

Zenphi Actions

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Zenphi's Actions

Actions are the key building stones of Zenphi's automation flows, they decide what to do at each step of the workflow, such as sending an email or evaluating a line of text. Most actions depend on data provided from earlier actions, by external input, such as form or task response, values found in a table or a sheet. They also produce output which can be sent to its list of output tokens or stored in a table, sheet or document.

Exceptions to this are the *Control Flow* actions, which are part of the flow design itself, such as Log to History or Terminate.

Another special group of actions are the *Operations* actions, they are tools to help you shape and transform data such as the *Change Text Case* and *Perform Math Operation* actions.

Integral flow actions that are designed to provide data for the Zenphi functions are treated the same as other available integrations, for example the collection of Tables actions.

Index of Actions in Zenphi



Flow actions for building the logic in Zenphi

O, Break Loop

End the current loop

G Change State

Switch to a different state within the state machine

Concurrency Lock

Ensure only 1 instance of the contained actions are performed at any time, across all flows

C²Foreach item

Perform a set of actions for each item in a collection

^{...}, If Condition

Branch the flow based on a condition

Log to History

Creates a log entry in the flow run history with the specified message.

\mathcal{O} Loop

Repeat a set of actions n number of times

≓Parallel

Perform multiple actions at the same time

Parallel Foreach item

Perform a set of actions for each item in a collection in parallel

Pause

Pauses or delays the flow execution.

品Run Subflow

Run a Zenphi Subflow by passing input data, wait for its execution to finish, and retrieve the output data for further use.

ESet Run Name

Set the name of the current flow run.

Set Variable

Set variable values

🗘 State Machine

Define multiple paths/states of flow actions and use conditions to change between states

€Switch

Determine which branch to follow based on a condition

-€Switch By Value

Determine which branch to follow based on a value

⊗Terminate Flow End the flow execution



Actions to get input from users

Assign Task

Assigns an approval task to a user and waits for the outcome.

Request Data

Assign a task and/or collect data from users via an online form



A toolbox of functions to manipulate number, dates and text

Add Time to DateTime

Adds a specified amount of time to a given DateTime value.

Calculate Business Hours

Calculate business hours between two dates

Calculate Date Difference

Calculates the time difference between two dates.

AdChange Text Case

Converts a string to upper case, lower case, or title case.

Σ Compute Aggregations

Computes the minimum, maximum, sum, and average values for the given collection of numbers.

Sconcatenate Collection to Text

Concatenates the members of a collection into a single text string using the specified separator between each member.

Concatenate Text

Concatenates two text values into a single string.

Convert Base64 to File Converts a base64 string into file content.

Convert Collection to CSV Converts a collection of data into a CSV file.

Convert File Contents to String Converts the content of a file to a string.

Convert File to Base64

Converts a file into a base64 encoded string.

Soconvert Time Zone

Converts a DateTime value from one time zone to another.

Onvert Unix Timestamp to DateTime

Converts a Unix timestamp value to a DateTime.

^{24/7}Convert to DateTime

Converts a text value to a DateTime using the specified format.

Convert to JSON String

Converts any value to a JSON string.

¹²³⁵Convert to Number

Converts a text value to a number using the specified format.

Oconvert to Unix Timestamp

Converts a DateTime value to a Unix timestamp.

♦Count Items in Collection

Counts the number of items in a collection.

Create Text File

Creates a new text file from the provided text content.

OCurrent Date Time

Gets the current date and time in the specified time zone.

Execute Script

Evaluates a JavaScript expression.

T Extract Substring

Extract a string from a specific index with a given length.

Extract Text from HTML

Extracts text content from an HTML string.

Find Value with RegEx

Finds a single value that matches a specified RegEx pattern.

Find Values with RegEx

Finds all values that match a specified RegEx pattern.

^[24/7]Format Date Time

Format the specified date time value using a specific format string and culture.

Sormat Number

Converts a number to text using a specified format, such as currency or decimal.

Generate GUID

Generates a globally unique identifier (GUID).

Generate Random Number

Generates a random number.

✓Map Value

Maps or changes an input value based on specified criteria and returns the matching result.

@Parse Email Address

Parses an email address into structured data.

Perform Math Operation

Performs a mathematical operation such as addition, subtraction, multiplication, or division.

Executes a query to retrieve items from a collection based on specified criteria. Optionally group the items in the collection.

Read Flow Information

Retrieves context information for the current flow instance.

Replace Placeholders

Replaces one or more placeholder tokens in a text value with the specified values.

Replace Text

Replaces one or more placeholder tokens in a text value with the specified values.

Search Text

Checks if the text contains, starts with, or matches a certain pattern provided by the user.

Split Text with RegEx

Splits text into a collection of strings using a RegEx pattern.

ਾਂ Trim Text

Trims whitespace from the beginning and end of a text string.



Actions for integration of and communication with external applications

Convert JSON to Object

Converts JSON text to a structured object.

Convert XML to JSON

Converts an XML payload to a JSON object.

Encode/Decode Base64

Encodes or decodes a string value using Base64 encoding.

Generate Email HTML

Generates email HTML content using a specified template.

Make HTTP Request

Performs an HTTP request to a specified endpoint and immediately continues execution as soon as a response is received. Use this action when you need to make a call and handle the response without waiting for further external triggers.

Make HTTP Request with Callback

Performs an HTTP request to a specified endpoint, then pauses execution and waits for a callback to resume. Use this action when you need to make a call, pause the flow, and continue only after receiving a response or additional data. The action sends a callback URL in the x-zenphi-callback-url header, which the receiving API can use to trigger the continuation.



