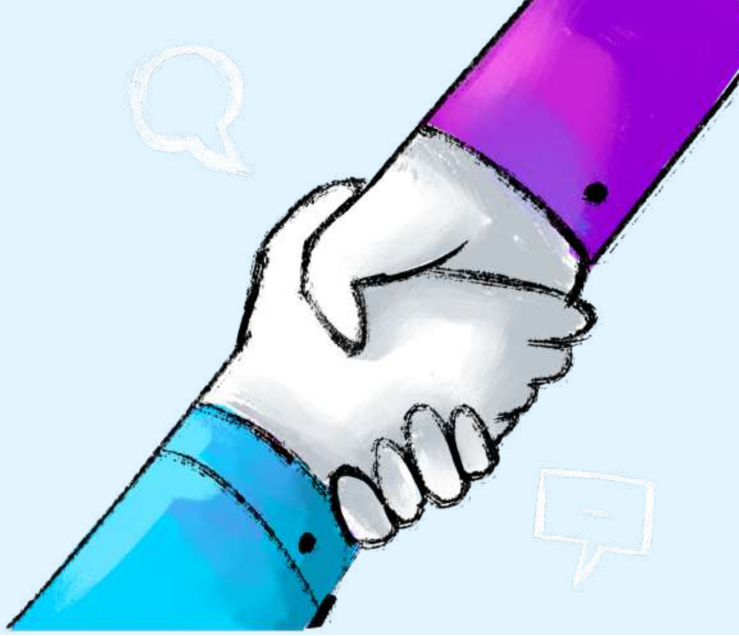
Admin panel handbook

Table of contents

Welcome to



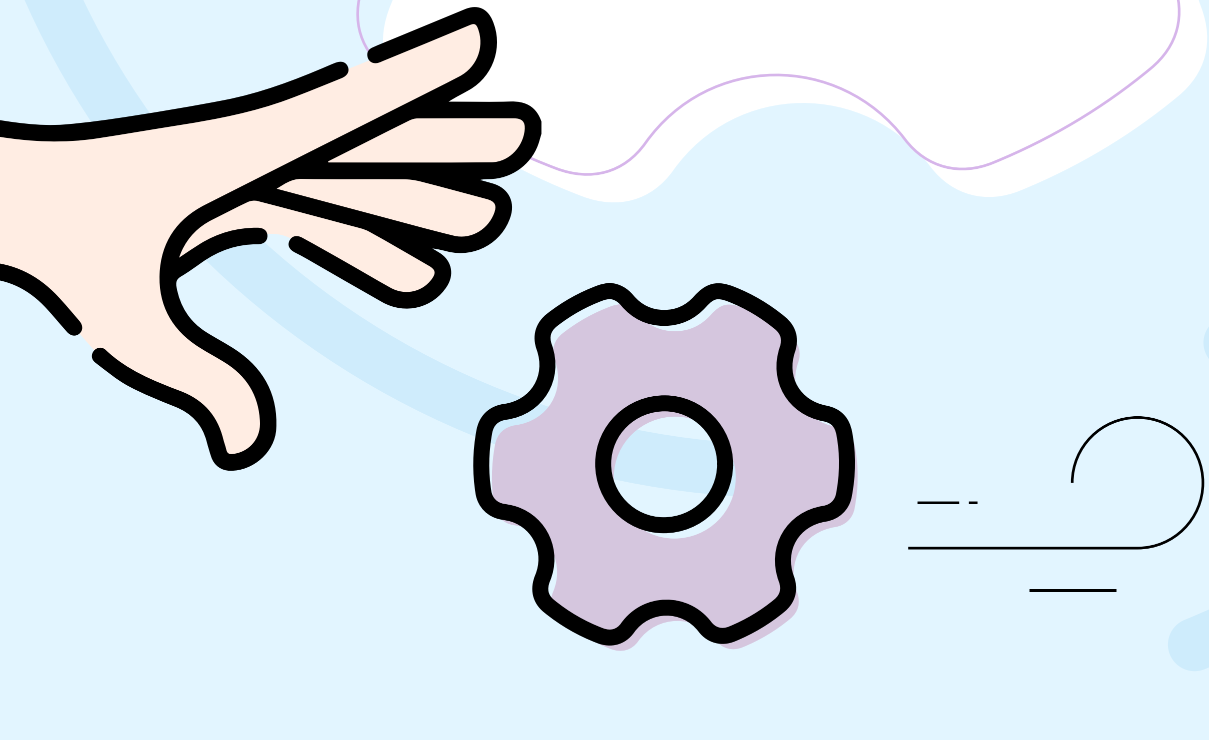
Zoho Cliq

This handbook will guide you through your admin capabilities in Zoho Cliq and help you make the most of all that Zoho Cliq has to offer.

We have also highlighted many of the useful features of Zoho Cliq to empower you as an admin.

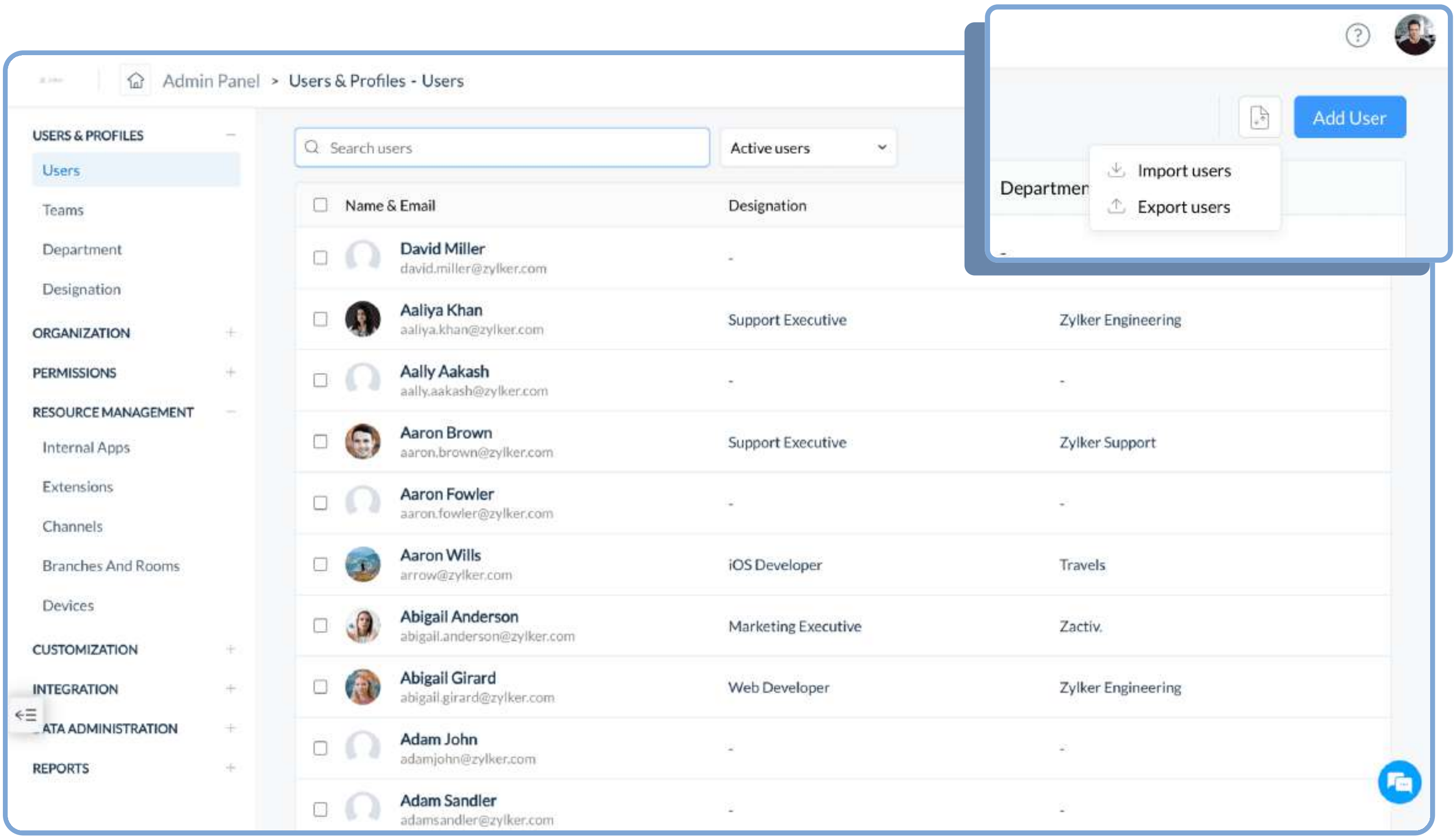
Initial setup :

Invite users, create departments, and track adoption rates.



