



# Zoho Cliq

Your solution to all questions on workplace communication and productivity

# About Cliq

- Business messaging software
- Organization, Team level communications
- Reminders & Calendar Events
- Audio / Video calls / Screen Sharing
- Desktop & Mobile Apps
- Connect with other applications with our extensible platform powered by deluge

# Direct Messaging Space

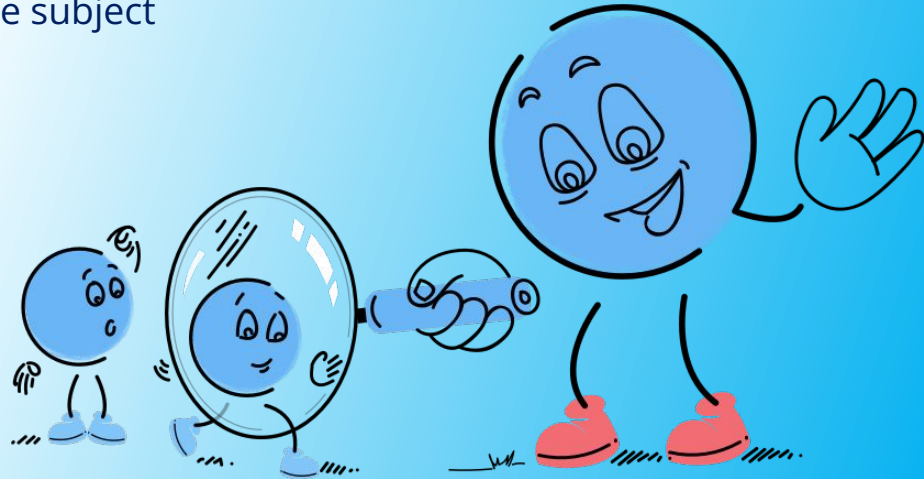
- Unique broadsheet view with multi chat layout
- Share files, annotate images, contact, location, events
- Star messages based on categories
- @mention users, bots and channels
- Instant peek at any shared URL - thanks to URL Unfurling!
- Apply markdowns to convert plain boring messages to rich text
- Fork Chat - Extend your conversation with a new set of user, while preserving the context

# Group Conversations : Adhoc Chats

- Direct messaging space with multiple people
- Generally created in an instant to arrive at quicker decisions
- Short term collaboration within or across teams
- Private Group Participants Limit - 500
- Quote & Reply to a message

# Channels - An organized platform for topics of discussion

- Tune In / Tune Out mode of participation
- Assign roles and enable permissions based on roles
- Open access or Invite Only access based on the subject
- Current Channel Participant Limit - 2000
- Integration with external applications
- Serves as a Knowledge Base



# Channel Levels



Organization



Team




Personal




External

# Channel Listing in Cliq

**Channels** [+ Create/Join](#)


 @Marketing ...

#Campaign-monitor

 @Team Zylcal ...

#marketing

#development

 @Team Zylker ...

#random


#Zendesk

#updates 🔔

#user-education

#development

#issues 🔔

 Organization ...

#desk

#bitbucketnotifier

#Zylker Support


#mailchimp

#desk

#feedback


#General

#ZylkerHackathon - ...

 Personal ...

#Trip

#Partner Summit 20...

 External ...

#furniture-vendor


**Channels** ✕

Channels are discussion rooms where members of your organization can put their heads together to discuss on any topic. Look for channels that interest you and in case you don't find any, create a new one. 😎

Create Channel


🔍

Search channels




**#CliqTrix - Participants** Active 1 month ago


This Channel is for CliqTrix contest updates. Videos & help docs will be shared here.

 477


Join




**#Development@Software** Active 2 months ago

 3


Join



**#zylker desk** Active 2 months ago


 2

Join




**#crm-leads** Active 2 months ago

Leads qualified in Zoho CRM are automatically posted here.

