ZOHO Creator

A beginner's guide to Workflow Automation

Table of Contents

Introduction

Problem solving is fundamental to human beings. From the wheel to the World Wide Web, humans have always been about solving problems to make life easier. However, this isn't a one-step process; there's a structure to it.
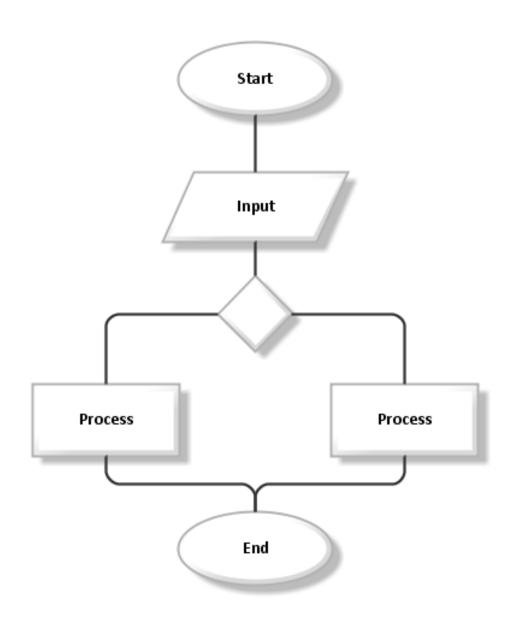
This structure is what workflows are all about—creating a flow or a framework to accomplish a task successfully.

So what, then, is workflow automation?

Workflow automation

The process of automating a series of actions to complete a task with little to no human intervention is called workflow automation. In simpler words, it's automating repetitive tasks to make your work easier, with the help of software or digital tools.

Why is it needed?

Consumers today expect results faster, and automation is the only way to deliver. By automating frequently occurring tasks, organizations can save time, effort, and money.

By delivering quality work quickly and accurately, businesses gain an advantage over competitors relying on manual processes. This is why we need workflow automation.

> *The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.*
>
> **- Bill Gates**

Workflow automation isn't a magic solution that'll change your business altogether. It's more of a catalyst to help you reduce your workload, invest time on things that matter, and save on costs—but only when applied to an already optimized system.

Based on our experience, before automating workflows, there are a few steps to follow:

Identify repetitive tasks

Define your requirements clearly

Sketch a workflow of the processes that you'd like to automate.

Choose workflow automation software that suits your needs

Train stakeholders on the software

Create workflows as simple or complex as you want

And then you're done!

Benefits of workflow automation

Having a workflow automation process in place can immensely benefit your business.

Boosts productivity

By automating redundant processes, employees can save time on menial tasks and focus on solving more complex problems.

Reduces manual errors

With automated processes, errors can be avoided, and even if they occur, the system will notify you of where the error is, so you can fix them quickly.

Increases transparency

By defining workflows for internal communication, every detail can be shared, tracked, and accessed across departments by every stakeholder in real time, providing complete visibility.

Enhances customer satisfaction

Setting up workflow rules to automatically route support tickets based on priority helps resolve issues faster and provides a valuable experience for customers.

There is plenty of workflow automation software in the industry that provides the benefits we mentioned above, and much more. But how do you find the right workflow automation software? While it depends on a lot of factors, like your business needs, your technical skills, resources, pricing, and more, there are a few things you shouldn't compromise on. We'll go into this in more detail in the next section.

What to look for in workflow automation software

An ideal workflow automation solution should be easy to use, have excellent analytics features, and suit your business needs. We've compiled a list of 6 essential features you should look out for when making your choice:

Ease of use
The software you choose must be simple to use by people of all technical levels. A tool with a drag-and-drop interface is ideally suited for this.

Role-based controls
While creating approval workflows, having access controls based on organizational hierarchy will help you better secure data.

Dashboards & reports
You should be able to visualize key performance indicators, and analyze business data with interactive charts, gauges, tables, and more, within a few clicks.

Seamless Integrations
Choose systems that have prebuilt integrations with ERPs, payment gateways, third-party vendors, and authentication services.

Mobile support
For in-the-field jobs, mobile support is crucial. Look for a system that supports easy mobile access.

Additional capabilities
In case you'd like to incorporate more functionalities, the platform should provide options like APIs and custom functions, to make your process as customizable as possible.

