



IT technicians · Zoho One optimization



Zoho Social

User and Administrator Manual

→ [Go to the index](#)

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Index — English version

Click any title to jump directly to that section. Each chapter ends with a “Back to index” link.

PART 1 — USER GUIDE

1. Introduction and access

- 1.1 About this manual
- 1.2 What is Zoho Social?
- 1.3 Supported networks
- 1.4 Signing in

2. Interface and navigation

- 2.1 Main tabs
- 2.2 Switching brands

3. Creating a post

- 3.1 Writing and publishing
- 3.2 Advanced options

4. Scheduling and calendar

- 4.1 Scheduling methods
- 4.2 Using the calendar
- 4.3 Time zone

5. Zia, Canva and content curation

- 5.1 Zia, the AI assistant
- 5.2 Canva
- 5.3 Content curation

6. Inbox and engagement

- 6.1 Handling interactions
- 6.2 Assignment and automation
- 6.3 Creating a lead or ticket

7. Monitoring and social listening

- 7.1 Setting up monitor columns
- 7.2 Listening dashboard

8. Reports and analytics

- 8.1 Available statistics
- 8.2 Custom and scheduled reports

9. Collaboration and approvals

- 9.1 Team discussions
- 9.2 Submitting a post for approval
- 9.3 Approving

10. Mobile app

- 10.1 Features

11. Best practices

- 11.1 Nuagix recommendations

PART 2 — ADMINISTRATOR GUIDE

12. Roles and member management

- 12.1 Pre-defined roles
- 12.2 Adding a member
- 12.3 When an employee leaves

13. Brands, portal and agencies

- 13.1 Managing brands
- 13.2 Agency plans

14. Connecting and maintaining channels

- 14.1 Connecting a channel
- 14.2 Network prerequisites
- 14.3 Reconnecting

15. Setting up the approval process

- 15.1 Implementing approvals
- 15.2 For agencies

16. Integrations

- 16.1 Available integrations
- 16.2 Setting up the Zoho CRM integration

17. Security, audit and compliance

- 17.1 Security
- 17.2 Compliance (Law 25 and network policies)

18. Subscription and credits

- 18.1 Plans
- 18.2 Tracking usage

19. Deployment checklist

- 19.1 Before going live

APPENDIX

A. English-French glossary

- A.1 Interface terms

Part 1 — User Guide

1. Introduction and access
2. Interface and navigation
3. Creating a post
4. Scheduling and calendar
5. Zia, Canva and content curation
6. Inbox and engagement
7. Monitoring and social listening
8. Reports and analytics
9. Collaboration and approvals
10. Mobile app
11. Best practices

[↑ Back to index](#)

1. Introduction and access

1.1 About this manual

This manual describes the Zoho Social features available to 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 Social?

Zoho Social is Zoho's social media management tool. It lets you schedule and publish content across several networks, reply to messages and comments from a single inbox, monitor mentions of your brand and measure your results. It integrates with Zoho CRM, Zoho Desk and Canva.

1.3 Supported networks

Network	Account types
Facebook	Business pages and groups
Instagram	Business and creator accounts (posts, carousels, Reels, Stories)
LinkedIn	Company pages and personal profiles
X (Twitter)	Profiles
Google Business Profile	Business listings (posts, reviews)
YouTube	Channels (videos and Shorts), paid plans
TikTok, Pinterest, Threads, Bluesky, Mastodon	Profiles and business accounts
WhatsApp	Bulk messaging, depending on plan

1.4 Signing in

1. Go to <https://social.zoho.com> (or <https://social.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 Social.
4. Choose the Brand you want to work on, in the top-left corner.

Nuagix tip — Install the Zoho Social mobile app (iOS and Android) and the zShare browser extension to publish and approve content from anywhere.

[↑ Back to index](#)

2. Interface and navigation

2.1 Main tabs

Tab	Purpose
Home	Live Stream and overview of brand activity
Messages / Inbox	Comments, private messages, reviews and mentions to handle
Posts	Published, scheduled, draft, pending approval and failed posts
Calendar	Calendar view of posts, drag-and-drop rescheduling
Monitor	Listening columns: keywords, mentions, hashtags, reviews
Reports	Per-network statistics, custom and scheduled reports
Collaboration	Team discussions and approvals
Settings	Channels, team members, publishing queues, integrations

2.2 Switching brands

A Brand groups the social media accounts of one company or client. Use the selector in the top-left corner to switch brands. Each brand has its own channels, members, queues and reports.

