



IT technicians · Zoho One optimization



Zoho Cliq

User and Administrator Manual

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Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

Index — English version

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1. Introduction and access

1.1 About this manual

This manual describes the Zoho Cliq features available to users and the functions reserved for administrators, as available in September 2026.

Available features vary by edition (Free, Standard, Professional, Enterprise, or included in Zoho Workplace and Zoho One) and by your organization's configuration.

1.2 What is Zoho Cliq?

Zoho Cliq is Zoho's team messaging platform. It brings together one-to-one and group chat, team or project channels, threads, audio and video calls, meetings with screen sharing, as well as bots and commands that connect Cliq to other Zoho apps. Cliq reduces internal email and centralizes team conversations.

1.3 Signing in

1. Go to <https://cliq.zoho.com> (or <https://cliq.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One or Zoho Workplace, open the app launcher and select Cliq.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — Install the Cliq desktop app (Windows, macOS, Linux) and the mobile app: notifications and calls are more reliable there than in a browser tab.

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2. Interface and navigation

2.1 Interface elements

Element	Purpose
Chats	One-to-one and group conversations
Channels	Discussion spaces by team, project or topic
Contacts	Organization colleagues and external contacts, with their status
Bots	Automated assistants and Zoho app bots
Search bar	Search messages, files, people, channels; run a command
Right panel	Conversation details: members, files, pinned messages, threads
Home screen and widgets	Overview: mentions, reminders, meetings, app widgets

2.2 Useful shortcuts

- Ctrl + K (Cmd + K): jump quickly to a conversation
- Up arrow: edit your last message
- Shift + Enter: new line without sending
- /: show available commands
- Ctrl + /: show the list of keyboard shortcuts

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3. Chat, threads and mentions

3.1 Starting a conversation

1. Click + next to Chats and choose one or more colleagues.
2. Write your message; format it (bold, list, code block) and add emojis or files.
3. Press Enter to send.
4. For a group conversation, name it so it is easy to find.

3.2 Message actions

- Reply in Thread to keep the main conversation readable
- React with an emoji, quote, forward or copy the message link
- Pin an important message at the top of the conversation
- Star it to find it in your saved messages
- Edit or delete your message, according to organization policies
- Turn a message into a task, reminder or record in another app (message actions)

3.3 Mentions

Mention	Effect
@name	Notifies a specific person
@group or @team	Notifies the members of a team or group
@all / @participants	Notifies all members of the conversation or channel, depending on permissions
@available	Notifies only members who are currently available
#channel	Inserts a link to a channel

Nuagix tip — Reserve @all for important announcements: too many general notifications lead colleagues to turn off alerts.

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4. Channels

4.1 Channel types

Type	Access
Organization channel	Open to all members of the organization
Team channel	Reserved for members of a team (e.g., Sales, Accounting)
Private channel	By invitation only
External channel	Includes people from other organizations, according to policies

4.2 Creating a channel

1. Click + next to Channels > Create Channel.
2. Enter the name (e.g., #project-client-abc), description and type.
3. Add members or an entire team.
4. Set permissions: who can post, mention everyone, add members.
5. Pin reference messages (goals, links, channel rules).

4.3 Channel roles

- Channel owner / super admin: all rights, including deletion
- Admin: manages members and settings
- Moderator: manages messages and posts
- Member: reads and posts according to permissions

Note — A channel can be set to announcement mode: only admins post, members react or reply in threads.

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5. Files and search

5.1 Sharing files

- Drag and drop a file into the conversation
- Attach a file from WorkDrive, Google Drive, OneDrive or Dropbox
- Preview documents, images and videos without downloading
- Files tab in each conversation to find exchanged documents
- Save a received file directly to WorkDrive

Nuagix tip — For a working document, share a WorkDrive link rather than an attachment: everyone edits the same version.

5.2 Searching

1. Click in the search bar.
2. Enter a keyword; filter by conversation, sender, period or type (messages, files, links).
3. Use filters to limit to mentions or pinned messages.
4. Click a result to see it in context.

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6. Calls, meetings and screen sharing

6.1 Audio and video calls

1. Open the conversation with a colleague or group.
2. Click the audio or video call icon.
3. During the call, turn the mic and camera on or off, share your screen or add participants.
4. Review call history in the Calls panel.

6.2 Meetings

- Start an instant meeting in a channel: members join in one click
- Schedule a meeting with a reminder and join link
- Share your screen or a single window, with the option to hand over control
- Meeting recording, depending on edition and policies
- Transcription and summary by Zia, depending on edition
- Virtual backgrounds and background blur

Note — For webinars or meetings with many external participants, use Zoho Meeting, which is integrated with Cliq.

6.3 Customer meetings

To meet a customer, prefer a Zoho Meeting or Zoom link sent by email or through Zoho Bookings. Cliq calls are best suited to internal exchanges and external channels with your partners.

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7. Statuses and notifications

7.1 Availability statuses

Status	Meaning
Available	Online and reachable
Busy	Online but focused; fewer notifications
Away	Inactive for a while or out of the office
Do Not Disturb	Notifications paused for a chosen period
Invisible	Signed in but shown as offline

7.2 Custom status and notifications

1. Click your profile picture > Status.
2. Choose a custom status (e.g., “In a customer meeting until 3 p.m.”) with an expiry time.
3. In Settings > Notifications, choose alerts per conversation: all, mentions only or none.
4. Set your working hours to automatically pause notifications outside those hours.

Nuagix tip — Set working hours in Cliq: it is a good right-to-disconnect practice for the team.

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8. Reminders, scheduled messages and polls

8.1 Reminders

1. Hover over a message > More > Remind Me, or type /remind.
2. Choose when to be reminded (in 1 hour, tomorrow morning, specific date).
3. To remind a colleague of a task, choose the person concerned.
4. View and manage your reminders in the Reminders panel.

8.2 Other tools

- Scheduled messages: write now, send later (e.g., Monday 8:30 a.m.)
- Polls (/poll): quick vote in a conversation or channel
- Tasks: create a task from a message, in Cliq or Zoho Projects
- Saved messages: find starred messages
- Drafts kept per conversation

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9. Bots, slash commands and widgets

9.1 Common slash commands

Command	Purpose
/remind	Create a reminder
/poll	Create a poll
/meet or /call	Start a meeting or call, depending on configuration
/status	Change your status
/giphy	Insert an animated image
App commands	E.g., create a CRM lead or Desk ticket from Cliq, depending on installed extensions

Note — Type / in the message box to see all commands available in your organization.

9.2 Bots and widgets

- Zoho app bots (CRM, Desk, Projects, etc.): notifications and actions directly in Cliq
- Custom bots created by the administrator to answer frequent questions
- Widgets: home screen dashboards (e.g., open deals, open tickets)
- Message actions: send a message to another app in one click
- Extensions from the Cliq Marketplace

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10. Integrations with Zoho apps

10.1 Common uses

Application	In Cliq
Zoho CRM	Deal notifications, contact lookup, lead creation
Zoho Desk	New ticket alerts, reply and assignment
Zoho Projects	Task creation, project updates in a channel
Zoho Mail	Share an email in a conversation
Zoho WorkDrive	Attach and save files
Zoho Calendar and Meeting	Meeting reminders and starting meetings
Zoho People	Attendance, time off and HR announcements

Nuagix tip — Create a #sales-alerts channel connected to Zoho CRM: the team sees won deals and hot new leads live.

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11. Zia, the AI assistant

11.1 Zia features

- Summary of unread messages in a conversation or channel
- Meeting summary and transcription, depending on edition
- Message translation, useful for French and English exchanges
- Writing help: rephrase or change the tone of a message
- Smart search through history
- Zia answers to questions about your Zoho data, depending on integrations

Note — Always review Zia's summaries and translations: they can miss important nuances. Availability varies by edition and organization settings.

