



Zoho
Cliq

Admin panel handbook



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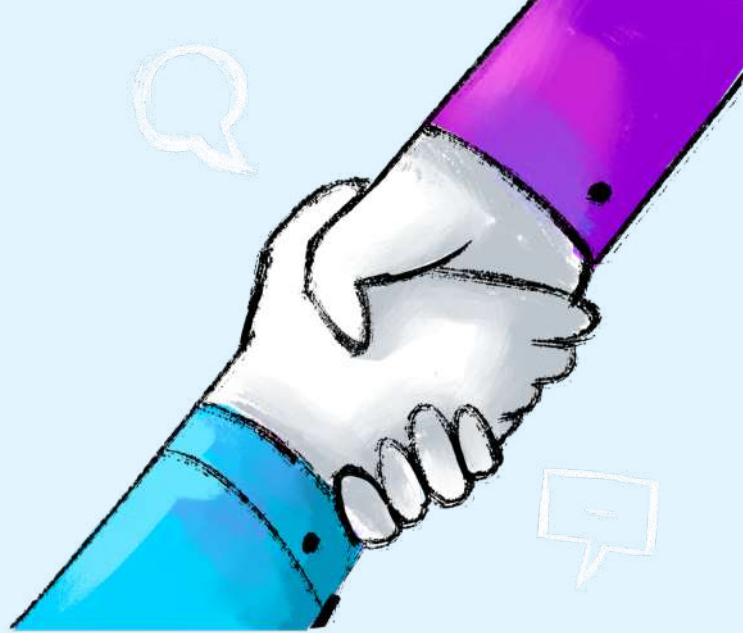
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Welcome to

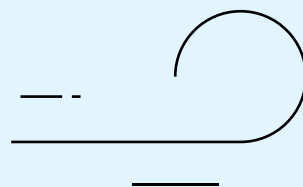
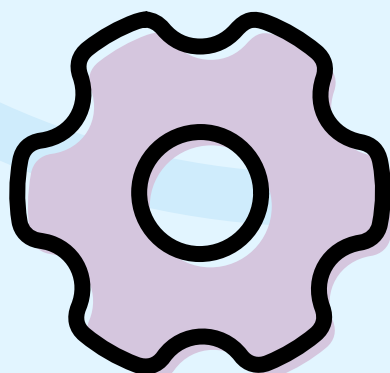
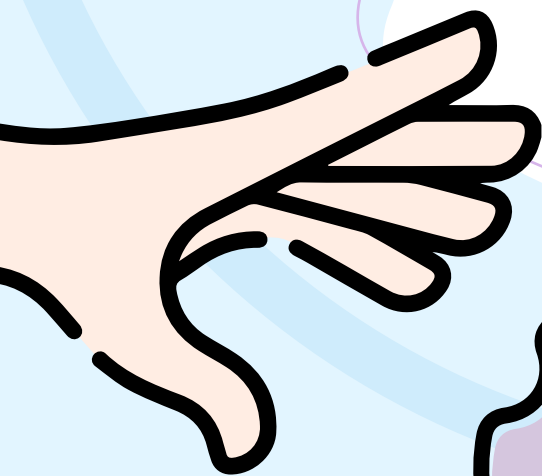


Zoho Cliq

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.

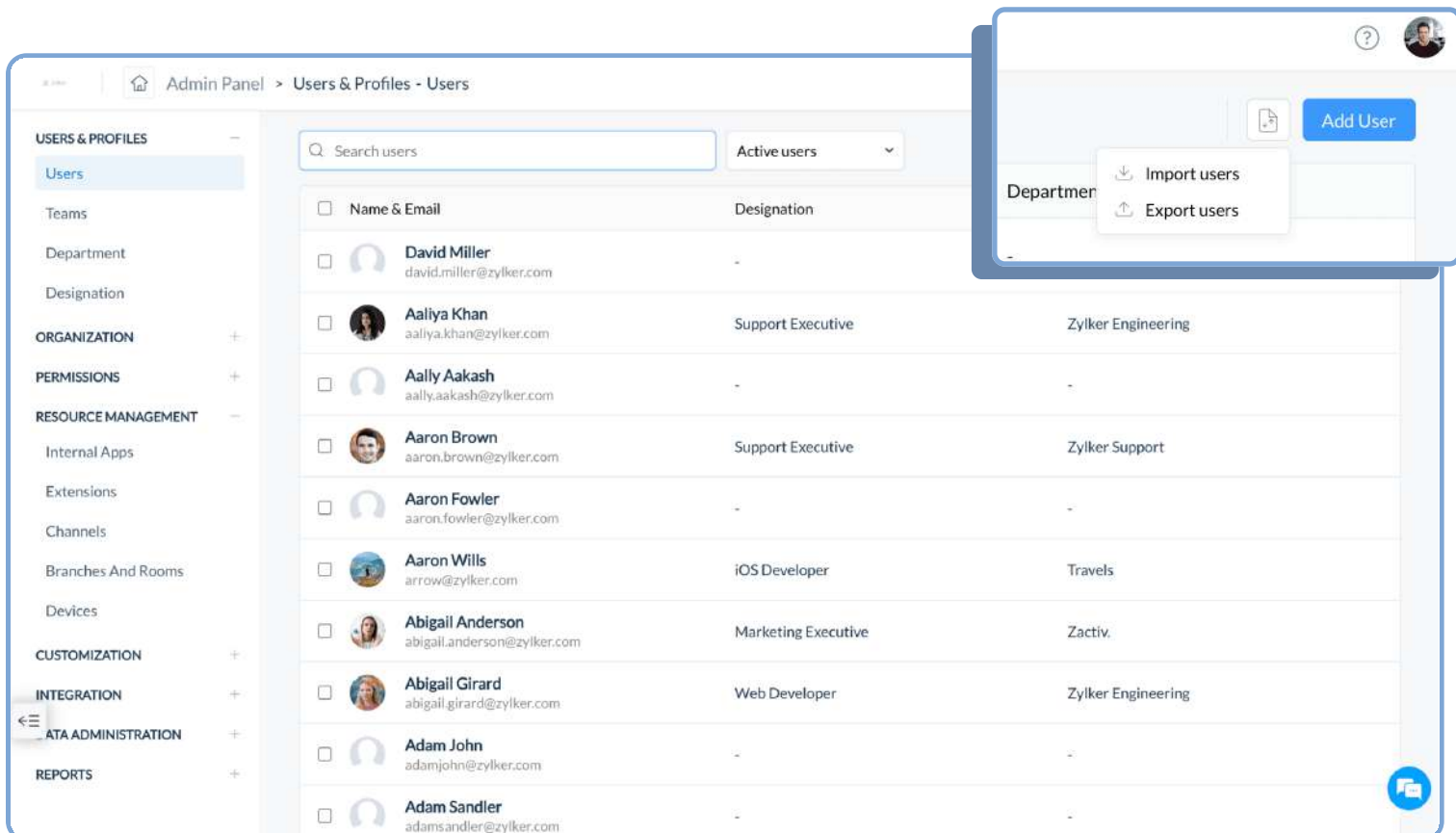
We have also highlighted many of the useful features of Zoho Cliq to empower you as an admin.

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.

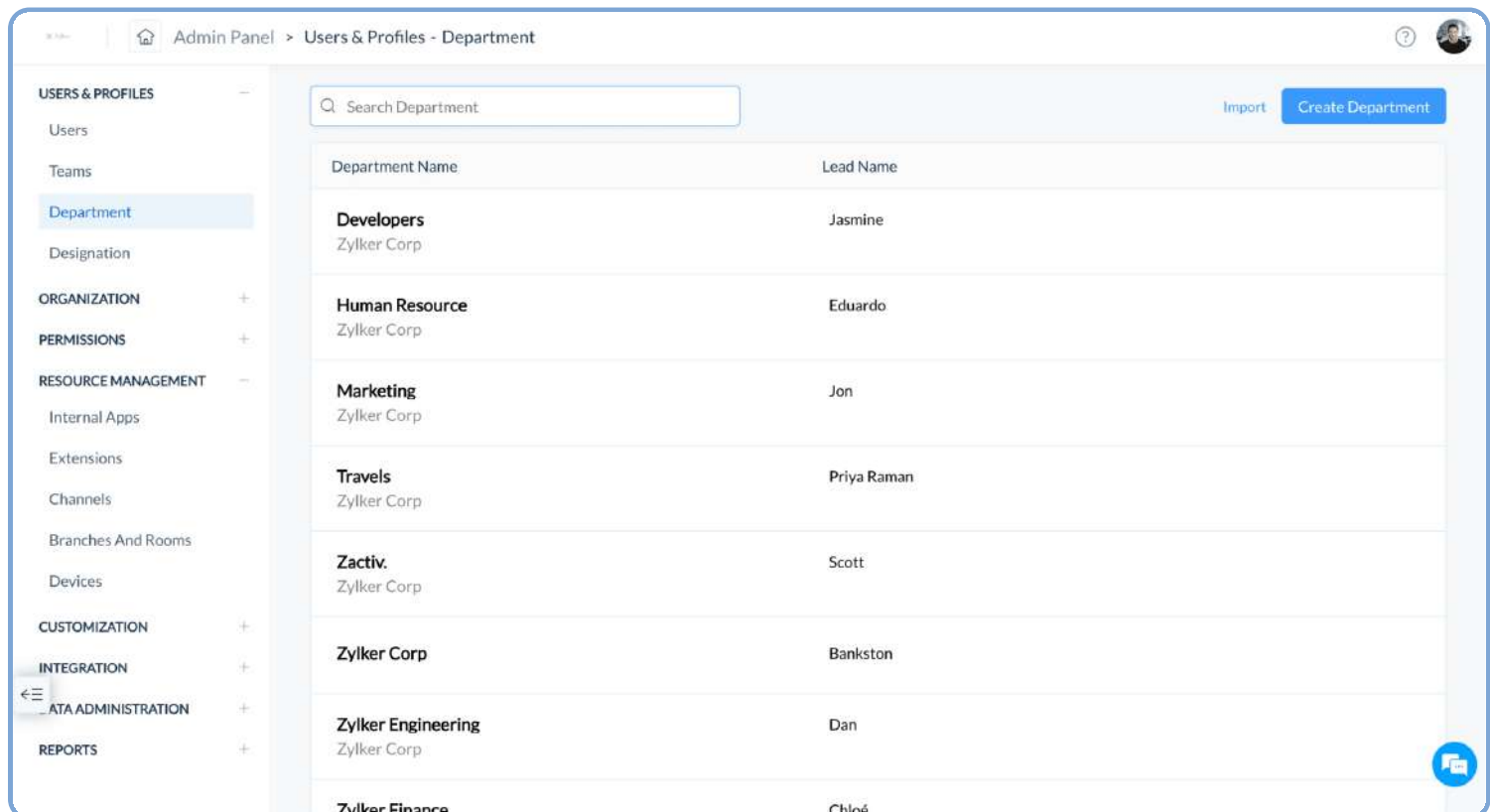


The screenshot shows the Zoho Cliq Admin Panel interface. The breadcrumb navigation at the top indicates the path: Admin Panel > Users & Profiles - Users. On the left sidebar, the 'USERS & PROFILES' section is expanded, showing 'Users' as the selected option. The main content area features a search bar, a dropdown for 'Active users', and a table of users. A callout box on the right highlights the 'Add User' button and the 'Import users' and 'Export users' options.