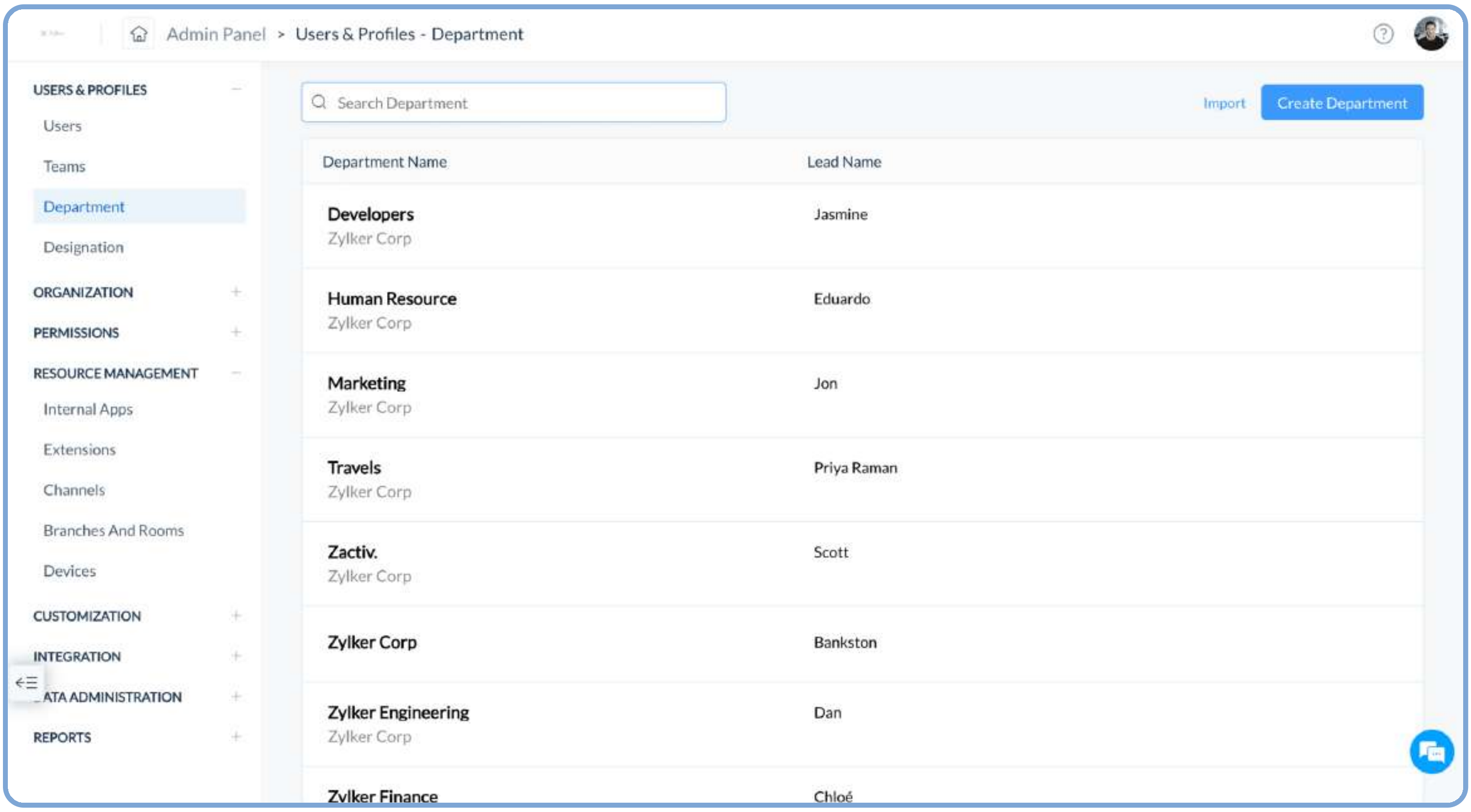
Inviting users

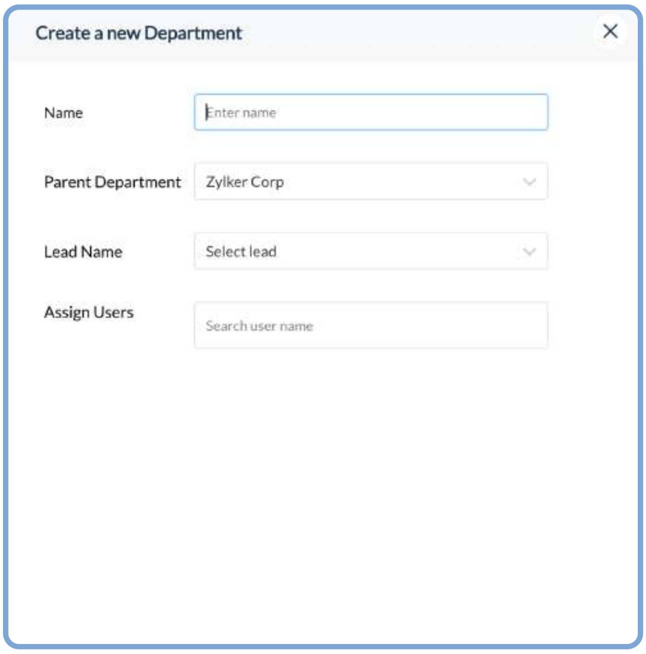
The first step to using Zoho Cliq is to onboard your employees. Once they have been added to Zoho Cliq as members of your organization, your employees can use the software and its features to boost the organization's productivity and performance. To add users, go to the **Admin Panel > Users & Profiles - Users.** Click **Add User** and add the employee's email to invite them. You can also click on the + icon near the search bar on the Zoho Cliq homepage to add users.

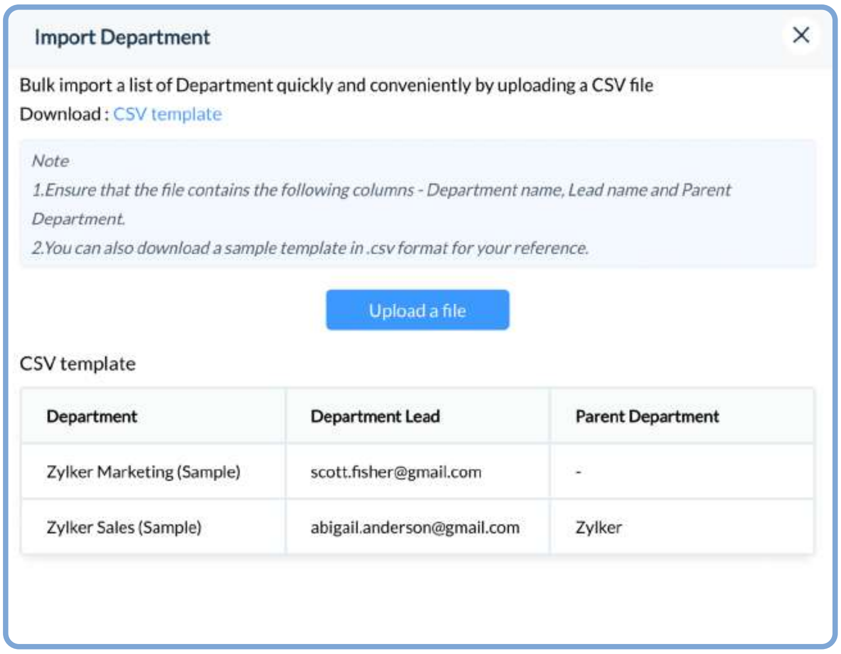


Creating departments

Departments help you classify the employees in your organization based on the area of work. Structure your organization's hierarchy and manage your employees by mapping them with their work divisions. To create a department, go to the **Admin Panel > Users & Profiles - Department.**



