

ZOHO Creator

Build a Vendor Selection app in 60 minutes

"It took me four-five months with Microsoft SharePoint to get to a point where it was deployable, and usable through all my users. With Zoho Creator, it literally took me about a week to get things up and running and rolling it out to my users."

> Robert Brandt IT Director, Telga Corporation



Build a Vendor Selection app in 60 minutes

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Overview

Zoho Creator is a low-code platform for building scalable cloud-based custom apps that can be seamlessly deployed to organizations of all sizes. The apps built using Zoho Creator can be accessed from smartphones, tablets, and any web browser.

This guide illustrates how to build a **Vendor Selection** app using Zoho Creator and provides an overview of how you can deconstruct your business processes and build a customized app that fits the needs of your organization.

Vendor Selection app

Imagine you are an executive who is in charge of selecting vendors who will supply materials to your company. You've decided to build an app that collects and manages information about the vendors who apply.

This app should cater to the following participants:

- The Vendors, who apply for selection.
- The **Manager**, who meets the vendors and decides whether they are eligible to be selected or not.
- The **Selection Executive** (you), who is in charge of monitoring this process.

Flow of the app



Create the Vendor Selection app

Let's start building the application.

- 1. Log in to https://creator.zoho.com. You will be taken to your account's Dashboard.
- 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 page.
- 3. Select Create from scratch on the left.
- Set the app's name as Vendor Selection, then click Create.
 You will be taken to the Design page of your app:

Vendor Selection	+ 😵 Design 🚠 Workflow 💮 Se		Se Shire & As	
		Q 10 -		-
Vendor Selection	Start building your application by creat	ating a form		

You've now created an app. However, the app does not have any components. You will need to start by creating the **Application form**, the component through which vendors enter data.

Create application form

Let's start by creating the **Application form**. Just like a spreadsheet has columns, forms in Zoho Creator have fields. Each entry submitted through a form is called a record.



You can add 'n' number of forms in your application.

- 5. Click **Create new form**, near the bottom of the Design page.
- 6. Select **Blank.**
- Set the form's name as Application Form, then click Create Form. You will be taken to the form builder:



- Drag and drop the Name field from the field palette (displayed on the left) to the form. Its Field Properties will appear on the right.
- 9. Each field consist of:
 - **Field name:** The text that is displayed next to an input area in a form. This lets the users know what information they are to enter in that field.
 - **Field link name:** The field link name is the name with which a field is internally referred by Zoho Creator.

·Ò Did you know?

The field link name is unique for fields in a form, i.e., there cannot be more than one field in a form with the same field link name.

- 10. Use the default names shown in the fields.
- Set the Name field as Mandatory to ensure that a vendor cannot submit an application without entering their name.
 - Navigate to the Field Properties > Validation section
 - Check the checkbox next to Mandatory

Field name	
Name	
Field link name	
Name	

- 12. Drag and drop the **Drop Down** field onto the form.
 - a. Set the Field name to Application Status.
 - b. Navigate to the Field properties > Choices section on the right, then set the choices as Applied, Scheduled for Meeting, Selected, and Rejected.
 - c. Click the radio button next to Applied.
- The Application status field is used to track the vendors' progress in the selection process. It must not be shown to the vendors when they submit the form, but must be visible to the selection executive and manager when they view the records. To hide it on the form so vendors cannot see it:
 - d. Navigate to the Field Properties > Permissions section and set the Show field to option as Admin only.

Permission	
Show field to	
Admin Only	\sim

13. Drag and drop the following fields to your form:

Type of Field	Set its Field name as	Configure its Field Properties
Email	Email address	Set as mandatory
Phone	Phone number	-
File upload	Vendor portfolio	Set as mandatory

Configure email notification on form submission

Now that you have created the form for vendors to submit their applications, let's look at how to to automate notifying the vendors that their applications were submitted successfully.

As the vendors will be sharing their email addresses in the Application Form, we can notify them by sending an email when they submit the form. To enable sending an email on form submission:

 Click the Properties icon near the top-right corner of the form builder, as shown below. The Form Properties pane will appear on the right.