<input type="checkbox"/>	Name & Email	Designation	Department
<input type="checkbox"/>	David Miller david.miller@zylker.com	-	-
<input type="checkbox"/>	Aaliya Khan aaliya.khan@zylker.com	Support Executive	Zylker Engineering
<input type="checkbox"/>	Aally Aakash aally.aakash@zylker.com	-	-
<input type="checkbox"/>	Aaron Brown aaron.brown@zylker.com	Support Executive	Zylker Support
<input type="checkbox"/>	Aaron Fowler aaron.fowler@zylker.com	-	-
<input type="checkbox"/>	Aaron Wills arow@zylker.com	iOS Developer	Travels
<input type="checkbox"/>	Abigail Anderson abigail.anderson@zylker.com	Marketing Executive	Zactiv
<input type="checkbox"/>	Abigail Girard abigail.girard@zylker.com	Web Developer	Zylker Engineering
<input type="checkbox"/>	Adam John adamjohn@zylker.com	-	-
<input type="checkbox"/>	Adam Sandler adamsandler@zylker.com	-	-

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**.



Department Name	Lead Name
Developers Zylker Corp	Jasmine
Human Resource Zylker Corp	Eduardo
Marketing Zylker Corp	Jon
Travels Zylker Corp	Priya Raman
Zactiv. Zylker Corp	Scott
Zylker Corp	Bankston
Zylker Engineering Zylker Corp	Dan
Zylker Finance	Chloé

Create a new Department

Name

Enter name

Parent Department

Zylker Corp

Lead Name

Select lead

Assign Users

Search user name

Import Department

Bulk import a list of Department quickly and conveniently by uploading a CSV file
Download : [CSV template](#)

Note

1.Ensure that the file contains the following columns - Department name, Lead name and Parent Department.
2.You can also download a sample template in .csv format for your reference.


Upload a file

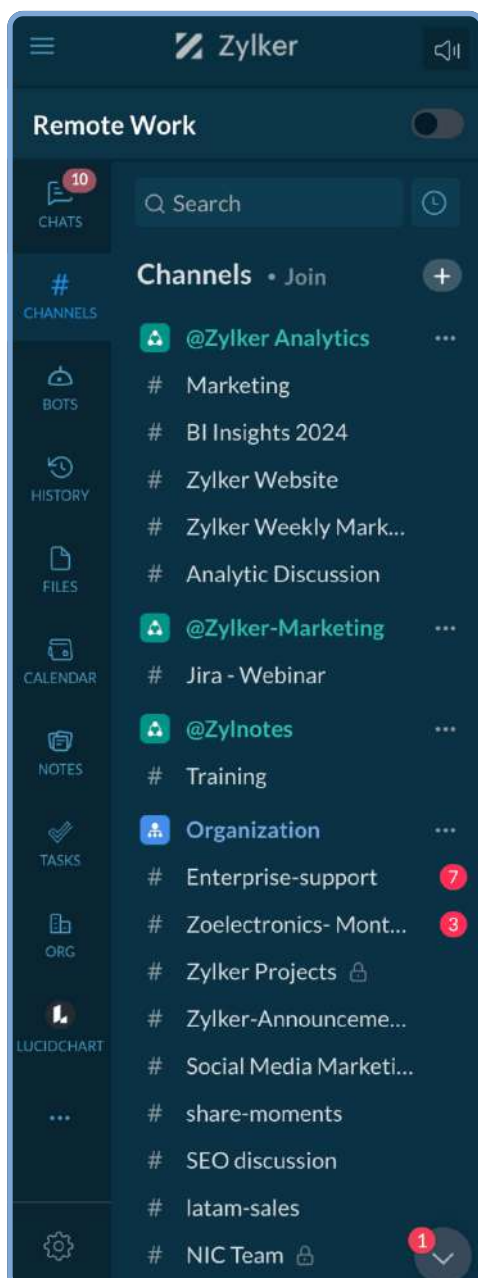
CSV template

Department	Department Lead	Parent Department
Zylker Marketing (Sample)	scott.fisher@gmail.com	-
Zylker Sales (Sample)	abigail.anderson@gmail.com	Zylker

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.



Channels > Create Channel

Channels are meant for enhanced collaboration across your organization. You can create channels for the entire organization, your team or across multiple teams.

Organization


Team

Personal

External

Select the channel level that you want to create.