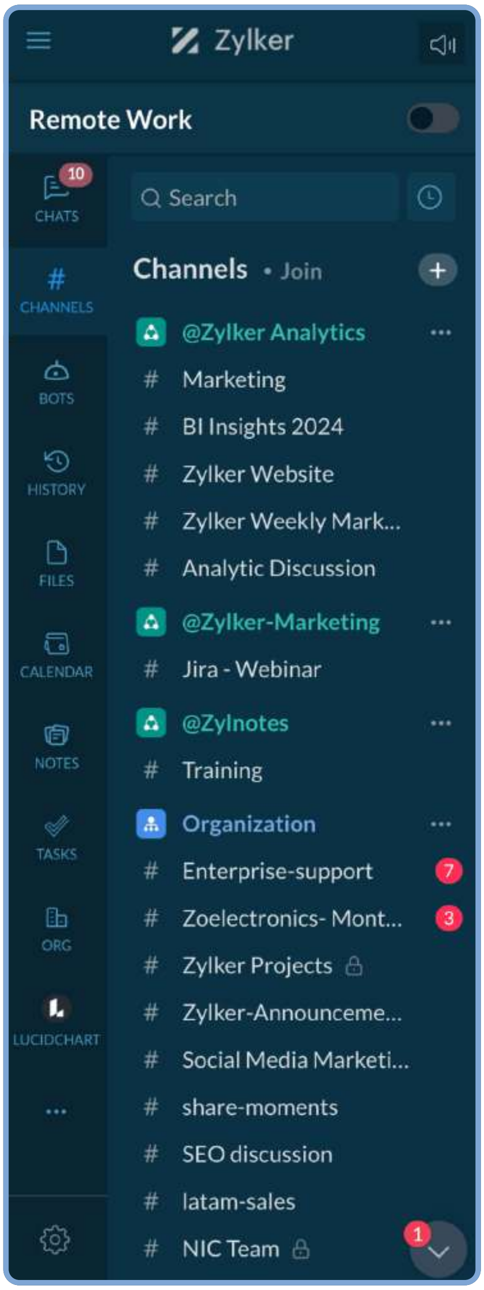


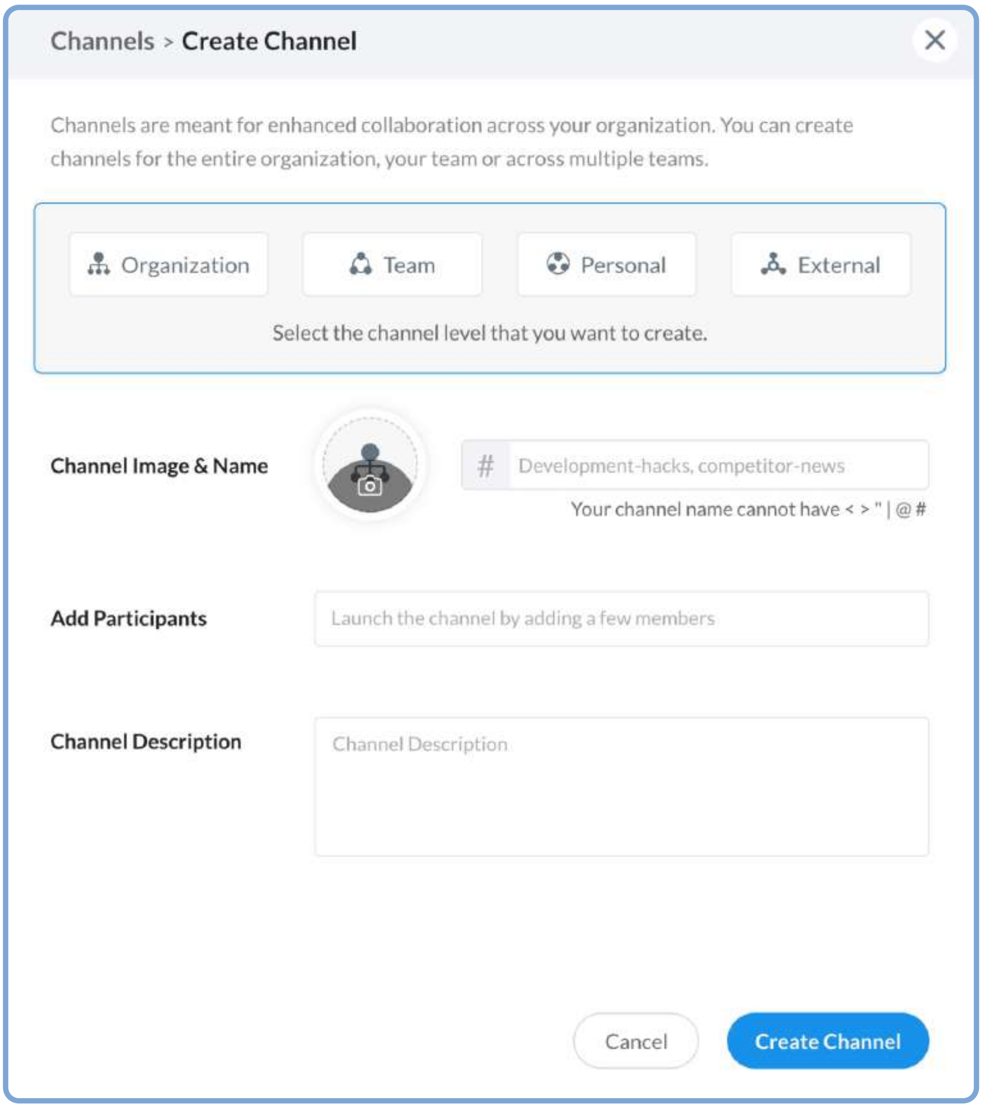


Collaborating in channels

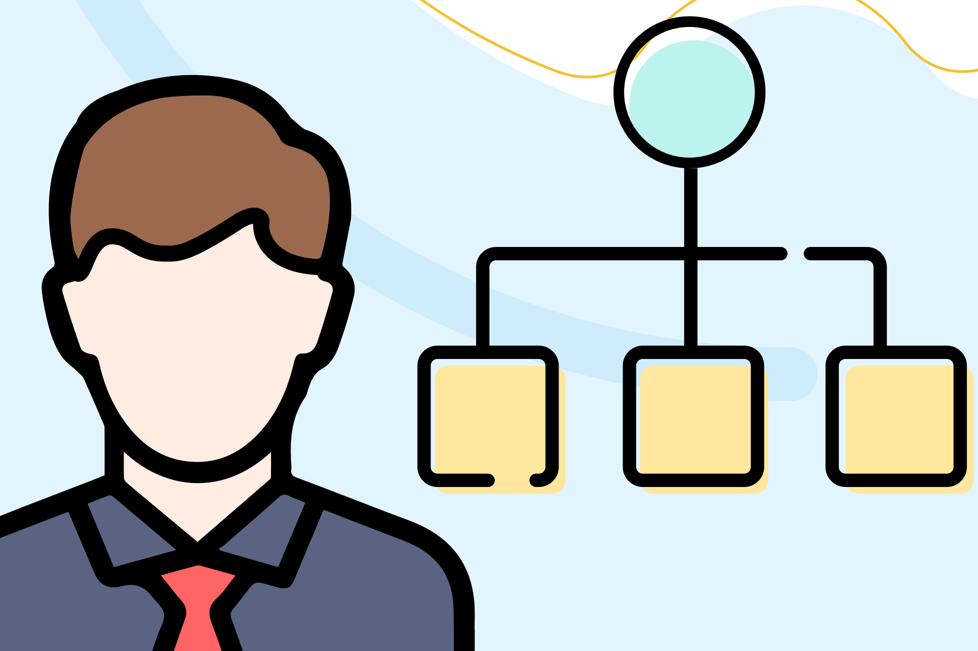
Channels are organized spaces for communication. These can be made for different levels, such as organization-wide, team-specific, personal, or external chats.

To create a channel, click on the + icon next to Channels in the sidebar. Enter all details and create the channel.





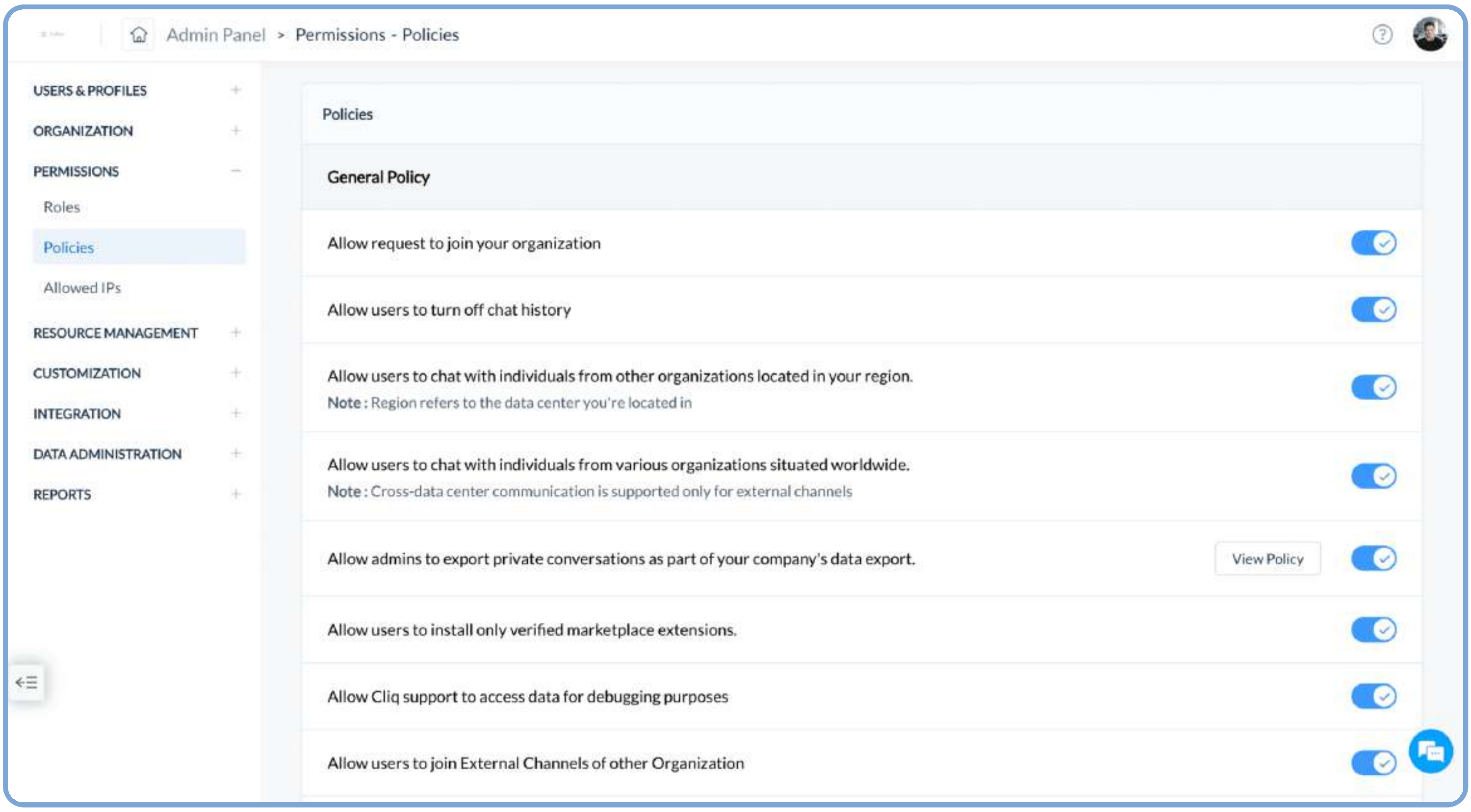
Managing your organization within Zoho Cliq



Adjusting organization policies

Policies are an essential part of streamlining internal processes and ensuring employee compliance. As an admin, you have control over how employees communicate through Zoho Cliq. You can enable or disable policies as needed to ensure that your employees comply with your policies.

