learn the Basics

App-building, in plain English.

Zoho Creator

DRAG. DROP. SIMPLE!

This guide has the very essentials to publish your application.

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

Privacy Promise

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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.

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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?

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?

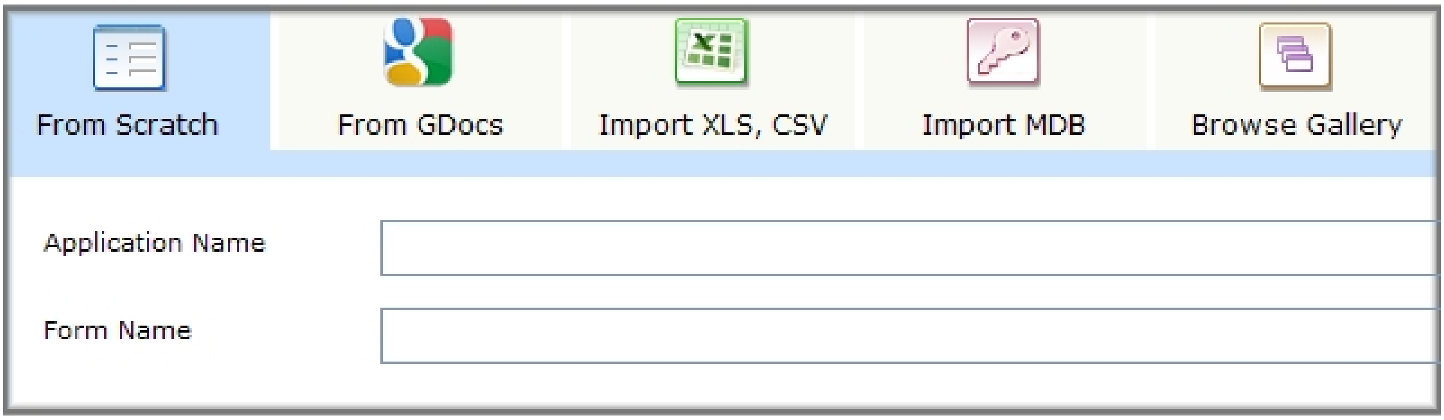
Accessible	:	whenever and wherever you need it
Affordable	:	for small businesses and even bootstrappers
Collaborative	:	as it is all online
Customizable	:	to suit your need
Efficient	:	in automating tasks
Empowering	:	you to build applications yourself
Integrated	:	with Zoho CRM, Zoho Invoice, Zoho Reports, 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

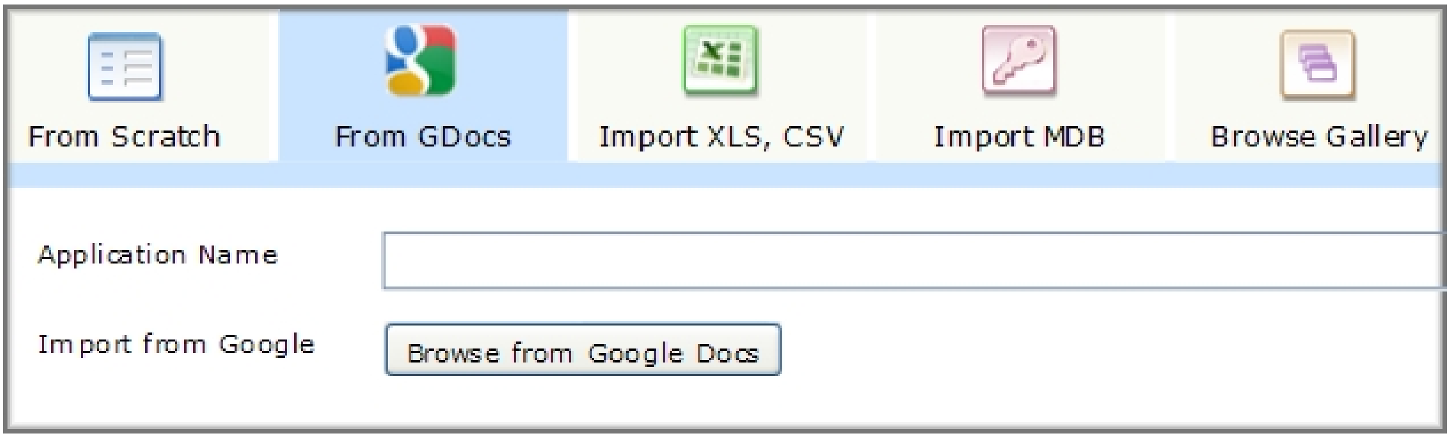
If you don't have any application in your account yet, the first screen you see would be the new-application page. “From Scratch” option will be selected by default.



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.