Channel Image & Name



Development-hacks, competitor-news

Your channel name cannot have < > " | @ #

Add Participants

Launch the channel by adding a few members

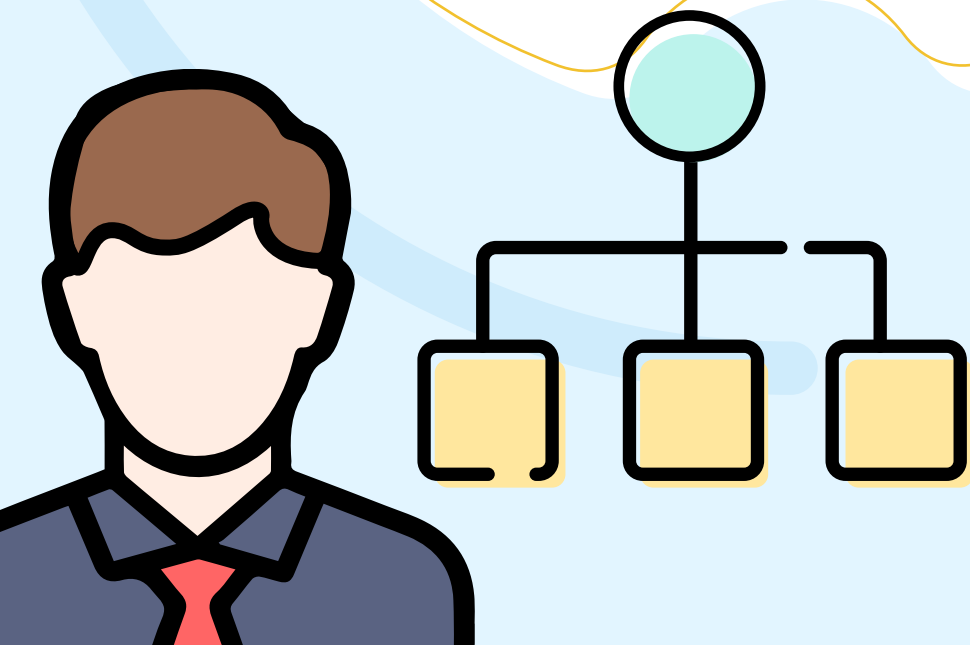
Channel Description

Channel Description

Cancel

Create Channel

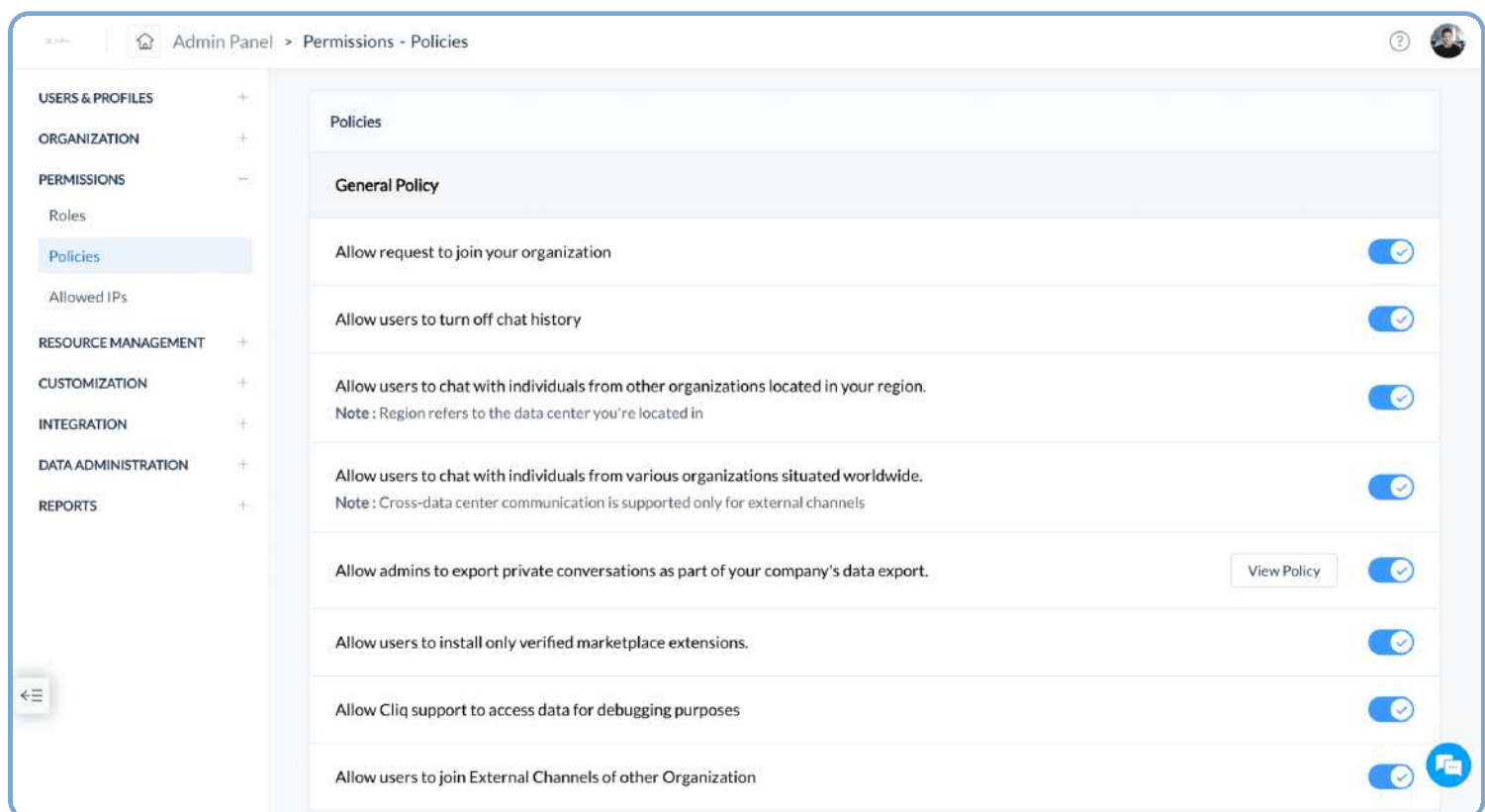
Managing your organization within Zoho Cliq



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**.

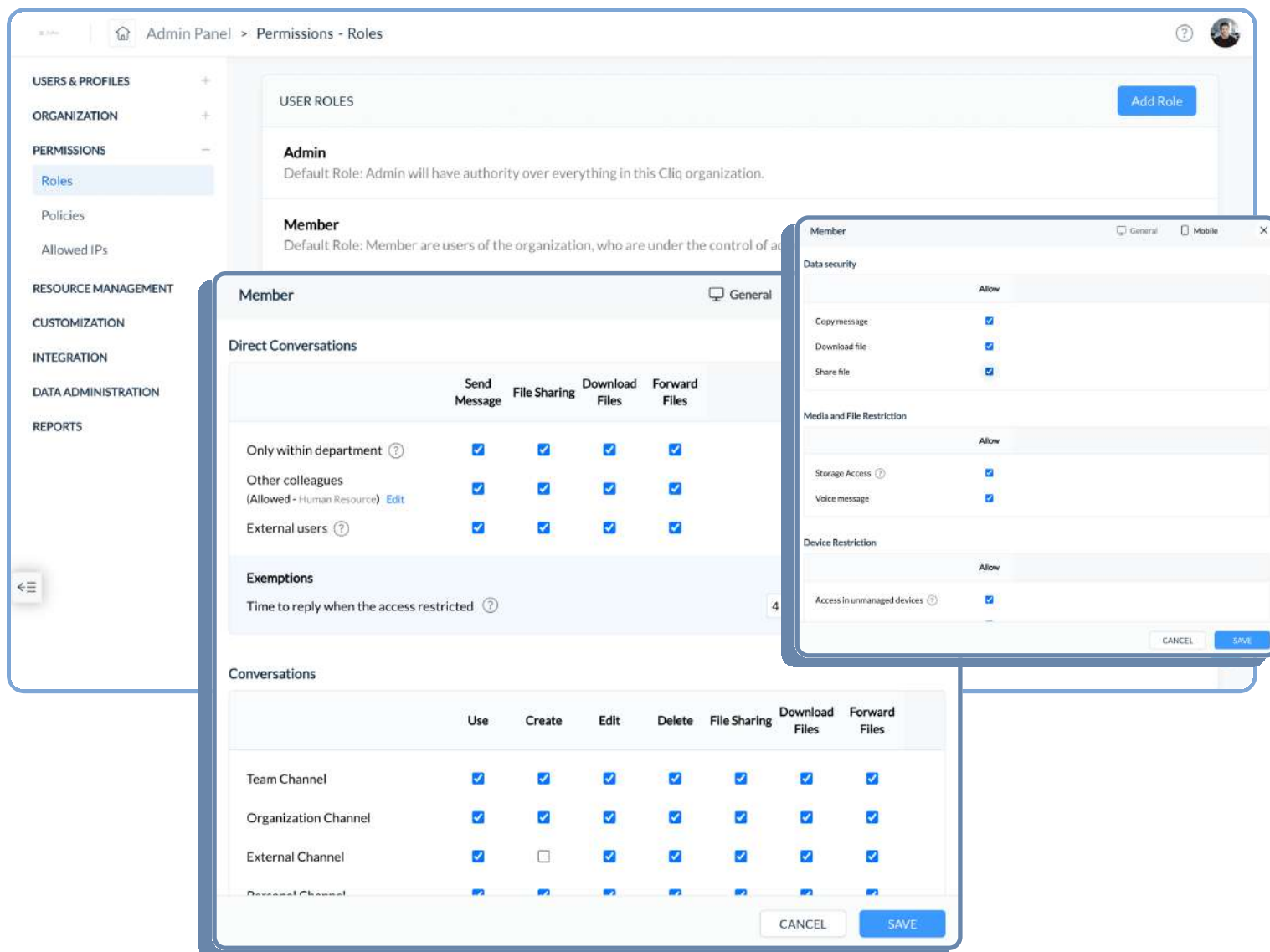


Adding roles and permissions

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**.



Admin Panel > Permissions - Roles

USER ROLES [Add Role](#)

Admin
Default Role: Admin will have authority over everything in this Cliq organization.

Member
Default Role: Member are users of the organization, who are under the control of...

Member [General](#) [Mobile](#)

Direct Conversations

	Send Message	File Sharing	Download Files	Forward Files
Only within department ?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other colleagues (Allowed - Human Resource) Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
External users ?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Exemptions
Time to reply when the access restricted ? 4

Conversations

	Use	Create	Edit	Delete	File Sharing	Download Files	Forward Files
Team Channel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Organization Channel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
External Channel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Personal Channel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[CANCEL](#) [SAVE](#)

Configurations:

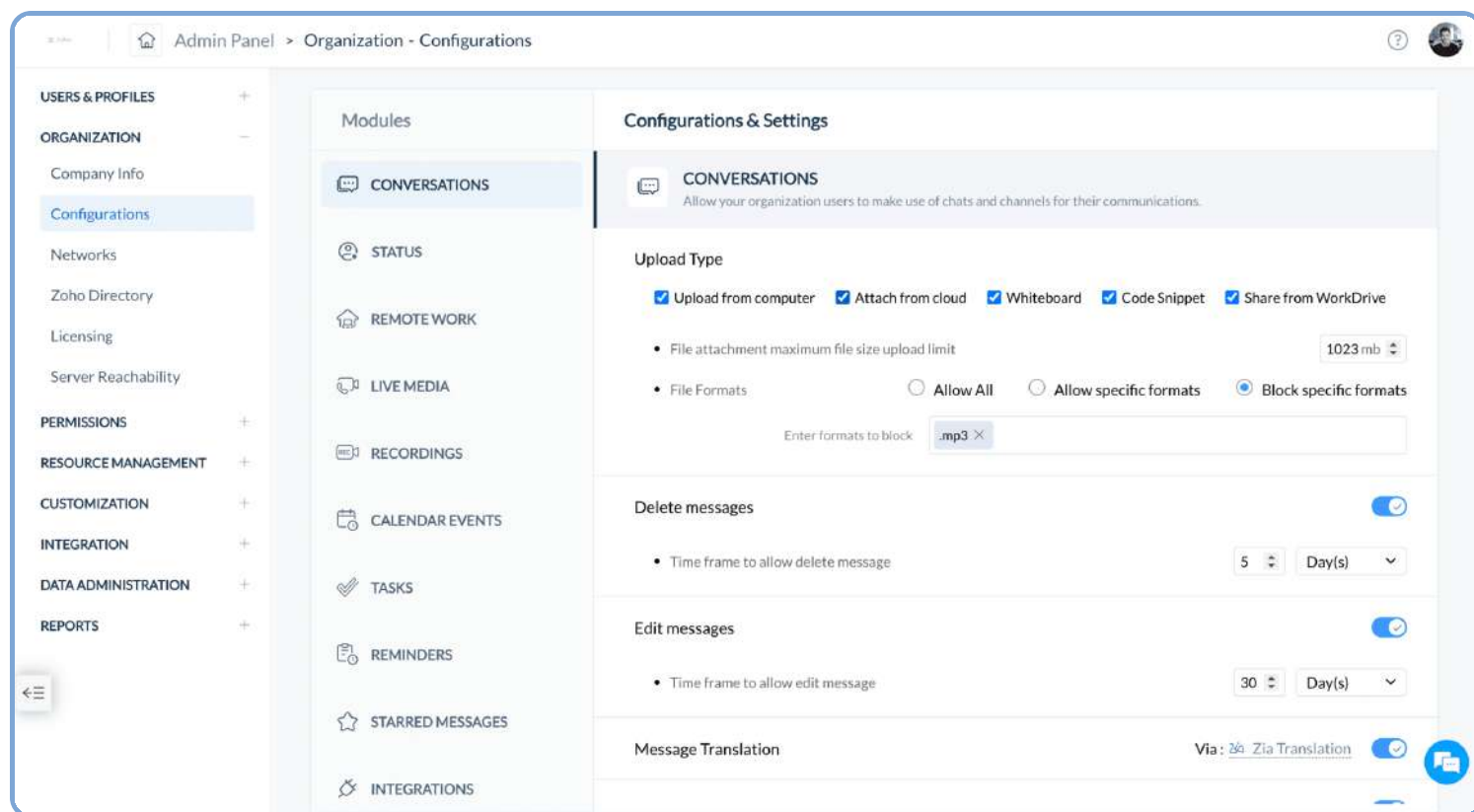
Customizing access for specific modules

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

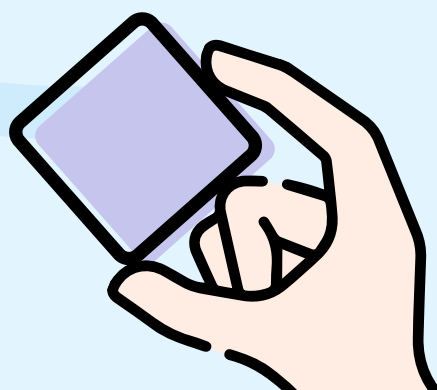
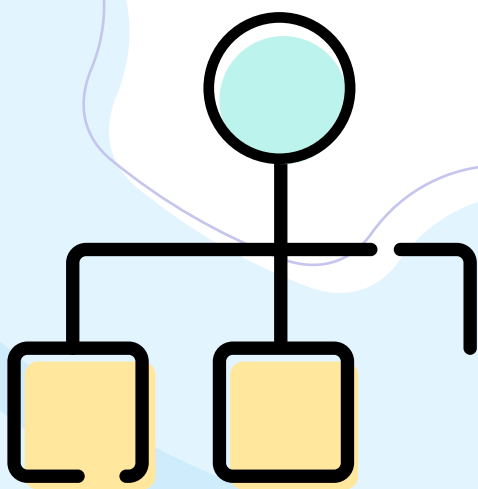
To customize Zoho Cliq to fit your requirements,

go to the **Admin Panel > Organization - Configurations**



Here is a detailed [help document](#) on how to configure these modules.

Customizing your Zoho Cliq organization

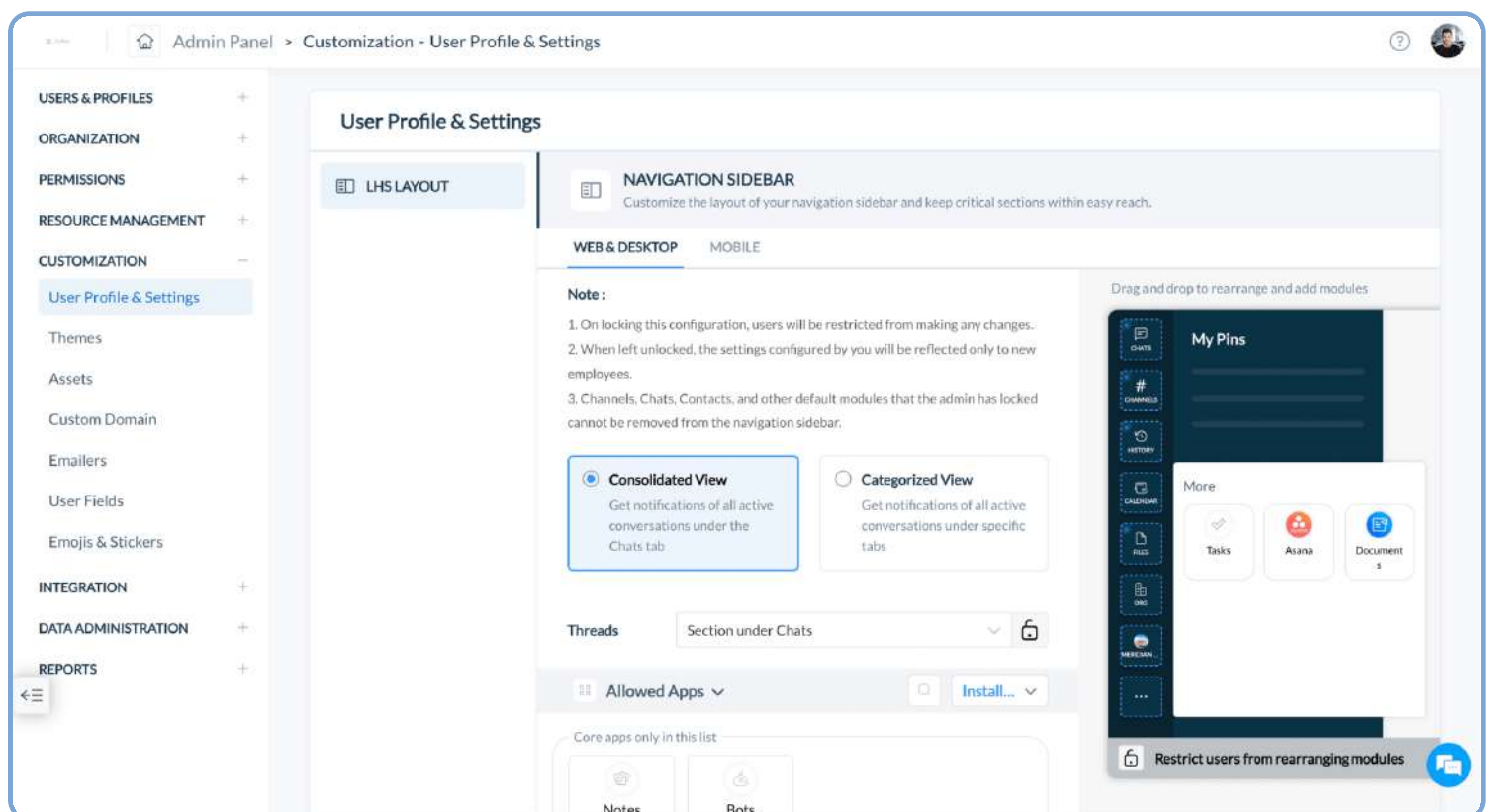


Make Zoho Cliq your own

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

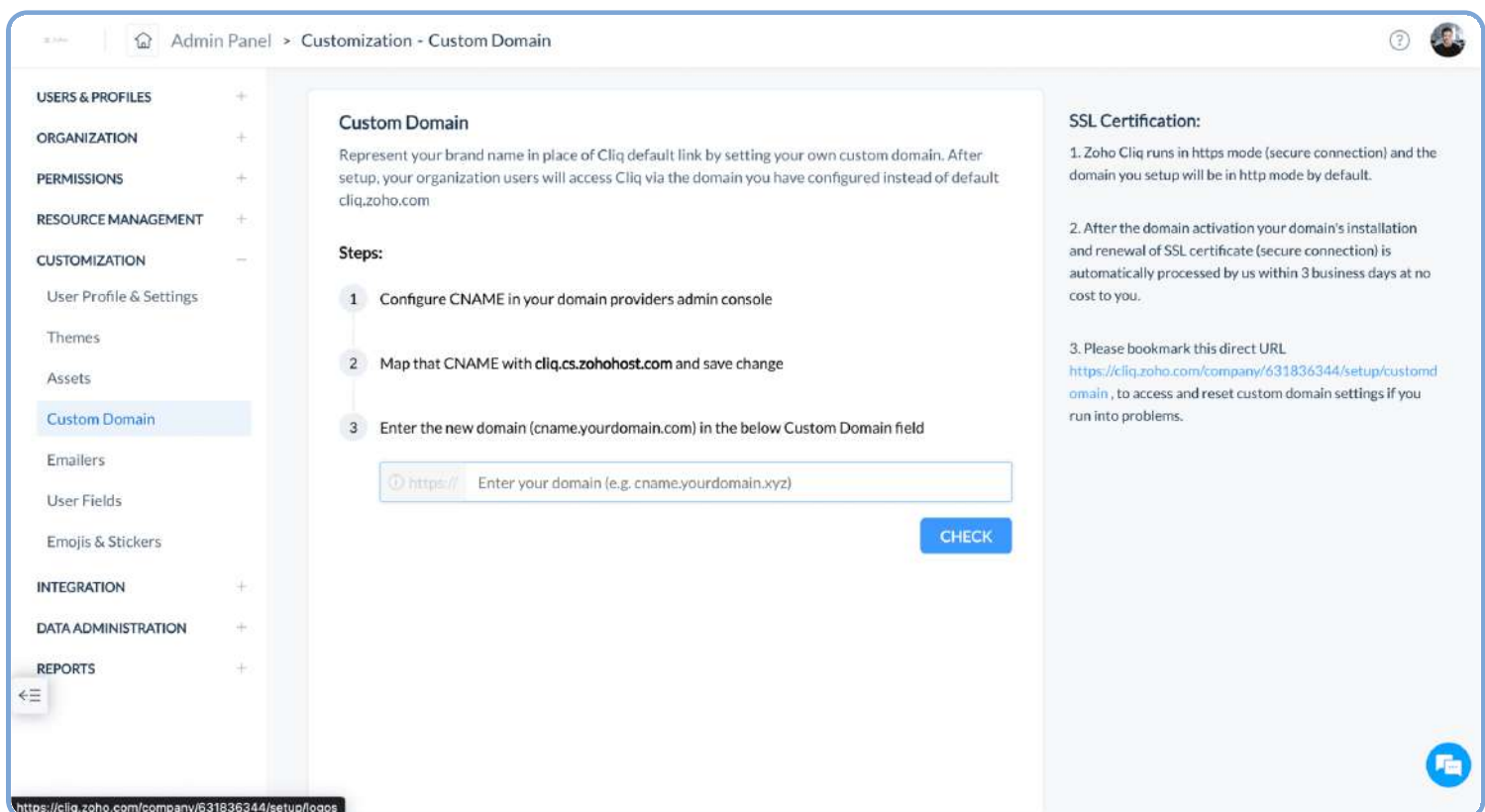
This customization gives your employees the sense that they're using a communication tool unique to your organization.