 Check the checkbox next to Send email notification, as shown below. The Customize link will appear:

Form Properties	~
On Successful Submission	
Show message	
Application Added Successfully	
	10
Send email notification Customize	
Direct to	
Capture Coolecation	

- 16. Click **Customize**. In the Set email notification pop-up window:
 - a. Set To: Select the Email Address field from Form
 Fields.
 - b. Enter Subject to 'Confirming your Application'.
 - c. Enter Message as shown in the below screenshot. The \${Name} can be added by selecting the Name field from the Insert fields dropdown in the Message field. Adding the Name field enables

you to send a personalized email message with the vendor's name in the greeting.

d. Click Done.

From	zoho.adminuserid 💛
То	\$(Email_Address) ×
	Add Cc Add Bcc Add Reply-to
Subject	Confirming your Application
Message	B / U → ▲ ◇ 『F 江 ■ ■ ■
	田田福福 🌭 🛥 藥 🖩 岩 🛚 🖘 🖄 🌄
	Insert fields
	Hello \${Name}, We have received your application. You will be notified once your meeting is scheduled.

17. Close the **Form Properties**, then click **Done** at the top-right corner of the form builder.

Access the app to add a few records

We have created the **Application** form for the vendors to apply for the selection, and configured email notification to be triggered when they submit the application. Now let's see how to add and view the records.

 Click Access this application in the top-right corner of the Design page.



19. You can access the **Application Form.**

Vendor Selection						
Vendor Selection	Application Form					
Applications	Name *	Mary	Smith			
Application Form		First Name	Lost No	me		
Call Appendations	Application Status	Applied	×			
	Email Address *	mary.smith@zylker.co	m			
	Phone Number	#1 +1 + 201-555	-0123			
	Vendor Portfolio*	Portfolio.docx		×		
		Submit Res	91			

20. Try submitting a few sample entries in your form.

The data that you enter in your form can be viewed as a report. Zoho Creator creates a list report by default for every form that you create in the application. You can see all the records submitted through the form in this list report. **All Applications** is the list report created automatically for the **Application** form.

Click All Applications on the left menu as shown below. It will display all the records submitted through the Application Form.



The view that you see on accessing the **All Applications** report is its **Quick View**. The Quick View of a report enables your users to view multiple records in one glance.

Vendor Selection		<u> </u>	Q	Ø Edit	his application ③ Help
Vendor Selection	All Applications				Q 🛨 🗏
Applications	👁 🗌 Name	- Application Status	 Email Address 	- Phone Number	Vendor Portfolio -
Application Form	Randolf Silcox	Applied	rsilcox8@simplemachines.org	4791734618	Portfolio.docx
	Codi Reke	Applied	crake7@sciencedally.com	\$ 2041460724	Portfolio.docx
C. All / pplications	Adiana Rebichon	Applied	atebichon6@nhs.uk	6649895648	Portfolio.docx
	Julius Paroni	Applied	jparoni5@nbcnews.com	C 3031159102	Portfolio.docx
	Micaela Willstrop	Applied	mwillstrop4@samsung.com	C 4751822046	Portfolio.docx
	Micki Braddon	Applied	mbraddon3@state.gov	G134358566	Portfolio.docx
	Garrick Dunthorn	Applied	gdunthorn2@cornell.edu	\$845366150	Portfolio.docx
	Quent Otter	Applied	gotter/@wikia.com	C 6726090992	Portfolio.docx
	Leslie Sproston	Applied	Isproston@dslideshare.net	4633227900	Portfolio.docx
	Mary Smith	Applied	mary.smith@zylker.com	C+12015550123	Portfolio.docx
Vivek	Showing 10 of ###				

When you click on a record, the **Detail View** will slide in from the right. The **Detail View** of a report enables your users to view a single record in detail.

Vendor Selection			0 0	🖋 East this sophication 🛛 🕤 Help
	All Applications		\diamond	🖌 Edit 🛛 Q1 Duplicate More ~ 🗙
Vendor Selection	All Applications All Applications All Applications Randof Sicox Cod Rate Adams Retochon Jalus Patori Jalus Patori Micelle Mitterop Micel Braddon Genric Pathom Quent Otter Lustle Sproton May Smith	Application Status Applied Applied	Name Application Status Email Address Phone Number Vendor Portfolio	✓ Edit Q) Duplicate More ~ X Mary Smith Applied Imary Smith/#sylket.com < +12015550123 Pertfolio.dsox
(ge Vivela	Showing 10 of ###			

Create Schedule Meeting form

At this stage, your app only has one form: the **Application Form**. To schedule meetings with the vendors, you need to create another form. The manager should be able to select a vendor name and set a meeting date in this form.

