



Admin's Handbook





Welcome to Zoho Cliq

This handbook will get you acquainted with your admin capabilities in Cliq and help you make the most of all that Cliq has to offer.

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

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2. Setting up your Cliq organization

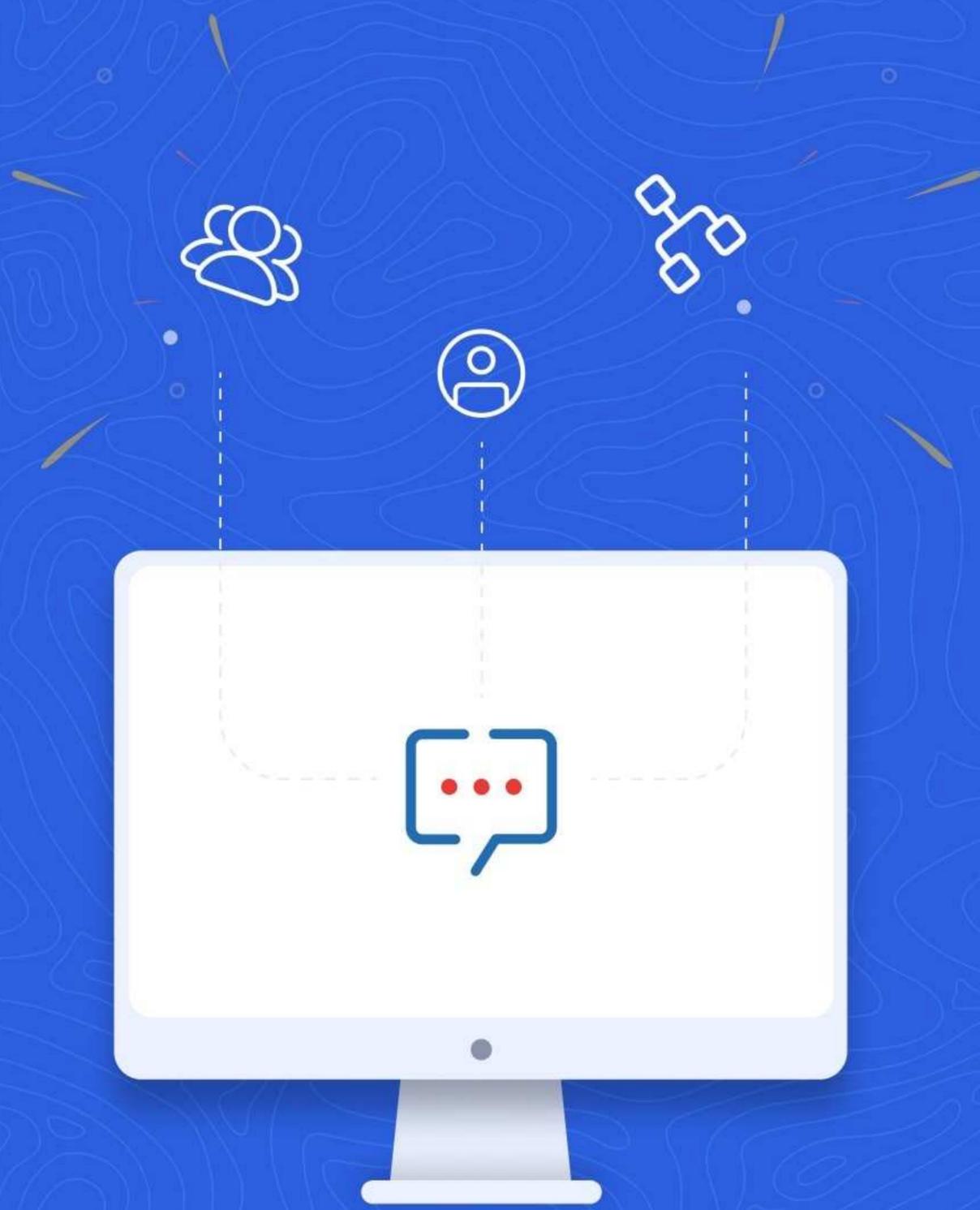
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Initial setup