 4

Join



**#Zylker cliq support** Active 2 months ago

To post issues regarding cliq

# Cliq Global Search – Messages

- Narrow down your search results using the following search tags
  - `from:@user`
  - `to:@user`
  - `hasfile:filename`
  - `haslink:linkdetail`
  - `in:#channel or chat`
  - `after: a date`
  - `before: a date`
  - `on: a date`



# Cliq Global Search - Users

- Directly search for users in your Organization
  - Name
  - Department
  - Email ID
  - Employee ID
  - Phone Number
- User search works with Zoho People

# Search powered with search tags

For example: To search for  
a file sent by a user use,  
**from:@user** followed by  
**hasfile:filename\*.filetype**

Search: from: @Lewis -Marketing Strategist hasfile: \*.png

Messages

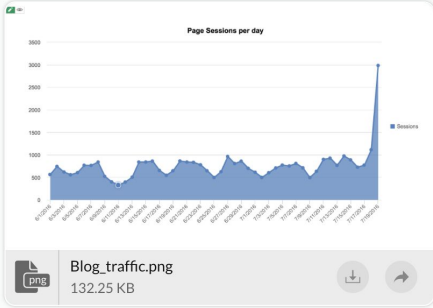
#email-campaigns@Team Zylker Jul 27th 2016, 11:34 PM  
Lewis -Marketing Strategist: Blog\_traffic.png

Wednesday, July 27th 2016

You  
@Abigail - Marketing Lead Can we have a look at the traffic generated from your blog post?

Lewis -Marketing Strategist

Page Sessions per day



Blog\_traffic.png  
132.25 KB

Abigail - Marketing Lead  
★ The Blog has been retweeted 225 times! 🤔

You  
These are awesome numbers! Way to go! 🎉👏👏

Lewis -Marketing Strategist  
Congrats @Abigail - Marketing Lead 🤔 Awesome stuff! 🎉

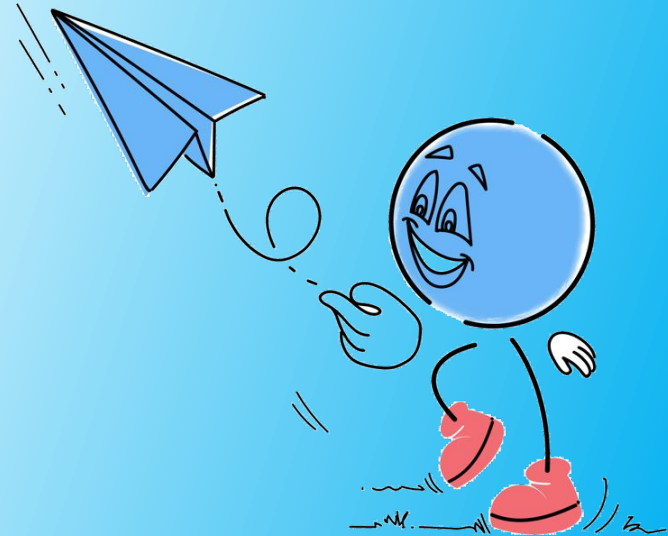
Sunday, December 24th 2017

You have added Chloe - IT Admin, Olivia - Marketing Research Analyst,

Continue

# Audio, Video Calls & Screen sharing

- WebRTC based
- Audio and Video device Preferences
- No installation required
- Screen sharing with browser extension





## Direct Messages



Patricia James  
Paula Rojas  
Emma - Developer  
Alejandro Mendoza  
Leads

[show all](#)

## Contacts



Amelia  
Martha - Product Lead  
Mustafa - Technical A...  
Chloe - IT Admin  
Timothy - CEO  
Tai Chang  
Raghav Rao  
Peter (VP of Sales)  
Quinn Rivers  
Ryan - Support Agent

[show all](#)

Manage



Patricia James

● Online



Friday, September 22nd

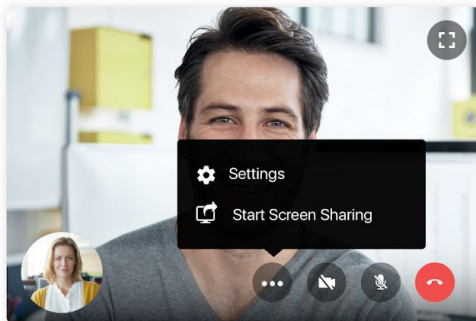


Patricia James

Hello Scott, I am still thinking about using a sorted array to have the list of events in our calendar applications view.