To enable and disable policies, go to the **Admin Panel > Permissions - Policies.**

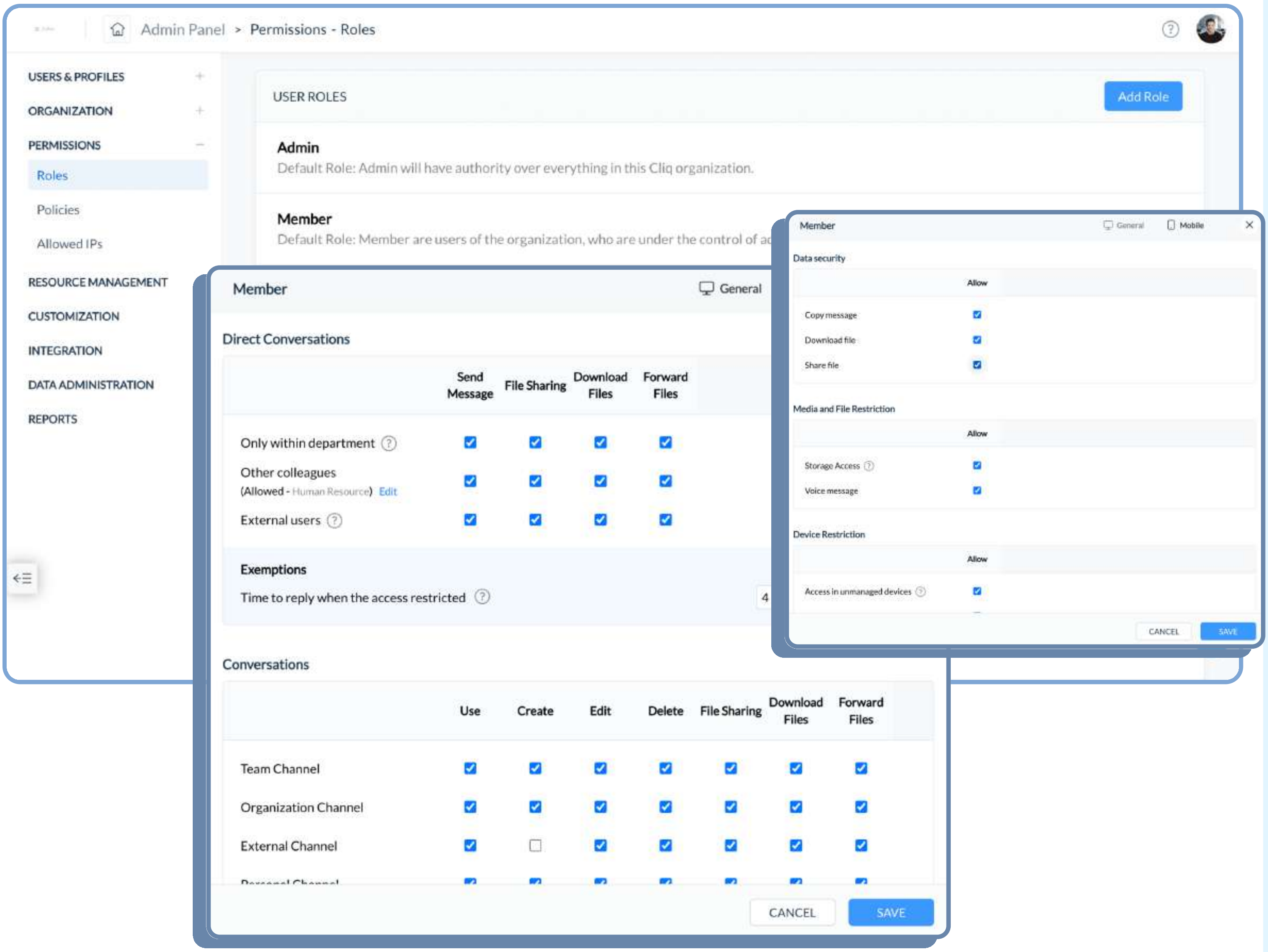


Adding roles and permissions

Configure feature access for your users with the help of the **Roles and Policies** section under **Permissions.**

Defining roles within your organization helps employees know what's expected of them. The default roles in Zoho Cliq are Super Admin, Admin, Moderator, and Member. You can also customize the roles according to your organization.

To assign roles, go to the **Admin Panel > Permissions - Roles.**



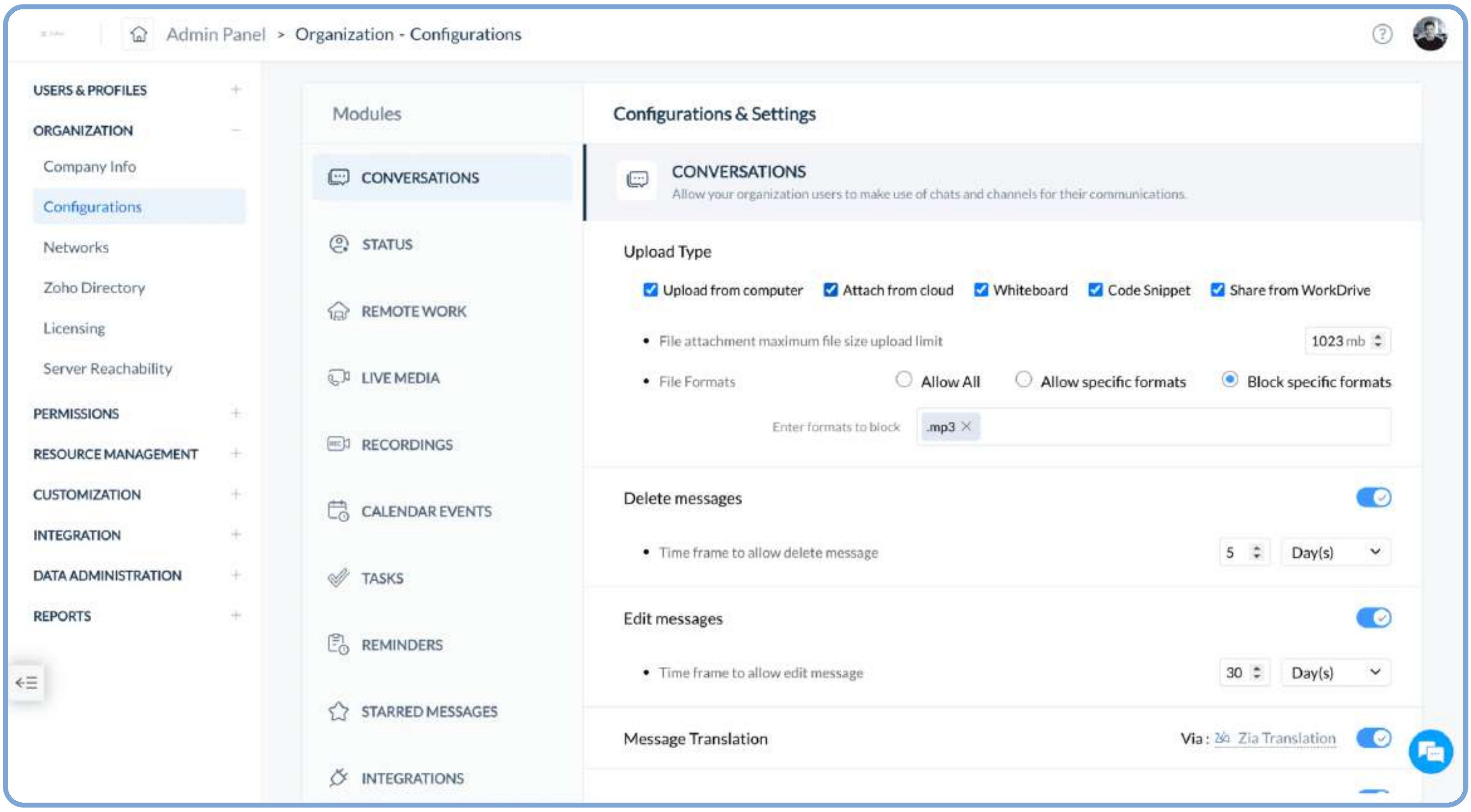
Configurations:

Customizing access for specific modules

Each module in Zoho Cliq can be customized using the configurations and settings available in the Admin Panel. You can also enable and disable the modules as needed. You can configure:

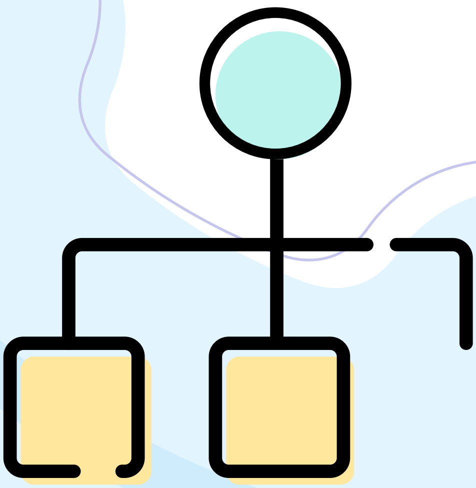
- Remote Work
- Live Media
- Recordings
- Calendar Events
- Reminders
- Starred Messages
- Integrations
- Migration Tools
- Mobile Access
- Help Resources

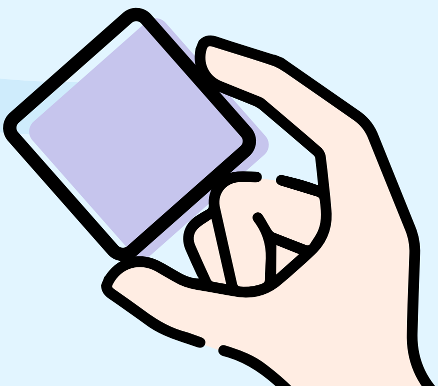
To customize Zoho Cliq to fit your requirements, go to the **Admin Panel > Organization - Configurations**



Here is a detailed **help document** on how to configure these modules.