You won't find these features or flexibility in any packaged solutions, which is where low-code comes into the picture.
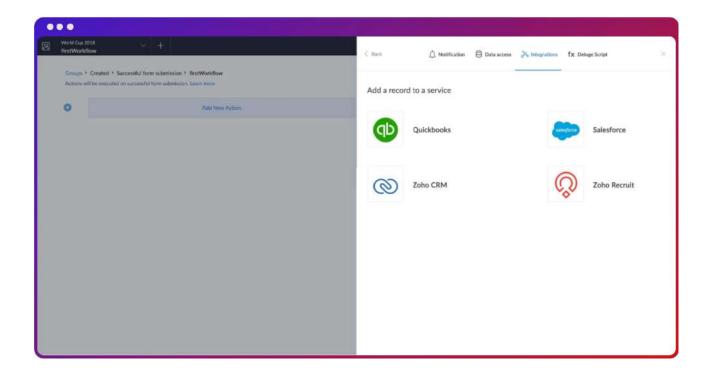
Low-code for workflow automation

Low-code is a way of designing and developing applications that allows users with little to no programming knowledge to build apps with prebuilt code snippets or blocks and a drag-and-drop visual interface. A low-code approach to development means the technical resources required to build an application are minimal. The speed at which you can develop on low-code means you can plan your digital transformation journey in a more agile and cost-effective manner.

Why low-code? Low-code's intuitive development platform enables businesses to adapt to market changes quickly, which in turn gives them an advantage over their competitors. Faster time to market, legacy system modernization, zero deployment, and high security are just a few of the other reasons why an increasing number of businesses are choosing low-code platforms for their business or digital transformation projects.

Going strong for over 15 years, Zoho Creator is a low-code platform that allows users to build complex workflows with its simple drag-and-drop interface. Its rich suite of features, like prebuilt integrations, multiplatform support, access controls, and guided scripting, makes it easier to design and automate workflows for every process. Using Zoho Creator's workflow automation tools, you can get more done in less time and build scalable workflow solutions.

Moreover, Zoho Creator's latest feature, Blueprint, helps you map out your processes—specifying each step, deciding who's in charge of what, setting conditions, and automating actions which will help you manage all your workflows seamlessly.

Zoho Creator is equipped with workflows for every need:

Forms

Forms are the basic structure for creating any application on our visual workflow builder. They let you import data, add fields, set triggers, and perform actions. In short, they help you make sense of your data; all visually.

Schedules

As the name suggests, this allows you to create workflows for tasks that are built around different schedules, without any user input. You can set up a schedule to send anniversary wishes to employees, welcome emails to prospects, SMS notifications updating shipment details to customers, and much more.

Approvals

This is a dedicated workflow builder for all approval requests, ranging from assignment submission to visa documentation. You can add single or multilevel approvals based on filters, and even add actions to be performed upon approval or rejection.

Payments

All payment-related workflows, like selling subscriptions, collecting registration fees, sending purchase orders, and more, can be created using this option. All you have to do is configure a payment gateway, and then create the payment workflow. And that's it—you're good to go with all your financial transactions

Custom functions

For more complex workflows, you can use the *functions* feature, which lets you create functions and invoke them using Java or Deluge (our in-house scripting language) statements. This feature provides more customizability options for professional developers and businesses that require complex applications.

Moreover, to give you a high-level overview of all your workflows, you can access the *workflow dashboard.* Here, your workflows are displayed based by date created, and you can create, edit, enable, disable, and delete workflows directly from the dashboard page.

Customer stories

Automating your core processes using Zoho Creator's workflow automation platform can have a real impact on your business. Take a look at some of our top customers' low-code stories.

aboitiz
Equity Ventures

Aboitiz Equity Venture is one of the largest conglomerates in Asia. It was started in the late 1800s as a hemp trading business, and today its investments are predominantly in banking and financial services. As the Aboitiz Group diversified into many businesses, their commitment to sharing grew accordingly. However, they didn't have a proper system in place to track all their CSR activities.

With an increasing number of projects, Aboitiz management decided to find a more efficient and effective way of managing them. To serve its diverse beneficiary base, Aboitiz started looking for a low-code digital platform that would uniquely suit the sectors they operate in—consumer goods, utilities, financials, and industrials. After extensive research, they decided to implement Zoho Creator as the key platform to realize their digital ambitions.

Zoho Creator enabled Aboitiz to roll out a full-fledged web and mobile CSR application in just two months, which is used by all their business heads, finance executives, and program leads. This end-to-end solution has more than 1,000 dynamic workflows that take care of the entire project management process, without needing any manual supervision.

The employees at Aboitiz started by using a template to track their projects, with the intent of modifying it to meet their requirements. As there were so many tasks that could be performed without creating any code at all, they started using Zoho Creator for automating each of their team's processes. This was the turning point, as these employees realized the possibilities of Zoho Creator, and built apps themselves for all their internal processing needs.