Any recommendations?

Build I ahel



Actions ▾



**\*Bold\*** *\_Italics\_* ~~~Strike~~~ **!Blockquote** ...



Alejandro Mendoza

● Offline



Friday, September 22nd



You

Hi

Sunday, September 24th



You

Hi Alejandro 🤔

Let's schedule a meeting tomorrow to discuss the upcoming product launch with [@Abigail - Marketing Lead](#) and [@Jacob](#) ?

Hi Scott

Yes! How does 3 pm tomorrow sound? I'll inform [@Abigail - Marketing Lead](#) and [@Jacob](#) about it. 🤔 👍

Thanks man! See you then 🤔

Alejandro Mendoza is offline. Your messages will be delivered when Alejandro Mendoza comes online.

Actions ▾



#User Education@Team Zylker

6 participants



Awesome!

I'll write a function for our feedback form, to get notified in Cliq directly when a new feedback is submitted. Will keep us all posted!



Emma - Developer

That's a great idea Lewis! 👍



Lewis - Marketing Strategist

It's done guys! Let's keep them feedbacks coming 🤔



You

Hi! We've got a new feedback.

[youremail@yourdomain.com](mailto:youremail@yourdomain.com) says

Great write up. Would love to have some more examples, with sample use cases.



Actions ▾

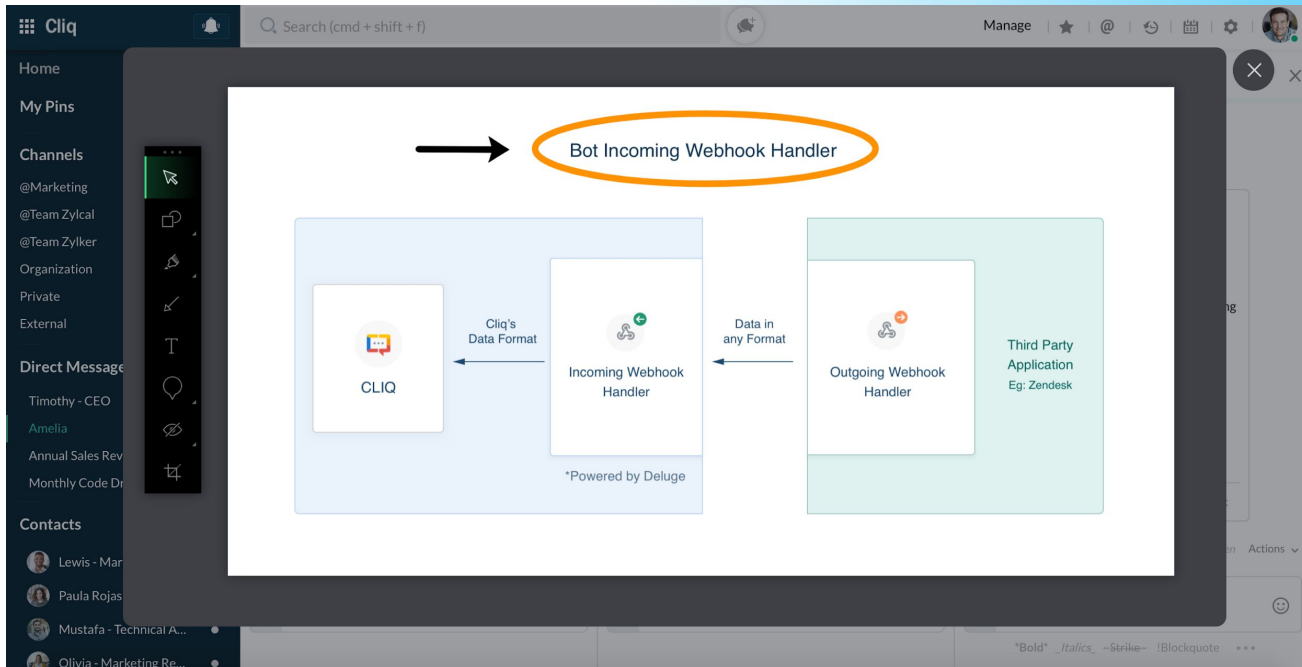
# PrimeTime - Video broadcast for Teams

- Conduct standup meetings or present to an audience
- Request to speak to participate in the call
- Option to chat with all the participants
- Available for Group Conversations and Channels
- Instant and scheduled PrimeTime



# Image Annotator

- Annotate the image attachments before sharing the file
- Edit the file shared in Cliq and forward



# Event Management

- Schedule and manage events
- Events stay in sync with Zoho Calendar
- Google, Outlook, CalDAV sync
- Let Zia, our AI Driven Event Manager handle your events
  - She creates a group chat with all the event participants
  - Posts timely reminders before the event starts
  - Provides an option to conduct your meeting through PrimeTime





# Reminders

- Add a reminder for any message in a chat, with auto detect time