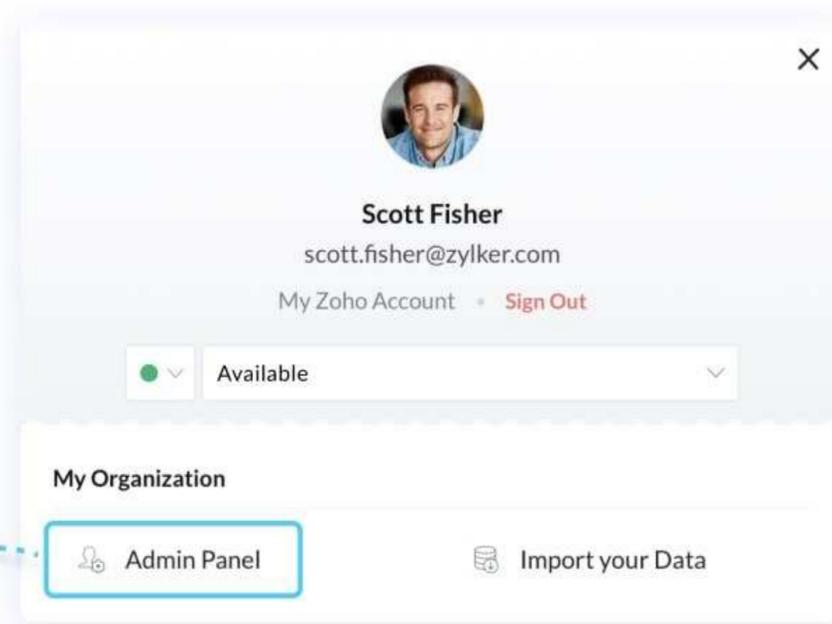
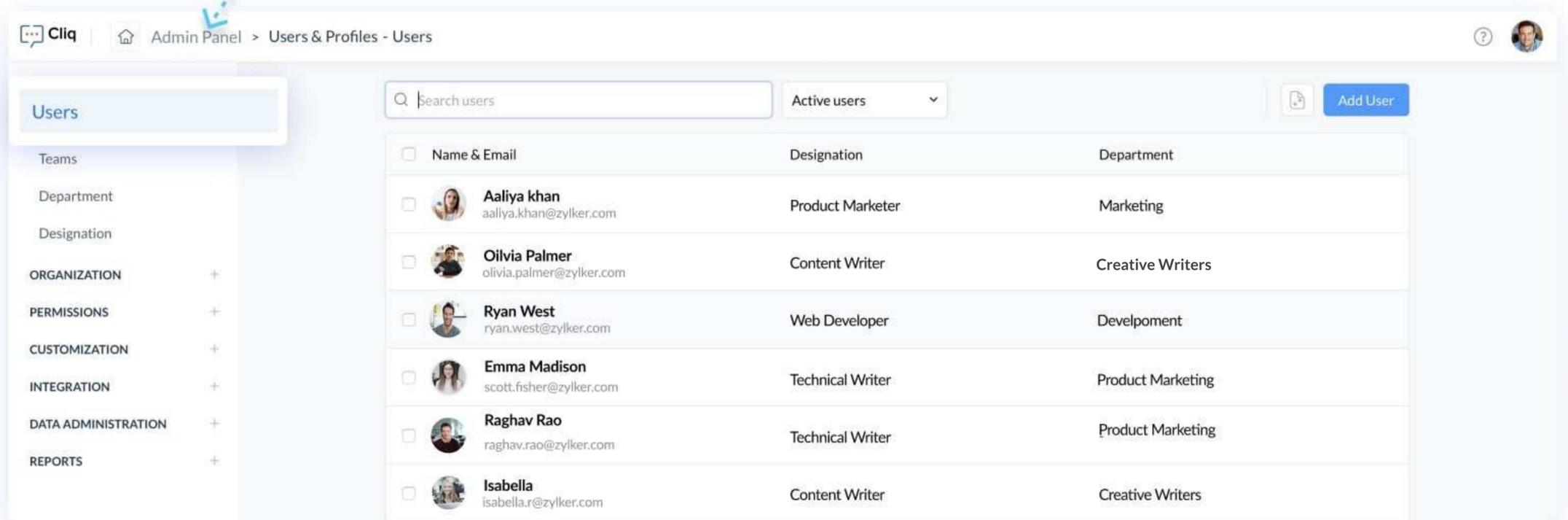
Adding users, teams and departments



Inviting Users

The first step to using Cliq is to onboard your employees. Once they have been added to Cliq as members of your organization, your employees will be able to use the platform and its features to boost up the organization's productivity and performance.

To begin adding users, go to the [Admin Panel > Users & Profiles - Users](#). Click Add User and add the employees email to invite them.

A screenshot of the Cliq Admin Panel. The breadcrumb navigation shows "Admin Panel > Users & Profiles - Users". The page has a sidebar on the left with a "Users" menu item highlighted. The main content area contains a search bar, a filter for "Active users", and an "Add User" button. Below these is a table of users with columns for Name & Email, Designation, and Department.

| <input type="checkbox"/> | Name & Email | Designation | Department |
|--------------------------|--|------------------|-------------------|
| <input type="checkbox"/> |  Aaliya Khan aaliya.khan@zylker.com | Product Marketer | Marketing |
| <input type="checkbox"/> |  Olivia Palmer olivia.palmer@zylker.com | Content Writer | Creative Writers |
| <input type="checkbox"/> |  Ryan West ryan.west@zylker.com | Web Developer | Development |
| <input type="checkbox"/> |  Emma Madison scott.fisher@zylker.com | Technical Writer | Product Marketing |
| <input type="checkbox"/> |  Raghav Rao raghav.rao@zylker.com | Technical Writer | Product Marketing |
| <input type="checkbox"/> |  Isabella isabella.r@zylker.com | Content Writer | Creative Writers |

Note: You can add users in bulk by importing a CSV file.