Find Zenphi File

Retrieves metadata, such as filename, size, and type, for a specified file in Zenphi.



Zenphi's built-in database where data is stored according to type and functions as an integral part of the Zenphi ecosystem.

Create Record

Create a new record in a Zenphi table. Returns newly created Record ID.

Create Records

Creates multiple records in a Zenphi table.

Delete Record

Deletes a record from a Zenphi table. Requires Record ID.

Delete Records

Deletes multiple records in a Zenphi table.

Find Record

Retrieves a record from a Zenphi table. Requires Record ID.

Returns a list of records from a Zenphi table based on one or more conditions.

EList Records by Id

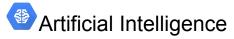
Returns a list of records from a Zenphi table. Requires Record IDs.

Finds a single record from a Zenphi table based on specified criteria. Returns Record ID for matching record.

Updates a record in a Zenphi table. Requires Record ID.

Dpdate Records

Updates multiple records in a Zenphi table.



All the Al integrations collected under one roof, this is where your flow becomes really smart.

Analyze Sentiment

Determines the sentiment of text using AI.

✦ Generate Text with Gemini

Generate new text and insights using Gemini's Generative AI. No setup is needed as this action uses Zenphi's built-in Gemini integration.

✦ Generate Text with Gemini (BYO API Key)

Generate text and insights using Gemini's Generative AI. Requires your own Gemini API key for setup.

Generate Text with Gen AI

Generate new text and insights using Zenphi's Generative AI. No setup is needed as this action uses Zenphi's hosted GPT-40 model.

Generate Text with OpenAI (BYO API Key)

Generate text, responses, or insights using prompts sent to OpenAI's API. Requires you to provide your own OpenAI API key for setup.

Generate Text with Reasoning Generative AI (Preview)

Generate responses and insights using supported Generative AI reasoning models. This action leverages models hosted in Zenphi's U.S. datacenter and requires no additional setup.

S Process Expense Document

Processes expense documents such as invoices and receipts to extract data from them.

Run Al Model

Executes the selected AI model on the specified PDF or Image file to extract values.

Run Document OCR

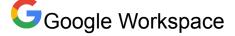
Extracts text from a document using OCR.

Translate Document

Translates a PDF, Microsoft Word, Excel, or PowerPoint document using AI while keeping the original document formatting.

Translate Text

Translates text and HTML content using AI.



For Google Workspace advanced and Admin functionality

Add Label to File

Adds a label to a Google Drive file using a selected or manual label ID.

अ Create Calendar

Creates a secondary Google Calendar.

GCreate Calendar Delegate

Creates a calendar delegate in Google Calendar.

BCreate Calendar Event

Creates a new Google Calendar event.

Create Draft

Creates a new draft with the DRAFT label

GCreate Forwarding Address

Creates a forwarding address for a Gmail account.

©Create Gmail Delegate Creates a delegate for a Gmail account.

GCreate Gmail Filter Creates a new filter in Gmail.

GCreate Gmail Label

Creates a new label in Gmail.

Delete All Calendar Events

Deletes all events associated with the primary Google Calendar of an account.

• Delete Calendar

Deletes a secondary Google Calendar.

Delete Calendar Event
 Deletes a Google Calendar event.

Delete File/Folder

Deletes a file or folder from Google Drive.

GDelete Forwarding Address

Deletes a forwarding address from a Gmail account.

GDelete Gmail Delegate Deletes a delegate from a Gmail account.

GDelete Gmail Filter Deletes a filter from Gmail.

GDelete Gmail Label Deletes a label from Gmail.

Delete Label from File Deletes a label from a file in Google Drive.

GDelete Mobile Device

Removes a mobile device.

Delete Permission

Deletes a permission or member from a file, folder, or Shared Drive in Google Drive.

[®] Disable 2-Step Verification

Turns off 2-Step Verification for a user in Google Directory.

GFind Auto Forwarding

Retrieves the auto forwarding settings for a Gmail account.

Hind Calendar Event

Retrieves the details of a Google Calendar event.

Find Calendar Events

Finds events within a Google Calendar based on search criteria.

Find File/Folder

Retrieves information about a file or folder in Google Drive.

GFind Forwarding Address

Retrieves a forwarding address for a Gmail account.

GFind Gmail Delegate

Retrieves a delegate for a Gmail account.

GFind Gmail Filter

Retrieves a filter from Gmail.

GFind Gmail Label Retrieves a label from Gmail.

Find Permission

Retrieves a permission by its ID in Google Drive.

Generate Verification Code

Generates new backup verification codes for a user.

Invalidate Verification Code

Invalidates the current backup verification codes for the user.

GList Calendar Delegates

Retrieves the calendar delegates for a Google Calendar.

GList Connected Applications

Returns the set of tokens specified user has issued to 3rd party applications.

BList Contacts

Retrieves a list of all contacts from Google Contacts.

List Drive Labels

Lists all labels available in Google Drive.

List Drives Shared Externally

Lists Google Shared Drives in your domain that have one or more external members.

Lists the labels assigned to a file in Google Drive.

GList Forwarding Addresses

Retrieves the forwarding addresses for a Gmail account.

GList Gmail Delegates

Retrieves the delegates for a Gmail account.

GList Gmail Filters

Retrieves the filters from Gmail.

GList Gmail Labels Retrieves the labels from Gmail.

GList Gmail Signatures

Retrieves the email signatures from Gmail.

GList Mobile Devices

Retrieves a paginated list of all user-owned mobile devices for an account.