- Create, view and manage your reminders with the reminder widget in Cliq's top nav bar
- Set reminders for yourself, a colleague, a chat or a channel
- Another shortcut for creating a reminder - /reminder command
- View reminders using /reminders





Zoho Cliq is **extensible** and **Integrated**

# Zoho Integrations



CRM



Expense



Desk



People



Calendar



Flow



Invoice



Books



Subscriptions

# Third-party Integrations



# Zoho Marketplace

- Platform to find extensions & Integrations that work with Zoho applications
- Currently has over 200 apps, out of which 30 are exclusive to Cliq
- Caters applications to our 30 million customer base



# Extensible Cliq Platform

- Powered by deluge
- Connect with third party applications seamlessly
- Build Integrations components such as



Slash Commands



Bots



Message Actions




Storage




Schedulers




# Slash Commands




Zoho CRM beginner training tutorial introduction




Zoho CRM Demo




What is Zoho?




Getting started with Zoho Flow




/youtube Zoho|







**/addbug** Create a bug in Zoho Projects




**/appear** - via Appear Ex... Start video call



**/asana** - via Asana Exte... Get the list of tasks in your Asan...



/a



Select a command   ↩ to select   Close [Esc]

# Bots to notify updates instantly

- Rec



## Status Updated in Zoho Desk

Ryan West has updated the status of Ticket [#21731447](#) from Open to Closed .



## Deal Won!

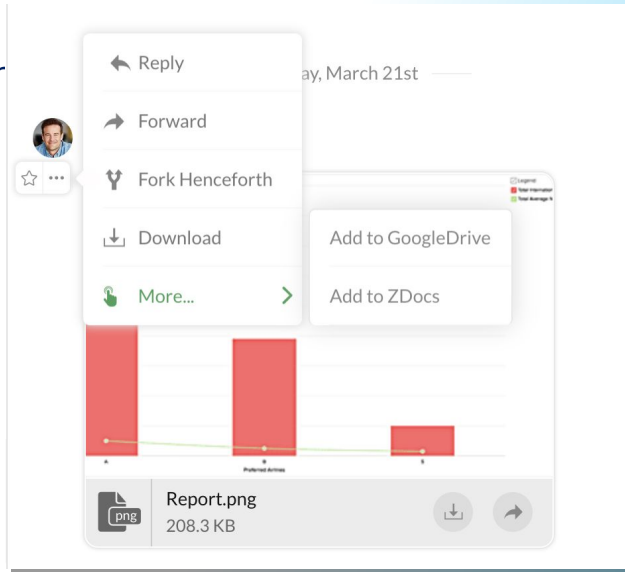
🎉 Congrats, Li Jung just closed a deal for 13 CRM users for an of amount 238.0 🎉 [Details Here](#)

## Deal details

Users	Customer	Edition	Company
13	Olivia Palmer	Standard	ZylCal Technologies

# Custom Message Actions


- Perform custom action




Text, attachment, URL

# Message Cards and Buttons

- Share

 PollBot



**Where do we go for the team trip?**

Bahamas or Thailand

This is a Non-Anonymous Poll Created by  
[manasa.sm@zohocorp.com](mailto:manasa.sm@zohocorp.com).