Customizing your Zoho Cliq organization



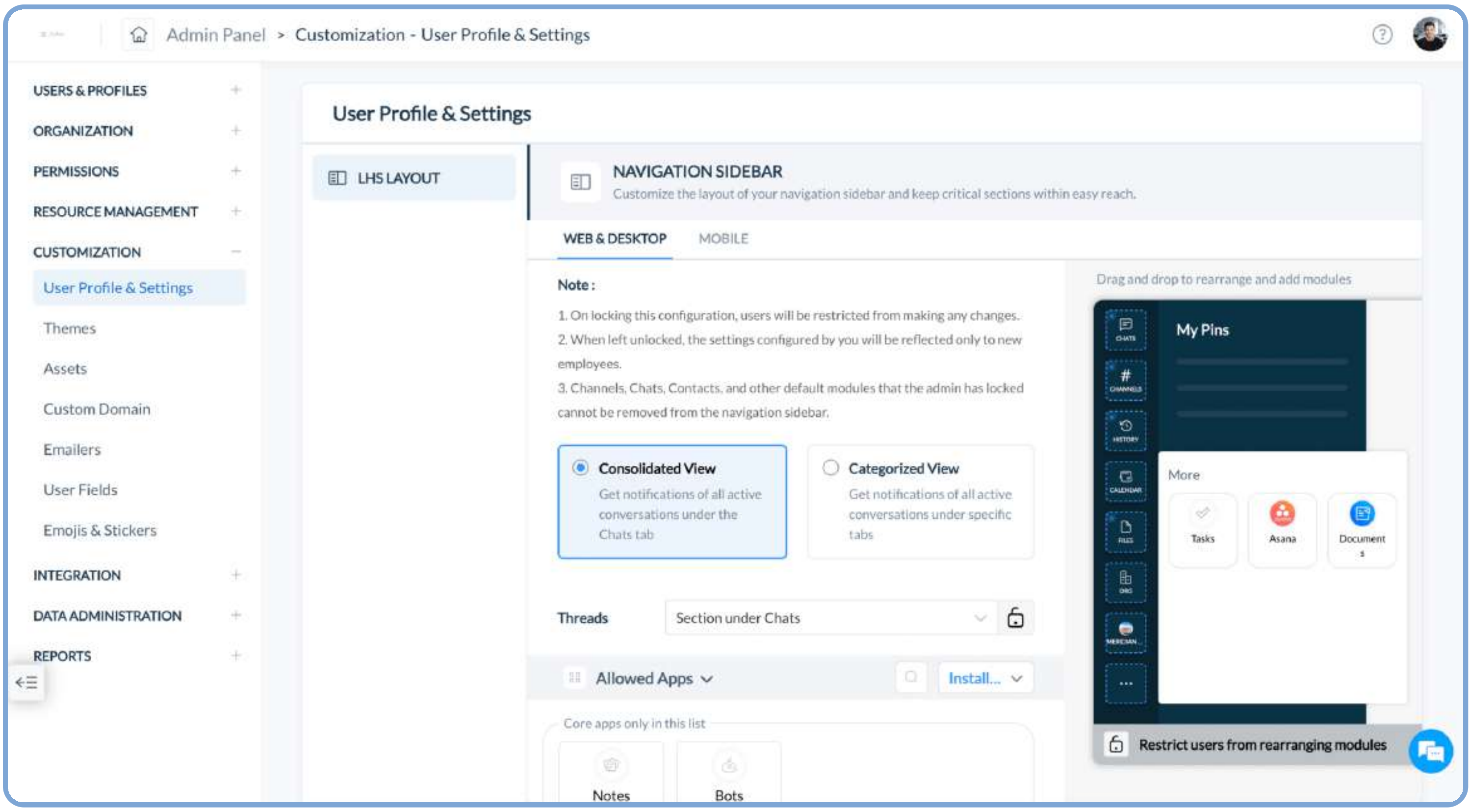


Make Zoho Cliq your own

Through customization and rebranding, you can tailor Zoho Cliq to suit your organization's specific needs.

After logging in to your Zoho Cliq account, you can access admin privileges by navigating to the top bar and clicking on your profile picture. In the dropdown menu, you'll find the Admin Panel option under the My Organization section.

To make Zoho Cliq your own communication software, go to the **Admin Panel > Customization**



Customization and rebranding

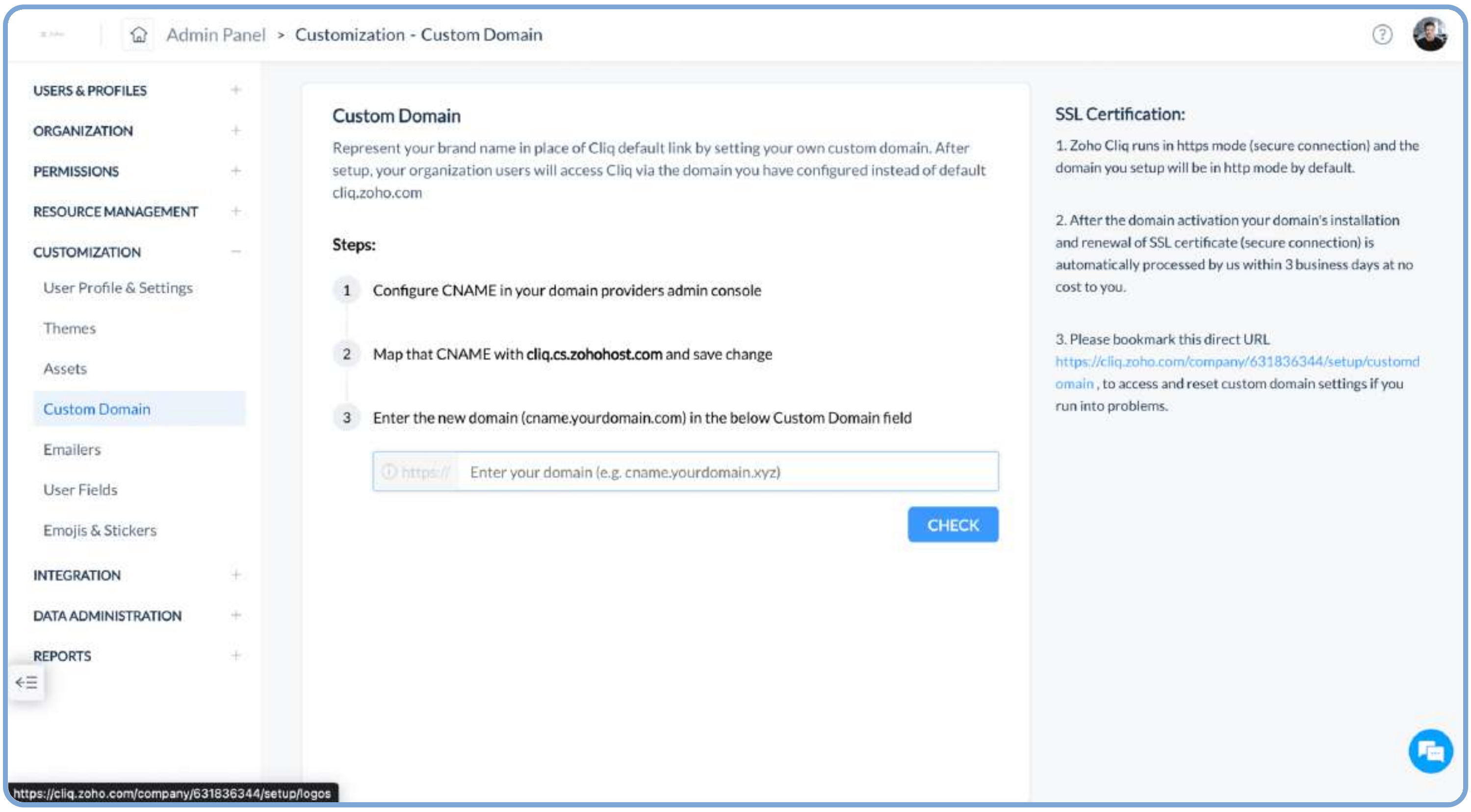
This customization gives your employees the sense that they're using a communication tool unique to your organization.

To customize Zoho Cliq, go to the **Admin Panel > Customization - Assets**

Here, you can upload your organization's logo and change the color theme according to your organization's branding.

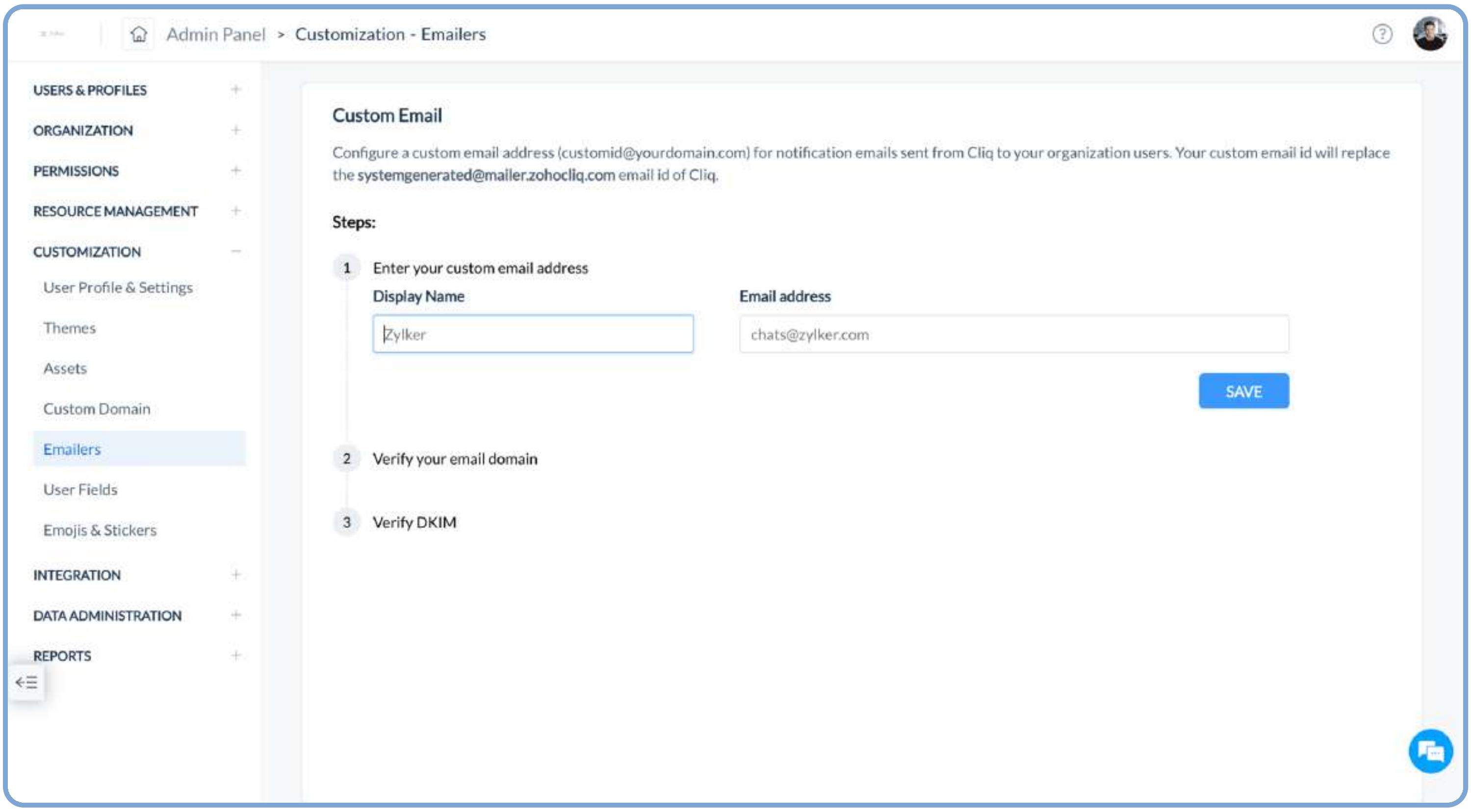
Custom domain

Set up your own domain name by clicking on **Custom Domain.** Your custom domain will replace the default Zoho Cliq link (cliq.zoho.com), reinforcing your brand's identity.