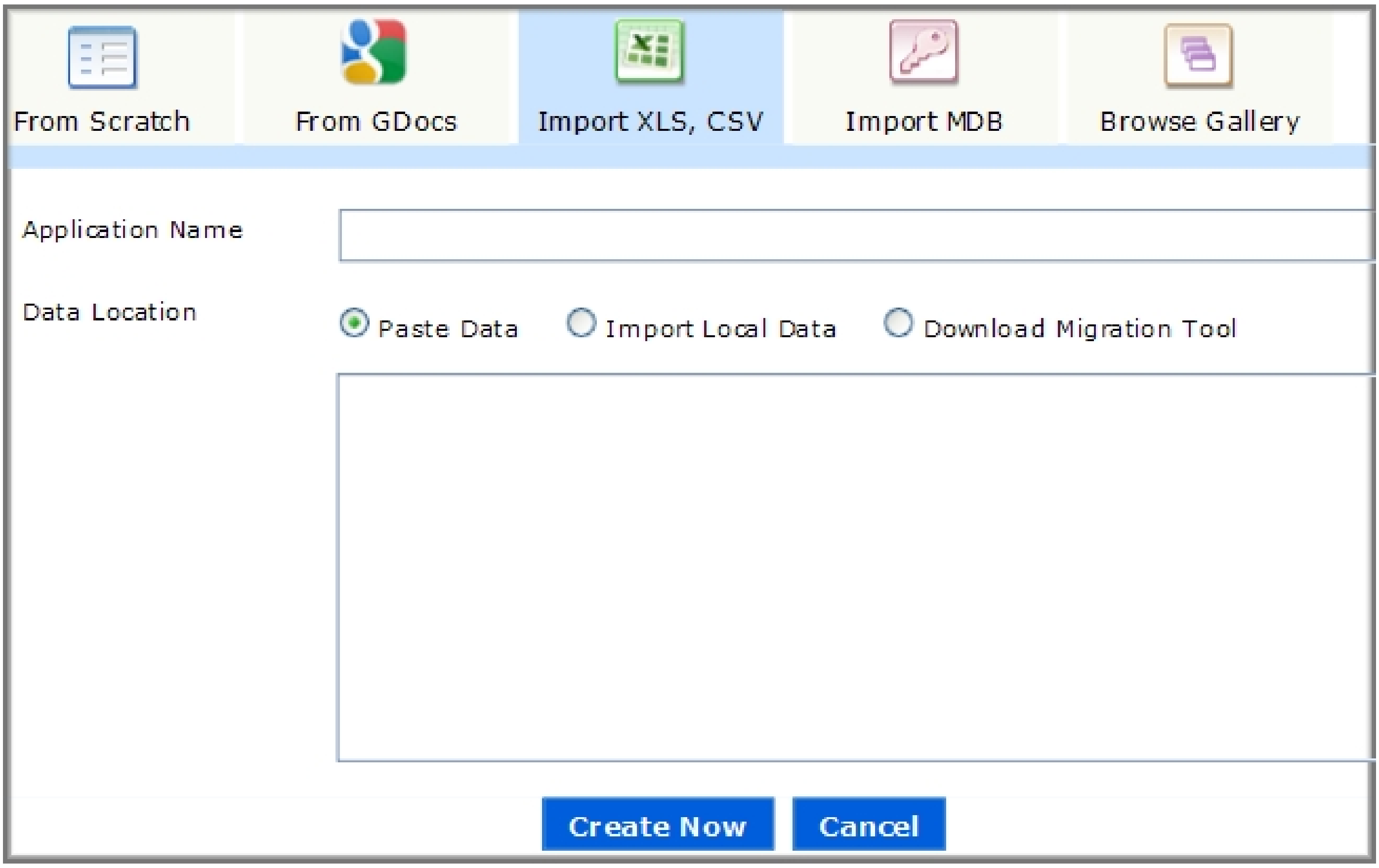


1. In the “Create new application” page, the second option you see will be “From Gdocs”. Select it.
2. If you are logged into Google, all your files would be listed on the "Import from Google" list box. You can name your application, and select the file to import. If you are not logged into Google, you'll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



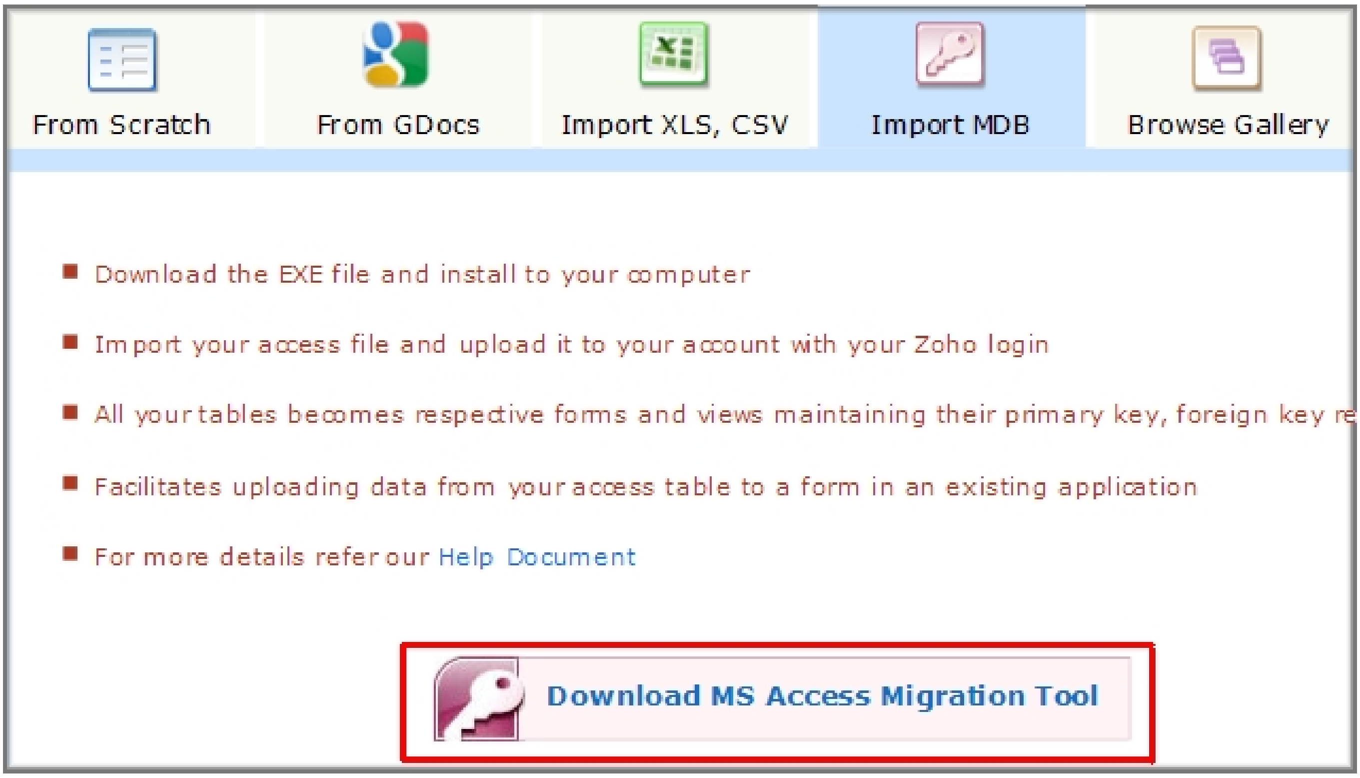
2. Select the preferred option: paste the data from the file into the text box provided, or locate the file on your computer and upload it.