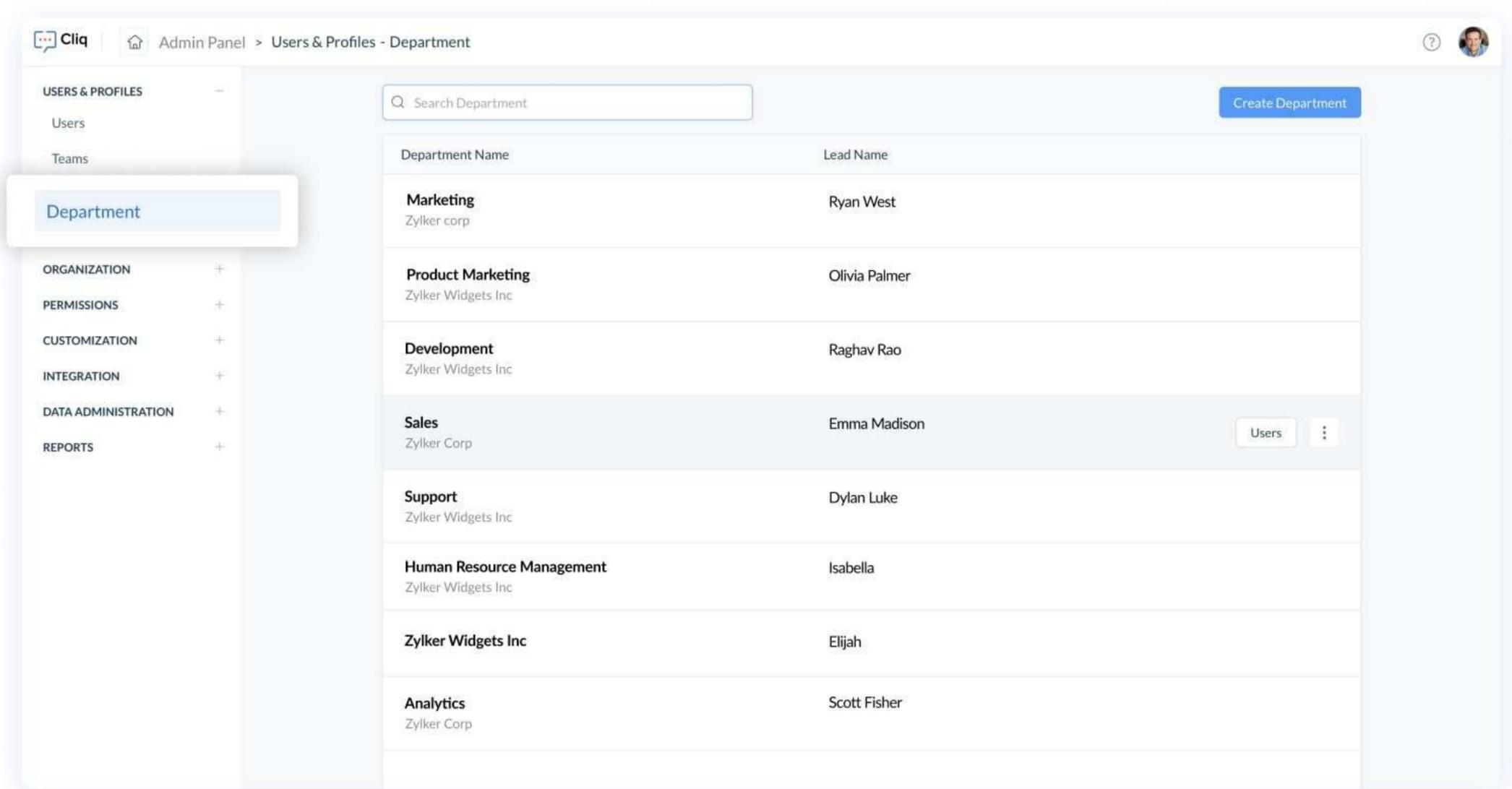


Creating Departments:

Structure your organization with Departments

Cliq Departments help reflect your organization's systematic division based on the line of work. Structure the hierarchy of your organization and manage your employees by mapping them with their work division.

To create a department, go to the [Admin Panel > Users & Profiles - Department](#).



