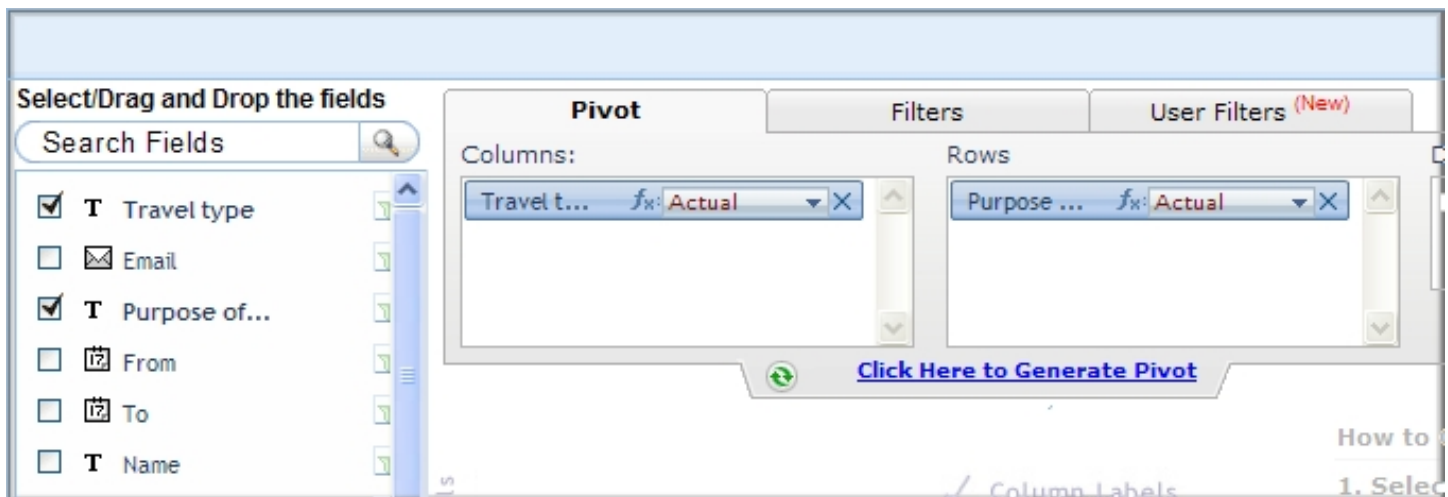
Choose a view based on which the report sh

Place in Section

Reports 

Select the section in which you want this rep
section/page.

3. Specify a name for your report, and most importantly, the view which you want to create the report based on.



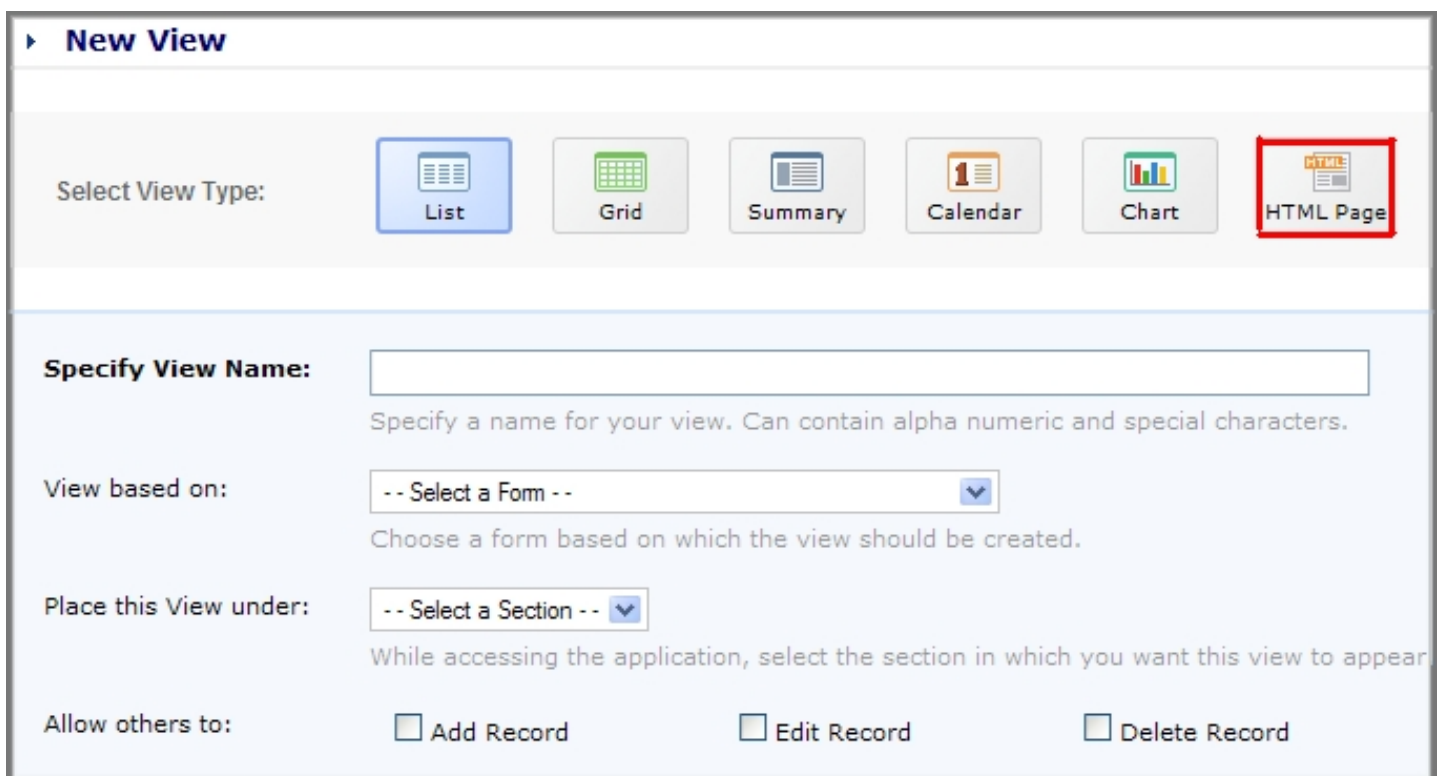
4. That takes you to the report-creation page as in the image above. Drag the field for the corresponding axis, from the list on the left. If you want to plot a graph on date versus temperature, drag the date field to the x axis and the temperature field to the y axis.
5. With filters for reports, you can also limit the data that is considered for generating reports.
6. Click on "Generate Report" once you are done with customization.