[↑ Back to index](#)

3. Creating a post

3.1 Writing and publishing

1. Click New Post.
2. Select channels or a Publishing Group.
3. Write your text; customize it per network if needed (length, tone, hashtags).
4. Add media: up to 10 images (reorderable), a video, a GIF or a document.
5. Add alt text to each image for accessibility.
6. Mention pages or profiles (@) and add suggested hashtags.
7. Check the network-specific preview.
8. Choose: Publish Now, Schedule, Add to Queue or Save as Draft.

3.2 Advanced options

- UTM parameters and URL properties added directly in the Compose window
- Link shortener and click tracking
- Automatic image optimization for each network's format
- Add an audio track to videos
- Threaded posts for X, Bluesky and Threads; polls on Threads
- Instagram Trial Reels to test content with new audiences
- First comment and location, depending on network

Nuagix tip — Tailor each version: short text with hashtags for Instagram, more professional and detailed for LinkedIn.

[↑ Back to index](#)

4. Scheduling and calendar

4.1 Scheduling methods

Method	How it works
Specific scheduling	A chosen date and time for each post
Queues	Recurring time slots; posts are added to the next free slot
SmartQ	Zoho Social predicts the best times based on your audience's past engagement
Bulk Scheduling	Import a CSV file containing several posts
Repeat	Republish content at regular intervals

4.2 Using the calendar

- Day, week or month views
- Drag and drop a post to reschedule it
- Filter by channel, status or team member
- Export posts (published, scheduled, drafts, pending) to PDF to share with a client

4.3 Time zone

The time zone can follow your browser, your Zoho account or the brand settings. Check it before scheduling posts for another region.

[↑ Back to index](#)

5. Zia, Canva and content curation

5.1 Zia, the AI assistant

- Generate a caption from a prompt
- Rephrase text: shorter, more formal, more engaging
- Suggest personalized replies in the inbox
- Runs on Zia credits included depending on plan

5.2 Canva

1. In the Compose window, click the Canva icon.
2. Connect your Canva account the first time.
3. Create a visual or open an existing design.
4. Click Publish to Zoho Social: the image is added to your post.

5.3 Content curation

- RSS feeds: follow blogs and share their articles in a few clicks
- zShare extension: share a web page or image directly from your browser
- Media library to reuse your images and videos

[↑ Back to index](#)

6. Inbox and engagement

6.1 Handling interactions

- Comments, private messages, mentions and reviews grouped by channel
- Filters: message type, reviews, dark comments, unread
- Direct replies with attachments (image, audio, video)
- Private replies to Facebook or Instagram comments
- Facebook ad comment management
- Reaction tracking on Facebook and LinkedIn
- Full conversation history with each person

6.2 Assignment and automation

1. Assign a conversation to a colleague with the Assign button.
2. Set up automatic assignment rules based on channel, keywords or interaction type.
3. Create automatic private replies triggered by keywords in comments.
4. Mark the conversation as closed once handled.

Nuagix tip — Set a target response time (e.g., 4 business hours) and use automatic assignment so nothing goes unanswered.

6.3 Creating a lead or ticket

- Turn a person into a Zoho CRM lead or contact
- Convert a message into a Zoho Desk ticket for customer support

[↑ Back to index](#)

7. Monitoring and social listening

7.1 Setting up monitor columns

1. Monitor tab > Add Column.
2. Choose the network and type: keyword, hashtag, mention, public page or profile.
3. Enter the terms to track (e.g., your brand, products, competitors).
4. Reply, like or share directly from the column.