> *We can now develop an application with complex workflows in less than 2 weeks, and there's no need for us to set up databases. Also, sharing of applications can be done in just a few clicks.*
>
> **- Niry Chien Marañon**
>   Software Engineer, Aboitiz Equity Ventures

Proovia is an independent family-run business based out of the UK. They offer their customers services like distribution of goods, express and economy shipping, transport, warehousing, and storage.

Before Zoho Creator, Proovia relied solely on spreadsheets. They spent a significant amount of time and resources on managing their day-to-day tasks, instead of focusing on improving their customer experience. As their business grew, it became difficult to manage manually.

Proovia was introduced to Zoho Creator by our partner, APPZ Limited, in 2018. They made the first prototype of Proovia's app in less than a week, and have been working with Dragos, the founder, on adding features ever since.

The app started with two main features—notifications and route optimization, but over the past 2 years they've added over 60 forms and hundreds of workflows to the app.

As of today, they're able to create custom dashboards for different needs, which resulted in easier access to critical information. In the application, they've configured workflows to log their drivers' expenses during deliveries, auto-assign delivery vans and routes, apply leave, and more. This has made it much easier for managers to supervise their drivers.

A few more customer stories:

The Creator platform allows us to implement new features really quickly, and at a relatively low cost. The team has a never-ending list of ideas, and the ease of implementation means that we can try them all out. If they work, we keep them, if they don't, we throw them away and move on to the next thing.

- Keith
Appz Limited

Our life and the way we worked changed 100 percent. Now, we work much faster, we save money, and we have improved our workflows.

- Francisco Moreno
Group Travel

Zoho Creator has provided us the opportunity to create bespoke workflow processes that would otherwise not be possible with off-the-shelf software.
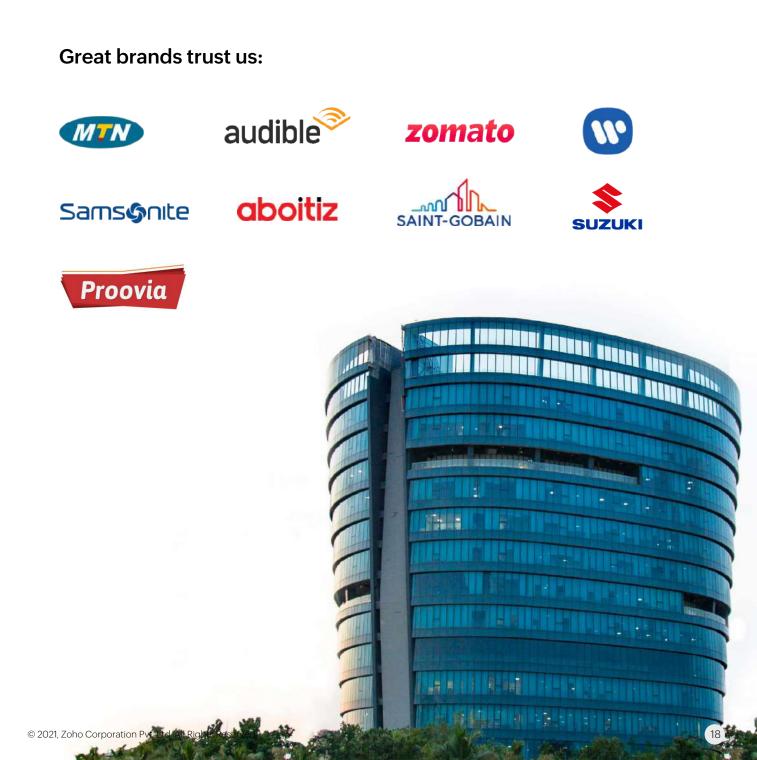
- Clinton Fisher
Manager, Floral Impressions

Conclusion

At Zoho Creator, we've always worked towards a single purpose—empowering users to build functional apps with minimal coding expertise. We've helped 13,000+ brands create bespoke workflows and improve their end-to-end operations across a variety of industries. With over 15 years of experience in catering to B2B organizations, we have the best tools in the trade to help you improve your business. You can get started with Creator by visiting the [signup page.](#) You can also check out our [prebuilt workflow templates](#) to get started right away.

About us

Running a business is no mean feat, and we believe we can help. Rapidly build custom applications that are a perfect fit for your business, or choose from our extensive range of prebuilt apps and modify them. The best part? You don't have to be a programmer. Just signup, pick a plan, and start building!

Great brands trust us:

ZOHO Creator

www.zoho.com/creator

We'd love to talk! Reach out to us:
hello@zohocreator.com

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