Bahamas!

Thailand

view results

**Issue List:**

Hey Scott ! 😊 These are the issues found under your name.

Issue Title	Issue ID	Severity	View Details
Channel rest apis	14	Major	 Info
Channel image not updated!	11	Major	 Info
/message Rest API not working	1	Critical	 Info

All Open Issues

# Schedulers





- Configure schedulers to perform timed action

Hey Everybody!  
Just a reminder about your status update for the week!  
Please make sure to update it before you leave for the day.  
Happy Weekend! 😊



Todoist ①

Hey there, your list of tasks is here!

Task Name	Mark as complete	View Task
 One line content for announcement channel	<a href="#">Complete</a>	<a href="#">View Task</a>
 Platform guide changes - add button object code snippet in object definition page	<a href="#">Complete</a>	<a href="#">View Task</a>
 Platform guide changes - Explain suggestions param in Bot message handler	<a href="#">Complete</a>	<a href="#">View Task</a>
 Platform guide changes - change button code snippet in functions	<a href="#">Complete</a>	<a href="#">View Task</a>

# Cliq Storage

- Use Cliq storage to store, sync and work with data seamlessly

The screenshot displays the Cliq Storage interface. On the left, a sidebar lists various integrations: Commands, Message Actions, Functions, Schedulers, Databases (highlighted), Bots, and Extensions. The main panel is titled 'Integrations' and shows a list of databases under 'My Databases' and 'All Databases'. The 'zylkerrequestmanagement' database is selected, showing its description and sample scripts for adding, fetching, and updating records.

**Integrations**

- Commands
- Message Actions
- Functions
- Schedulers
- Databases**
- Bots
- Extensions

**My Databases**

- Usage Statistics** Created by You  
To get the usage statistics of ZylCal
- Weekly Sales Report** Created by You  
To keep track of weekly sales reports.
- Zylker Request Management** Created by You  
To store internal queries and requests raised through the raise request command

**All Databases**

- pollbotdb** via Poll bot Extension  
Pollbot reports.
- pollstatdb** via Poll bot Extension  
Get pollstatus reports.

**zylkerrequestmanagement**

To store internal queries and requests raised through the raise request command

**Sample script to add record**

```
values_map=Map();
values_map.put("status", "ABC");
values_map.put("userid", "123");
values_map.put("completed", "TRUE");
values_map.put("requested", "ABC");
values_map.put("requestedby", "ABC");
values_map.put("assignedto", "ABC");
response_map=zoho.cliq.createRecord("zylkerrequestmanagement", values_map);
```

**Sample script to fetch the list of records**

```
query_map=Map();
criteria_string="status=ABC";
query_map.put("criteria", criteria_string);
response_map=zoho.cliq.getRecords("zylkerrequestmanagement", query_map);
record_id=0;
if(response_map.get("status").equalsIgnoreCase("SUCCESS") && response_map.get("list").size()>0){
    record_id=response_map.get("list").get(0).get("id");
}
```

**Sample script to get record**

```
// To get record with the record id
record_id="123456789";
response_map=zoho.cliq.getRecordById("zylkerrequestmanagement", record_id);
```

**Sample script to update record**

[Edit Configuration](#)

# Message Builder

- Design cards with different components and themes
- Get your card's JSON instantly - hands free coding!

Message Builder

Configurator

Get message JSON

Choose your theme

Poll

Basic Information

Message sender

Poll Bot

Message sender's image

<https://pollbot.duckgroup.xyz/img/pollbot>

Message

Where are we going for the team trip?