7.2 Listening dashboard

- Track reviews, mentions and keywords
- Spot trends and emerging topics
- Monitor Bluesky channels, Instagram tags and public Threads profiles

[↑ Back to index](#)

8. Reports and analytics

8.1 Available statistics

Report	Content
Brand overview	Follower growth, reach and engagement across all networks
Per-network reports	Data specific to Facebook, Instagram, LinkedIn, X, YouTube, etc.
Post performance	Sort by likes or comments to find top content
Hashtags	Hashtag performance, comparisons, saved and scheduled reports
LinkedIn profile	Post statistics for a personal profile
Demographics	Followers' age, gender, countries and cities, depending on network
Team	Response time and volume handled per member

8.2 Custom and scheduled reports

1. Reports > Custom Reports > New Report.
2. Add the charts and metrics you need, per channel or for the whole brand.
3. Add your logo for a client report.
4. Schedule automatic email delivery (weekly or monthly) or export to PDF.

[↑ Back to index](#)

9. Collaboration and approvals

9.1 Team discussions

- Comment on a post or conversation and tag (@) a colleague or client
- Built-in chat, audio and video calls
- Discussion history kept with each post

9.2 Submitting a post for approval

1. Write the post as usual.
2. If your role requires it, click Submit for Approval instead of Publish.
3. The approver is notified and can approve, reject or request changes.
4. Once approved, the post goes out at the scheduled time.

9.3 Approving

- Approvals tab: approve or reject one or several posts at once
- Approve from the iOS or Android mobile app
- Mandatory or optional comment on rejection

[↑ Back to index](#)

10. Mobile app

10.1 Features

- Write, schedule and publish on all channels
- Publish Instagram Stories and YouTube videos or Shorts
- Reply to messages and comments
- Approve or reject pending posts
- View statistics and receive notifications
- Connect new channels

[↑ Back to index](#)

11. Best practices

11.1 Nuagix recommendations

- Build a monthly editorial calendar and fill queues in advance
- Use SmartQ to publish when your audience is active
- Adapt text and format to each network instead of posting identical text everywhere
- Add alt text to every image
- Reply to comments and reviews quickly, especially negative reviews
- Measure engagement and clicks, not just follower counts
- For Quebec audiences, publish in French, with an English version as needed
- Connect Zoho Social to Zoho CRM to turn engagement into business opportunities

[↑ Back to index](#)

Part 2 — Administrator Guide

- 12. Roles and member management
- 13. Brands, portal and agencies
- 14. Connecting and maintaining channels
- 15. Setting up the approval process
- 16. Integrations
- 17. Security, audit and compliance
- 18. Subscription and credits
- 19. Deployment checklist

[↑ Back to index](#)

12. Roles and member management

12.1 Pre-defined roles

Role	Main permissions
Portal Admin	Full control: all brands, subscription, members, settings
Brand Admin	Full control of one brand: channels, members, publishing, inbox, reports
User	Publishing, messages, comments, advanced reports, leads, Zia; no inbox
Limited Publisher	Messages, comments, advanced reports and Zia; cannot publish without approval
Custom roles	Tailored permissions (Premium, Agency and Agency Plus plans)

12.2 Adding a member

1. Settings > Team Members > Add Member.
2. Enter the email address and choose the role.
3. Select the brands the member can access.
4. The member receives an invitation to join the portal.

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

12.3 When an employee leaves

1. Reassign their open conversations and pending posts.
2. Check whether any channels were connected with their personal account; reconnect them with a company account.
3. Remove them from brands, then deactivate their access.

Caution — If a channel was connected with the employee's personal account, removing it can stop publishing on that channel.

[↑ Back to index](#)

13. Brands, portal and agencies

13.1 Managing brands

- Create one brand per company, division or client
- Set each brand's logo, time zone and members
- Publishing Groups: group channels from several brands to publish in batch
- Number of brands depends on plan

13.2 Agency plans

- Agency and Agency Plus plans: multiple client brands in one portal
- Client access to approve posts and view reports
- Agency-branded reports, exportable to PDF

[↑ Back to index](#)

14. Connecting and maintaining channels

14.1 Connecting a channel

1. Settings > Channels > choose the network.
2. Sign in to the network with an account that has admin rights on the page or profile.
3. Grant all requested permissions (publishing, messages, statistics).
4. Select the pages or accounts to add to the brand.