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.



The screenshot shows the Zoho Cliq Admin Panel interface. The breadcrumb navigation at the top reads "Admin Panel > Customization - Custom Domain". On the left sidebar, the "CUSTOMIZATION" section is expanded, and "Custom Domain" is selected. The main content area is titled "Custom Domain" and includes a description: "Represent your brand name in place of Cliq default link by setting your own custom domain. After setup, your organization users will access Cliq via the domain you have configured instead of default cliq.zoho.com". Below this, a "Steps:" section lists three instructions: 1. Configure CNAME in your domain providers admin console; 2. Map that CNAME with cliq.cs.zohohost.com and save change; 3. Enter the new domain (cname.yourdomain.com) in the below Custom Domain field. A text input field is provided with a placeholder "https:// Enter your domain (e.g. cname.yourdomain.xyz)" and a "CHECK" button. To the right, an "SSL Certification:" section contains three numbered steps explaining the process and providing a direct URL to access and reset custom domain settings. The URL at the bottom of the page is "https://cliq.zoho.com/company/631836344/setup/logos".

Admin Panel > Customization - Custom Domain

Custom Domain

Represent your brand name in place of Cliq default link by setting your own custom domain. After setup, your organization users will access Cliq via the domain you have configured instead of default cliq.zoho.com

Steps:

- 1 Configure CNAME in your domain providers admin console
- 2 Map that CNAME with cliq.cs.zohohost.com and save change
- 3 Enter the new domain (cname.yourdomain.com) in the below Custom Domain field

[https://](#) Enter your domain (e.g. cname.yourdomain.xyz) **CHECK**

SSL Certification:

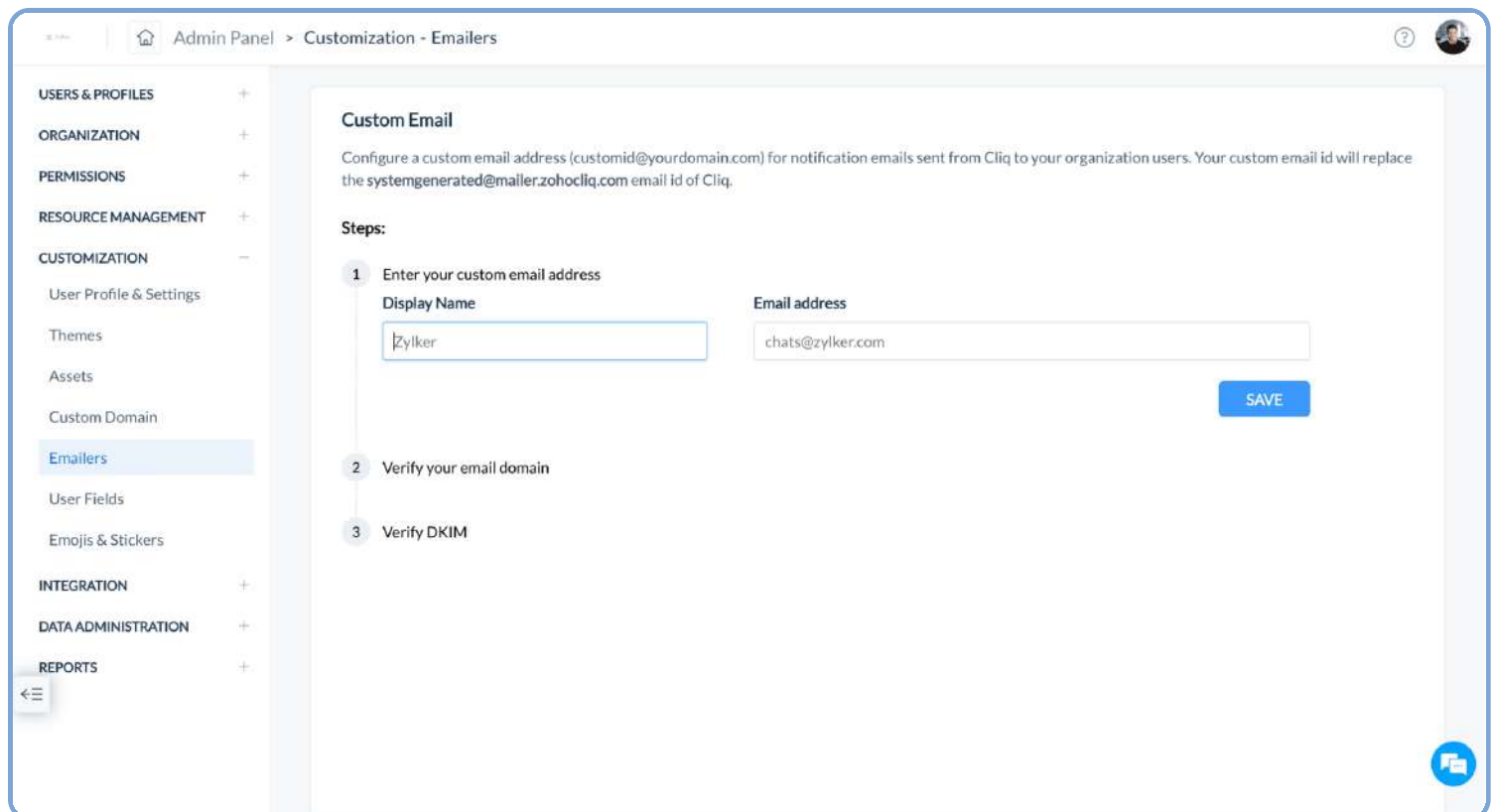
1. Zoho Cliq runs in https mode (secure connection) and the domain you setup will be in http mode by default.
2. After the domain activation your domain's installation and renewal of SSL certificate (secure connection) is automatically processed by us within 3 business days at no cost to you.
3. Please bookmark this direct URL <https://cliq.zoho.com/company/631836344/setup/customdomain>, to access and reset custom domain settings if you run into problems.

<https://cliq.zoho.com/company/631836344/setup/logos>

Custom email

By default, notifications from Zoho Cliq come from the `systemgenerated@mailier.zohocliq.com` address. You can replace the system-generated email address with one of your choice by going to

Admin panel > Customization - Emailers.



The screenshot shows the Zoho Cliq Admin Panel interface. The breadcrumb navigation at the top reads "Admin Panel > Customization - Emailers". On the left, a sidebar menu lists various categories: "USERS & PROFILES", "ORGANIZATION", "PERMISSIONS", "RESOURCE MANAGEMENT", "CUSTOMIZATION", "INTEGRATION", "DATA ADMINISTRATION", and "REPORTS". Under "CUSTOMIZATION", the "Emailers" option is selected and highlighted in blue. The main content area is titled "Custom Email" and contains the following text: "Configure a custom email address (customid@yourdomain.com) for notification emails sent from Cliq to your organization users. Your custom email id will replace the systemgenerated@mailier.zohocliq.com email id of Cliq." Below this, a "Steps:" section lists three steps: 1. Enter your custom email address, 2. Verify your email domain, and 3. Verify DKIM. Step 1 is currently active and shows two input fields: "Display Name" with the value "Zylker" and "Email address" with the value "chats@zylker.com". A blue "SAVE" button is positioned to the right of the "Email address" field. A blue chat icon is visible in the bottom right corner of the interface.

Admin Panel > Customization - Emailers

Custom Email

Configure a custom email address (customid@yourdomain.com) for notification emails sent from Cliq to your organization users. Your custom email id will replace the systemgenerated@mailier.zohocliq.com email id of Cliq.

Steps:

- 1 Enter your custom email address
- 2 Verify your email domain
- 3 Verify DKIM

Display Name

Email address

SAVE

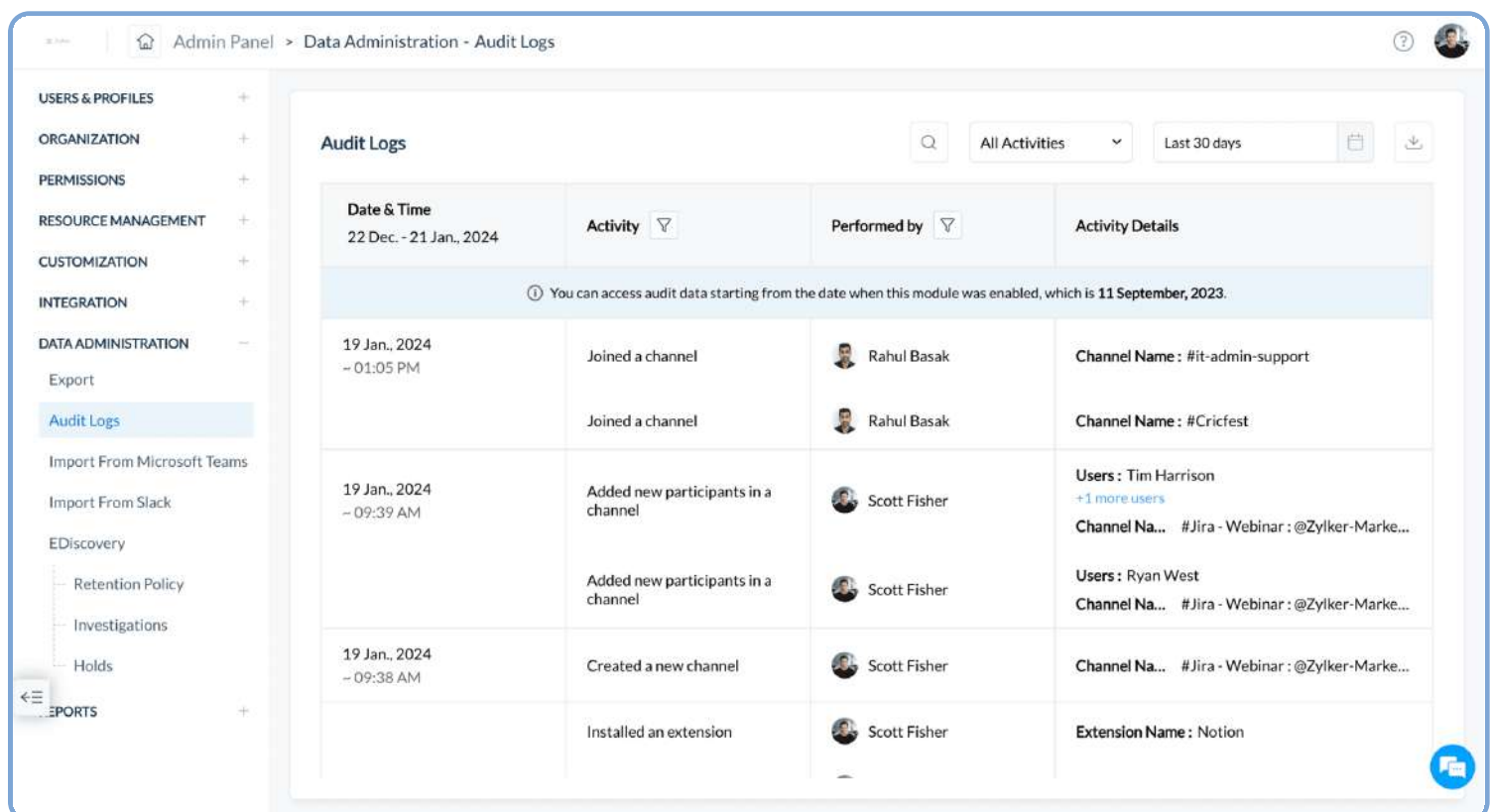
Data administration



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**.

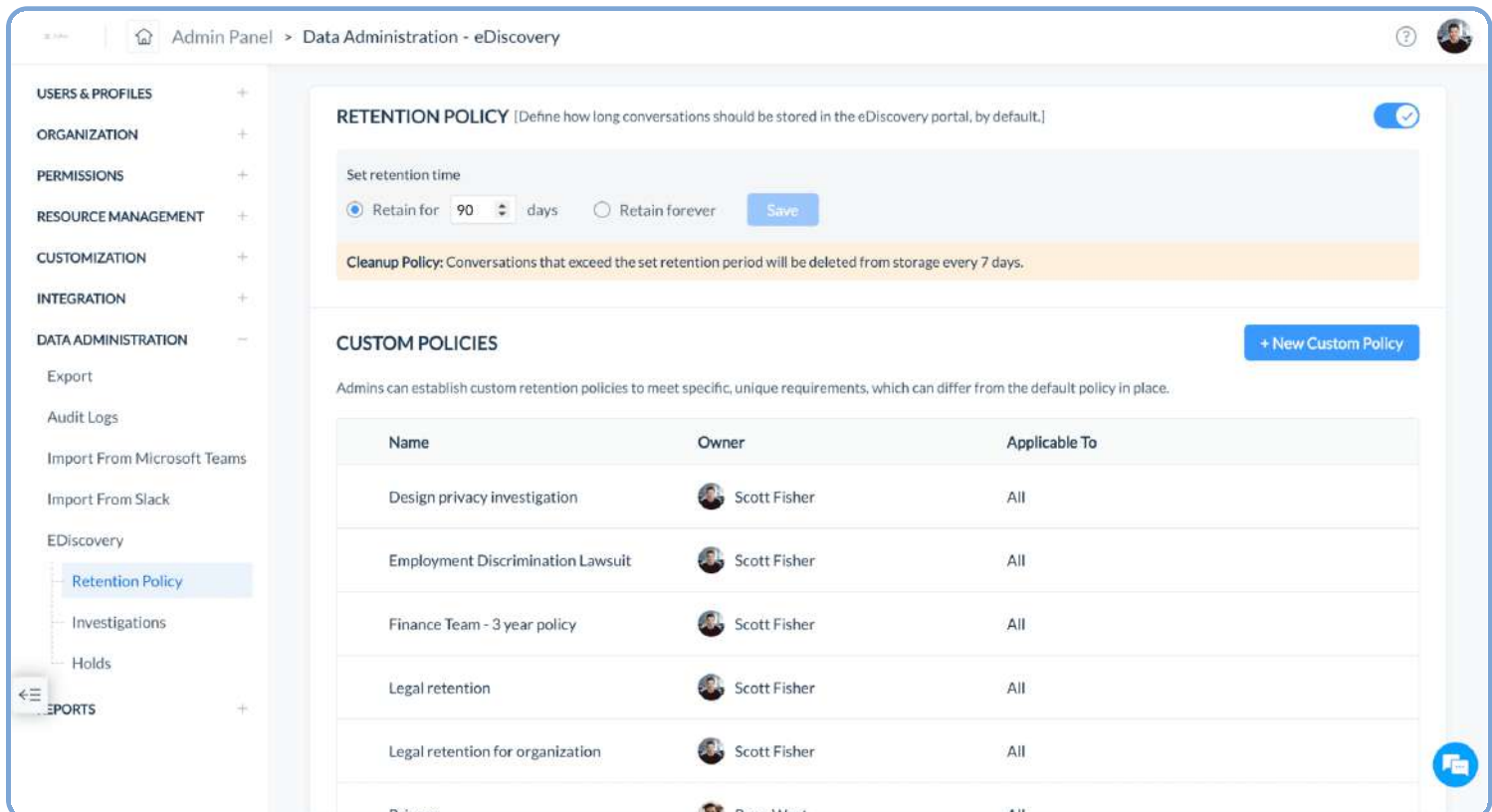


The screenshot shows the 'Audit Logs' page in the Admin Panel. The breadcrumb navigation is 'Admin Panel > Data Administration - Audit Logs'. The left sidebar lists various administrative sections, with 'Audit Logs' highlighted under 'DATA ADMINISTRATION'. The main content area features a table of audit logs with the following columns: 'Date & Time', 'Activity', 'Performed by', and 'Activity Details'. A notice at the top of the table states: 'You can access audit data starting from the date when this module was enabled, which is 11 September, 2023.' The table contains several entries, including users joining channels, adding participants, creating channels, and installing extensions.

Date & Time	Activity	Performed by	Activity Details
22 Dec. - 21 Jan., 2024			
You can access audit data starting from the date when this module was enabled, which is 11 September, 2023.			
19 Jan., 2024 ~ 01:05 PM	Joined a channel	Rahul Basak	Channel Name : #it-admin-support
	Joined a channel	Rahul Basak	Channel Name : #Cricfest
19 Jan., 2024 ~ 09:39 AM	Added new participants in a channel	Scott Fisher	Users : Tim Harrison +1 more users Channel Na... #Jira - Webinar : @Zylker-Marke...
	Added new participants in a channel	Scott Fisher	Users : Ryan West Channel Na... #Jira - Webinar : @Zylker-Marke...
19 Jan., 2024 ~ 09:38 AM	Created a new channel	Scott Fisher	Channel Na... #Jira - Webinar : @Zylker-Marke...
	Installed an extension	Scott Fisher	Extension Name : Notion

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.**



The screenshot displays the 'Admin Panel > Data Administration - eDiscovery' interface. The left sidebar contains a navigation menu with categories like 'USERS & PROFILES', 'ORGANIZATION', 'PERMISSIONS', 'RESOURCE MANAGEMENT', 'CUSTOMIZATION', 'INTEGRATION', and 'DATA ADMINISTRATION'. Under 'DATA ADMINISTRATION', options include 'Export', 'Audit Logs', 'Import From Microsoft Teams', 'Import From Slack', 'eDiscovery', 'Retention Policy', 'Investigations', 'Holds', and 'EXPORTS'. The 'Retention Policy' option is highlighted.

The main content area is titled 'RETENTION POLICY [Define how long conversations should be stored in the eDiscovery portal, by default.]' and includes a toggle switch that is turned on. Below this, there is a section for 'Set retention time' with two radio buttons: 'Retain for 90 days' (selected) and 'Retain forever'. A 'Save' button is present. A yellow box contains the 'Cleanup Policy: Conversations that exceed the set retention period will be deleted from storage every 7 days.'

