



Understanding Roles and Permissions

Roles in Zoho Social replicates the set of responsibilities that are specific to a job position in an organization, whereas permissions are the level of access that are given to the users based on the features and information they require to fulfil their roles.

Zylker travels is a travel agency that uses Zoho Social to manage their digital presence. They have a wonderful team of social media managers, marketers, content creators, and analysts to carry out different activities across all their social media handles.

The users managing these responsibilities are added as Team Members in their Social Account. Since their areas of work will be different from each other, they will not be requiring access to all the functionalities provided by the product.

A social media manager would require access to publish on their social channels, a marketer will require access to social media and leads information, and an analyst would need analytical information on their posts that they can understand from the visual reports and metrics. In order to enable users to be able to fulfil their roles and responsibilities as part of representing their brand on social media, you can assign permissions and give appropriate access for the roles you choose for them.

The available permissions are **Publishing**, **Messages**, **Comment/Reply**, **Advanced Reports**, **Leads Data** and **Zia**.

There are four pre-defined roles in Social: **Portal Admin**, **Brand Admin**, **User**, and **Limited Publisher**. These roles have the following default permissions:

- **Portal Admin** - Publishing, Messages, Comment/Reply, Advanced Reports, Leads Data, Zia, and Inbox.
- **Brand Admin** - Publishing, Messages, Comment/Reply, Advanced Reports, Leads Data, Zia, and Inbox.
- **User** - Publishing, Messages, Comment/Reply, Advanced Reports, Leads Data and Zia.
- **Limited Publisher** - Messages, Comment/Reply, Advanced Reports and Zia.



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Roles & Permissions								
Role Name	Publishing	Messages	Comment / Reply	Advanced Reports	Leads Data	Zia	Inbox	+ Create New Role
Brand Admin	<input checked="" type="checkbox"/>							
User	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
Limited Publisher	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Product Marketer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Intern	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing analyst	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Support Rep	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Trainee	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Client Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Messages	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supervisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Understanding the permissions

- Publishing:** Publishing permission enables users to publish and schedule posts directly, without the need for an approval. If posts have to be approved, provide this access to limited users so that no posts are made without consent. Users without this access will have to send their posts to designated approvers for them to approve the post before publishing.
- Messages:** Messages permission enables users to be able to view the messages received on their Facebook, Twitter, and Instagram handles. This access can be given to the marketing and support teams so that they can monitor the messages and requests received from their audience. For team members who don't have this access, the Messages tab will not be displayed in Zoho Social.
- Comment/Reply:** This permission gives users access to comment on posts and reply to the messages received on the social channels. The team responsible for handling social media channels will require this access to communicate and respond to any interaction on their profiles. Without this permission, users will be able to view the posts and messages, but will not be able to make add any comments on posts or reply to the messages received.
- Advanced Reports:** This permission gives users the access to a whole range of reports like Summary, Audience, Post & Engagement, Performance, Reach & Impression, Performance, and others. Users without this permission will be able to view only the Summary reports of all social media channels, by default.
- Leads Data:** This Permission enables users to have access to leads-related information. They will be able to view and download the details of individual leads obtained, and monitor their lead ads account for

Facebook and LinkedIn. Team members without this permission will be able to view the lead forms, their status, and map the fields, but they will not be able to view individual leads data.

- **Zia:** This permission provides users with access to the Compose with Zia feature (Open AI's Integration with Zoho Social) in the compose window. Zia uses OpenAI's generative AI capabilities to generate content effortlessly. Users will be able to create multiple variations of content like social media posts, hashtags, and captions; rephrase existing content according to their requirements; and generate images quickly and more efficiently.
- **Inbox:** This permission provides users with access to the Inbox module on Zoho Social. They will be able to view all the interactions and monitor and respond to them, for all connected social networks. Users with this permission and the Zia permission will be able to use Zia to reply to an Inbox interaction, by drafting or rephrasing content.

Creating New Roles

In addition to the default roles that are available, you will also be able to create your own Custom Roles with the specific permissions that you want to assign to your Team Members. Creating custom roles helps you restrict certain permissions from specific Team Members so that they only have access to the features that they would need. Zoho Social account admins can enable or disable any of the permissions for custom roles whenever required.

In order to create a new role,

1. Click  in the *top-right corner*. You'll be directed to the *Brand Information* screen.
2. Click **Roles and Permissions** under *Brand Settings*, then click .
3. Give your new role a name, check the permissions that you want to assign to this role, then click **Save**.

Product Marketer

Feature Availability

Creating custom roles and assigning permissions to them is a feature available to all customers on **Premium**, **Agency**, and **Agency Plus** plans.