△List Permissions

Lists the permissions of a file or Shared Drive in Google Drive.

GList User Calendars

Retrieves the calendars of a user in Google Calendar.

List User's Devices

Lists or searches for device users in Google Workspace.

List User's Files/Folders

Searches and lists files or folders that the specified user owns or has access to on Google Drive.

List User's Shared Drives

Lists the Google Shared Drives that the user has access to or the drives across your domain.

AList User's Shared Files

Lists shared files or folders for a user.

List Verification Codes

Retrieves the current set of valid backup verification codes for the specified user.

Move File/Folder

Moves a specified file or folder to a new location in Google Drive.

GRemove Connected Application

Removes all access tokens issued by a user for an application.

Share a specified file, folder, or Shared Drive in Google Drive.

GTake an Action On a Mobile Device

Takes an action that affects a mobile device. For example, remotely wiping a device.

GUpdate Auto Forwarding

Updates the auto forwarding settings for a Gmail account.

• Update Calendar Event

Updates an event in a Google Calendar.

GUpdate Gmail Label

Updates a label in Gmail.

GUpdate Gmail Signature

Updates the email signature for a Gmail account.

GUpdate Gmail Vacation Setting

Updates the vacation or out of office responder setting for a Gmail account.



Access and manipulate information from your AppSheet applications

Create Record

Creates a new record in the specified AppSheet table.

7 Delete Record

Deletes an existing record from the specified AppSheet table.

7 Find Record

Retrieves an existing record from the specified AppSheet table.



Returns a list of existing records from the specified AppSheet table.



VUpdate Record

Updates an existing record in the specified AppSheet table.



Effortlessly schedule meetings, set reminders, and organize your time across devices.

Add Attendees

Invites one or more new attendees to the specified Google Calendar event.

Sil Create Event

Creates a new Google Calendar event.

Delete Attendees

Removes one or more new attendees from the specified Google Calendar event.

Find Event

Retrieves the details of a Google Calendar event.

Hist Events

Returns events within a Google Calendar based on the provided search criteria.

Hist Free/Busy Information

Returns free/busy information for a set of Google Calendars.

• Update Event

Updates an event in a Google Calendar.



A streamlined messaging platform for teams to collaborate and communicate in real-time.

PAdd Space Member Add a Member to a Google Chat Space.

Create Space

Creates a space and adds specified users to Google Chat.

Delete Space Member Deletes a membership from a space. Lookup SpaceFind details about a space.

Post Message

Post a Message to Google Chat.

PSearch Spaces

Search and list spaces in the Google Chat.



Centrally manage and organize all your personal and professional contacts, accessible across Google services.

OCreate Contact

Creates a new contact in Google Contacts.

Ocreate External Contact

Creates a new external contact in your Google Workspace domain.

BDelete Contact

Deletes a contact from Google Contacts.

BDelete External Contact

Deletes an external contact in your Google Workspace domain.

Delete Contact Photo

Deletes the profile photo of a contact from Google Contacts.

BList Contacts

Returns a list of all contacts from Google Contacts.

BList External Contacts

Returns a list of external contacts in your Google Workspace domain.

OUpdate Contact

Updates a contact in Google Contacts.

Opdate External Contact

Updates an external contact in your Google Workspace domain.

OUpdate Contact Photo

Updates the profile photo of a contact in Google Contacts.



A centralized hub to manage users, groups, and organizational structure within a Google Workspace environment.

Add Alias

Adds an alias to a user in Google Directory.

Add to Group

Adds a user or group to another group in Google Directory.

• Assign License

Assigns a Google product license to a user in Google Directory.

ACreate Group

Creates a new group in Google Directory.

Create Organizational Unit

Creates a new organizational unit for users who need specific features and settings in Google Directory.

ACreate Password

Generates a random password using the specified requirements.

Create Role

Creates a role in Google Directory.

Create Role Assignment

Creates a role assignment in Google Directory.

Create User

Creates a new user in the directory in Google Directory.

Delete Alias

Removes an alias from a user in Google Directory.

ADelete Group

Deletes a group in Google Directory.

Contraction Contractica Contra

Removes a member from a group in Google Directory.



Delete License

Revokes a Google product license from a user in Google Directory.

Delete Organizational Unit

Removes an organizational unit in Google Directory.

O Delete Role Deletes a role in Google Directory.

• Delete Role Assignment

Deletes a role assignment in Google Directory.

Deletes a user in Google Directory.

Delete User Photo

Removes the user's photo in Google Directory.

Find Group

Retrieves a group's properties along with a list of all members in the group in Google Directory.

AFind Group Member

Read a group member's information in Google Directory.

• Find License

Retrieves a specific user's license by product SKU in Google Directory.

[®] Find Manager

Finds the manager of a specified user in Google Directory.

Find Organizational Unit

Retrieves an organizational unit in Google Directory.

Find User

Read a user's profile in Google Directory.

• Find User Photo

Retrieves the user's photo in Google Directory.

• Find User's Data Transfer

Retrieves a data transfer request by its resource ID in Google Directory.

• Find Users Usage

Retrieves users' usage information in the account in Google Directory.

CList Activities

Retrieves a list of activity events for a specific customer's account and application, such as the Google Drive application, in Google Directory.

Hist Calendar Resources

Retrieves a list of calendar resources for an account in Google Directory.

CList Data Transfers

Lists the data transfers for a customer by source user, destination user, or status in Google Directory.

List Direct Reports

Retrieves all users reporting to the specified manager in Google Directory.

List Group Aliases

Lists all aliases for a group in Google Directory.