The screenshot displays the Cliq Admin Panel interface for managing departments. The breadcrumb navigation shows 'Admin Panel > Users & Profiles - Department'. A search bar labeled 'Search Department' is at the top right, next to a 'Create Department' button. A sidebar on the left lists navigation options: 'USERS & PROFILES' (with sub-items 'Users' and 'Teams'), 'Department' (highlighted), 'ORGANIZATION', 'PERMISSIONS', 'CUSTOMIZATION', 'INTEGRATION', 'DATA ADMINISTRATION', and 'REPORTS'. The main content area is a table with columns for 'Department Name' and 'Lead Name'. The table lists several departments with their respective lead names and company names. The 'Sales' department row is highlighted and includes a 'Users' button and a dropdown menu icon.

| Department Name | Lead Name |
|--|---------------|
| Marketing Zylker corp | Ryan West |
| Product Marketing Zylker Widgets Inc | Olivia Palmer |
| Development Zylker Widgets Inc | Raghav Rao |
| Sales Zylker Corp | Emma Madison |
| Support Zylker Widgets Inc | Dylan Luke |
| Human Resource Management Zylker Widgets Inc | Isabella |
| Zylker Widgets Inc | Elijah |
| Analytics Zylker Corp | Scott Fisher |

Note: Users can be a part of only one department.

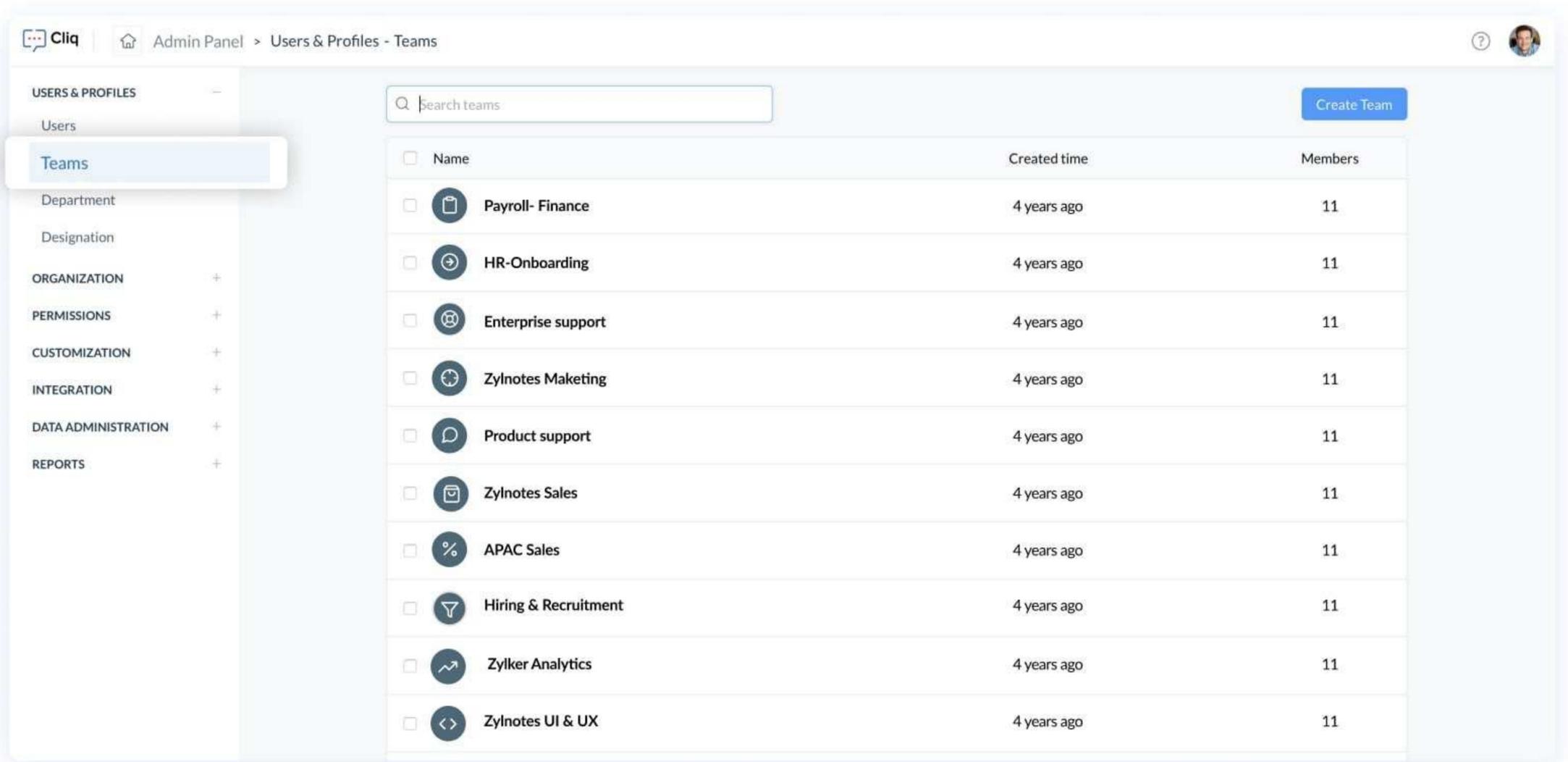
Teams:

Make collaboration easier by creating Teams

Teamwork enhances productivity and improves your organization's performance.