Customization

HTML Views

With a powerful combination of HTML and DELUGE script, and the easy-to-use drag-drop editor, you can achieve the desired layout for your view without even having much expertise in these languages. HTML views let you create dashboard pages with lists of reports, widgets and other embedded items.

1. Select New View from the Views tab.
2. Specify the type as HTML, and name the view.



New View

Select View Type:

List Grid Summary Calendar Chart **HTML Page**

Specify View Name:
Specify a name for your view. Can contain alpha numeric and special characters.

View based on: -- Select a Form --
Choose a form based on which the view should be created.

Place this View under: -- Select a Section --
While accessing the application, select the section in which you want this view to appear

Allow others to: ☐ Add Record ☐ Edit Record ☐ Delete Record

3. This will open the html editor, with all the elements listed on the left. If you are well-versed in HTML, switch to the free-flow editor using which you can type away the code. Beginners just need to drag the needed elements from left, and drop them onto the code space on the right.
4. Specify the required parameters and save the script.
5. For all the endless possibilities with HTML view, refer our detailed online help center.

Layout

Customizing the layout is essential when you want to embed your forms on your website or blog. Be it color scheme or layout of fields, you can change it to suit your taste. Splash your attitude all over your application, perhaps.

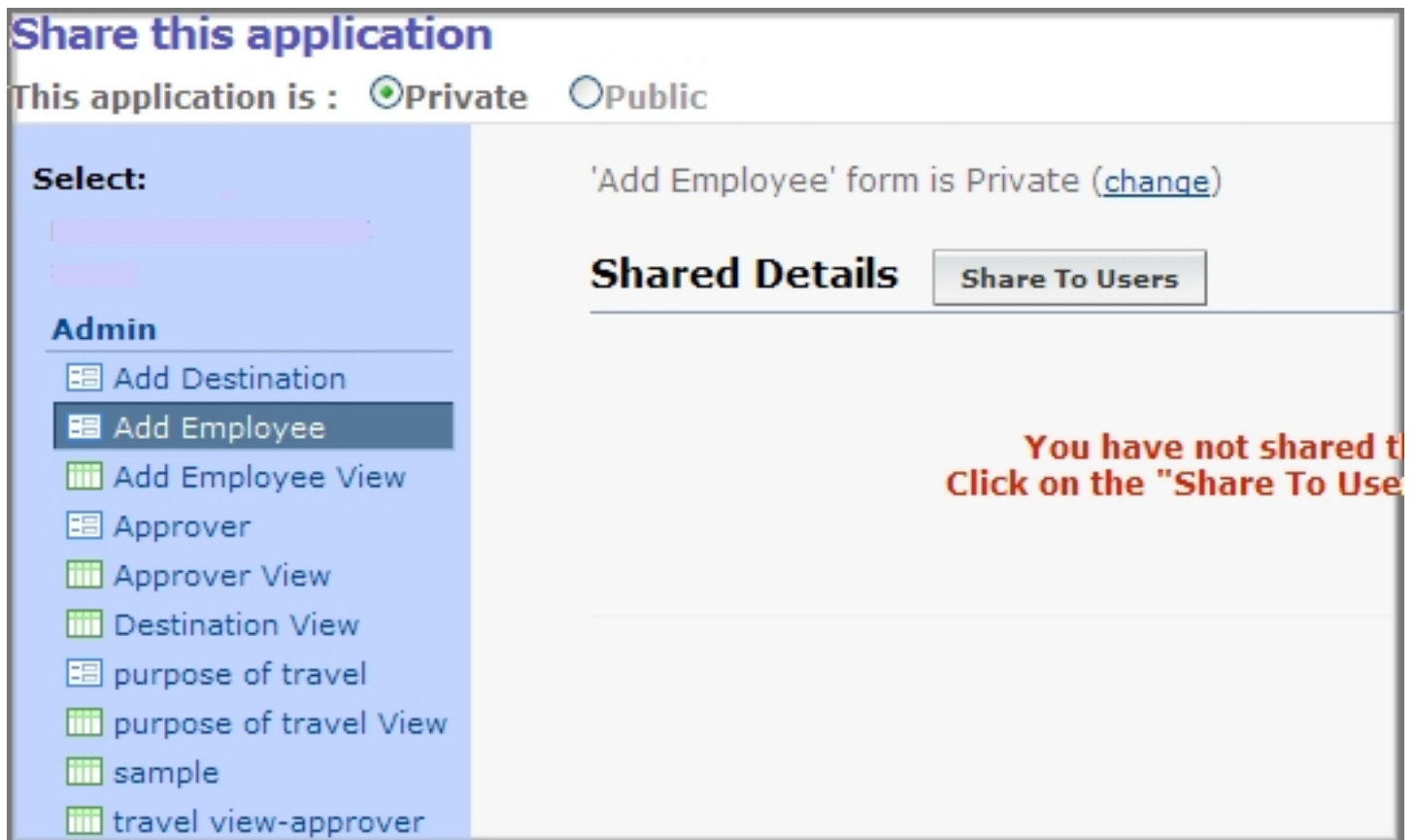
The screenshot displays the 'Project Manager Creator' interface for layout customization. At the top, there are three tabs: 'Choose Layout', 'Choose Theme', and 'Rearrange Links'. Below these, the 'Default Themes' section is visible, featuring two preview cards: 'Classic' and 'Gradient'. The 'Classic' theme preview shows a blue header and sidebar, with a 'Select Color' section below it offering five color options: blue, green, yellow, black, and grey. The 'Gradient' theme preview shows a brown header and sidebar. At the bottom, the 'Custom Themes' section includes a 'Create Themes +' button.