Let's create a **Schedule Meeting** form with the required fields.

22. Click Edit this application at the top-right corner of the app:



23. Click the **Add New** icon displayed at the top of the Design page.

Vendor Selection	× 🚛	@ D	esign 🐰 Workflow	🚯 Settings
	U			s e
0.0.0	_			
Vendor Selection	All Application	IS		Q + =
	🗸 🏶 🗌 Name	* Application Stat *	Email Addre * Phone	Numb Vendor Portfo "
Application Form				
🗔 All Applications				

- 24. Select Form, and then Blank.
- 25. Name the form **Schedule Meeting**, then click **Create Form**.

You have created the **Schedule Meeting** form. We need a field with the vendor names for the manager to the choose the vendor and schedule the meeting. The vendor names are collected through the **Application** form. You will use a **lookup** field to let the manager select the vendor name from the **Application** form.

- 26. Drag and drop a **Lookup** field onto the form.
 - a. Select New Relation.
 - b. Select the Vendor Selection app, then the Application Form, and then the Name field.
 - c. Set the **Display Type** as **Dropdown.**
 - d. Click Done.

	Forms		Fields	
Applicati	Application Form	>	Email Address	
×			Name	
			Phone Number	
2			Added Location	
>			Added Time	
2 2 2 2		ני ע ע ע	Phone Number Added Location Added Time	

- 27. Go to Field Properties on the right pane:
 - a. Set its Field Name as Vendor.
 - b. Navigate to the **Validation** section and check the checkbox next to **Mandatory**.
 - Navigate to the Choices section and check the checkbox next to Set Filter Select the Application Status field, then the equals operator, then Applied, and then click Done.

By default, when you access the application, the **Vendor** field will display all the vendors who are in different stages of the selection process. By setting the above filter with the **Status** equals **Applied**,

the manager will only see the vendors whose interviews are yet to be scheduled.

Application Status	\sim	equals	\sim	Applied	\sim	AND OR
1						
Add New						

- 28. Drag and drop the **Radio** field onto the form:
 - a. Enter the Field Name as 'Selected?'
 - b. Navigate to the Field Properties > Choices section on the right, and set the choices as shown below:

Y	es	1	Ŧ
	lo	+	- 4

29. Drag and drop the following fields onto the form:

Type of Field	Set its Field name as	Configure its Field Properties
Date-Time	Meeting Date & Time	Set as mandatory
Multi Line	Comments	-

Click **Done** at the top-right corner of the form builder. You will be taken to the form's Design page.

You have created the Schedule Meeting form. The manager can schedule interviews with the vendors using this form.

Create workflow to hide fields, send email & update record

When the manager schedules a meeting for a vendor:

- The vendor should receive an email stating the date and time of the meeting.
- Their Application Status in the Application Form must be updated from Applied to Scheduled for Meeting. (This is to ensure that the manager does not schedule another meeting for the same vendor. This supplements the filter we added to the Vendor lookup field in the Schedule Meeting form).

 You also need to hide the Selected? and Comments fields when a manager schedules a meeting. It doesn't make sense for the manager to see these fields when scheduling a meeting. They're only needed when the meeting between the manager and vendor has taken place.

To achieve these goals, you can create a workflow to be triggered when the **Schedule Meeting** form is used. To create this workflow:

- Click the Add New icon at the top of the Workflow or Design page of your app.
- 32. Select Workflow.
- 33. Select While using the form.
- Select Schedule Meeting from the dropdown next to Choose form.
- 35. Select the choice Created for Run when a record is.
- Set the workflow's name as Send meeting details & update vendor record, then click Create Workflow.