Organize your workforce and help your employees collaborate efficiently by adding them into small, flexible Cliq Teams.

To create a team: Go to [Admin Panel > Users & Profiles - Teams](#).



The screenshot shows the 'Admin Panel > Users & Profiles - Teams' page in the Cliq application. The left sidebar contains a navigation menu with 'Teams' selected. The main area features a search bar for teams and a table listing existing teams.

| <input type="checkbox"/> | Name | Created time | Members |
|--------------------------|----------------------|--------------|---------|
| <input type="checkbox"/> | Payroll- Finance | 4 years ago | 11 |
| <input type="checkbox"/> | HR-Onboarding | 4 years ago | 11 |
| <input type="checkbox"/> | Enterprise support | 4 years ago | 11 |
| <input type="checkbox"/> | Zynotes Maketing | 4 years ago | 11 |
| <input type="checkbox"/> | Product support | 4 years ago | 11 |
| <input type="checkbox"/> | Zynotes Sales | 4 years ago | 11 |
| <input type="checkbox"/> | APAC Sales | 4 years ago | 11 |
| <input type="checkbox"/> | Hiring & Recruitment | 4 years ago | 11 |
| <input type="checkbox"/> | Zylker Analytics | 4 years ago | 11 |
| <input type="checkbox"/> | Zynotes UI & UX | 4 years ago | 11 |



Departments vs. Teams: When to use both

Teams

Team is a group of users who work together on a project/task

Users can be part of multiple teams

Used to create projects or topic specific channels and internal tools such as bots, commands

Departments

Department is a division of the company to which the user belongs, such as Marketing, Sales, IT Administration, HR

Users can be part of only one department

Comes in handy when you're defining your organization hierarchy

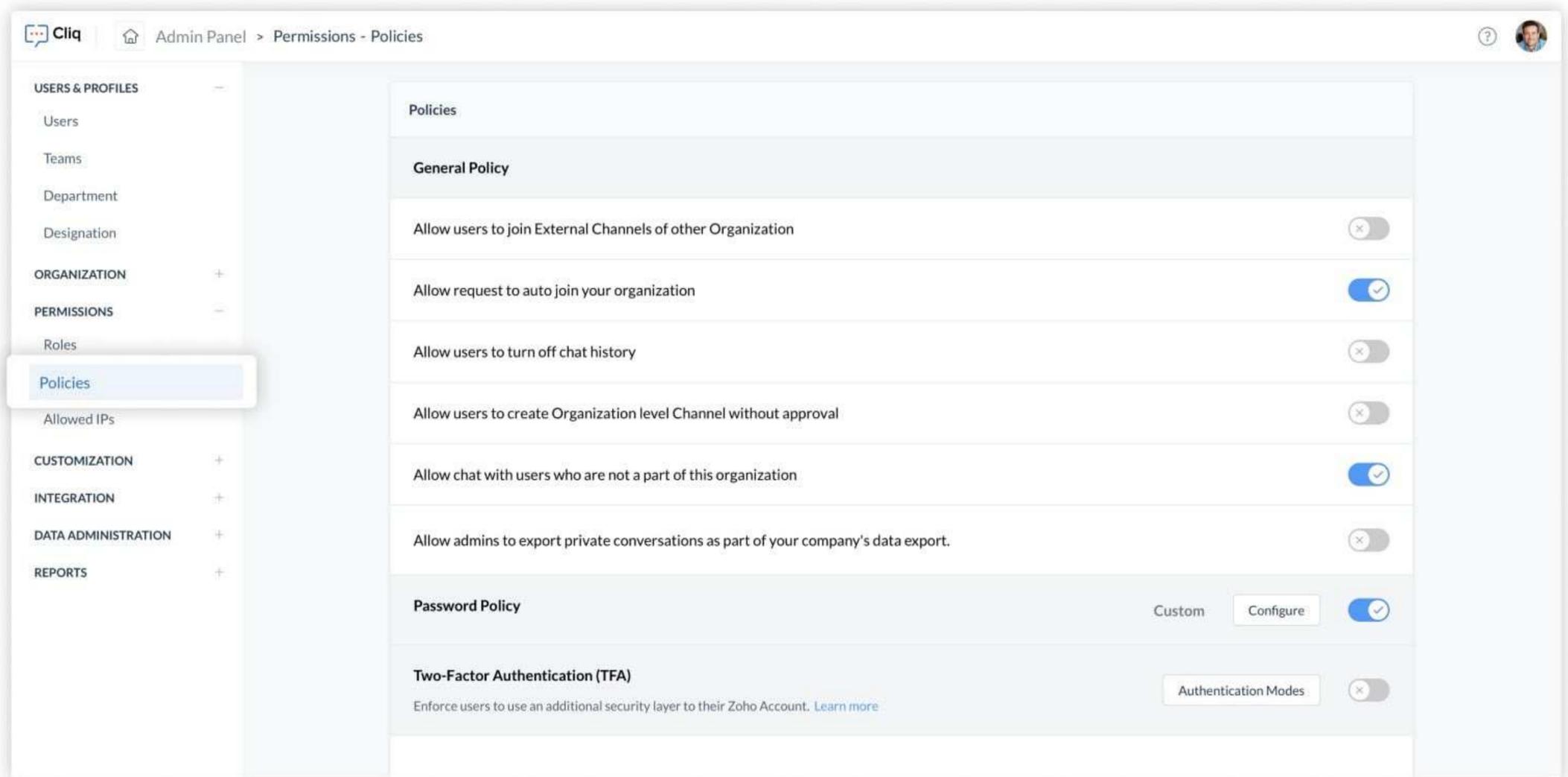
Most organizations have different departments, such as HR department, Finance department, Marketing department, Sales department, and so on.. similarly, most departments are comprised of several teams.