Custom email

By default, notifications from Zoho Cliq come from the systemgenerated@mailer.zohocliq.com address. You can replace the system-generated email address with one of your choice by going to **Admin panel > Customization - Emailers.**

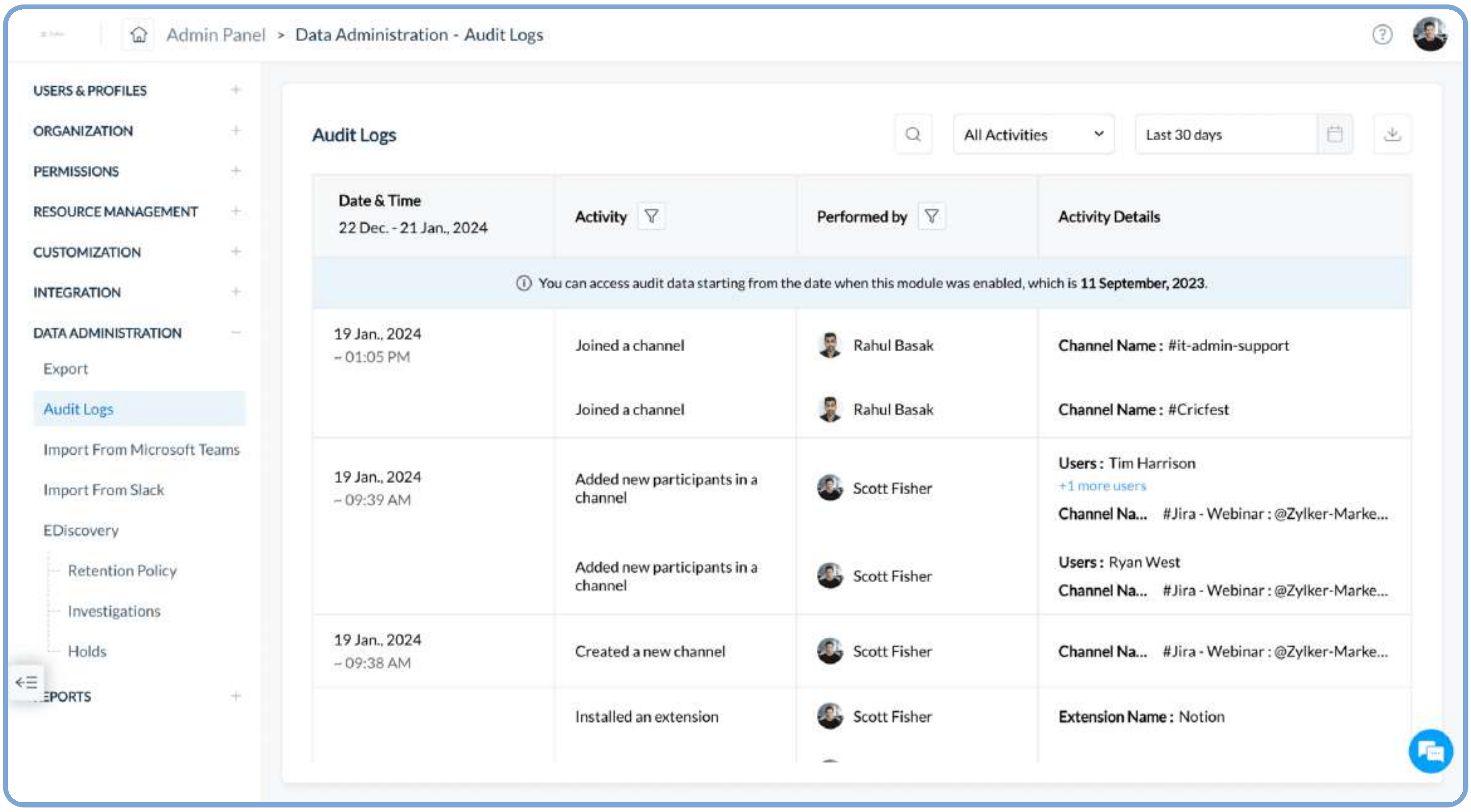


Data administration

Audit logs

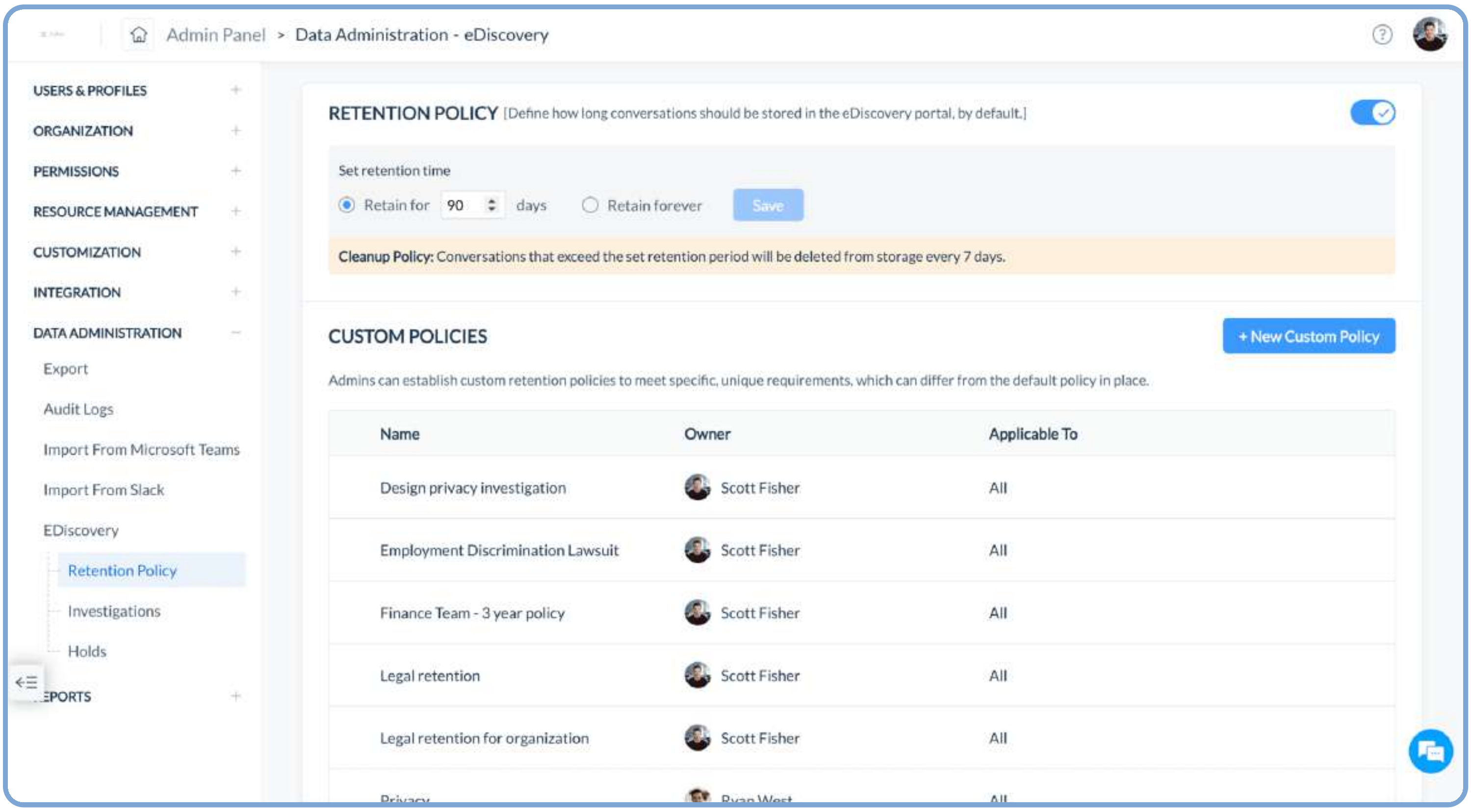
Audit logs contain information on all the actions performed in your organization. For instance, when a user pins a message or joins a channel, all this information is readily available for the admins to view in the audit logs.