Choose form	Schedule Meeting ~
Run when a record is	Created Created or Edited Edited Delete
Name the workflow	Send meeting details & update vendor record

- 37. Click Add New Action in the workflow builder.
- 38. To hide fields:
 - a. Select Field actions.
 - b. Select Hide fields.
 - c. Select the **Selected?** and **Comments** fields from the dropdown.
 - d. Click Save at the bottom-right corner.
- To send meeting details to vendors and update the application status of the vendor, you first need to fetch the vendor record from the **Application Form**.
 - a. Select Add New Action.
 - b. Select Deluge Script.
 - c. Select **On success**. The script builder will open.

- d. Drag and drop the **fetch records** task on the script builder. The syntax of the task will appear.
- e. Replace the variables in the syntax with following names as shown in the table below:

Syntax	Variable Name
<variable></variable>	vendor_record
<form></form>	Application_Form
<field></field>	ID
<opr></opr>	=
<expression></expression>	input.Vendor

The fetch record task that you have defined should be same as the one shown below:

```
vendor_record = Application_Form[ID = input.Vendor];
```

- 40. Use the **Send mail** task to send an email to the vendor's email address with the meeting date and time. To do this:
 - Drag and drop the Send mail task on the script builder.
 - Replace the variables in the syntax with the names listed in the table below:

Syntax	Variable Name
from: <expression></expression>	from :zoho.adminuserid
to: <expression></expression>	to :vendor_record.Email_Address
subject: <expression></expression>	subject :"Meeting Scheduled"
message: <expression></expression>	message :"Hello " + vendor_record. Name + " Your meeting has been scheduled on " + input.Meeting_Date_Time

The send mail task that you have defined should be same as the one shown below:

```
sendmail
[
from :zoho.adminuserid
to :vendor_record.Email_Address
subject :"Meeting Scheduled"
message :"Hello " + vendor_record.Name + " Your meeting
has been scheduled on " + input.Meeting_Date_Time
]
```

- 41. The next step is to update the vendor's status to **Scheduled for meeting**. To do this:
 - Drag and drop the **Update records** task.
 - Replace the variables in the syntax with the following names listed in the table below:

Syntax	Variable Name
<collection_variable></collection_variable>	vendor_record
<field></field>	Application_Status
<expression></expression>	"Scheduled for Meeting"

The Update record task that you have defined should be same as the one shown below:

vendor_record.Application_Status = "Scheduled
for Meeting";

- 42. Click **Save** and close the script editor.
- 43. Click **Done** at the top-right corner of the workflow builder. You will be taken to your app's Workflow page.

Create calendar to schedule meetings

The manager can easily schedule vendor meetings using a calendar. Zoho Creator enables you to create a **Calendar** report to schedule meetings and view the data collected using the **Schedule Meeting** form. To create a calendar report for this form:

- 44. Click the **Add New** icon at the top of the Design page.
- 45. Select **Report**, then **Calendar**.
- 46. Select **Schedule Meeting** from the dropdown next to **Based on the form**.
- 47. Select the **Vendor** field from the dropdown next to **Event title**.

- 48. Select the **Meeting Date & Time** field from the dropdown next to **Event starts on**.
- 49. Set the report's name as **Meeting Calendar Report**, then click **Create Report**.

Based on the form	Schedule Meeting		×
Event title	Vendor		Y
Event dates	Event starts on	Meeting Date & Time	v
	Event ends on	-Select field-	×
Name report	Meeting Calendar F	teport	

You will be taken to the report's Design page. Customize it as follows:

- 50. Click **Detail View** on the right.
- 51. Click Layout.
- 52. Select the second layout as shown below. Close theConfigure fields window that slides in from the right.



Create a workflow to update the status of selection

Once the meeting is over, the manager either selects or rejects the vendor by editing the record in the **Schedule Meeting** form. This should automatically update the **Application Status** field in the **Application Form**. To set this up:

- 53. Click the **Add New** icon at the top of the **Workflow** or **Design** page of your app.
- 54. Select Workflow.
- 55. Select While using the form.
- 56. Select **Schedule Meeting** from the dropdown next to **Choose form**.
- 57. Select the choice **Edited** for **Run when a record is**.
- 58. Set the workflow's name as **Post meeting update**, then click **Create Workflow**.