Let's consider this scenario: under the HR department, there will be divisions such as the Onboarding team, Payroll team, HR support team, and more.

Collaborative efforts between HR and Finance will have a significant impact on employee satisfaction and financial strategizing, so in this case the payroll team will consist of members from both the HR department and the Finance department.

Adjusting organization policies

Policies are an essential part of streamlining internal processes and ensuring employee compliance. As an admin, Cliq gives you control over implementation of policies for your organization. You can enable or disable policies according to your organizational needs to ensure that your employees are committed to the organization's vision.



The screenshot displays the Cliq Admin Panel interface for managing organization policies. The breadcrumb navigation shows 'Admin Panel > Permissions - Policies'. The left sidebar contains a menu with categories: 'USERS & PROFILES' (Users, Teams, Department, Designation), 'ORGANIZATION', 'PERMISSIONS' (Roles, Policies), 'Allowed IPs', 'CUSTOMIZATION', 'INTEGRATION', 'DATA ADMINISTRATION', and 'REPORTS'. The 'Policies' item is selected. The main content area is titled 'Policies' and is divided into sections: 'General Policy' and 'Two-Factor Authentication (TFA)'. The 'General Policy' section includes seven toggle switches: 'Allow users to join External Channels of other Organization' (disabled), 'Allow request to auto join your organization' (enabled), 'Allow users to turn off chat history' (disabled), 'Allow users to create Organization level Channel without approval' (disabled), 'Allow chat with users who are not a part of this organization' (enabled), and 'Allow admins to export private conversations as part of your company's data export.' (disabled). The 'Password Policy' section shows 'Custom' selected, a 'Configure' button, and an enabled toggle. The 'Two-Factor Authentication (TFA)' section includes an 'Authentication Modes' button and a disabled toggle. A 'Learn more' link is present under the TFA section.



Adding roles and permissions

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

Defining roles within your organization provides coherence so employees know what's expected of them.

The default roles in Cliq are Super Admin, Admin, Moderator, and Member. You can also customize roles for your organization.

To assign roles: Go to [Admin Panel > Permissions- Roles](#).

Admin General Mobile

Conversations

| | Use | Create | Edit | Delete | File Sharing |
|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Team Channel | <input checked="" type="checkbox"/> |
| Organization Channel | <input checked="" type="checkbox"/> |
| External Channel | <input checked="" type="checkbox"/> |
| Personal Channel | <input checked="" type="checkbox"/> |
| Group Chats | - | <input checked="" type="checkbox"/> | - | - | <input checked="" type="checkbox"/> |

Internal tools

| | Use | Create | Delete |
|-----------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Commands | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Bots | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Functions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Message Actions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Schedulers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Databases | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Widgets | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

