



Zoho Corporation

Z O H O

Managing your team in Zoho Social

When you sign up for Zoho Social, a Portal will be auto-generated for you in your company name, and you'll be the Portal Owner and assigned the role of a Portal Admin.

What's a Portal?

A Portal in Zoho Social is an entity where you can manage all your social media channels in one place. If your business has multiple departments, you can replicate this in Social by creating Brands and connecting the appropriate social media channels. All the users in the Portal are called Portal Members, and the users in the Brand are called Team Members.

In simple terms, a **Portal** is like a house, and **Brands** are the different rooms in that house.

Consider this example: Zylker is an organization with multiple departments such as Zylker Cafe and Bakery, Zylker BnB, and Zylker Holidays. Each of these departments have a dedicated set of social media channels on Instagram, Facebook, Twitter, LinkedIn, and so on.

When they create an account in Zoho Social, Zylker will be the Portal, and the different departments are created as Brands where the respective social media channels can be connected and managed.

Who's a Portal Admin?

As a Portal Admin, you can add Brands and Team Members to your Portal and manage them directly from your Portal Settings. You can also create new roles, assign them to team members, and assign permissions to access different channels. You'll also get access to Brand Settings, where you can add and delete Brands or Members to/from the Brand.

Who's a Portal Owner?

The user who creates the Zoho Social account will automatically be the Portal Owner. They can manage subscriptions, and all the communication regarding that will be communicated to this user. The Portal Admin or the Portal Owner can transfer ownership to another user in Zoho Social if required.

Read More: [Managing roles and permissions](#)

Adding team members

Once the social media channels are connected while getting started with Zoho Social, you can start inviting your team members to a Brand by adding the following details:

- **Email:** The email address of the user you want to invite to Social.
- **Role:** Roles in Zoho Social replicate the set of responsibilities that are specific to a job position in an organization. By default, we have three roles in Zoho Social: **Brand Admin**, **User**, and **Limited Publisher**. The permission to access different features in Social varies based on the role that you specify.
- **Channels:** The different social media channels that you want to give access to the team member.
- **Add as an approver:** Lets the team member approve posts to be published or scheduled.

You can also invite your team members to Social from the Settings page at any time.

To add team members while getting started with Social

1. Enter the **Email** in the *Invite people to work on this Brand* popup.
2. Select the **Role** and **Channels** from the dropdown list.
3. Select the checkbox to **Add as an Approver**.
4. Click **Send Invite**.

Once invited, an email will be sent to the respective team members inviting them to your Zoho Social

account.

Invite people to work on this Brand ✕

We'll send them an email

Type their email address *	Role	Channels	Add as an Approver
<input type="text" value="patricia@zylker.com"/>	Brand Admin	All Channels	<input checked="" type="checkbox"/>
<input type="text" value="william@zylker.com"/>	Limited Publis...		<input type="checkbox"/>
<input type="text" value="sarahjames@zylker.com"/>	Brand Admin	All Channels	<input checked="" type="checkbox"/>
<input type="text" value="Eg: name@mailbox.com"/>	User	All Channels	<input type="checkbox"/>

[+Add more](#)

MORE ABOUT ROLES AND SETTINGS:

- All team members have access to all features on this brand except settings.
- Brand Admins have access to all features and can manage social networks, team members and settings on this brand.
- Portal Admins can manage settings across brands. To Invite them, go to Settings → All Members.
- To create custom roles and assign network permissions, go to Settings → Roles and Permissions.

[Skip](#)

[Send Invite](#)

To add team members from the Settings page

1. Go to **Settings** > **Brand Members** and select the **Team Members** tab.
2. Click **Invite**.

Members (4)	Role	Channels	Approver
 Burrows burrows@zylker.com Status: Active	Portal Admin	All Channels	<input checked="" type="checkbox"/>
 Clarissa Armstrong clarissa.armstrongzylker@gmail... Status: Active	Limited Publis...		<input type="checkbox"/>

3. Enter the **Email** and select the **Role** and **Channels** from the dropdown list.
4. Select the checkbox to **Add as an Approver**.
5. Click **+ Add more** to invite more team members.

6. Click **Invite**.

Invite people to work on this Brand ×

Your team member's email address *	Role	Channels	Add as an Approver
<input type="text" value="clarissa.armstrongzylker@gmail.com"/>	<input type="text" value="Social Media M..."/>	<input type="text" value="f t in"/>	<input type="checkbox"/>

[+Add more](#)

[Cancel](#)

Adding team members from Zoho CRM

If you've integrated Zoho Social with Zoho CRM, you can go ahead and start inviting users from CRM directly to Zoho Social.

To invite Zoho Social users from Zoho CRM

1. Go to **Settings > Brand Members** and select the **Team Members** tab.
2. Click **Invite**.
3. Select **Add from Zoho CRM** and click **Continue**.