Buttons

Italy

Greece

Bahamas

View Results

+ Add button

Card Details

Title

POLL

Icon url

<https://img.robohostatic.com/chat/default/logo>

Thumbnail url

<https://pollbot.duckgroup.xyz/img/pollbot>

Components

Note: The components you add here will be seen when you tap on the card.

Add Components

Preview

View code

Poll Bot

POLL

Where are we going for the team trip?

Italy

Greece

Bahamas

View Results

Message Builder

Configurator

Get message JSON

Your message card as JSON is shown below

Copy Show

Copy

```
{
  text: "Where are we going for the team trip?",
  bot: {
    name: "Poll Bot",
    image: https://pollbot.duckgroup.xyz/img/pollbot.png
  },
  card: {
    title: "POLL",
    thumbnail: https://pollbot.duckgroup.xyz/img/pollbot.png,
    theme: "poll"
  },
  buttons: [
    {
      label: "Italy",
      action: {
        type: "open.url",
        data: {
          web: https://img.robohostatic.com/chat/default/officeschat/images/
        }
      },
      type: "+"
    },
    {
      label: "Greece",
      action: {
        type: "open.url",
        data: {
          web: https://img.robohostatic.com/chat/default/officeschat/images/
        }
      },
      type: "+"
    },
    {
      label: "Bahamas",
      action: {
        type: "open.url",
        data: {

```

Preview

hide code

Poll Bot

POLL

Where are we going for the team trip?

Italy

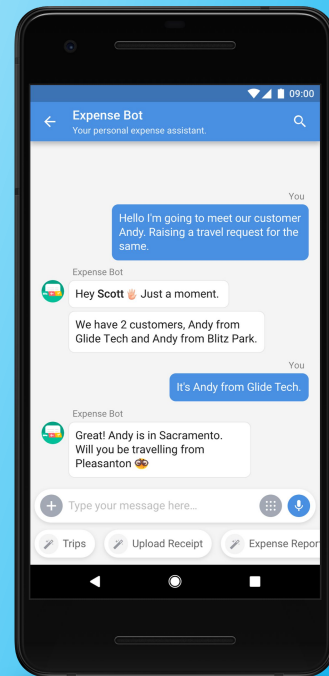
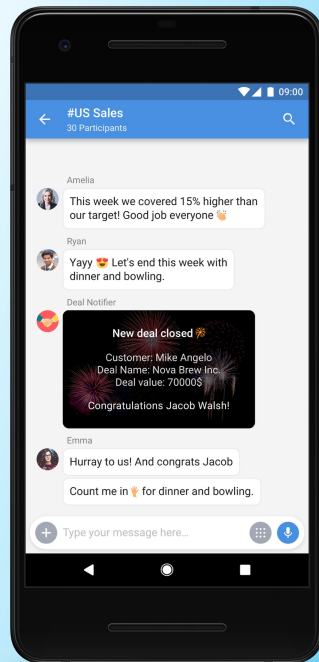
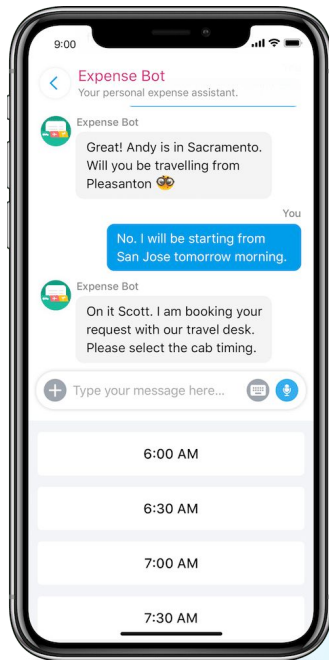
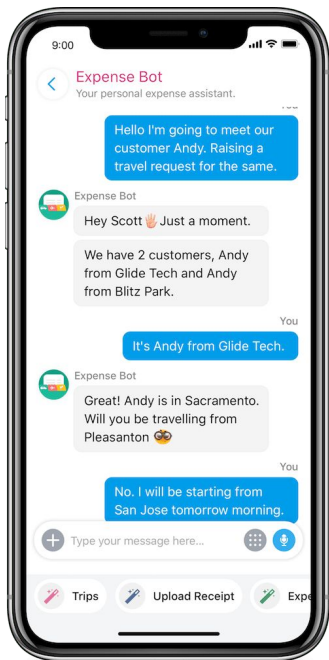
Greece

