

## Zoho Flow Sandbox Creation Process

Unlike other Zoho applications, Zoho Flow does not support creating a sandbox environment directly. To address this limitation, we created a duplicate of Zoho Flow and set up a new function in Zoho Flow for sandbox operations.

When you need to create a record in the Zoho CRM sandbox from Zoho Flow, you must establish a connection between Zoho Flow and the Zoho CRM sandbox. Below is the step-by-step process for creating this connection:

### Steps to Create a Connection for Zoho CRM in Zoho Flow:

#### 1. Access Zoho Flow

Log in to your Zoho Flow application.

#### 2. Navigate to Settings

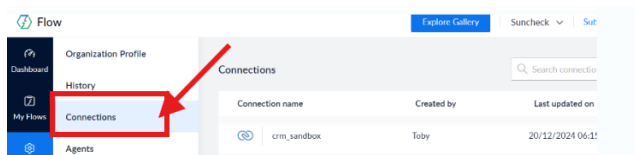
In the Zoho Flow dashboard, locate and click on the **Settings** option in the main menu. (Refer Fig 2)



(Refer Fig 2)

#### 3. Go to Connections

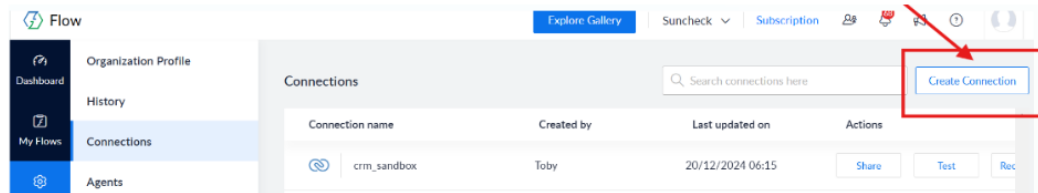
Under the Settings section, select **Connections** from the available options. (Refer Fig 3)



(Refer Fig 3)

#### 4. Create a New Connection

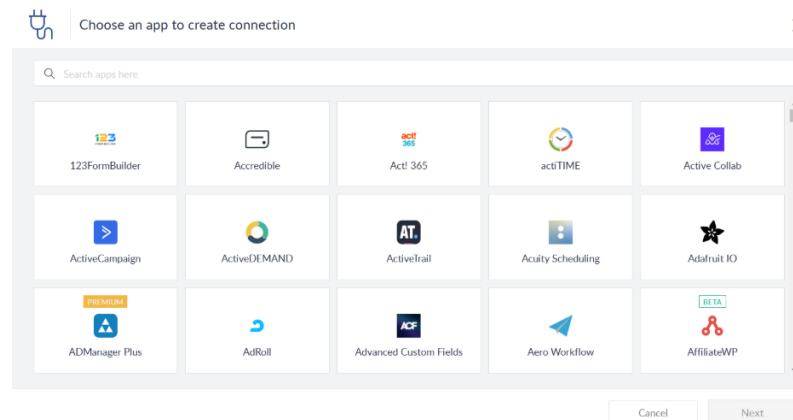
Click on the **New Connection** button to start creating a new connection. (Refer Fig 4)



(Refer Fig 4)

#### 5. Select the Application

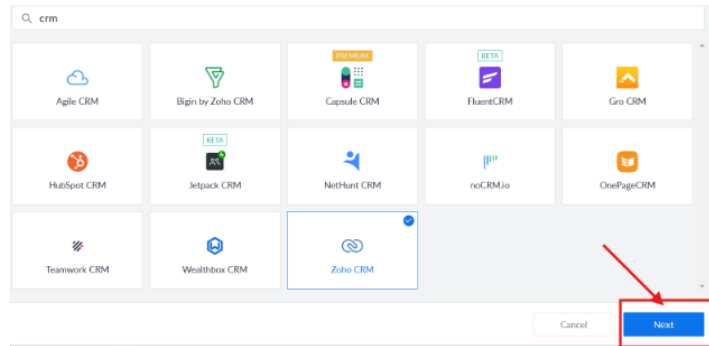
Choose the application you want to connect to, in this case, **Zoho CRM** (specifically for the sandbox). (Refer Fig 5)



(Refer Fig 5)

#### 6. Proceed with Setup

Click on the **Next** button to move to the connection details setup. (Refer Fig 6)



(Refer Fig 6)

## 7. Enter Connection Details

Provide a **name** for the connection. Ensure the name is descriptive, such as "Zoho CRM Sandbox Connection."

## 8. Authorize the Connection

Click on the **Authorize** button to proceed.(Refer Fig 8)




(Refer Fig 8)

## 9. Select the Sandbox Organization

A new window will open, prompting you to choose the organization associated with your Zoho CRM sandbox. Select the relevant sandbox organization to establish the connection. (Refer Fig 9)

Choose the services for Zoho Flow

 CRM

CRM


Choose one of the CRM's organizations to connect with Zoho Flow.

PRODUCTION

☐ Suncheck

**SANDBOX**

☐ Sandbox of CRM



(Refer Fig 9)

## 10. Complete the Process

Once the sandbox organization is selected, the connection setup will be completed successfully.

This connection will now enable seamless communication between Zoho Flow and the Zoho CRM sandbox, allowing you to test and validate your workflows in a controlled environment.