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.

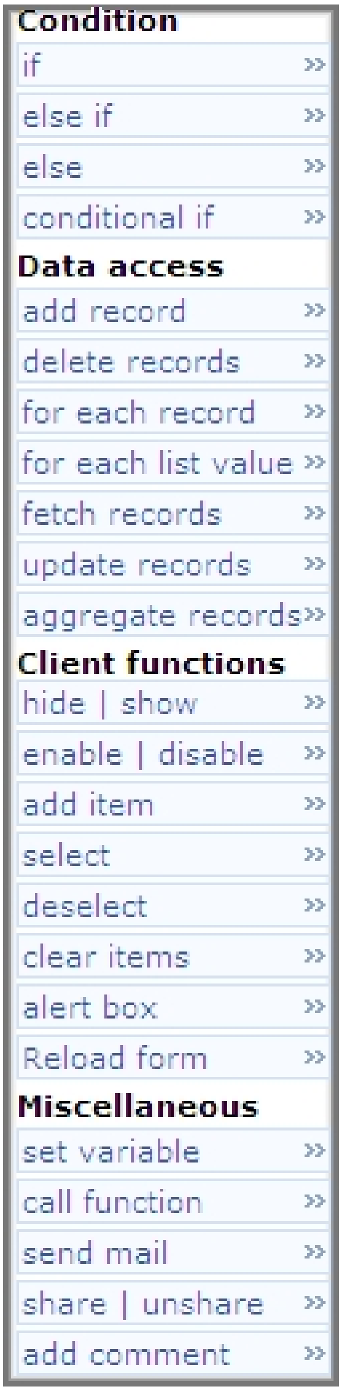
- "Lookup" fields are for creating a relationship between two forms. The look-up field on one form can fetch the data entered into a field on another form.

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:

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.

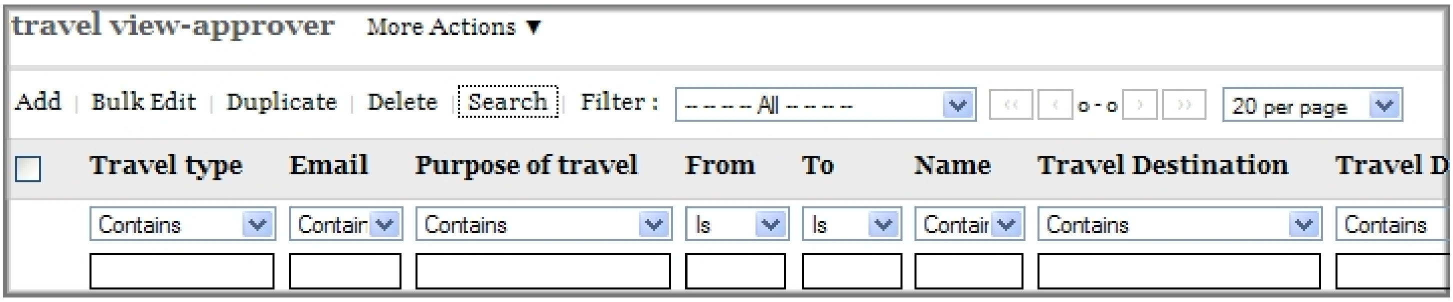
Data Analysis

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:

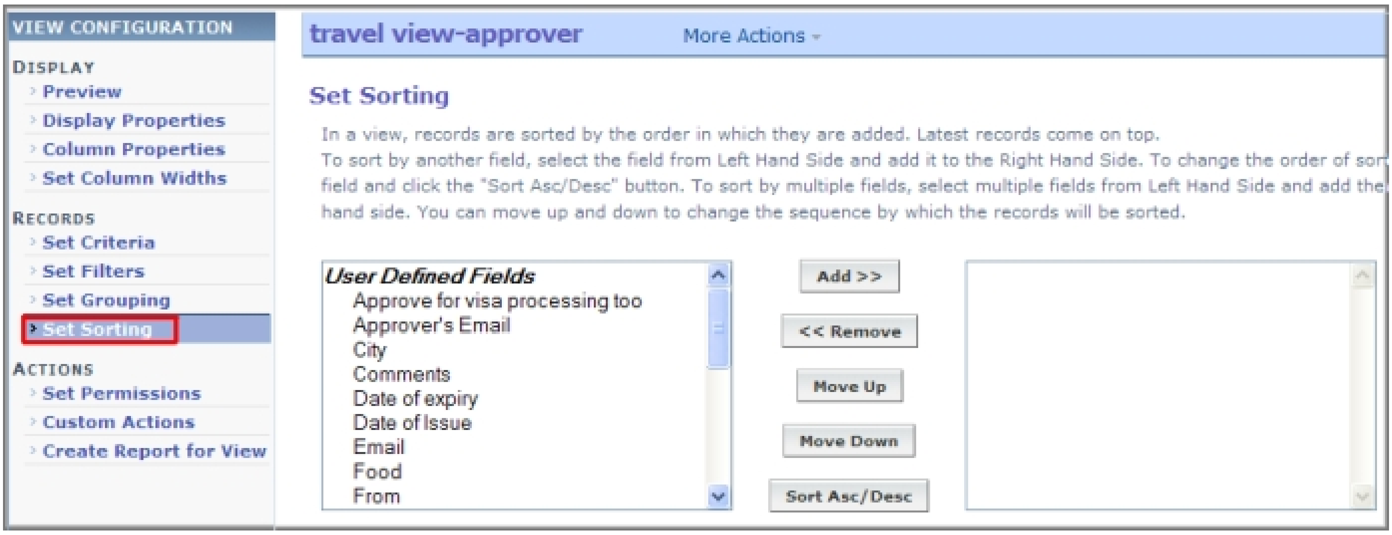


1. In the live-mode of your application, click on Search located right below the header.
2. Combining the values of multiple fields, you can get closer to the information you are looking for.

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.



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.

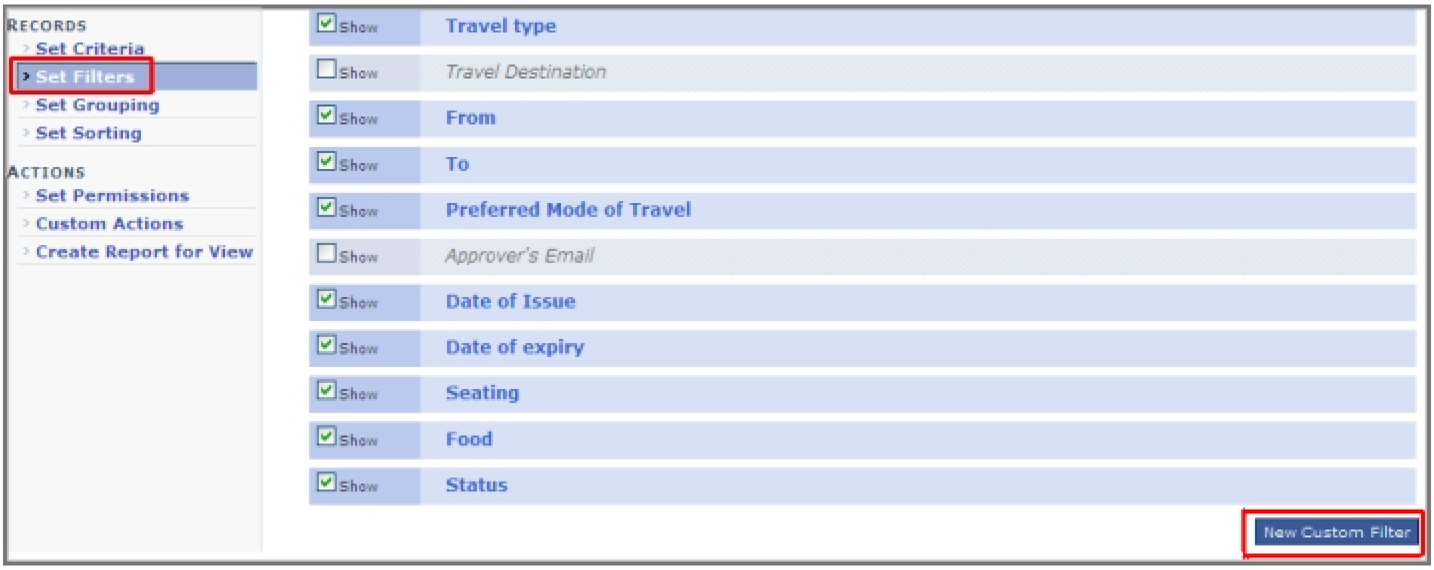
Filtering

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.



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.