1. From the Settings tab, select "Customize".
2. You will find three tabs on the customization page: "Layout" has a bunch of default ones you could preview and choose from. "Choose theme" tab lists some color schemes, and also allows you to design a custom theme too. "Rearrange links" is to group your forms, views and reports into categories.

Sharing

This is the most important part of data collection. You need to share your forms with your users so that they can update information. Zoho Creator offers a range of options and access permissions, enabling you to selectively share modules of an application.

1. Click on "Share" tab.
2. Broadly, you can keep the entire application private or make it publicly accessible to anyone. By default, it would be private, and making it public will enable search engines to list your application on search-results.



3. Secondly, you can publicize an individual Form, View or Report, while keeping the rest of the application private.
4. To share individual components of your application (Form, View or Report) to select users, choose the component to share from the list on the left, and click on "Share to users" button.

Share

[Add From Contacts](#)

user1@zoho.com
user2@zoho.com
user3@zoho.com

Role: ☒ User ☐ Developer

☒ Send Invitation ([customize message](#))

Share Clear

5. In the dialog box which appears, specify the email addresses of people you want to share it with, separated by a comma.
6. Choose between two access permissions; User or Developer. A "User" can view the information, not alter it. Developer has all permissions as you, the owner of the application.
7. You can choose to send an invitation email, and personalize the message too.

Additional Resources:

There is much more to our Help Center than this quick-start guide. Other reference materials are:



<https://help.creator.zoho.com>



<https://zoho.com/creator/videos.html>



<https://www.forums.zoho.com/zoho-creator>



<https://api.creator.zoho.com>



zoho.com/creator