Choose form	Schedule Meeting	~
Run when a record is	Created Created or Edited Sector	ed ODeletec
Name the workflow	Post meeting update	

- 59. Click Add New Action in the workflow builder.
- 60. Select **Deluge Script**.
- 61. Select **On success.**
- 62. Drag and drop the **Fetch Records** task onto the script builder. The syntax of the task will appear.
- 63. Replace the variables in the syntax with following names as shown in the table below:

Syntax	Variable Name
<variable></variable>	vendor_record
<form></form>	Application_Form
<field></field>	ID
<opr></opr>	=
<expression></expression>	input.Vendor

The **Fetch Record** task that you have defined should be same as the one shown below:

vendor_record = Application_Form[ID = input.Vendor];

- 64. Drag and drop the **if** task onto the editor. The syntax of the task will appear.
- 65. Replace the variables in the syntax with following names as shown in the table below:

Syntax	Variable Name
<variable></variable>	input.Selected
<opr></opr>	==
<expression></expression>	"Yes"

- 66. Drag and drop the **Update record** task between the braces of the **if** task defined in the previous step. The syntax of the task will appear.
- 67. Replace the variables in the syntax with the names shown in the table below:

Syntax	Variable Name
<collection_variable></collection_variable>	vendor_record
<field></field>	Application_Status
<expression></expression>	"Selected"

The **If** and the **Update record** tasks that you have defined should be same as the one shown below:

```
if (input.Selected == "Yes")
{
vendor_record.Application_Status = "Selected";
}
```

 Drag and drop the Else task onto the editor. The syntax of the task will appear.

- 69. Drag and drop the Update record task between the braces of the Else task defined in the previous step. The syntax of the task will appear.
- 70. Replace the variables in the syntax with the names shown in the table below:

Syntax	Variable Name
<collection_variable></collection_variable>	vendor_record
<field></field>	Application_Status
<expression></expression>	"Rejected"

The **Else** and the **update record** task that you have defined should be same as the one shown below:

```
else
{
vendor_record.Application_Status = "Rejected";
}
```

- 71. Click **Save** and close the script editor.
- 72. Click **Done** in the top-right corner of the workflow builder.

Create dashboard to view key metrics

Zoho Creator allows you to create a dashboard where you can view and keep track of key metrics such as the number of the vendors who are in different stages of the selection process. To create this dashboard:

- 73. Click the Add New icon at the top of the Design page.
- 74. Select Page.
- 75. Set the page name to **Dashboard**, then click **Create Page**. You will be taken to the page builder.
- 76. Drag and drop the first panel. The Panel Configuration pane will slide in from the right.



77. Select Count under Display.

B Verdus Selecture - +	Panel Configuration	💽 Design 🛛 🗔 Code		
EJ Panel	Default font = 8+ B		Display	Action
El Oun				
Fill Ponts	385		A Suffiction	
IIE Report	New employees this m	ionth	Zoho Creator	
∬ Snippeta			Σ Sum Total of all values in a f	eid
 Button 			Minimum Smallest value entered	in a field
			all Maximum Largest value entered (n a feid
			IDI Median Median value of the sa	ected field
			X Average Average of all values in	a field
			() Court og myr records in a s	
			F17 Distinct count	
			Value 385	

78. Select the **Application Form**.

Display	Action
Display data	0
Count 🗸	Q
Select form	
Application Form	
Schedule Meeting	
Showing all 2 forms in Vendor	Selectionapp. Change App

79. Select Selected Records under Evaluate for.

80. Define the records to be counted using the expression, as shown below, then click **Done**.

Application Status	~] [e	quals	×	Applied	~	AND OR
						and the second sec
+ Add New						

81. You'll see the following on the right.

Display	Action
Display data	~
Count 🗸	0
Form	
Application Form 🗸	
Evaluate for	
All records	Selected records
((Application_Statu	s == "Applied"))
Show count as	

82. Select the text box that is displayed below the count.



83. Set its **Value** to **Applied** on the right.

Display	Action
Display data	
Text 🗸	A
Value	
Applied	

- 84. Click the **Close** icon at the top-right corner of the Panel Configuration pane.
- 85. Click Panel on the left, then repeat steps 76 to 84 until that you have a total of 4 panels in your page that show the total number of records from the Application Form where the Application Status is 'Applied', 'Scheduled for Meeting', 'Selected', and 'Rejected'.