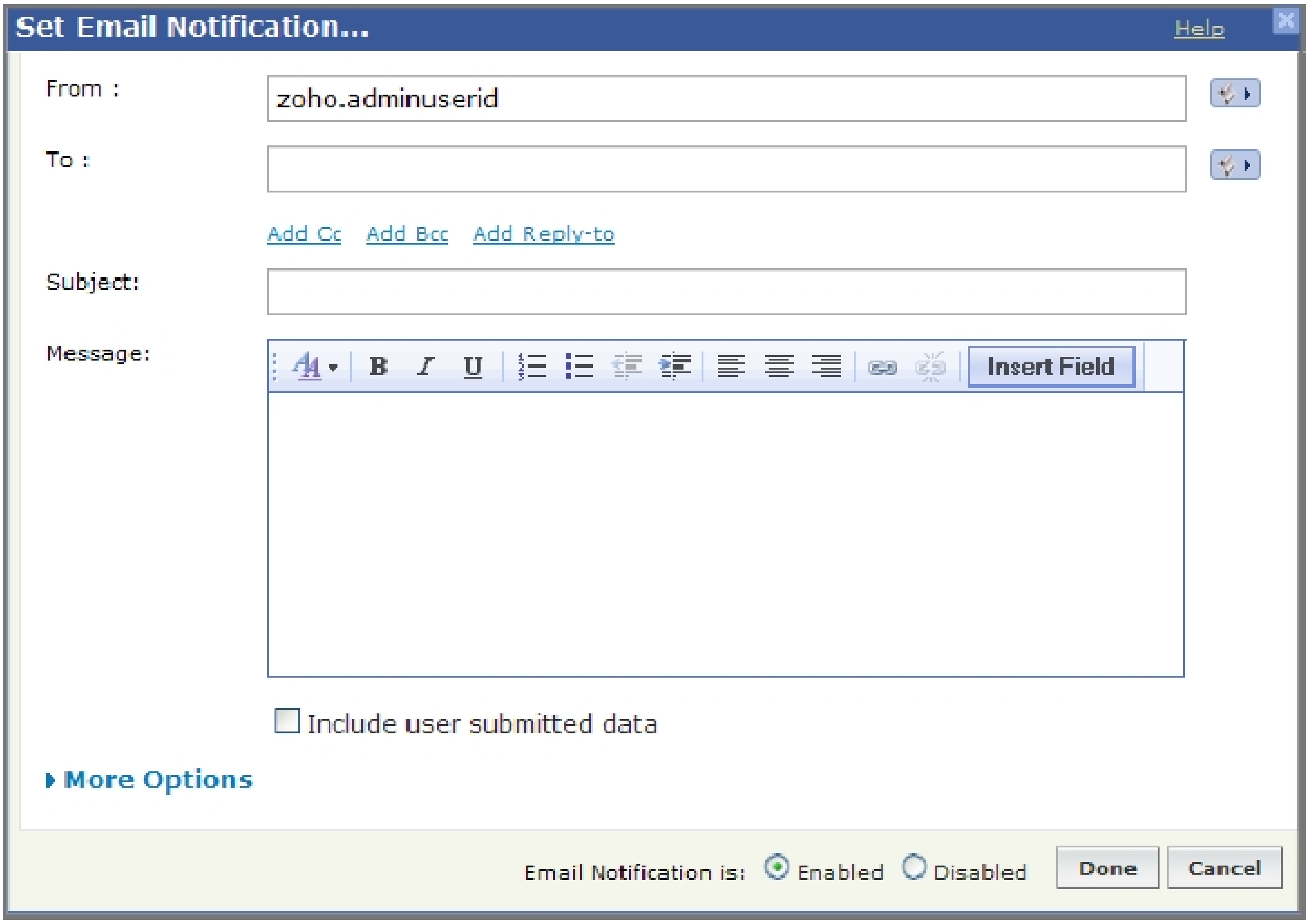
2.Click on Set Grouping from the options on the left.

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.

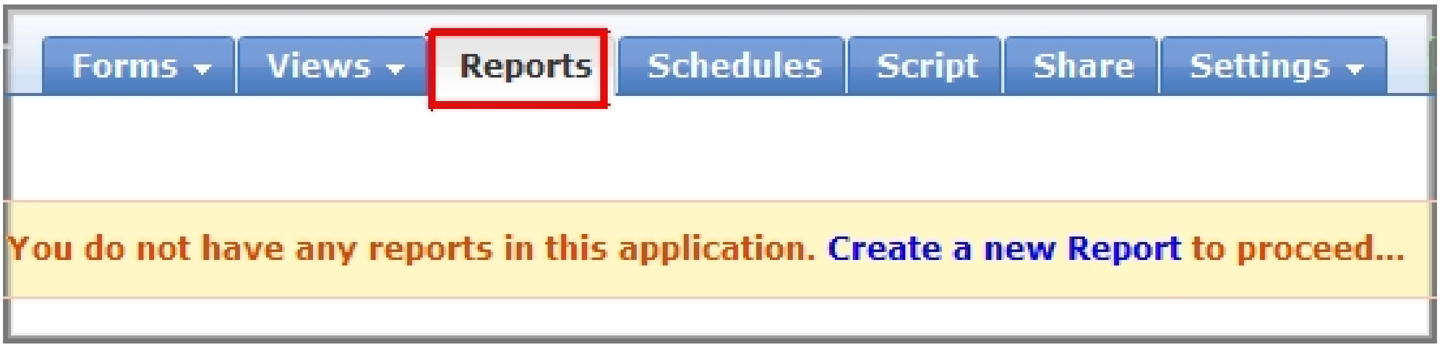
1. Navigate to the form for which you want notifications enabled.
2. Point to "More actions", and select "Email Notifications" from the list that expands.