AList Group Members

Retrieves a paginated list of all members in a group in Google Directory.

AList Groups

Finds groups in the directory in Google Directory.

OList Licenses

Lists all users assigned licenses for a specific product SKU in Google Directory.

CList Organizational Units

Retrieves a list of all organizational units for an account in Google Directory.

OList Privileges

Retrieves a list of all privileges for a customer in Google Directory.

[®]List Recently Deleted Users

Retrieves a list of users deleted in the last 20 days.

CList Role Assignments

Retrieves a list of all role assignments in Google Directory.

CList Roles

Retrieves a list of all the roles in a domain in Google Directory.

Restore User

Undelete a deleted user in Google Directory.

Sign Out User

Signs out a user in Google Directory.

Suspend User

Suspends or un-suspends a user in Google Directory.

Transfer User's Data

Transfers a user's data like Google Drive, Docs, Calendar to another user in Google Directory.

Opdate Group

Updates a group in the directory in Google Directory.

AUpdate Group Settings

Changes group settings in Google Directory.

OUpdate License

Updates a user's product SKU with a different SKU in the same product in Google Directory.

OUpdate Organizational Unit

Updates an organizational unit in Google Directory.

[®] Update User

Updates a user in the directory in Google Directory.

OUpdate User Photo

Adds a photo for the user in Google Directory.

[®] Update User to Admin

Changes a user's super administration rights in Google Directory.



A collaborative, online word processor for creating and editing text documents with real-time sharing.

Convert to Google Docs

Converts Microsoft Word, OpenDocument Text, HTML, RTF, plain text, JPEG, PNG, GIF, BMP, and PDF files to Google Docs format.

Create Document

Creates a new Google Docs document.

Create Document from Template

Creates a new document or PDF file using the specified template in Google Docs.

Create Document from Template

Creates a new document or PDF file using the specified template in Google Docs.

Export Document

Exports a Google Docs document to another file format.

Insert Content into Document

Inserts HTML or text content into a Google Docs document.

Insert Table from Sheets into Document

Adds a table range from a Google Sheets file to a specific place in a Google Docs document.

Merge Documents

Inserts the content of one Google Docs document into another document.

Replace Placeholders in Document

Updates a Google Docs document by replacing one or more placeholder tokens with the specified text.

Translate Google Docs Document

Translates a Google Docs document into another language using AI.



Securely store, share, and access all your files from anywhere, on any device.

Add Label to File

Adds a label to a Google Drive file using a selected or manual label ID.

Add Member to Shared Drive

Adds a member to a specified Shared Drive in Google Drive.

Copy File

Copies a specified file in Google Drive.

Create Comment

Adds a comment to the specified file in Google Drive.

Create Folder

Creates a new folder in Google Drive.

Create Shared Drive

Creates a new Google Shared Drive in Google Drive.

Create Shortcut

Creates a shortcut to a specified file or folder in Google Drive.

Delete Item

Deletes a specified file or folder in Google Drive.

Delete Member from Shared Drive

Removes a member from a specified Shared Drive in Google Drive.

Delete Shared Drive

Removes a specified Shared Drive in Google Drive.

Delete Sharing

Deletes a permission or member from a specified file, folder, or Shared Drive in Google Drive.

Export File

Exports a Google Drive file to a specified file format.

Find Comment

Retrieves a specific comment from a file in Google Drive.

Find File/Folder

Retrieves information about a specified file or folder in Google Drive.

Find Permission

Retrieves a permission by its ID in Google Drive.

Generate HTML from Template

Generates an HTML file or content in Google Drive using a specified template.

Returns all comments from a specified file in Google Drive.

Searches and lists files and folders in Google Drive that match the specified filter criteria.

List Permissions

Lists the permissions of a specified file or Shared Drive in Google Drive.

List Shared Drive Members

Lists the members of a specified Shared Drive in Google Drive.

List Shared Drives

Lists the Google Shared Drives that the user has access to or the drives across your domain.

Ave File/Folder

Moves a specified file or folder to a new location in Google Drive.

Move Files/Folders

Moves a collection of files or folders to a new location in Google Drive.

Rename File/Folder

Renames a specified file or folder in Google Drive.

Save File

Uploads and saves a file to Google Drive.

Set Drive Visibility

Hides or shows a Google Shared Drive from the default view in Google Drive.

Share File/Folder

Share a specified file, folder, or Shared Drive in Google Drive.

Updates a file in Google Drive by adding a new version of it.



Google's intuitive email service offers seamless communication, robust organization, and powerful search.

Add Label

Adds a label to an Gmail email message.

Create Draft

Creates a new draft with the DRAFT label

Create Label

Creates a new label in Gmail.

Delete Email Label

Deletes one or more labels from the specified email message in Gmail.

Delete Email Label

Deletes one or more labels from the specified email message in Gmail.

Delete Label Deletes the specified label in Gmail.

Find Email

Retrieves a Gmail message using its ID.

Find Label

Retrieves information for the specified label in Gmail.

List Emails

Searches through Gmail emails based on the provided criteria.

List Labels

Returns a list of all labels in the user's Gmail mailbox.

Send Email

Send an email using Gmail.

Google Reseller

A centralized platform for Google Resellers to manage subscriptions.

Service Find Customer

Retrieves the specified customer's information in your Google Reseller account.

Service Subscription

Retrieves the specified subscription's information in your Google Reseller account.

List Subscriptions

Returns a list of subscriptions managed by the reseller. The list can include all subscriptions, all of a customer's subscriptions, or all of a customer's transferable subscriptions.



A powerful, collaborative online spreadsheet program for data analysis, organization, and visualization.