Invite people to work on this Brand ×

 **Invite via email**
Just type out their email addresses and we'll send them an invite from you

 **Add from Zoho CRM**
Add team members from your connected Zoho CRM account 

[Cancel](#)

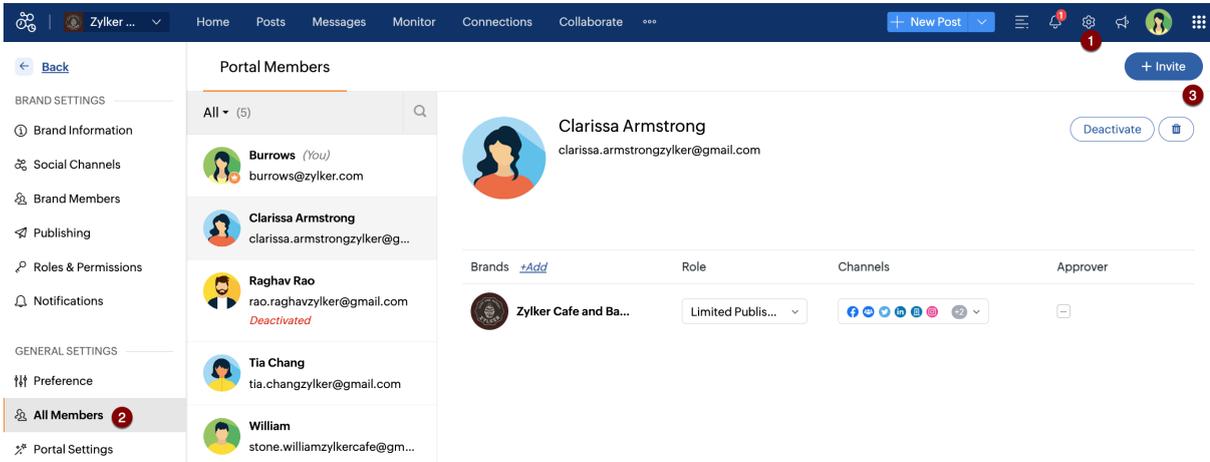
4. Select the checkbox next to the Zoho CRM User(s).
5. Select the appropriate **Role** and **Channels** from the dropdown list and select the checkbox to **Add as an Approver**.
6. Click **Invite**.

Adding team members to multiple Brands

The Portal Admin has access to invite team members to multiple Brands available in Zoho Social at once.

To invite team members

1. Go to **Settings** > **All Members** under *General Settings*.
2. Click **+ Invite**.



3. Enter the **email address**.

You can select the checkbox to invite them as a Portal Admin. They will have access to manage all the Brands.

4. Select the **Brands, Brand Role, Channels**, and enable the checkbox to **Add as an Approver**.
5. Click **Invite**.

Invite a new member to your Portal

Your team member's email address *

Invite this member as a Portal Admin

All Brands

Brand(s)	Brand Role	Channels	Add as an Approver
<input checked="" type="checkbox"/> Zyker Cafe and Ba...	Social Media Manager	Facebook, Twitter, LinkedIn, Instagram, YouTube, Pinterest	<input type="checkbox"/>
<input checked="" type="checkbox"/> Zyker Mart	User	All Channels	<input checked="" type="checkbox"/>

[Cancel](#) [Invite](#)

Adding Client Members

For a social media management agency, it's important to establish and maintain a healthy collaboration with your clients so that everyone's on the same page regarding the content strategy and the goals that are to be achieved. Zoho Social lets you invite your clients and allow them to monitor and keep tabs on their Brand's performance.

A client member can do the following:

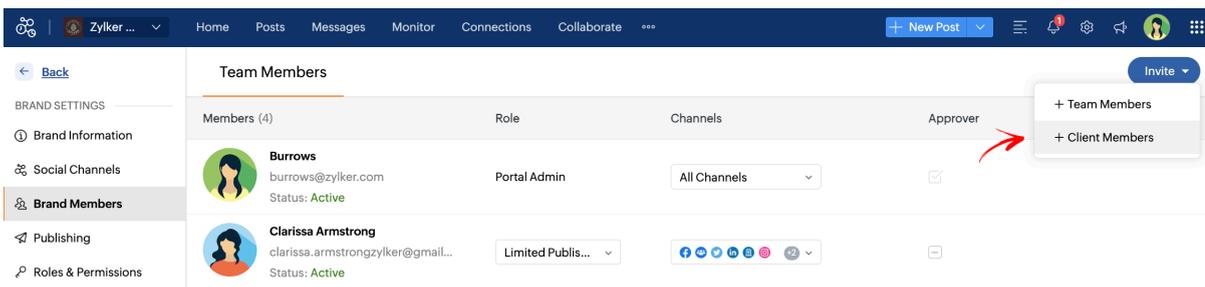
- Monitor the Brand health, recent posts, and live stream.
- View all the published, scheduled, unpublished, and posts sent for approval, along with in-depth analytics of individual posts.
- View the RSS feeds and manage the Social Library. Clients can upload media from the Desktop or Media Library.
- Initiate discussions in the Collaborate tab and participate in discussions where they're tagged.
- View reports that are shared by the team members.
- Approve posts to be published or scheduled.

 **Note:**

- Client members can be added only in Agency or Agency Plus plans in Zoho Social.

To add client members

1. Go to **Settings > Brand Members**.
2. Click **Invite > Client Members**.



3. Enter the **Email** and select the checkbox to **Add as an Approver**.
4. Click **+ Add more** to invite more client members.
5. Click **Invite**.

An email will be sent to the client users with the link to access Zoho Social.

Invite people to work on this Brand ✕

Your client's email address *

seth.g@abccompany.com

[+Add more](#)

Add as an Approver

[Cancel](#) [Invite](#)