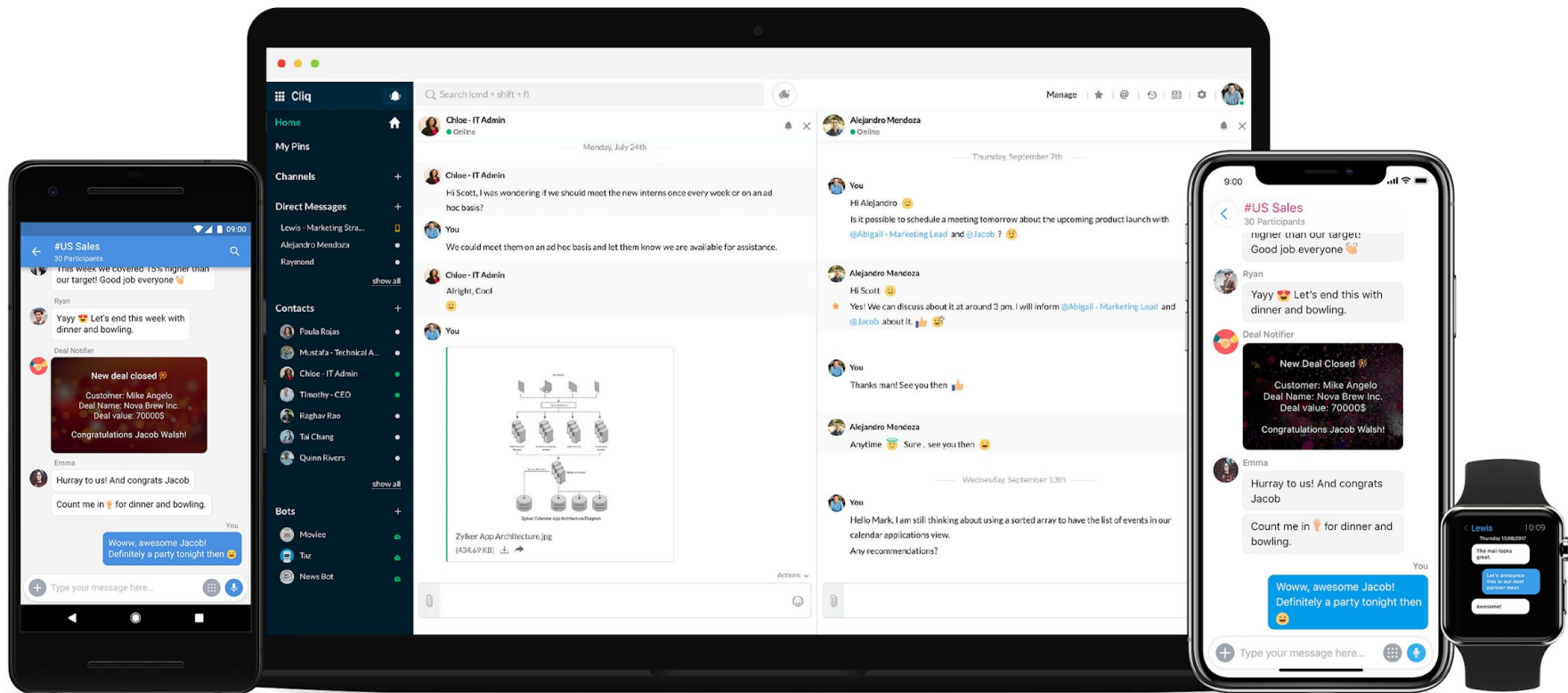
Bahamas

View Results



# Mobile Ready





# Compliance

- ISO 27001:2013 certified
- SOC 2 Type II compliant
- GDPR compliant





**Thank You**