Vendor Selection Deshboard	~ +			Ø Done
E Panel			Configure T	
Chart	(٦		
Form	Ct ()	Ct ()	Ct ()	Ct ()
III Report	Applied	Scheduled for Meeting	Selected	Rejected
El Snippets				
Button				

 Select Report on the left, then select the Vendor Selection application, then the Meeting Calendar Report.

Windor Selection Dashboard	× +	O Dane
E Panel	Application Report Configure T	
Chart	Vendor Selection Meeting Calendar Repo	
E Form	Embed as report Ct ()	Ct ()
III Report	Selected	Rejected
G: Snippets		
Button		
	Embed as button	
	Meeting Calendar Report	
	Meeting Calendar Depart	
	View.	

- 87. Drag and drop the **Embed as Report** widget onto your page.
- 88. Click **Done** at the top-right corner of the page builder.

Publish an application form for public access

By default, only you and the users you share your app with (using their email addresses) can access it. The Application Form must be accessible to all vendors, even if you do not know their email addresses. To let anyone access the **Application Form**, use the **Publish** feature in Zoho Creator. Once your app is published, the link can be posted publicly or embedded in your website and accessed by anyone. To publish this form:

89. Click Settings. You will be taken to your app's Settings page.



90. Click Publish under Users and Control.



91. Select **Application Form** from the dropdown, then click **Publish**.



92. Copy the **Perma Link** that appears in the Published URL pop-up window. You can use the **perma** link to post a public link or send in a email campaign.

Perma Link	Embed Code
https://creator.zo	hopublic.com/vivek.rajagopal/vendor-selection/form-
perma/Applicatio	on_Form/qmae2u2nkBNVbHYxBYukMqqZmmvdRh6gdCNKi mNvv9aWPE7muXPBW4ui1As030Q8Dv6fNNRNdz4aJ6BCv
трскив	

 If you want to embed this form in your website, use the Embed Code.

Perma Link	Embed Code		
<iframe frame<="" height="</th><th>500px" th="" width="100%"><th>border='0'</th><th></th></iframe>	border='0'		
allowTransparen	cy='true' scrolling='auto'		
src='https://creat	tor.zohopublic.com/vivek.r	ajagopal/vendor-selectic	on/form-
embed/Applicati	ion_Form/qmae2u2nkBN	/bHYxBYukMqqZmmvdR	h6gdCNK
	mNVV9aWPE/muXPBW4u	TASU30Q8DV6TNNRN02	Adjerch:

Share the app with managers

Now that you've built an app and customized it to suit your business process, the last step is to share the app to the manager. Sharing an app means granting access to some or all components in it. To share the app:

94. Click **Share** at the top-right corner of the Design page:



95. Select User.



- 96. Enter the email address of the manager you want to share your app with in the textbox below **Add Users**.
- 97. Select **Add Permission Set** in the **Choose a permission** dropdown. The Add Permission Set pane will appear.
- 98. Enter the name 'Manager' and a description (optional) for the permission set.
- 99. Select the components that you want the manager to be able to access and the actions they can perform. For the Vendor Selection app:

- a. Check the View checkbox for the Application form, then select the All Applications report. (The manager should not be able to add records to the form; they should be able to view all records submitted; they should not be able to edit any of the records).
- b. Check the Access checkbox for the Schedule Meeting form, as the manager should be able to add records through it.

Name					
Manager					
Description					
Profile Description					
Set Permissions					
Set Permissions Define the permission for reco Module	nds associated with the Access	forms View	Edit	Delete	More
Set Permissions Define the permission for reco Module Application Fo	nts associated with the Access	forms View All Applications	Edit	Delete	More
Set Permissions Define the permission for Heo Module Application Fo Schedule Mee	rds associated with the Access	forms View All Applications	Edit	Delete	More

- c. Click Save and Associate.
- d. Click Share.

Access the app to schedule a meeting

The manager can schedule a meeting with the vendor using the **Calendar** report created above. To do this, the manager uses the link received via email.