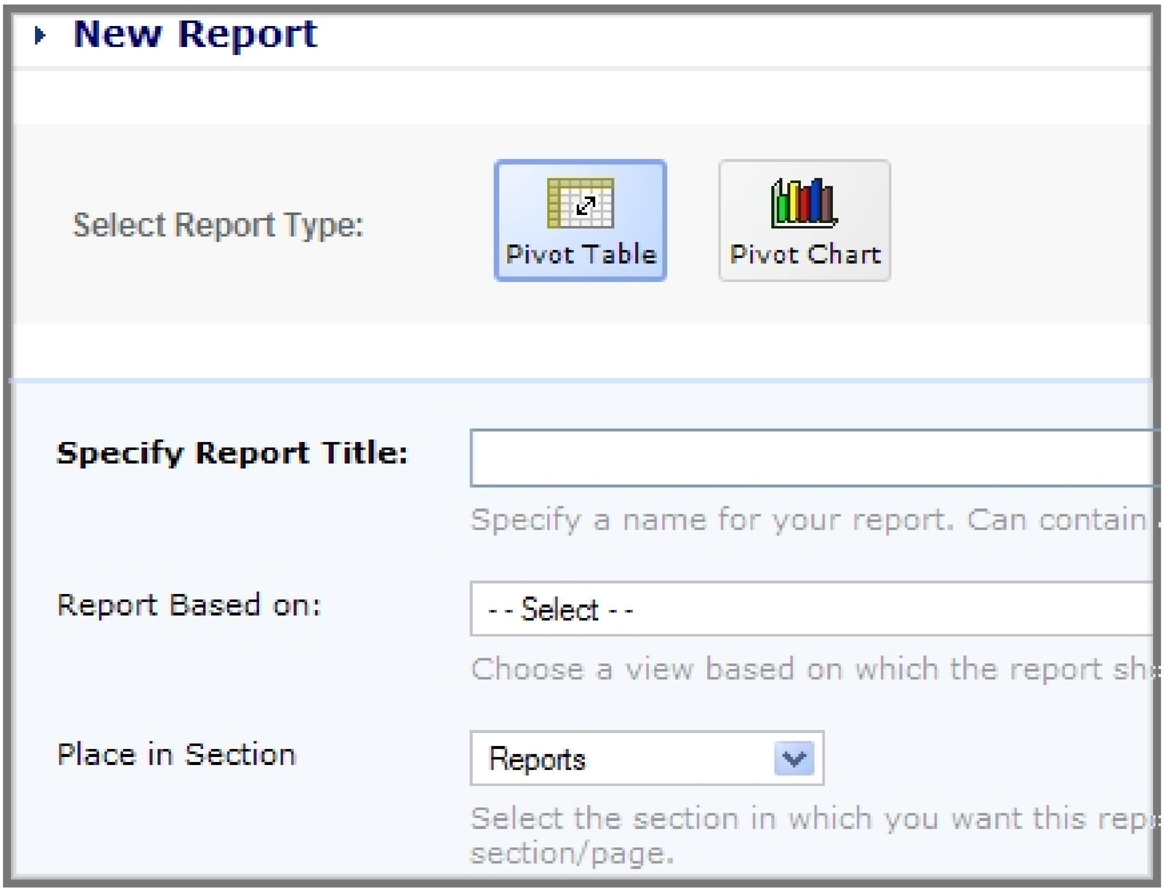
3. Configure the inbox you want your notifications in. Even multiple mailboxes, separated by comma.

Reporting

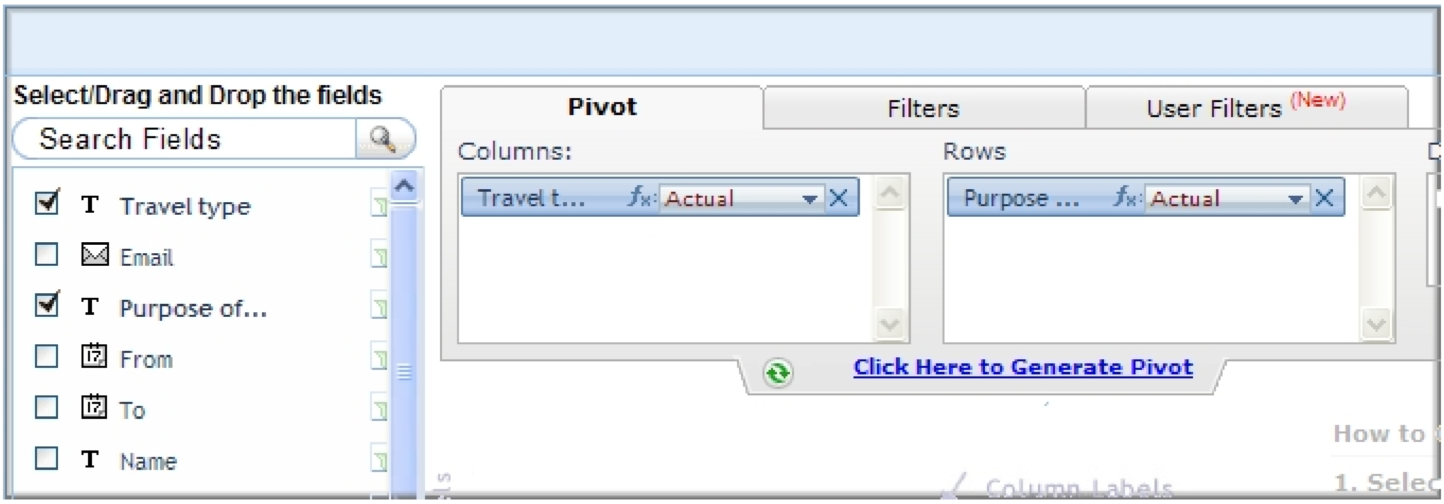
Reports help in graphically displaying otherwise-monotonous data. Plot the values you want on a chart or table that matches your website's color scheme and embed it to support your claim. There are two types of reports; Pivot Charts and Pivot Tables.



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.



