

CHS Payroll: Assign "Submitted By" and add followers

ZOHO Flow

- New Flow **Ticket Creation Form**
 - Changes the field "Ticket Creator" to an agent's name with a corresponding email and adds two followers to the ticket.
 - Add app trigger from **ZOHO Forms**
 - Select: **Entry submitted - New version**
 - If there's no connection to **ZOHO Forms**, create one
 - Click on **NEW**
 - Find **ZOHO Forms**
 - Name the connection
 - On *Use this connection to execute*
 - Select **Only specific triggers and actions**
 - Checkmark only **Entry Submitted - New Version**
 - Click **Authorize**
 - Click **Accept**
 - Select the form from the pickup list.
 - Leave the **Filter Criteria** empty.
 - Click **Done**
 - From Logic > Flow Control
 - Add a **Delay** step after the trigger
 - In **Delay for** type: '1 minute' (without the apostrophes)
 - Click **DONE**
 - From Logic > Flow Control
 - Add a **Select Variable** step after the previous one
 - Rename Variable if needed, in our case is *follower_1_id*
 - **Value**
 - Go to ZOHO Desk > Settings > Users And Control > Agents
 - Click the agent to add as a follower
 - Copy the last number from the URL
 - i.e. `https://desk.zoho.com/support/ORG_NAME/ShowHomePage.do#setup/users-control/agents/615417000000168353`
 - Paste **615417000000168353** in value
 - Click **Done**
 - Rename this step to **Follower 1 ID**
 - In Flow > Logic > Flow Control
 - Add a **Select Variable** step after the previous one
 - Rename Variable if needed, in our case is *follower_2_id*
 - **Value**
 - Go to ZOHO Desk > Settings > Users And Control > Agents
 - Click the agent to add as a follower

- Copy the last number from the URL
 - i.e. `https://desk.zoho.com/support/ORG_NAME/ShowHomePage.do#setup/users-control/agents/615417000000139001`
 - Paste **615417000000139001** in value
 - Click `Done`
- Rename this step to **Follower 2 ID**
- In Flow > Logic > Custom Functions
 - Click on `+ Custom Function`
 - Function name **updateTicketForm**
 - Return type **string**
 - Input Parameters

Name	Type
follower_1_id	<code>int</code>
follower_2_id	<code>int</code>
email	<code>string</code>
ticket_subject	<code>string</code>
- Copy the content of *updateTicketForm.dg*
- If there's no connection to **ZOHO Desk**, create one
 - Click on `MY CONNECTIONS`
 - Click on `CREATE CONNECTION`
 - Fin **ZOHO Desk**
 - Name the connection
 - On *Use this connection to execute*
 - Select **Only specific triggers and actions**
 - Checkmark
 - **Triggers > Ticket Created**
 - **Actions > Fetch Ticket**
 - **Actions > Update Ticket**
 - **Actions > Fetch Agent**
 - Click `Authorize`
 - Click `Accept`
 - You can find this connection name by clicking on `VIEW DETAILS`
- Update the information required in the function
 - Line 19, update **org_id**
 - Line 21, update **ticket_creator_api_name**
 - Line 33, update *connection* to the ZOHO Desk connection name
 - Line 48, update the last argument of `zoho.desk.searchRecords` to the ZOHO Desk connection name
 - Line 63, update the last argument of `zoho.desk.update` to the ZOHO Desk connection name
 - Line 83, update *connection* to the ZOHO Desk connection name
- Click `Save`
- Click the [X] mark in the top right corner
- Add `updateTicketForm` as the last step to the flow
 - **follower_1_id**
 - Click **Follower 1 ID** in the list to the right
 - Select your variable

- follower_2_id
 - Click **Follower 2 ID** in the list to the right
 - Select your variable
- email
 - Click **Entry submitted - New version** in the list to the right
 - Select **Submitted By**
- ticket_subject
 - Click **Entry submitted - New version** in the list to the right
 - Select **Subject**
- In the upper right corner, click on **YOUR FLOW IS** from **OFF** to **ON**
- Test the Flow creating an entry in your form.

Video:

