



IT technicians · Zoho One optimization



Zoho SalesIQ

User and Administrator Manual

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Prepared by Nuagix · September 2026

nuagix.ca · support@nuagix.ca

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 SalesIQ features available to operators (users) and the functions reserved for administrators, as available in September 2026.

Interface labels may vary slightly depending on your account language and plan.

1.2 What is Zoho SalesIQ?

Zoho SalesIQ is Zoho's customer engagement platform: live chat on your website, real-time visitor tracking, chatbots and AI agents, messaging on WhatsApp and social networks, a knowledge base and audio calls. It integrates natively with Zoho CRM, Zoho Desk, Bigin and several other Zoho apps.

- Turn website visitors into qualified leads
- Answer sales and support questions live
- Automate frequent answers with a bot or an AI agent
- Centralize WhatsApp, Messenger, Instagram and other conversations
- Measure team performance and customer satisfaction

1.3 Signing in

1. Go to <https://salesiq.zoho.com> (or <https://salesiq.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, open the app launcher and select SalesIQ.
4. Set your status to Available to start receiving conversations.

Nuagix tip — Install the Zoho SalesIQ mobile app (iOS and Android) to answer visitors even when you are away from your desk.

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2. Interface and navigation

2.1 Main modules

Module	Purpose
Conversations	Ongoing, waiting, missed and closed chats across all channels
Visitors	Real-time list of people currently on your website
Users / Contacts	Identified visitors, leads and verified contacts
Bots	Zobots, Answer Bot and Zia Agents
Resources	Articles, FAQs and canned responses
Reports	Team, visitor and bot dashboards
Settings	Brands, departments, operators, routing, integrations

2.2 Operator status

Status	Effect
Available	You receive new conversations
Busy	You stay signed in but no longer receive new conversations
Offline	No conversations; visitors can leave a message

Note — Your status can sync with your other Zoho apps (Cliq, Desk) to stay consistent.

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3. Live chat

3.1 Accepting and handling a conversation

1. A sound and visual notification signals a new conversation.
2. Click Accept to take the conversation.
3. Review the visitor panel: pages visited, source, history, score, CRM data.
4. Reply; use Canned Responses with the slash “/”.
5. Share a file, article or link if needed.
6. End the conversation and add a note or tag.

3.2 In-chat tools

- Transfer to a colleague or another department
- Invite a colleague (group chat)
- Voice notes and one-click audio calls
- Screen sharing; remote access with Zoho Assist; camera-based visual support with Zoho Lens
- Real-time translation (DeepL) for visitors who speak another language
- Zia Writing Assistant: rephrase, polish or generate a reply
- Real-time Smart Suggestions
- AI summary of the chat or call, pushable to CRM or Desk

3.3 After the conversation

- Feedback request: emoji, stars or thumbs up/down
- Transcript emailed to the visitor, if enabled
- Create a lead, contact, Desk ticket or Zoho Projects task

Nuagix tip — Reply within 30 seconds: first-response speed is the single biggest driver of chat satisfaction.

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4. Visitor tracking and proactive engagement

4.1 Real-time visitor list

- Name (if known), location, current page, source (Google, ads, email)
- Number of visits, last visit, time on site
- Lead Score calculated from behaviour
- Filters: new, returning, customers, hot leads

4.2 Engaging a visitor proactively

1. Spot an interesting visitor (e.g., on the Pricing page for 2 minutes).
2. Click Engage and write a personalized message.
3. The message appears in the visitor's widget; the chat starts if they reply.

4.3 Automatic triggers

Administrators can configure Triggers that automatically send a message or launch a bot based on criteria: page visited, time spent, source, number of visits, country.

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5. Messaging channels

5.1 Supported channels

Channel	Use
Website widget	Chat on your website, branded with your colours
Mobile app (Mobilisten)	Chat built into your own mobile app
WhatsApp	Conversations and campaigns using approved, multilingual templates
Facebook Messenger and Instagram	Private messages from your pages
Telegram, LINE, WeChat	Popular messaging apps depending on your customers
QR code	Visitors scan a printed code to start a conversation

5.2 Replying on every channel

All conversations arrive in the same Conversations module, with an icon showing the channel. You reply the same way regardless of where the message came from.

5.3 WhatsApp campaigns

1. Choose a Meta-approved WhatsApp template (available in several languages).
2. Select contacts who consented to WhatsApp messages.
3. Personalize variables and send a one-to-one message or a broadcast.
4. Replies arrive in Conversations like a regular chat.

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6. Chatbots and AI agents

6.1 Bot types

Type	How it works
Codeless Zobot (Codeless Bot Builder)	Card-based guided flow: questions, buttons, forms, conditions
Answer Bot	Answers natural-language questions from your articles and FAQs
Zia Agents	Autonomous AI agents that work like operators, with instructions and tools
Programmable bot	Deluge scripts or webhooks for custom needs

6.2 Building a codeless Zobot

1. Bots > Zobot > New Bot > Codeless Builder.
2. Choose the brand and pages where the bot appears.
3. Add cards: welcome message, choice question, name and email capture, appointment booking.
4. Add conditions (e.g., if “Sales”, transfer to the Sales department).
5. Always provide a handoff to a human.
6. Test the bot in preview, then publish it.

6.3 AI knowledge sources

- SalesIQ articles and FAQs
- Webpages module: turns your website content into an answer source
- Choice of AI model: Zia, OpenAI, Anthropic, Google AI or DeepSeek, depending on configuration

Caution — Review bot and AI agent answers regularly. Limit them to reliable, up-to-date sources to avoid inaccurate answers.

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7. Articles, FAQs and canned responses

7.1 Available resources

- Articles: help content published in the widget and used by Answer Bot
- AI-powered article generation and translation
- Dynamic FAQs, personalized using visitor data
- Canned Responses: reusable text for operators

7.2 Creating a canned response

1. Resources > Canned Responses > New Response.
2. Give it a short shortcut (e.g., /hours).
3. Write the text; insert variables if needed (visitor name, operator name).
4. Choose whether it is personal or shared with the department.

Nuagix tip — Prepare canned responses in both French and English to serve all your customers quickly.

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8. Contacts, leads and follow-ups

8.1 Identifying visitors

- Pre-chat form (name, email, phone)
- Automatic identification of contacts known in Zoho CRM or Bigin
- Channel-verified or JWT-verified users (customers signed in to your portal)

8.2 Pushing to other apps

- Create or update a Zoho CRM lead or contact, with the conversation summary
- Use CRM booking forms directly in SalesIQ
- Create a Zoho Desk or Freshdesk ticket, with tag sync
- Create a Zoho Projects task
- Send a Zoho Survey in the conversation

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9. Reports and dashboards

9.1 Available reports

Report	Content
Overview	Conversation volume, response rate, missed chats
Team performance	First response time, average duration, ratings per operator
Visitors	Traffic, sources, popular pages, conversions
Bots	Conversations handled, handoffs to humans, unanswered questions
Satisfaction	Feedback results
Department dashboard	Conversations per department and operator availability

9.2 TV display

The SalesIQ TV app (Android and iOS) continuously displays key metrics and recognition pop-ups for the team, ideal for a support centre.

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10. Mobile app

10.1 Features

- Receive and reply to conversations on all channels
- See real-time visitors and engage them
- Make and receive audio calls
- Use canned responses and share files
- Change status and receive push notifications

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11. Best practices

11.1 Nuagix recommendations

- Display clear availability hours and an offline form outside those hours
- Use a bot to qualify (name, email, need) before handing off to a human
- Always offer the option to talk to a person
- Personalize proactive messages based on the page visited
- Push every useful conversation to Zoho CRM for follow-up
- Serve Quebec customers in French first, with English as a secondary language
- Review unanswered bot questions monthly to enrich your articles
- Measure first response time and satisfaction, not just volume

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12. Roles and operator management

12.1 Roles

Role	Main permissions
Portal Owner	Full ownership; only one who can transfer portal ownership
Admin	Portal management: brands, operators, integrations, settings, chat supervision
Supervisor	Supervision of departments and conversations, team reports
Associate	Handles conversations for the departments they are assigned to
Custom profiles	Feature-level access control, depending on edition

12.2 Adding an operator

1. Settings > Operators > Add.
2. Enter the email address, choose the role and profile.
3. Assign the operator to one or more departments and brands.
4. Set their maximum number of simultaneous chats.
5. The operator receives an invitation to join the portal.

Note — In Zoho One, access to SalesIQ is first granted from the Zoho One admin console.

12.3 When an employee leaves

1. Reassign their open conversations and any bots they own.
2. Remove them from departments, then deactivate them.
3. If they were the Portal Owner, first transfer ownership to another admin.

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13. Brands, widget and departments

13.1 Brands

A brand corresponds to a website or app. Each brand has its own widget, channels, departments, bots and resources. All brand options are grouped on a single settings page.

13.2 Customizing the widget

1. Settings > Brands > select the brand > Personalization.
2. Choose colours (gradients available), launcher style and position.
3. Write welcome and offline messages in French and English.
4. Enable the pre-chat form and feedback request.
5. Copy the installation code into your site footer (or use the WordPress plugin).

13.3 Departments and hours

- Create departments (Sales, Support, Billing) and assign operators
- Set business hours and holidays per department
- Show an offline form outside hours, with automatic lead or ticket creation

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14. Routing, triggers and workflows

14.1 Chat routing

Mode	How it works
Broadcast	All available operators are notified; the first to accept takes the chat
Auto-assignment	Round robin or load-based distribution
Routing rules	Based on page, language, country, source or visitor score
Bot first	The bot qualifies, then transfers to the right department

14.2 Triggers

1. Settings > Automation > Triggers > New Trigger.
2. Define the criteria (page, time spent, source, visits, country).
3. Choose the action: proactive message, launch a bot, assignment.
4. Activate and check the effect in reports.

14.3 Workflow Builder

The codeless drag-and-drop builder automates actions based on events (chat ended, lead created, poor rating): webhook call, CRM update, Cliq notification. Each flow can be tested before activation.

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15. Integrations

15.1 Zoho integrations

Application	Typical use
Zoho CRM / Bigin	Identify visitors, create leads, push summaries, booking forms
Zoho Desk	Create tickets, sync tags and summaries
Zoho Projects	Turn a conversation into a task
Zoho Cliq	Real-time notifications and replies from Cliq
Zoho Survey	Send a survey in the conversation
Zoho Campaigns	Add visitors to a mailing list, with consent
Zoho Assist / Zoho Lens	Remote access and visual support
Zoho Analytics	Advanced reports and cross-app dashboards

15.2 Setting up the Zoho CRM integration

1. Settings > Integrations > Zoho CRM > Enable.
2. Choose when to create a lead (after every chat, when an email is provided, manually).
3. Map SalesIQ fields to CRM fields and set the lead source.
4. Enable pushing summaries and transcripts to the CRM record.
5. Set the owner (chat operator or CRM assignment rule).
6. Test with a dummy conversation.

15.3 Other integrations

- AI models: OpenAI, Anthropic, Google AI, DeepSeek (your organization's API key)
- DeepL for real-time translation
- Freshdesk / Freshservice, WordPress, Shopify and more
- REST API and Mobilisten SDK for mobile apps

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16. Security and compliance

16.1 Security

- Multi-factor authentication and single sign-on managed by Zoho Accounts / Zoho Directory
- JWT user verification for signed-in customers
- Audit Logs: tracking of critical actions and configuration changes
- Profanity management: automatic blocking or filtering on all channels
- Masking of sensitive data (e.g., card numbers) in conversations
- Hosting in the Canadian data center available (zohocloud.ca)

16.2 Law 25 and privacy

- Show a consent banner for tracking cookies; SalesIQ can wait for consent before tracking the visitor
- Tell visitors the purpose of data collection in the pre-chat form
- Set a retention period for conversations and visitor data
- Respond to access and deletion requests from individuals
- Document the use of external AI models and data transfers

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

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17. Subscription and plans

17.1 Plans

Plan	For whom
Free	Discovery: basic chat, few operators
Basic	Small teams: visitor tracking, simple bots
Professional	Sales and support teams: routing, integrations, reports
Enterprise	Organizations: custom profiles, advanced AI agents, multiple brands
Zoho One / CRM Plus	SalesIQ included in the suite

17.2 Tracking usage

Settings > Subscription shows the plan, number of operators, tracked visitors and conversations. Add-ons (operators, visitors, WhatsApp or AI credits) are managed there.

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18. Deployment checklist

18.1 Before going live

- ☐ Brand created and widget customized (colours, FR and EN messages)
- ☐ Widget code installed on the website and tested
- ☐ Operators added, roles and capacities set
- ☐ Departments, business hours and holidays configured
- ☐ Routing rules and proactive triggers active
- ☐ Welcome and qualification Zobot published, with human handoff
- ☐ Articles and FAQs written for Answer Bot
- ☐ Canned responses created in French and English
- ☐ Zoho CRM and Zoho Desk integrations configured and tested
- ☐ WhatsApp, Messenger and Instagram channels connected, if required
- ☐ Consent banner and privacy policy up to date (Law 25)
- ☐ Operators trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho SalesIQ 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
Operator	Opérateur
Chat / Conversation	Conversation / clavardage
Visitor	Visiteur
Brand	Marque
Department	Département
Chat Widget	Widget de clavardage
Canned Response	Réponse prédéfinie
Trigger	Déclencheur
Routing	Routage
Bot / Zobot	Robot conversationnel
Handoff	Transfert vers un humain
Lead Score	Pointage
Associate	Associé
Supervisor	Superviseur
Portal Owner	Propriétaire du portail
Workflow	Flux de travail
Audit Log	Journal d'audit
Feedback	Rétroaction
Pre-chat Form	Formulaire avant la conversation
Offline	Hors ligne

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