14.2 Network prerequisites

- Instagram: business or creator account, linked to a Facebook page or connected directly with Instagram credentials
- Facebook: admin or full-control role on the page in Meta Business
- LinkedIn: super admin or content admin role on the company page
- Google Business Profile: owner or manager of the listing; profiles can be created from Zoho Social

14.3 Reconnecting

Networks periodically expire access tokens, or invalidate them after a password change. Zoho Social then shows an alert on the channel. Reconnect it promptly to avoid failed scheduled posts.

Nuagix tip — Connect channels with a shared company account rather than an employee's personal account.

[↑ Back to index](#)

15. Setting up the approval process

15.1 Implementing approvals

1. Settings > Roles & Permissions: remove the Publishing permission from roles that must go through approval (or use the Limited Publisher role).
2. Designate approvers (Brand Admins or a custom role).
3. Enable approval notifications by email and in the app.
4. Test the process with a dummy post.

15.2 For agencies

Invite the client with access limited to approvals and reports. They can approve posts from the web or the mobile app, without access to other brands.

[↑ Back to index](#)

16. Integrations

16.1 Available integrations

Application	Typical use
Zoho CRM	Create leads and contacts from interactions; see social activity in the CRM record
Zoho Desk	Convert a message or comment into a support ticket
Canva	Create and import visuals into posts
Zoho Marketing Plus	Unified marketing planning with Campaigns, Survey and more
Google Analytics	Click tracking with UTM parameters

16.2 Setting up the Zoho CRM integration

1. Settings > Integrations > Zoho CRM > Connect.
2. Choose the destination module (Leads or Contacts) and the lead source.
3. Map the fields and choose the default owner.
4. Grant the Leads Data permission to the relevant roles.
5. Test by creating a lead from a comment.

[↑ Back to index](#)

17. Security, audit and compliance

17.1 Security

- Multi-factor authentication and single sign-on managed by Zoho Accounts / Zoho Directory
- Access restricted by brand and role
- Audit Log: history of member actions (publishing, deletions, settings changes)
- Hosting in the Canadian data center available (zohocloud.ca)

17.2 Compliance (Law 25 and network policies)

- Limit access to leads data to people who need it
- Export personal data collected on social networks only for a specific purpose
- Follow each network's policies (Meta, LinkedIn, Google) on messaging and automation
- Obtain consent before sending bulk WhatsApp messages
- Document your social media usage rules for the team

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

[↑ Back to index](#)

18. Subscription and credits

18.1 Plans

Plan	For whom
Free	Discovery, one brand and a few channels
Standard / Professional	Small businesses: more channels, SmartQ, reports
Premium	Teams: custom roles, advanced listening, custom reports
Agency / Agency Plus	Agencies managing multiple client brands
Zoho One / Marketing Plus	Zoho Social included in the suite

18.2 Tracking usage

Settings > Subscription shows the plan, number of brands, channels and members used, and remaining Zia credits.

[↑ Back to index](#)

19. Deployment checklist

19.1 Before going live

- ☐ Brands created (logo, time zone)
- ☐ Channels connected with a company account
- ☐ Members added and roles assigned
- ☐ Approval process configured and tested
- ☐ Publishing queues and SmartQ configured
- ☐ Inbox assignment rules created
- ☐ Monitor columns (brand, products, competitors) created
- ☐ Zoho CRM, Zoho Desk and Canva integrations configured
- ☐ UTM parameters defined
- ☐ Monthly report scheduled for management
- ☐ Social media usage policy communicated
- ☐ Users trained and documentation delivered

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

[↑ Back to index](#)

Appendix

A. English-French glossary

[↑ Back to index](#)

A. English-French glossary

A.1 Interface terms

English (interface)	French
Brand	Marque
Channel	Canal
Post	Publication
New Post	Nouvelle publication
Queue	File de publication
Bulk Scheduling	Planification en masse
Publishing Group	Groupe de publication
Inbox	Boîte de réception
Monitor	Surveillance
Social Listening	Écoute sociale
Live Stream	Flux en temps réel
Hashtag	Mot-clic
Alt Text	Texte de remplacement
Approval	Approbation
Limited Publisher	Éditeur limité
Brand Admin	Administrateur de marque
Team Member	Membre de l'équipe
Audit Log	Journal d'audit
Assignment Rule	Règle d'assignation
Scheduled Report	Rapport planifié

[↑ Back to index](#)