To access audit logs, go to the **Admin Panel > Data Administration - Audit Logs.**



eDiscovery and DRP

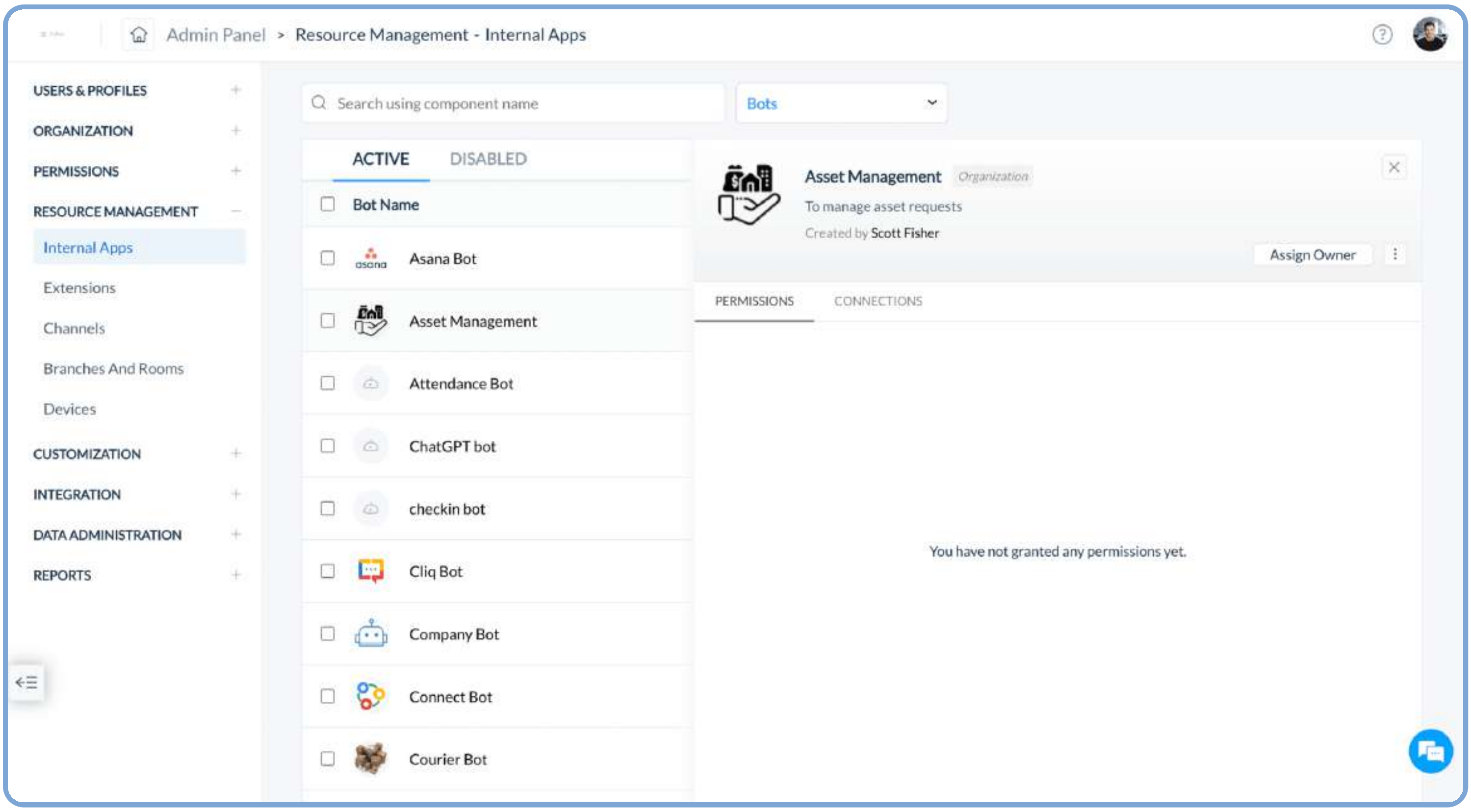
Ensure utmost protection for your organization's valuable assets and data. You can stay prepared for compliance audits and prevent intellectual property theft issues with ease using rapid evidence provisioning. To edit your organization's retention policies, go to the **Admin Panel > Data Administration - eDiscovery.**



Resource management

Internal app management: As an admin, you can manage the internal apps and bots created by your organization members. For instance, if the owner of an internal app leaves the organization, you can assign that ownership to another user.

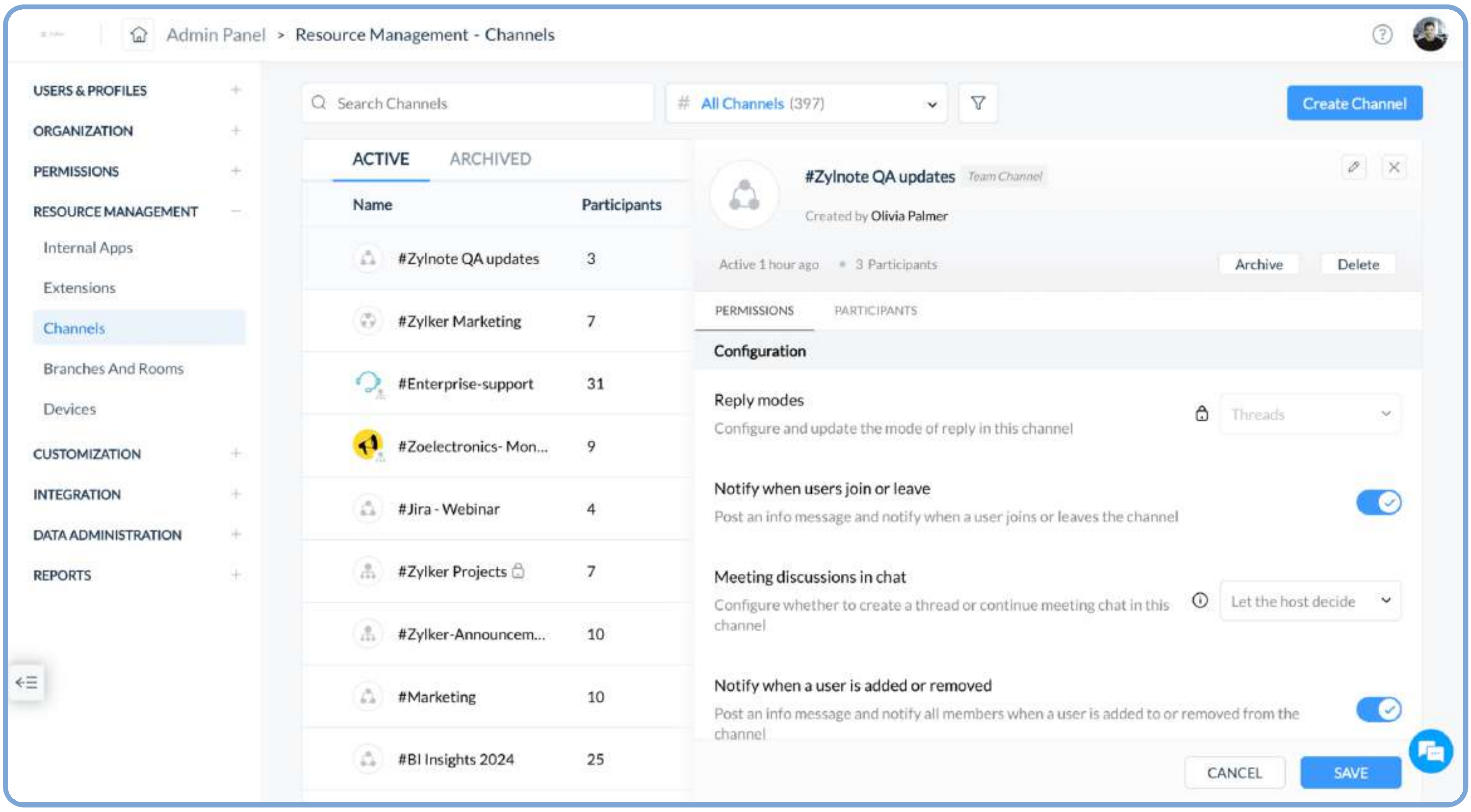
Do so by going to the **Admin Panel > Resource Management - Internal Apps.**



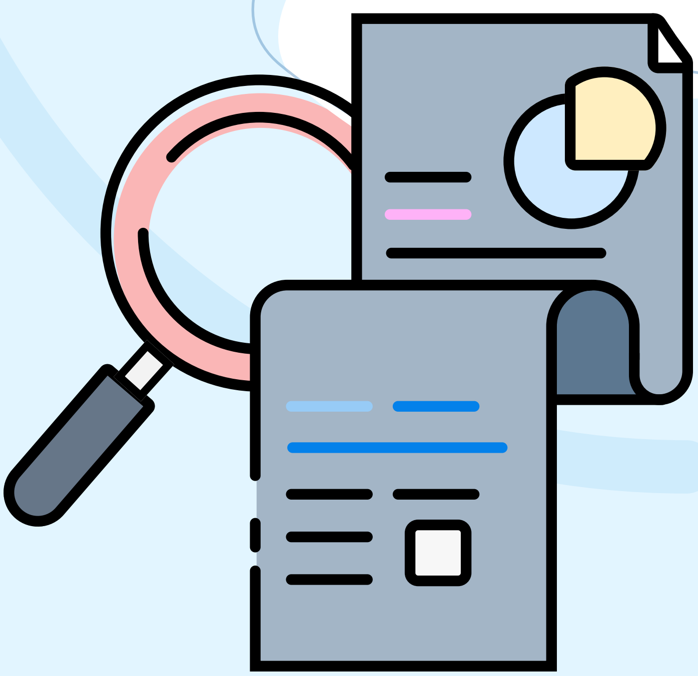
Channel management

If you're seeking greater control over your channels, the centralized channel management in the Admin Panel is your solution. You can gain control over every channel within your organization, allowing you to seamlessly perform detailed actions like adding or removing participants and adjusting roles available to a channel admin, all from a single centralized location.