100. The manager accesses the Meeting Calendar report.



- 101. The manager schedules a meeting by clicking on the required date in this report.
 - This will open the Schedule Meeting form, as shown below:
 - The manager will select a vendor and set their meeting's date and time, and then click Submit.

/endor *	Garrick Dunthorn ×	*
Institut Data & Time	10.11	20
reeting Date & Time	16-May-2018 10:00:00	

- 102. Once the manager schedules an meeting, the following events happen:
 - a. A record appears in the Meeting Calendar report.

Vendor Selection	Meeting Calendar	Report				Ī	Q 🚹 🗉	
Applications	Today		e c Moy	< < May, 2018 > >				
G Schedule Meeting ~	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
Schedule Meeting Schedule Meeting R.			<u>i</u>	2	3	4	5	
🕮 Meeting Calendar Re								
O Deshboard	6	7	8	9	10	n	12	
	13	14	15	16 Garrick Dunthorn	17	18	19	
	20	21	22	23	24	25	26	

- b. The vendor's Application Status is updated from Applied to Scheduled for Meeting.
- c. An email is sent to the vendor, informing them of the date and time of their meeting.
- 103. Once the meeting has taken place, the manager can update whether the vendor has been selected or not:
 - a. Select the required record in the Meeting Calendar Report. The **Detail View** will appear:

Vendor Selection							Edit this applie	cation	Help	
Vendor Selection						🖋 Edit	රථ Duplicate	More	~ X	
Applications	Overview									
🚊 Schedule Meeting	Vendor				Gar	rick Dunthor	'n			
Schedule Meeting R	Selected?									
Meetint Calendar Re	Meeting Date & Time				16-M	16-May-2018 10:00:00				
G Dashboarg	Comments									

- b. Click the **Edit** button. The **Schedule Meeting** form will open showing the details of the selected record.
- c. Set the Selected? field to Yes to select that vendor, or No to reject the vendor, then click Update.

Vendor Selection	Schedule Meeting	
	Vendor *	Garrick Dunthorn × 🔻
Schedule Meeting ~	Selected?	 ● Yes ○ No
Schedule Meeting R Meeting Calendar Re	Meeting Date & Time *	16-May-2018 10:00:00
S Dashboard	Comments	
		Update Cancel

 Based on the manager's selection, the vendor's Application
 Status is updated to either Selected or Rejected in the All Applications Report.

The selection executive (you), as the administrator of the app, has access to all its components. You can use the Dashboard page to view all of the selection-related information in one place.

Vendor Selection						/ Edit this	application () He
Vendor Selection	3 Applied	2	4 Scheduled for	1 Selected		2 Rejected	
Application Form All Applications	Meeting Calenda	r Report	meening			 	Q 💽 =
Schedule Meeting	Today		« < May	, 2018 > >		Month	Week Day
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	29		1	2	3	4	5
	6	7	8	9	10	11	12
	13	34	15	16 Garrick Dunthorn	17	18	19
	20	21	22	23	24	25	26
🕞 Vivek							

Application recap

The following table lists the requirements of the selection process and how the **Vendor Selection** app has addressed them.

•••

Requirement	Solution in Zoho Creator
Provide a way for vendors to easily apply to the selection process	Create a Form and Publish it (make it publicly accessible)
Automate notifying vendors that their applications were submitted successfully	Enable sending email notification whenever a vendors submits the Form
Provide a way for the manager to view the details of all vendors	Create a List Report and give the manager permission to view vendor records
Provide a way for the manager to schedule meetings with the vendors, and view the scheduled meetings	Create a Form through which the manager schedules meetings and create a Calendar Report, based on this Form, to view the scheduled meetings
Automate notifying the vendors as and when the manager schedules their meetings	Create a Workflow that sends an email once the manager schedules a meeting
Update the Application status of the vendor after each meeting	Create a workflow to update the vendor's Application status auto- matically based on the manager's decision
Provide a way for the selection executive to quickly glance at the status of the process via a dashboard that displays the vendor information	Create a page

Notes:

Notes:

From idea to app, faster than ever before.

School Management



Sales Management



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Inventory Management





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