Add Row

Adds a new row to the end of a Google Sheets document.

Add Rows

Adds multiple new rows to the end of a Google Sheets document from the specified collection.

Append Row

Adds a new row to the end of a Google Sheets document.

Convert to Sheets

Converts Microsoft Excel, OpenDocument Spreadsheet, CSV, TSV, and plain text files to Google Sheets format.

Copy Sheet

Creates a copy of a single sheet from a Google spreadsheet to another Google spreadsheet.

Create Sheet

Adds a new sheet to an existing Google Sheets document.

Create Spreadsheet

Creates a new Google Sheets document.

Delete Rows

Deletes the specified rows in a Google Sheets document.

Delete Sheet

Deletes a sheet from an existing Google Sheets document.

Duplicate Sheet

Creates a copy of an existing sheet within the same Google Sheets document.

Export Spreadsheet

Exports a Google Sheets document to another file format.

Export to PDF

Exports a Google Sheets or a specific range to a PDF format.

Find Row

Retrieves a row from a Google Sheets document using its row number.

Find Spreadsheet

Retrieves the Google Sheets document using the specified ID.

lnsert Cells

Inserts a set of cells or a full row at a specific row number in a Google Sheets document.

List Columns

Retrieves a range of values from the specified columns in a Google Sheets document.

List Rows

Retrieves all rows from the specified sheet or range in a Google Sheets document.

Lookup Row

Finds a single row in a Google Sheets document by searching values in a specified column.

Lookup Rows

Finds rows in a Google Sheets document by searching values in a specified column.

Rename Sheet

Renames a specific sheet in a Google Sheets document.

Update Row

Updates a specific row in a Google Sheets document.

Update Rows

Updates multiple rows in a Google Sheets document.



Create and collaborate on engaging presentations online with a variety of themes and multimedia options.

Add Chart to Slide

Adds a chart from a Google Sheets file to a specific location in a Google Slide.

Convert to Google Slides

Converts Microsoft PowerPoint and OpenDocument Presentation files to Google Slides format.

Delete Slides

Deletes one or more slides from a Google Slides file.

Duplicate Slide

Creates a copy of a slide within the same Google Slides file.

Export Google Slides

Exports a Google Slides file to another file format.

Generate Slides from Template

Generates a Google Slides or PDF file from a template.

Merge Slides

Merges multiple slides into a single Google Slides file.

Replace Placeholders

Updates a Google Slides document by replacing one or more placeholders with the specified text.



A scalable and durable object storage service for businesses to store and access their data in the cloud.

Copy Object

Copies an object between buckets in Google Cloud Storage.



A simple and integrated to-do list to manage and track your tasks across Google services.

Create Task

Adds a new task to a specified task list in Google Tasks.

Create Task List

Creates a new task list in Google Tasks.

Find Task

Retrieves a task from a specified task list in Google Tasks.

Find Task List

Retrieves information about a specific task list in Google Tasks.

List Task Lists

Returns a list of all task lists in Google Tasks.

List Tasks

Returns all tasks in a specified task list in Google Tasks.

Dpdate Task

Updates a specified task in Google Tasks.



Retain, archive, search, and export your organization's data from Google Workspace for compliance and legal needs.

⊠Create Export

Creates a new export in Google Vault.

☑ Find Export

Retrieves the specified export from Google Vault.

⊠List Exports

Returns a list of all exports in Google Vault.



A trusted electronic signature solution to easily send, sign, track, and manage documents securely in the cloud.

Send Document for Signing

Send a document for signing using Adobe Sign.

→ Send Template for Signing

Send a document for signing using a template in Adobe Sign.



A universally compatible file format preserving document formatting and content across different platforms.

Add Watermark

Adds a watermark to a newly rendered PDF document or an existing one.

Convert HTML to PDF

Converts an HTML string to a PDF document.

Convert Images to PDF

Converts one or more image files to a PDF document, with each image creating one page.

Extract Pages

Extracts one or more pages from the specified PDF document into a new PDF document.

Fill PDF Form

Fills out a form in a PDF document.

🚥 List Fields

Retrieves fields from a PDF document.

Merge Documents

Joins two or more PDF documents into one document.

Read Document Information

Retrieves metadata such as title, page count, etc., of a PDF document.

Split Pages

Splits PDF document pages and creates one new PDF document per page.

Update Security Settings

Configures protection settings for a PDF document.



A relationship intelligence platform built for dealmakers in private capital to find, close, and grow deals faster by leveraging their network.

&Create List Entry

Creates a new entry in the specified Affinity list.

&Create Organization

Creates a new Affinity organization.

&Find Organization

Searches your Affinity team's data and retrieves all organizations that meet the search criteria.

&Find People

Searches your Affinity team's data and retrieves all persons that meet the search criteria.

&List Entries

Returns all entries in the specified Affinity list.

𝔅Update List Entry

Updates an existing entry in the specified Affinity list.

&Update Organization

Updates an existing Affinity organization in the system.

&Upload Files

Uploads files attached to the specified Affinity entity.



A collaborative spreadsheet-database hybrid for organizing information, managing projects, and building custom applications without code.

Create Record

Creates a new record in the specified Airtable base.

Delete Record

Deletes the specified record from the Airtable base.

Find Record

Retrieves the specified record by its unique identifier from the Airtable base.



Returns a list of records from the specified Airtable base.



Updates the specified record with new information in the Airtable base.



An Australian-made eSignature platform offering secure and efficient digital document signing with features like SMS sending, team management, and blockchain verification.