CANCEL SAVE

Members General Mobile

Conversations

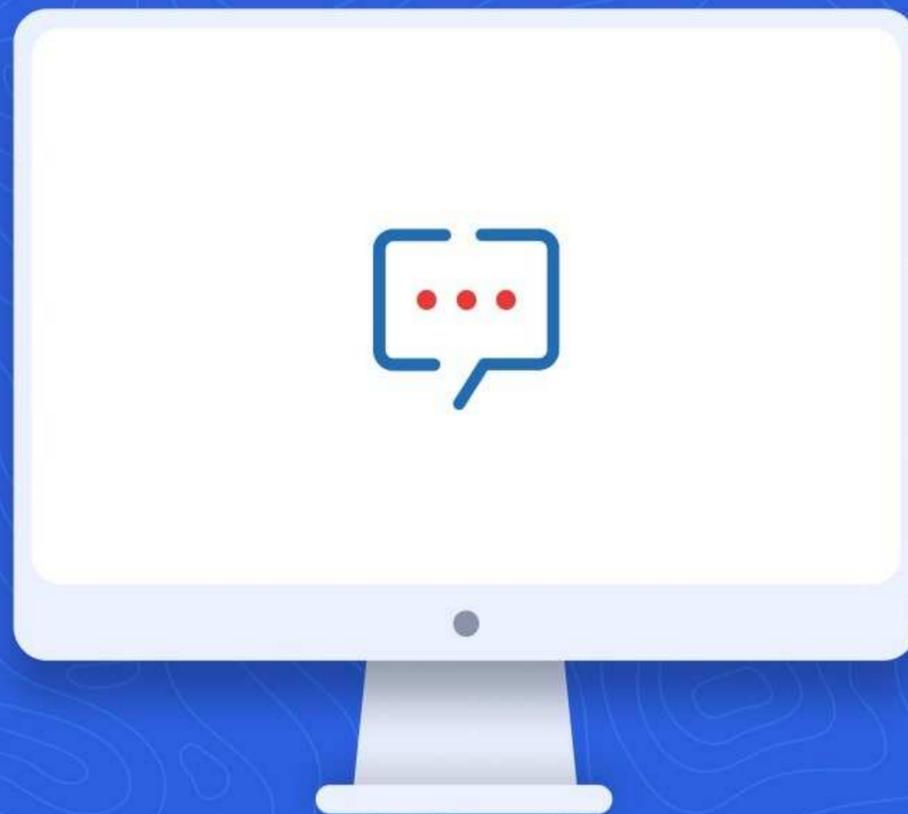
| | Use | Create | Edit | Delete | File Sharing |
|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Team Channel | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Organization Channel | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| External Channel | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Personal Channel | <input checked="" type="checkbox"/> |
| Group Chats | - | <input checked="" type="checkbox"/> | - | - | <input checked="" type="checkbox"/> |

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| Databases | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Widgets | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

CANCEL SAVE

Setting up your Cliq organization



Collaborate in channels

Cliq Channels are meant to enhance collaboration and connection in your organization. These can be made for different levels, such as organization-wide , team-specific, personal, or external chats.

To create a channel: Click on +Create/Join next to Channels in LHS pane and proceed further.

Channels • Join

- @Zylnotes
- # marketing - leads
- # support
- Organization
- Personal
- # In-app design & content
- External
- # ZPrints Vendor