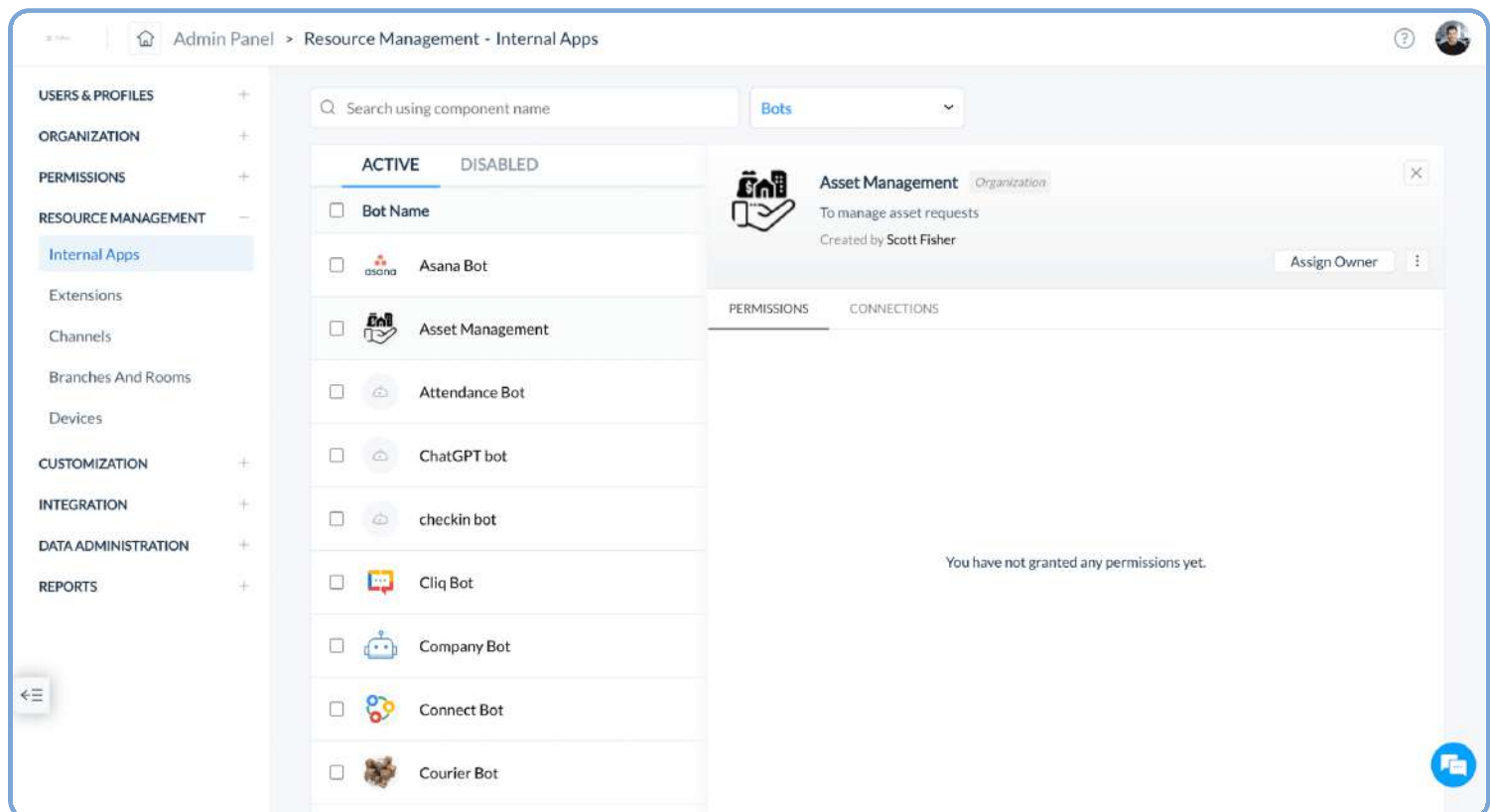
Below the retention policy settings is a section for 'CUSTOM POLICIES' with a '+ New Custom Policy' button. A note states: 'Admins can establish custom retention policies to meet specific, unique requirements, which can differ from the default policy in place.' A table lists the custom policies:

Name	Owner	Applicable To
Design privacy investigation	Scott Fisher	All
Employment Discrimination Lawsuit	Scott Fisher	All
Finance Team - 3 year policy	Scott Fisher	All
Legal retention	Scott Fisher	All
Legal retention for organization	Scott Fisher	All
Privacy	Ryan West	All

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.

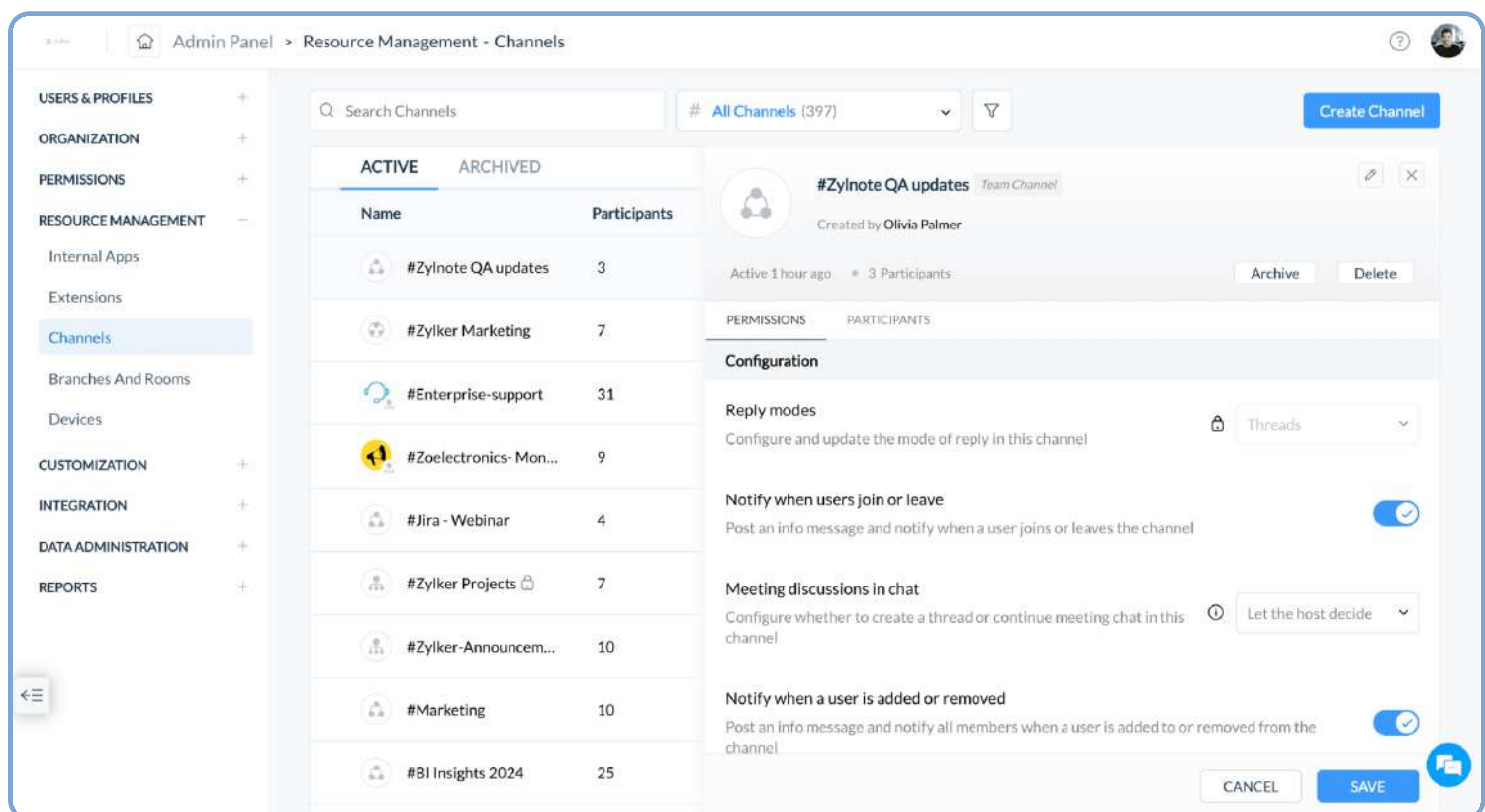
Do so by going to the **Admin Panel > Resource Management - Internal Apps.**



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.

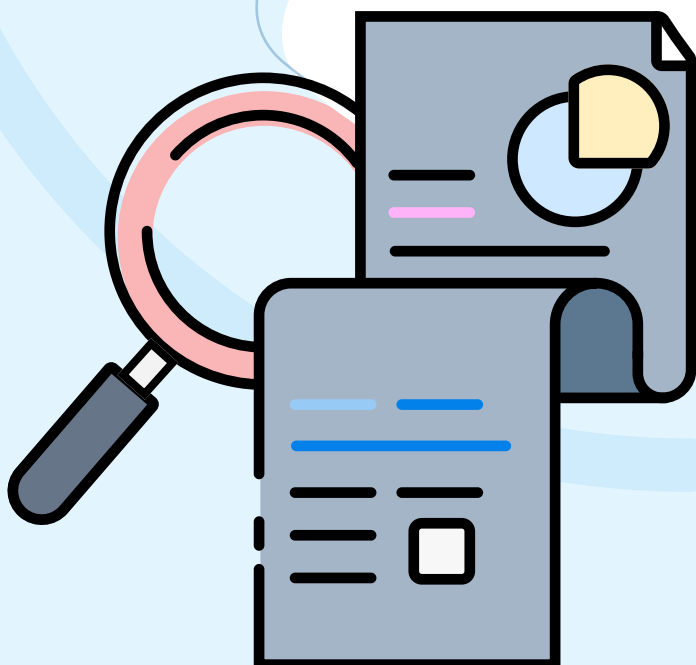
To do so, go to the **Admin Panel > Resource Management - Channels.**



The screenshot displays the 'Admin Panel > Resource Management - Channels' interface. On the left, a sidebar lists various management categories: USERS & PROFILES, ORGANIZATION, PERMISSIONS, RESOURCE MANAGEMENT (expanded), CUSTOMIZATION, INTEGRATION, DATA ADMINISTRATION, and REPORTS. Under 'RESOURCE MANAGEMENT', options include Internal Apps, Extensions, Channels (selected), Branches And Rooms, and Devices. The main area is divided into two sections. The left section shows a table of channels, with tabs for 'ACTIVE' and 'ARCHIVED'. The table lists channels such as '#Zylnote QA updates', '#Zylker Marketing', '#Enterprise-support', and others, along with their participant counts. The right section provides a detailed view of the selected channel, '#Zylnote QA updates', including its creation details, permissions, and configuration settings like 'Reply modes', 'Notify when users join or leave', and 'Meeting discussions in chat'.