▲ Send Document for Signing

Creates an Annature envelope using documents and sends it to recipients for digital signatures.

▲ Send Template for Signing

Sends a digital signing request based on the specified template.



A leading work management platform helping teams organize, track, and manage their projects and tasks effectively.

Create Comment Creates a new comment in Asana.

Create Custom Field Creates a new custom field in Asana.

OCreate Project Creates a new project in Asana.

^{oo}Create Task

Creates a new task in Asana.

OCreate Team Creates a new team in Asana.

SoDelete Custom Field

Deletes the specified custom field in Asana.

So Delete Project Deletes the specified project in Asana. oo Delete Task

Deletes the specified task in Asana.

% Find Project

Retrieves the specified project information in Asana.

So Find Task

Retrieves the specified task information in Asana.

So Find Team

Retrieves the specified team information in Asana.

%Find User

Retrieves the specified user information in Asana.

⁶ Find Workspace

Retrieves the specified workspace information in Asana.

&List Projects Returns a list of projects in Asana.

&List Tasks Returns a list of tasks, optionally filtered by specified criteria, in Asana.

ஃList Teams Returns a list of teams in Asana.

ooList Users Returns a list of users in Asana.

&List Workspaces Returns a list of workspaces in Asana.

OUpdate Custom Field Updates the specified custom field in Asana. OUpdate Project Updates the specified project in Asana.

OUpdate Task Updates the specified task in Asana.

OUpdate Team Updates the specified team in Asana.

So Update Workspace

Updates the specified workspace in Asana.

Supload Attachment

Uploads an attachment to an object and returns the compact record for the created attachment in Asana.



An all-in-one productivity platform combining project management, tasks, docs, goals, and more in a customizable workspace.

Create Task

Creates a new task in your ClickUp account.

Celete Task

Deletes a task in your ClickUp account.

CList Tasks

Returns a list of tasks in your ClickUp account.

CUpdate Task

Updates the specified task in your ClickUp account.



The leading eSignature platform enables secure and legally binding electronic agreements across various industries.

➡ Send Document for Signing

Sends one or more documents for signing using DocuSign.

▲ Send Template for Signing

Sends a document for signing using a specified DocuSign template.



A widely used cloud storage and file synchronization service for accessing and sharing files across devices.

℅Create Folder
Creates a new folder in Dropbox.

Solution Soluti Solution Solution Solution Solution Solution Solution S

Find FileRetrieves information about the specified file.

Rename ItemRenames a file or folder in Dropbox.

♥Upload File
Uploads a file to Dropbox.

♥Upload FilesUploads a collection of files to Dropbox.



A comprehensive CRM platform offering tools for marketing, sales, service, and operations to grow your business.

Create Note Creates a note in HubSpot.

Create Record Creates a new Contact, Company, Deal, or Ticket in HubSpot.

Delete Record

Deletes (archives) a record in HubSpot.

>Find Contact

Find a contact in HubSpot using their email address.

➢Find HubSpot Owner

Retrieves HubSpot owner information using the owner ID or email address.

Find Note

Retrieves a note identified by its ID in HubSpot.

➢Find Record
Retrieves a record from HubSpot.

Seturns all owners in a HubSpot account.

⇒List Records

Reads records from HubSpot matching the specified filter.

List Records by Text Query

Performs a text search against all property values in HubSpot.

Log Email Activity

Logs an email activity for a HubSpot object like contact, company, etc.

Update Email Activity

Updates a HubSpot email activity for a HubSpot object like contact, company, etc.

Update Record

Updates fields of an existing record in HubSpot.



A powerful issue tracking and project management tool designed for software development teams and beyond.

Create Comment

Creates a comment on the specified issue.

Create Issue

Creates a new issue or subtask in Jira, if the option to create subtasks is enabled.

Create Project

Creates a new project based on a specified project type template.

Create Project Category
 Creates a new project category in Jira.

Delete Issue

Deletes the specified issue from Jira.

Delete Project

Find Issue

Deletes the specified project from Jira.

Delete Project Category

Deletes the specified project category from Jira.

Retrieves the details of the specified issue in Jira.



A flexible service desk solution built on Jira, enabling IT and service teams to manage requests, incidents, problems, and changes efficiently.

♦List Issues

Finds issues based on the specified search criteria in Jira.

List Project Categories

Returns a list of all project categories in Jira.

♦ List Projects

Returns a list of all projects in Jira.

List Users by Project

Returns a list of users associated with the specified project key in Jira.

♦ Update Issue

Updates the specified issue in Jira.

◆Update Project

Updates the details of the specified project in Jira.

Create Comment

Creates a public or internal comment on an existing customer request.

Create Ticket

Creates a ticket in Jira Service Desk.

Find Ticket

Retrieves information about a specific ticket.

List Tickets

Returns a list of tickets, optionally filtered by the specified criteria.

+Update Ticket

Updates information for a specific ticket.



The world's largest professional networking platform for building connections, finding jobs, and sharing industry insights.

in Create Post

Creates a new post on a LinkedIn page.



A flexible Work OS where teams build custom workflows, manage projects, and collaborate effectively to achieve their goals.

M•Create Board

Creates a new board in the specified workspace on monday.com.

Create Item

Creates a new item in monday.com.

M-Create Subitem

Create a subitem

II. Delete Column Values

Deletes all items within a column's values in monday.com.

II. Delete Item

Deletes an item from a board on monday.com.

Nownload File

Downloads a file using its public URL in monday.com.

II. Find Item

Retrieves an item from all boards or specific boards in monday.com.