To do so, go to the **Admin Panel > Resource Management - Channels.**



Reports

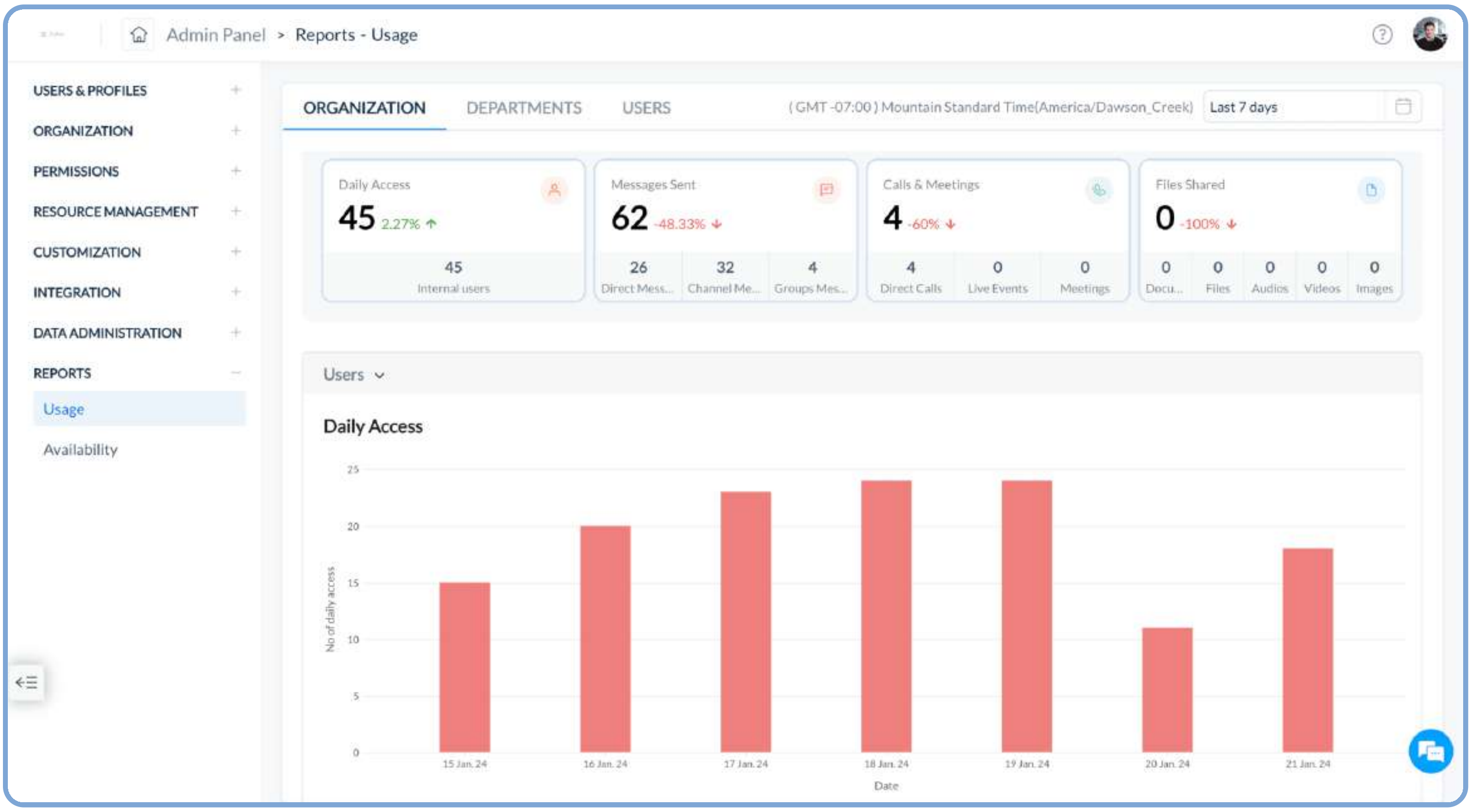


Tracking adoption rates

A communication tool's effectiveness depends on how actively people use it. As an admin, you can measure adoption rates and look at hours spent on different interactions with usage reports.

To access usage reports, go to the **Admin Panel > Reports - Usage.**

The usage reports are categorized into three tabs: Organization, Department, and Users.



Availability reports

You can use the Admin Panel to generate reports on remote work in Zoho Cliq. These reports are categorized into:

Summary reports

The summary report gives you an overview of the duration of working hours, internal hours, overall hours, and time of check-in/ check-out.

Read more

Attendance reports

The attendance report gives you an overview of the attendance of a particular user or department for the week.

Read more

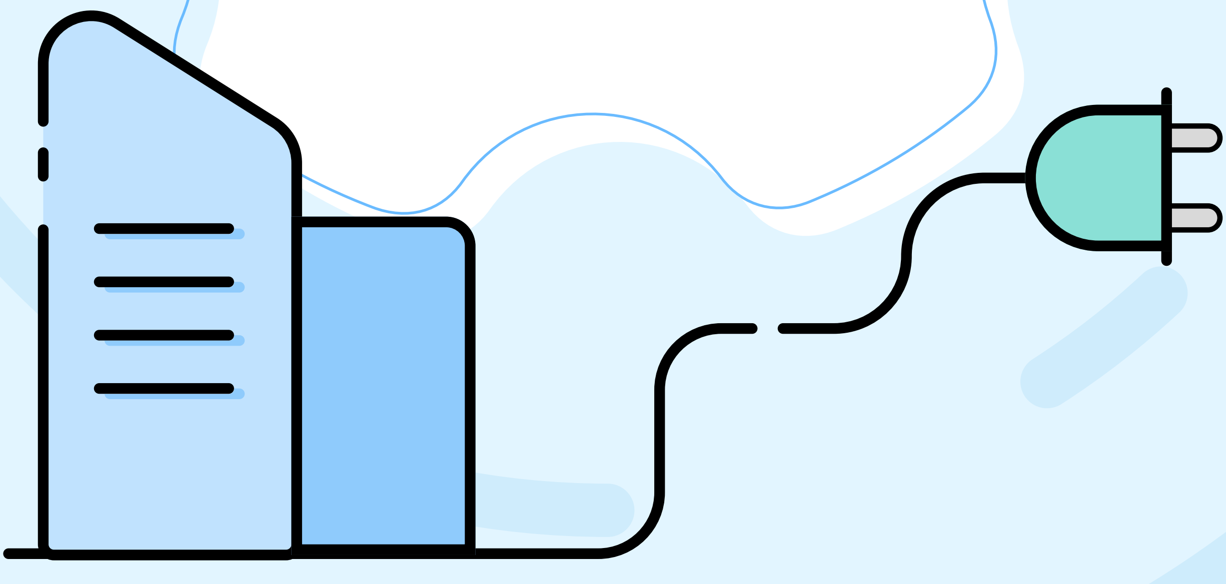
Users reports

The user report gives an overview of users' weekly and monthly detailed attendance.

Read more

To access these reports, go to the **Admin Panel > Reports - Availability.**

Setting up your organization

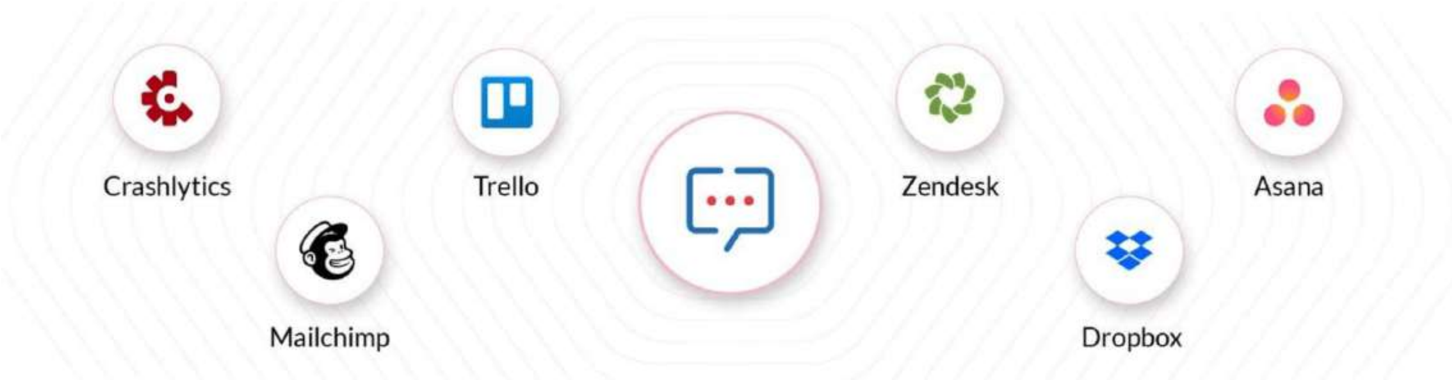


Connecting Zoho Cliq to your workplace apps

Install Zoho Cliq integrations for the apps your organization uses to stay up to date and access your apps directly from Zoho Cliq.

For instance, by integrating Google Drive with Zoho Cliq, you can access your files, receive notifications, and add comments without leaving Zoho Cliq.

Visit **Zoho Cliq Marketplace** and look for integrations that enhance your organization's performance.



Creating Networks

A Zoho Cliq Network is a dedicated space to collaborate with external business stakeholders such as partners, vendors, agencies, consultants, and volunteers. It equips you with an extensive set of configurable permissions to facilitate controlled, secure, and full-fledged external collaboration.

Installing extensions to make work easier: Creating custom workflows

Customize your organization's workflows with the help of bot assistants and commands in Zoho Cliq. Chatbots help you perform repetitive, day-to-day tasks and also provide you with instant notifications. You can customize your bots using Bot handlers.

For instance, PollBot helps your team make collaborative decisions without any bias. Create and run simple and beneficial polls using PollBot right from your Zoho Cliq window with slash commands. Type **"/poll"** in your chat to instantly create a poll for all chat participants.

To add chatbots, go to **Admin Panel > General - Channels.** Click Add Bot and begin entering the relevant information.

Resources

Your checklist to drive successful adoption

- Run a beta or pilot launch before starting company-wide adoption.
- Identify early adopters and make them product champions.
- Start from the top: Ensure your top management is well-aligned with this change.
- Create awareness among employees from every layer of the organization. Welcome employee opinions and discussions on the topic.
- Drive communication in Zoho Cliq channels for current events, ongoing projects, and other topics that will encourage people to participate.
- Engage with your employees, collect feedback, and optimize Zoho Cliq according to your organizational needs.

Resources

We hope you found this guide to getting started with Zoho Cliq helpful.
If you have any questions or would like help setting up your organization's Zoho Cliq account, please reach out to our support team at **support@zohocliq.com.**

User help center

Admin help center

Developer platform help center

Other resources

Zoho Cliq

We hope you have found this guide to getting started with Cliq organization helpful.

If you would require help in setting up your Zoho Cliq account, please contact our customer support team at

support@zohocliq.com

Help Page Forums Blogs Webinars

Follow us on

ZOHO