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



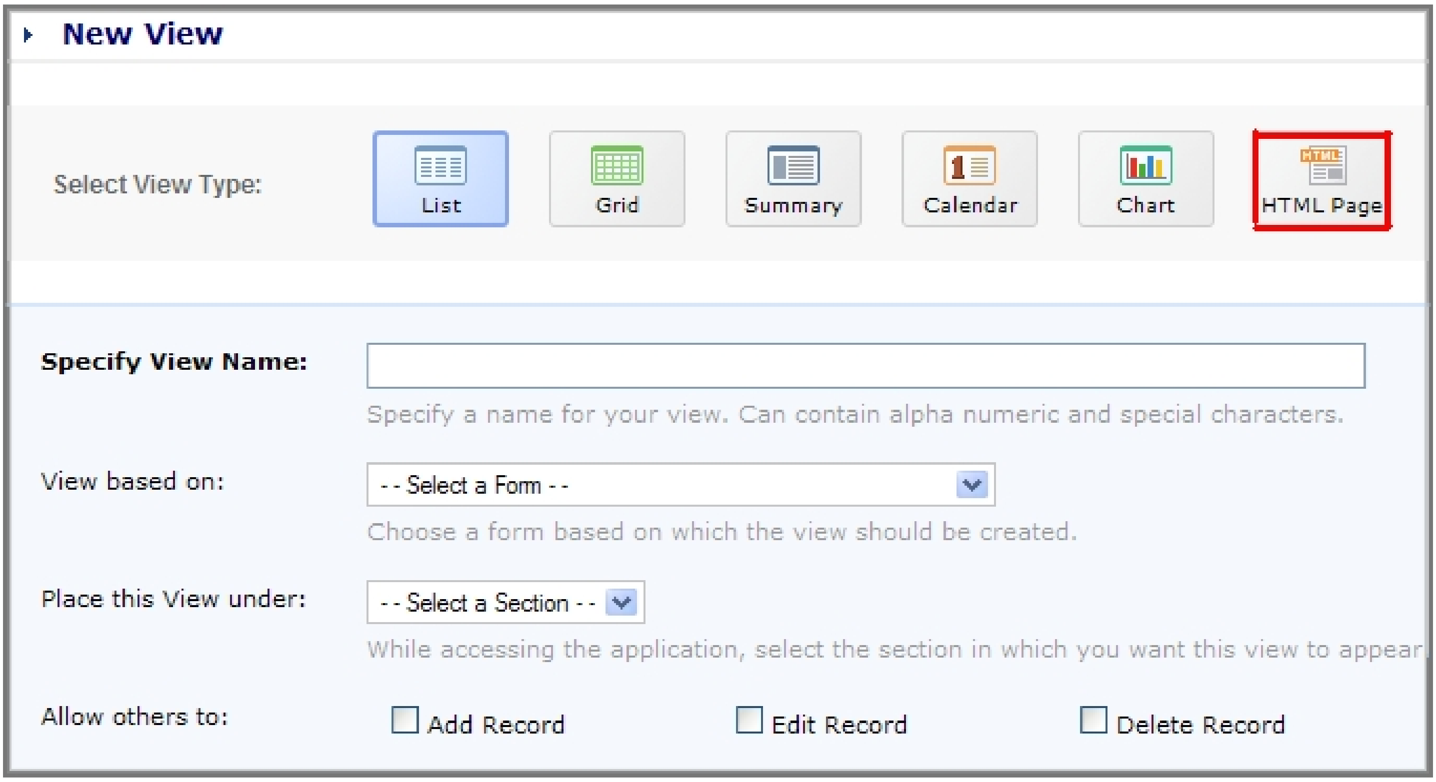
4. That takes you to the report-creation page as in the image above. Drag the field for the corresponding axis, from the list on the left. If you want to plot a graph on date versus temperature, drag the date field to the x axis and the temperature field to the y axis.
5. With filters for reports, you 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.

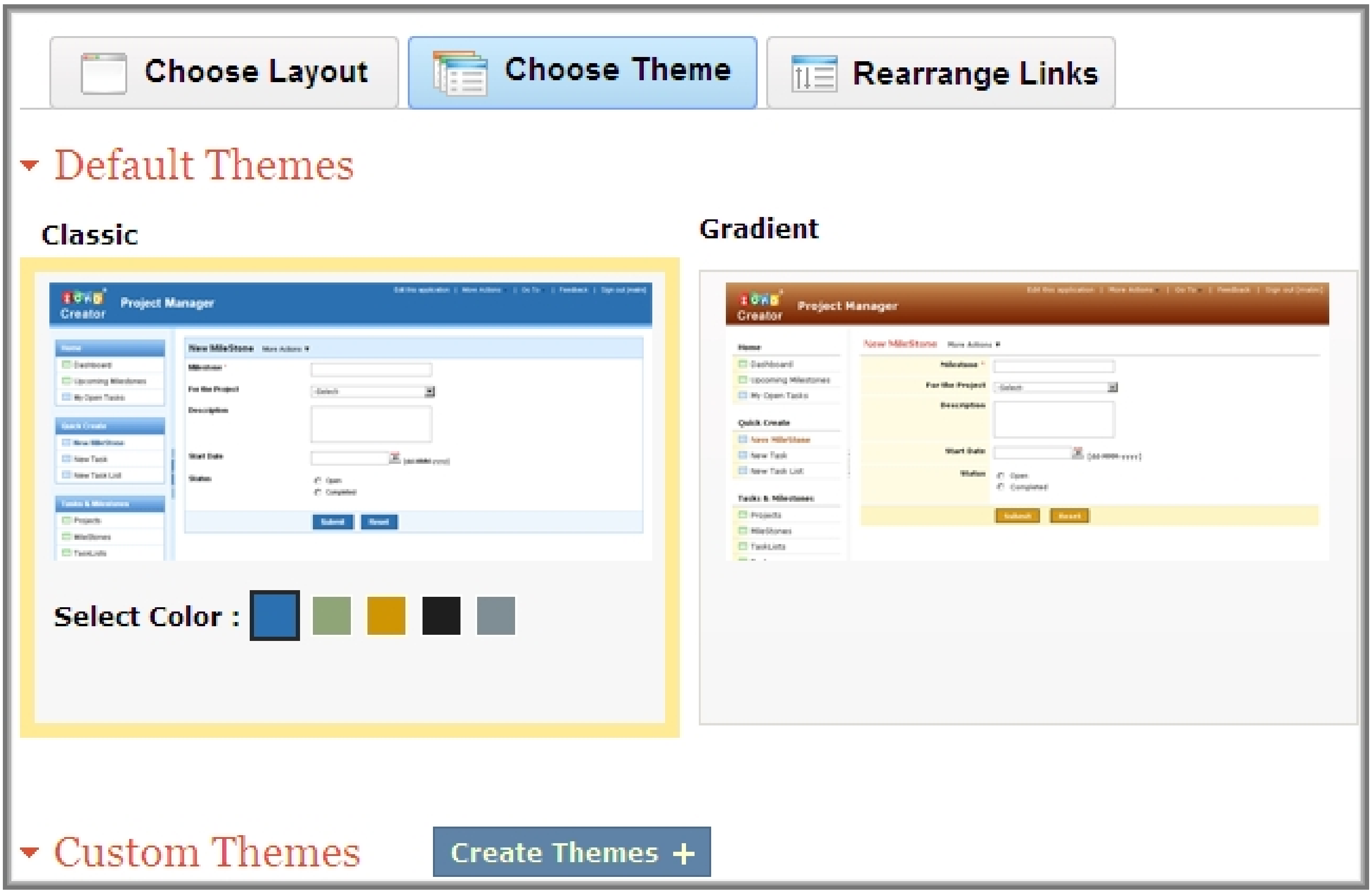
1. Select New View from the Views tab.
2. Specify the type as HTML, and name the view.