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12. Mobile app

12.1 Features

- Chat, channels, threads and mentions on iOS and Android
- Audio and video calls, joining meetings
- Voice messages and photo sharing
- Configurable notifications and Do Not Disturb mode
- Smartwatches: read and quick replies
- App lock with passcode or biometrics

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13. Best practices

13.1 Nuagix recommendations

- Use channels for teamwork and private chat for individual topics
- Reply in threads to keep channels readable
- Name channels consistently (e.g., #team-sales, #project-name, #announcements)
- Pin reference information in each channel
- Keep important decisions in a document or management tool, not only in Cliq
- Do not share passwords or sensitive personal information in conversations
- Respect your colleagues' statuses and working hours

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14. Users and roles

14.1 Organization roles

Role	Rights
Super Admin	Full access to the Cliq organization, billing and policies
Admin	Manages users, teams, channels and delegated settings
Member	Uses Cliq according to organization policies
Guest / external user	Limited access to the conversations and channels they are invited to, depending on edition

14.2 Adding a user

1. Admin Panel > Users > Add Users.
2. Enter email addresses, or import them; users from a verified domain can also join automatically.
3. Assign the role and add them to the appropriate teams and channels.
4. The user receives an invitation and can access Cliq once active.

Note — In Zoho One or Zoho Workplace, first add the user in the Zoho One (or Workplace) console and assign them Cliq.

14.3 When an employee leaves

1. Transfer ownership of the channels and bots they managed to another member.
2. Review the integrations and connections they created.
3. Retain their conversations according to the retention policy (eDiscovery if needed).
4. Deactivate the user to close their sessions and free the license.

Caution — Deactivate the account before deleting anything: deletion can make some conversations and files inaccessible.

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15. Organization and teams

15.1 Organization settings

- Organization name, logo and domain
- Default language and time zone
- Verified domains for automatic employee sign-up
- Default organization channel (e.g., #announcements) everyone is added to
- Welcome message for new members

15.2 Creating a team

1. Admin Panel > Teams > Create Team.
2. Name the team (e.g., Sales, Accounting, Management).
3. Add members or sync with an existing group.
4. A team channel is created; new members are added automatically.

Nuagix tip — Align Cliq teams with company departments and with Zoho Mail and WorkDrive groups: one logic everywhere.

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16. Managing channels

16.1 Administrator controls

Control	Effect
Channel creation	Allow all members or administrators only
External channels	Allow or block adding people from other organizations
Archiving	Archive inactive channels without losing history
Ownership transfer	Reassign a channel whose owner has left
General mentions	Limit the use of @all in large channels

16.2 Reviewing channels

1. Admin Panel > Channels.
2. Sort by activity, member count or type.
3. Archive inactive channels and merge duplicates.
4. Review the list of external channels and their participants.

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17. Communication policies

17.1 Available policies

Policy	Examples
External communication	Allow chat with external contacts, by domain or group
File sharing	File types and size, external sharing
Message editing and deletion	Allow or limit in time
Calls and meetings	Recording, external participants, screen sharing
Bots and extensions	Installation reserved for administrators or allowed for members
Mobile and desktop access	Device restrictions, depending on edition

17.2 Applying a policy

1. Admin Panel > Policies or Security.
2. Set the organization's default policy.
3. Create exceptions for certain groups (e.g., management, sales team).
4. Inform users of the rules in effect.

Caution — Restricting message editing after the fact strengthens traceability, but inform the team to avoid frustration.

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18. Retention and eDiscovery

18.1 Retention policies

1. Admin Panel > Data Retention.
2. Choose how long to keep messages and files (e.g., 1 year, 7 years, indefinitely).
3. Apply it to the whole organization or to certain conversation types (chats, channels).
4. Items older than the defined period are deleted automatically.

Caution — Deletion by the retention policy is permanent. Validate the period with management before enabling it.

18.2 eDiscovery and export

- Search the organization's messages by keyword, user, conversation or period
- Preserve data for an investigation or litigation
- Export conversations for a legal request
- Access limited to authorized administrators; searches are logged
- Available depending on edition

Note — The retention period must balance your legal obligations with Law 25's minimization principle. Document your choice.