Name	Participants
#Zylnote QA updates	3
#Zylker Marketing	7
#Enterprise-support	31
#Zoelectronics- Mon...	9
#Jira - Webinar	4
#Zylker Projects	7
#Zylker-Announcem...	10
#Marketing	10
#BI Insights 2024	25

Reports

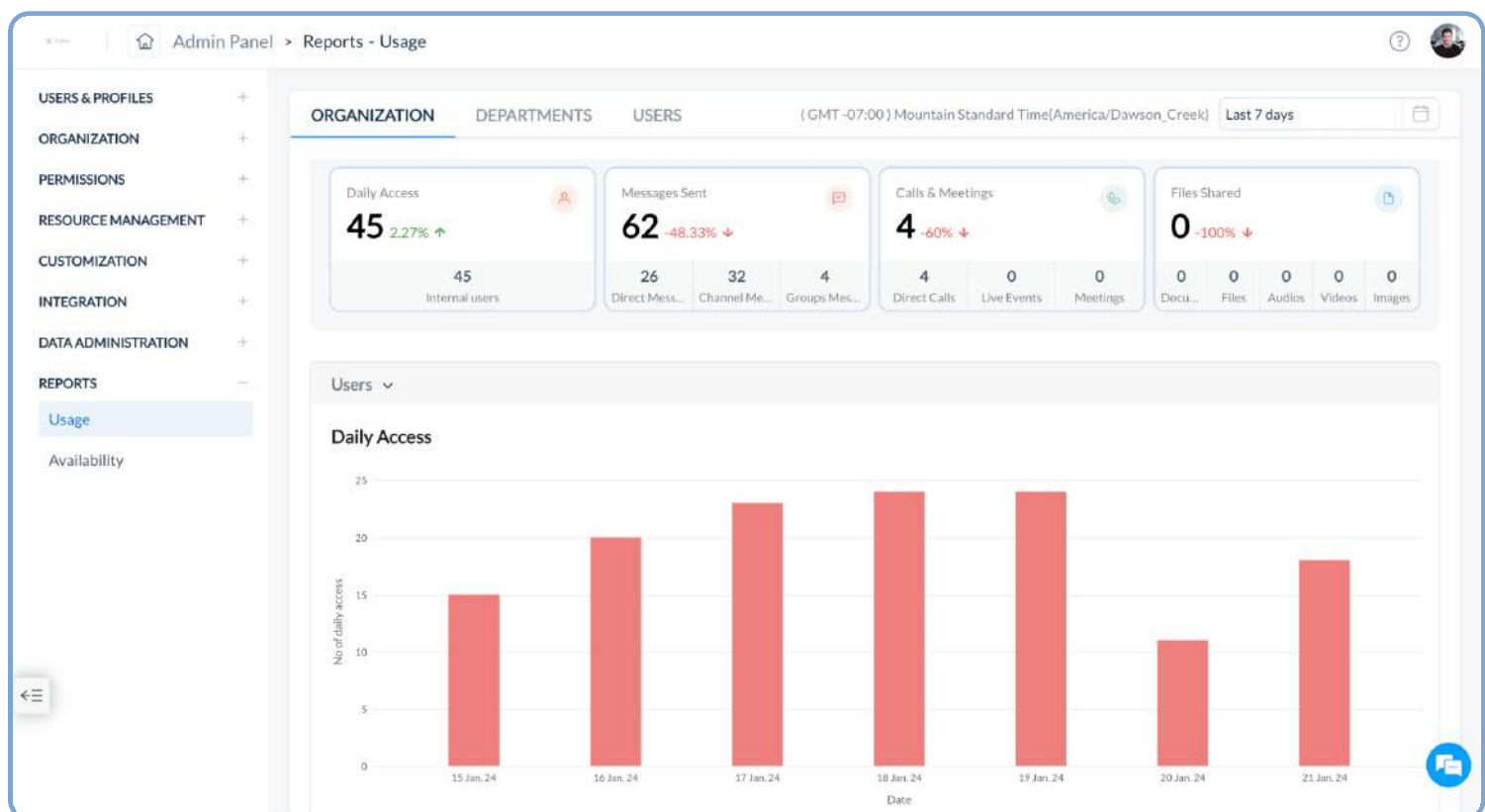


Tracking adoption rates

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 

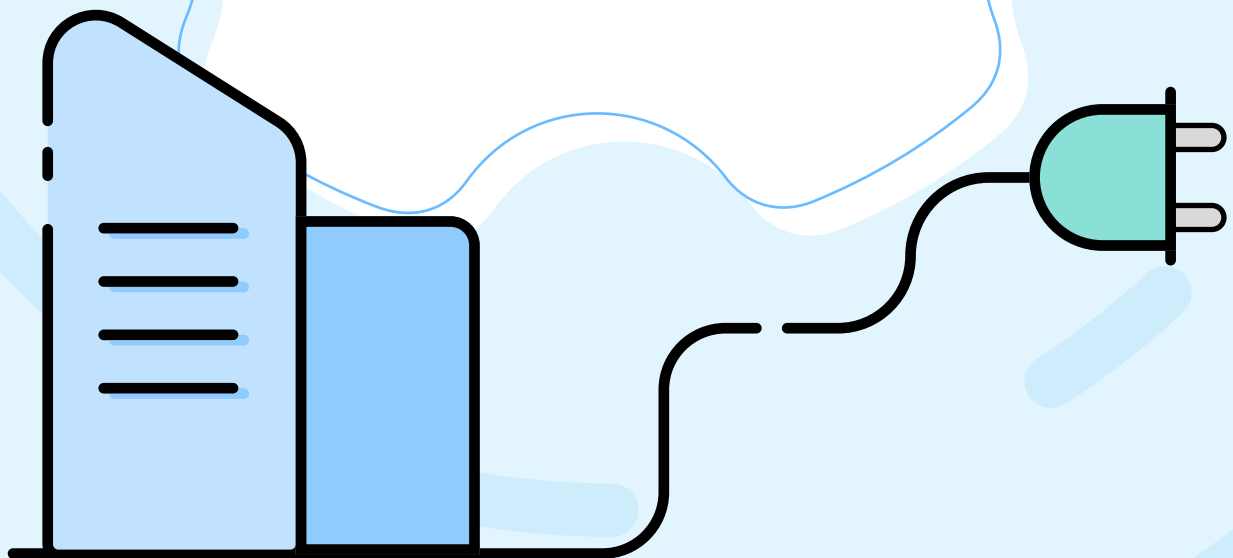
Users reports

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

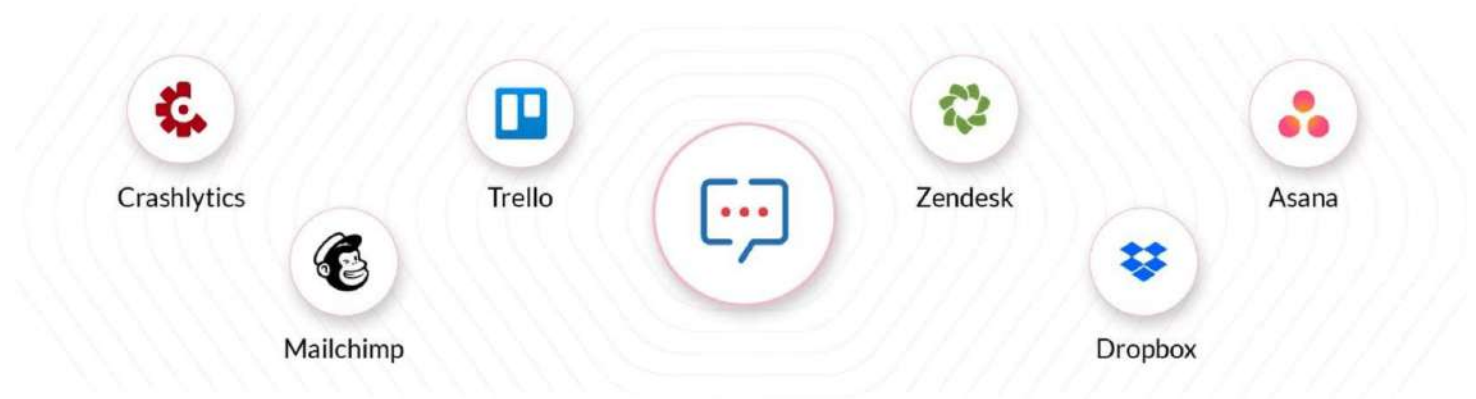


Connecting Zoho Cliq to your workplace apps

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.

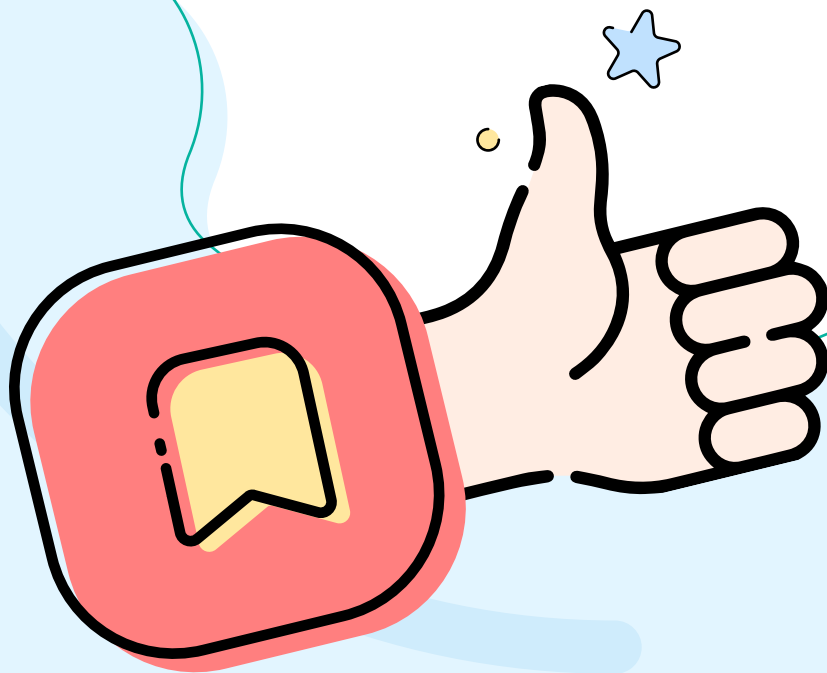
Installing extensions to make work easier: Creating custom workflows

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

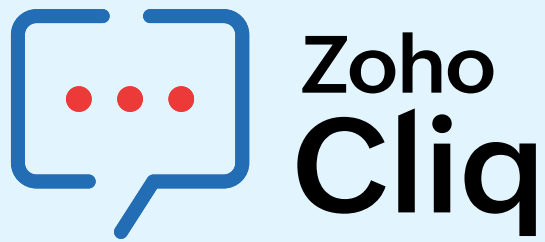


Developer platform help center



Other resources





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



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Webinars

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