Get Files

Get files from all boards or specific boards

Get Items By Group

Get items from a specific group

II. List Boards

Returns a list of boards from all workspaces in monday.com.

IIList Items

Returns items from all boards or specific boards in monday.com.

Move Item

Moves an item between groups within the same board in monday.com.

Update Item

Updates the values of columns on a specific item in monday.com.

W-Update Subitem

Update values of columns on a specific subitem

W-Upload File

Adds a file to the file column of a specific item in monday.com.

Microsoft Entra ID

Microsoft's cloud-based identity and access management service, providing secure access to applications and resources for employees, partners, and customers.

Assign Manager

Assigns a manager to a user in Azure Active Directory.

Create Group

Creates a group in Microsoft Entra ID (formerly Azure Active Directory).

Create User

Creates a user in Microsoft Entra ID (formerly Azure Active Directory)

Delete Group

Deletes a group from Microsoft Entra ID (formerly Azure Active Directory).

Delete User

Deletes a user from Microsoft Entra ID (formerly Azure Active Directory)

♦ Invite User

Invites a person as an external user in Microsoft Entra ID (formerly Azure Active Directory).

List Groups

Returns a list of groups from your Microsoft Entra ID (formerly Azure Active Directory).

List Users

Returns a list of users from your Microsoft Entra ID (formerly Azure Active Directory).

Update Group

Updates a group in Microsoft Entra ID (formerly Azure Active Directory).

Update User

Updates a user in Microsoft Entra ID (formerly Azure Active Directory).



A powerful spreadsheet software for data analysis, calculations, charting, and organization.

回Add Row

Adds a new row to a Microsoft Excel document or its table.

回Create Sheet

Adds a new sheet to an existing Microsoft Excel document.

Create Table

Create a new table in a specific sheet.

回Delete Rows

Deletes the specified rows in a Microsoft Excel document.

回List Rows

Retrieves all rows from the specified sheet or range in a Microsoft Excel document.

回List Sheets

Returns the names of all sheets within the selected workbook.

回List Tables

Retrieves all tables from the specified sheet in a Microsoft Excel document.

Finds a row in a specified Sheet in a Microsoft Excel document by searching values in a specified column.

但Lookup Rows

Finds rows in a specified Sheet in a Microsoft Excel document by searching values in a specified column.

回Update Row

Updates a row in a Microsoft Excel document or its table.



A personal information manager that integrates email, calendar, contacts, and tasks for efficient communication and organization.

Send Email

Send an email using the specified Outlook account.



A widely used word processing software for creating, editing, and formatting text documents.

· 回Generate Document Using Microsoft Word Template

Creates a new document or PDF file using the specified template in Microsoft Word format. Merge Microsoft Word Documents

Merge two Microsoft Word documents into a single Word document.



Microsoft's cloud storage service that lets you store files and photos and access them from any device.

Convert File

Convert a OneDrive file to a specified file format.

Copy File Copies a specified file in OneDrive.

Create Folder Creates a new folder in OneDrive.

Create Share Link

Creates a new sharing link for a file or folder in OneDrive.

CDelete File/Folder

Delete a specified file or folder from OneDrive.

C Download File Downloads a file using its public URL in

OneDrive.

Find File/Folder

Retrieves information about a specified file or folder in OneDrive.



A Microsoft platform for team collaboration, document management, and building intranet sites.

Check In File

Checks in a checked out file in document library

Check Out File Check out a file in document library

CList Files/Folders

Retrieve a list of files/folders in a specified OneDrive folder.

CMove File/Folder

Moves a specified file or folder to a new location in OneDrive.

CRename File/Folder

Renames a file or folder in OneDrive.

Search Files/Folders

Searches and lists files and folders in OneDrive that match the specified name.

C Update File Updates the content of a file in OneDrive.

CUpload File Uploads a file to OneDrive.

Copy File

Copy a file in a SharePoint document library or OneDrive Business.

Delete File/Folder

Delete a specific file or folder from the SharePoint document library or OneDrive Business.

Discard Check Out File

Discard the check out of a file in the document library. Any changes made to the item while it was checked out are discarded.

Find File/Folder

Retrieves information and metadata about a specified file or folder in document library or OneDrive Business

List Files/Folders

Retrieve a list of files/folders in SharePoint document library or OneDrive Business

Move File/Folder

Move a file or folder to a new location in a SharePoint document library or OneDrive Business.

Rename File/Folder

Rename a file or folder in a SharePoint document library or OneDrive Business.

Upload File

Upload a file to a location in a SharePoint document library or OneDrive Business.

SharePoint List

Flexible, customizable lists within SharePoint for tracking information, managing workflows, and organizing data collaboratively.

SAdd Attachment

Adds an attachment to an item in a SharePoint list.

Create List Item

Creates a new list item in a SharePoint list.

Delete Items

Delete items from a SharePoint list.

Service Find Item

Find an item from a SharePoint list.

List Items

Get the collection of items in a SharePoint list.

Update List Item

Updates a list item in a SharePoint list.



A robust relational database management system by Microsoft for storing, retrieving, and managing data.

Execute SQL Query

Executes any SQL query on the SQL Server database.



A popular open-source relational database management system known for its reliability and ease of use.

Myson Execute MySQL Query

Executes any SQL query on the MySQL Server database.



A leading multi-model database management system known for its scalability, reliability, and performance for enterprise applications.

ORACLE Execute Oracle Query

Executes a specified SQL query on an Oracle Server.



A serverless, highly scalable, and cost-effective data warehouse for analytics and big data processing.

Execute Query

Executes an SQL query in the specified Google BigQuery project.