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19. Development platform

19.1 Components

Component	Use
Bots	Assistants that respond to messages and send alerts
Slash commands	Custom commands (e.g., /timeoff to report an absence)
Message actions	Process a message with an app (e.g., create a ticket)
Widgets	Custom dashboards on the home screen
Schedulers	Run a task at a set time (e.g., weekly reminder)
Databases and connections	Store data and call external APIs
Incoming webhooks	Post to a channel from another application

19.2 Development best practices

- Develop in Deluge in the Cliq editor and test in a private channel
- Group components into an extension to deploy and update them
- Use OAuth connections with the minimum permissions
- Document every bot and command: purpose, owner, connected apps

Nuagix tip — An “internal FAQ” bot that answers questions about time off, procedures and tools saves small-business managers a lot of time.

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20. Integrations

20.1 Zoho integrations

Application	Typical use
Zoho CRM	Sales alerts and CRM actions in Cliq
Zoho Desk	Ticket notifications and management
Zoho Projects	Project channels and task creation
Zoho People	Attendance, time off and announcements
Zoho WorkDrive	Storage of shared files
Zoho Mail and Calendar	Email sharing and meeting reminders
Zoho Meeting	Meetings and webinars

20.2 Other integrations

- Cliq Marketplace: Google Drive, Dropbox, GitHub, Jira, Trello and more
- Zoom and other video conferencing tools, depending on extensions
- Zoho Flow to connect third-party apps
- Cliq REST API (OAuth 2.0) and incoming webhooks

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21. Security and compliance

21.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Access restriction by IP address
- Encryption of messages in transit and at rest
- Session and device management, remote sign-out
- Audit log of administrator and user actions
- Hosting in the Canadian data center (zohocloud.ca)

21.2 Privacy and Quebec Law 25

- Prohibit exchanging sensitive personal information in Cliq; use WorkDrive with restricted access
- Govern external channels and regularly review their participants
- Set a documented retention period
- Limit eDiscovery access to authorized people
- Document confidentiality incidents

Note — This manual is not legal advice. Confirm your obligations with your legal advisor.

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22. Editions and licenses

22.1 Editions

Edition	For whom
Free	Small teams: basic chat, channels and calls, limited history
Standard	Teams: full history, meetings, integrations
Professional	Organizations: advanced administration, development platform, higher limits
Enterprise	Advanced needs: retention, eDiscovery, compliance, depending on the offering
Zoho Workplace / Zoho One	Cliq included with the suite's other apps

22.2 Tracking usage

Admin Panel > Subscription shows the edition, licenses used and storage. Capacities (meeting participants, storage, history) vary by edition. Remove licenses from deactivated users.

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23. Deployment checklist

23.1 Before going live

- ☐ Organization, verified domain, language and time zone configured
- ☐ Users added and teams created
- ☐ Core channels created (#announcements, team and project channels)
- ☐ External communication and file sharing policies defined
- ☐ Usage rules communicated (threads, mentions, statuses)
- ☐ Integrations (CRM, Desk, Projects, WorkDrive) configured
- ☐ Custom bots and commands tested
- ☐ Retention policy defined (Law 25)
- ☐ Multi-factor authentication enabled
- ☐ Desktop and mobile apps installed
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Cliq setup, integration and training. Book a Zoom meeting: <https://nuagix.zohobookings.com/#/andre-martin>

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Appendix

A. English-French glossary

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A. English-French glossary

A.1 Interface terms

English (interface)	French
Chat	Clavardage
Channel	Canal
Thread	Fil de discussion
Mention	Mention
Pin	Épingler
Starred Messages	Messages enregistrés
Reaction	Réaction
Reminder	Rappel
Poll	Sondage
Status	Statut
Do Not Disturb	Ne pas déranger
Call	Appel
Meeting	Réunion
Screen Share	Partage d'écran
Slash Command	Commande slash
Message Action	Action de message
Team	Équipe
Admin Panel	Panneau d'administration
Data Retention	Rétention des données
Audit Log	Journal d'audit

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