Contacts

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



Connect Cliq to your workplace apps

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

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

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



Crashlytics



Mailchimp



Trello



Zendesk



Dropbox



Asana

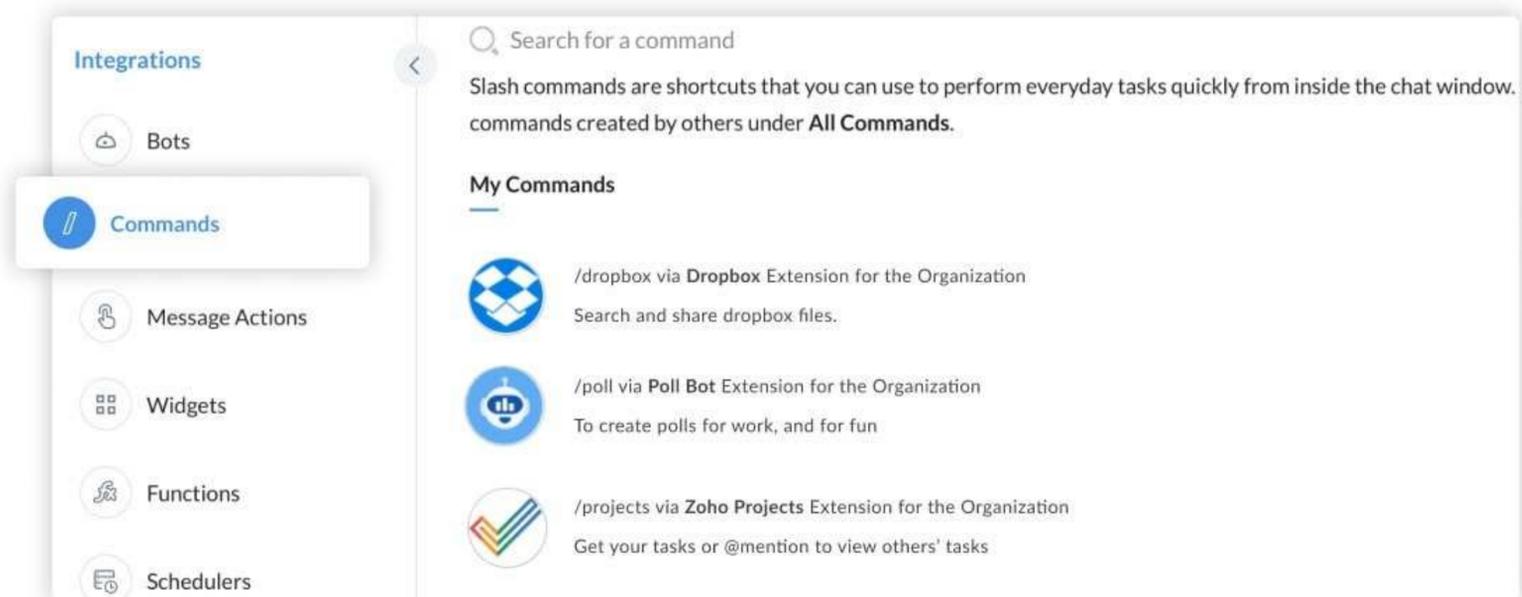
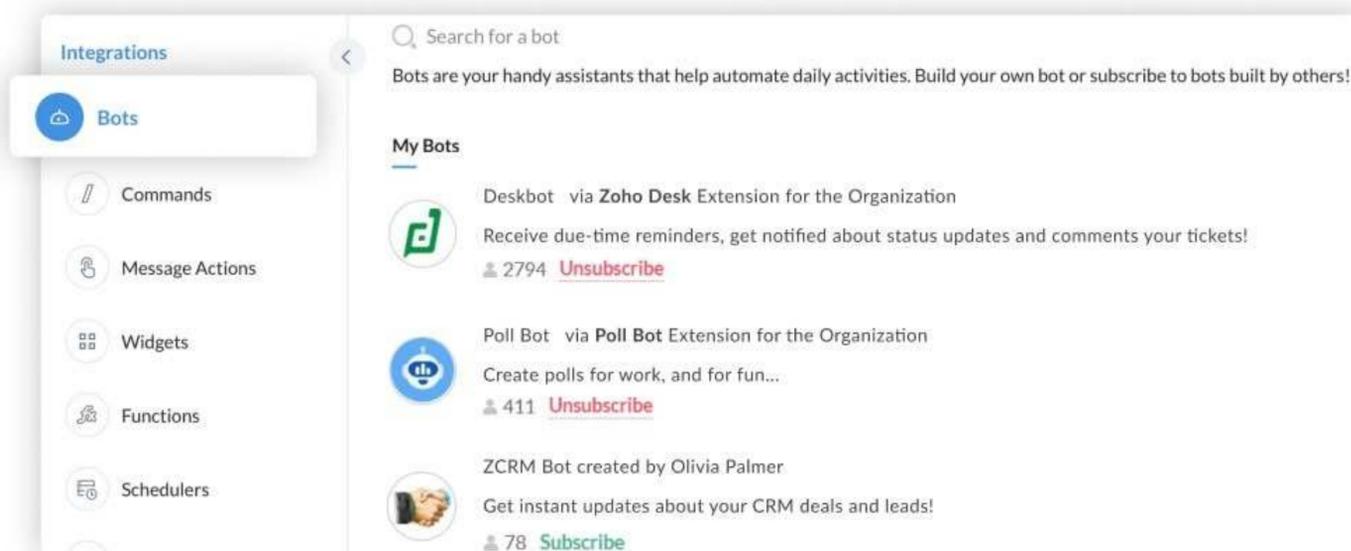


Create custom workflows

Customize your organization's workflows with the help of bot assistants and commands in Cliq.

Chat bots help you perform repetitive, day to day tasks and also provide you with instant notifications. You can customize your bots using Bot handlers in Cliq.

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





How to best use cliq

Your checklist to drive successful adoption

- Run a beta or a pilot launch before starting company adoption
- Identify early adopters and make them product champions
- Start from the top: make sure your top management is well-aligned and in agreement with this change
- Remove any other communication alternatives while making this shift.
- Make employees feel comfortable using a company provided tool by welcoming their opinions and discussions on any topic
- Creating awareness is a consistent effort that involves employees from every layer of the organization
- Drive communication in Cliq Channels for current events, ongoing projects, and other topics that will encourage people to participate
- Engage with your employees, collect feedback, and optimize

Resources

We hope you have found this guide to getting started with 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

<https://www.zoho.com/cliq/help/user-guide.html>

Admin Help Center

<https://www.zoho.com/cliq/help/admin-guide.html>

Developer Platform Help Center

<https://www.zoho.com/cliq/help/developers.html>

Cliq Blog

<https://www.zoho.com/cliq/blog>

We have really nice people you can talk with

Get in touch through

support@zohocliq.com

You can also reach out to us
in



@zohocliq