A sales-focused CRM platform for managing deals, tracking activities, and growing revenue through effective pipeline management.

PCreate Deal

Creates a new deal in Pipedrive.

PDelete Deal

Deletes the specified deal in Pipedrive. The deal will be permanently removed after 30 days.

PFind Deal

Retrieves the details of a specific deal in Pipedrive.

PList Deals

Find deals by searching through titles, notes, and/or custom fields in Pipedrive.

PUpdate Deal

Updates the properties of a specified deal in Pipedrive.



Cloud-based accounting software for small businesses to manage finances, track expenses, and generate reports with ease.

Create Bill

Creates a new bill in your QuickBooks account.

Create Customer

Creates a new customer in your QuickBooks account.

Create Expense

Creates a new expense in your QuickBooks account.

Create Invoice

Creates a new invoice in your QuickBooks account.

Create Vendor

Creates a new vendor in your QuickBooks account.

Delete Bill

Deletes a bill in your QuickBooks account.

Delete Invoice

Deletes an invoice in your QuickBooks account.

Find Customer

Finds a specific customer in your QuickBooks account.

Find Term

Find a specific term in your QuickBooks account.

Find Vendor

Find a specific vendor in your QuickBooks account.

List Bills

Returns a list of bills in your QuickBooks account.

List Customers

Returns a list of customers in your QuickBooks account.

List Expenses

Returns a list of expenses in your QuickBooks account.

List Invoices

Returns a list of invoices in your QuickBooks account.

List Terms

Returns a list of terms in your QuickBooks account.

List Vendors

Returns a list of vendors in your QuickBooks account.

Update Bill

Updates a bill in your QuickBooks account.

Update Customer

Updates a customer in your QuickBooks account.

Update Invoice

Updates an invoice in your QuickBooks account.

Update Vendor

Updates a vendor in your QuickBooks account.



The leading cloud-based CRM platform empowering businesses with tools for sales, service, marketing, and more to build stronger customer relationships.

Create File

Creates a new file in a Salesforce account.

Create Record

Creates a new record in Salesforce.

ODelete File

Deletes the file linked to a record in Salesforce.

ODelete Record

Deletes a record from Salesforce.

CFind Record

Retrieves a record from Salesforce.

CList Files

Returns a list of files associated with a record in Salesforce.

CList Records

Returns a list of records from Salesforce matching the specified filter.

OUpdate Records

Updates records in Salesforce matching the specified filter.



A leading cloud-based email platform for reliable transactional and marketing email delivery at scale.

Send Email

Send an email using SendGrid.



A popular messaging and collaboration platform bringing teams together with channels, direct messages, and integrations.

* Add Members

Adds users to the specified Slack channel.

Recreate Channel

Creates a new public or private channel in Slack.

☆Create User Group
Creates a new user group in Slack.

ist Channel Members

Returns a list of members in the specified Slack channel.

않List User Group Members

Returns a list of all users in the specified user group.

*List User Groups

Returns a list of all user groups for the team.

Send Message

Sends a message to a specified Slack channel.

BUpdate Channel

Edits the channel name or archives the specified channel.

⁸⊮Update User Group

Updates an existing user group in Slack.

📽 Update User Group Members

Updates the list of users in the specified user group.

⁸⊮Update User Group Status

Enables or disables an existing user group in Slack.

Smartsheet

A collaborative work management platform for planning, tracking, and managing projects and processes with a spreadsheet-like interface.

Attach File

Attach a file to the specified row in Smartsheet. Create Row Creates a new row in the specified Smartsheet sheet.

Delete Rows Deletes one or more rows from the specified Smartsheet sheet. Find Row
 Retrieves a row from the specified
 Smartsheet sheet.
 List Rows
 Returns a range of rows from the specified
 Smartsheet sheet.
 Update Row
 Updates cell values in the specified row of a Smartsheet sheet.



A global cloud communications platform providing businesses with voice, messaging, and connectivity services through robust APIs and a reliable network.

Send SMS

Send a text message to a cell/mobile number using Telnyx.



A visual project management tool using boards, lists, and cards to organize tasks and collaborate with teams.

Create Card

Update Card

Creates a new card on the specified board.

Updates a card on the specified board.

Delete Card

Deletes a card from the specified board.



A cloud communications platform enabling businesses to integrate voice, SMS, video, and other communication functionalities into their applications via APIs.

⊕Send SMS

Send a text message to a specified mobile number using Twilio.



A cloud-based accounting software designed for small businesses, offering features like invoicing, bank reconciliation, and financial reporting.



Creates a new bill in your Xero account.

Create Invoice

Creates a new invoice in your Xero account.

Create Purchase Order

Creates a new purchase order in your Xero account.

Email Invoice

Emails the invoice to the contact selected in that invoice.

List Bills

Returns a list of bills in your Xero account.

List Invoices

Returns a list of invoices in your Xero account.

List Purchase Orders

Returns a list of purchase orders in your Xero account.

Read Invoice/Bill as PDF

Retrieves the specified invoice or bill as a PDF document.



Retrieves the specified purchase order as a PDF document.

Update Bill

Updates the specified bill in your Xero account.

Update Invoice

Updates the specified invoice in your Xero account.

Update Purchase Order

Updates the specified purchase order in your Xero account.

The list of readily available integrations is growing all the time. This list is updated from time to time to reflect changes. The date for this update is displayed in the header of this document.

In-depth documentation for each of the actions is available on request.

For more information about any of the above Actions, how to get your own custom actions or if you wish to add your application to the list, get in touch with me and I will help you out.

I wish you all the best and good use of this index.



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