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.

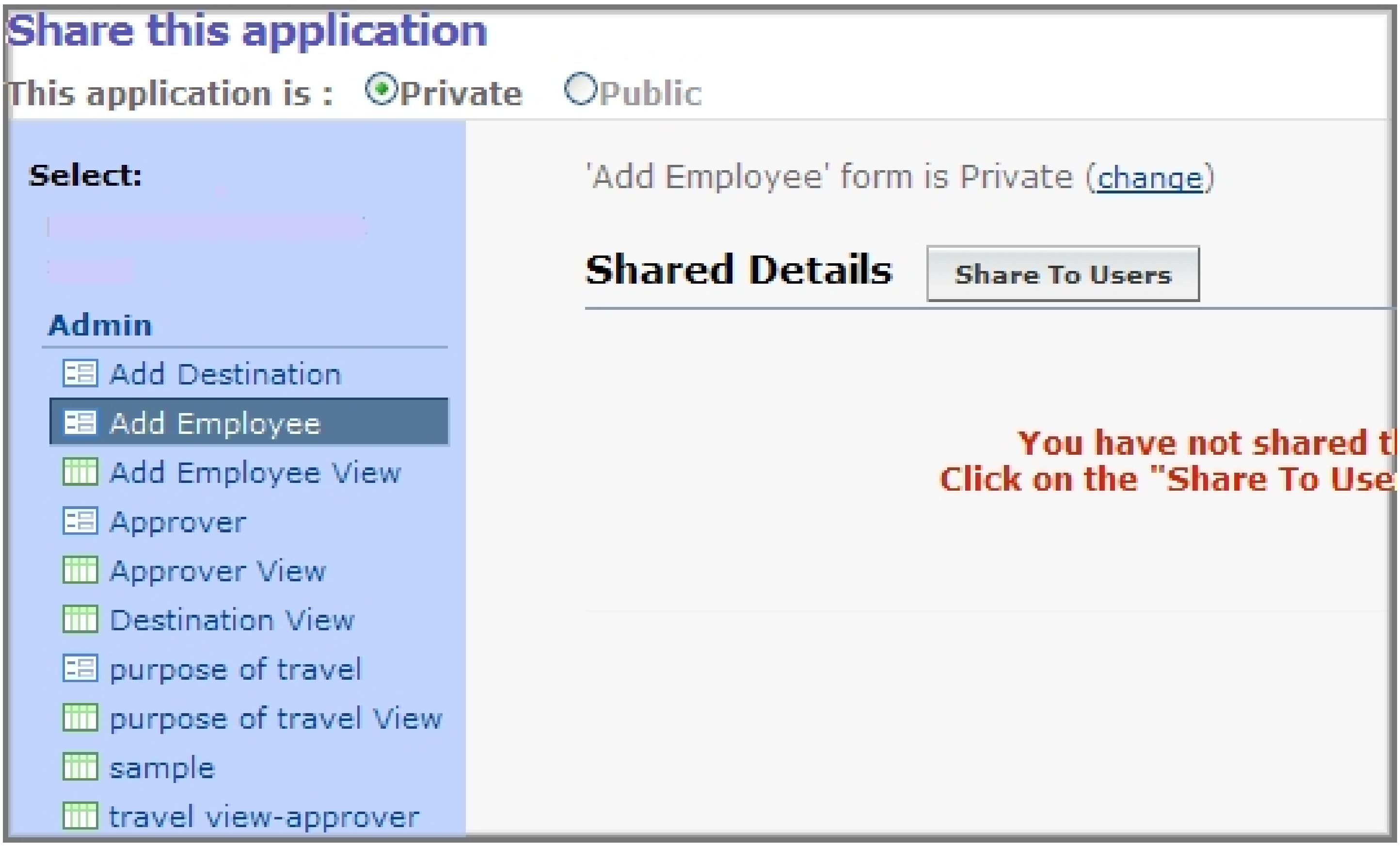


1. From the Settings tab, select "Customize".
2. You will find three tabs on the customization page: "Layout" has a bunch of default ones you could preview and choose from. "Choose theme" tab lists some color schemes, and also allows you to design a custom theme too. "Rearrange links" is to group your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

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

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